

# Oracle Taleo Enterprise Edition

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**Using Onboarding (Transitions)**



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# Preface

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

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# 1 Onboarding (Transitions) Basic Concepts

## About Onboarding (Transitions)

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 Enterprise Edition 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 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.

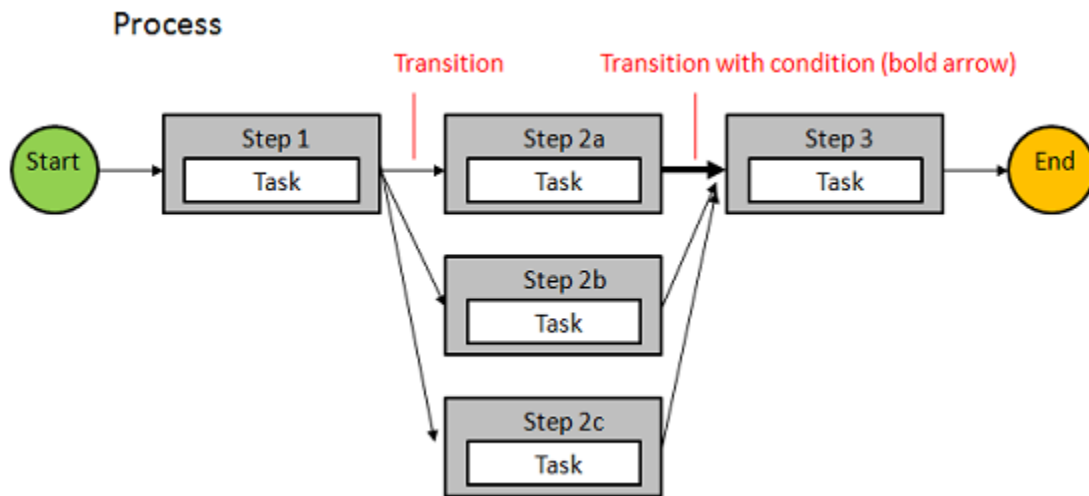
## Components of a process

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

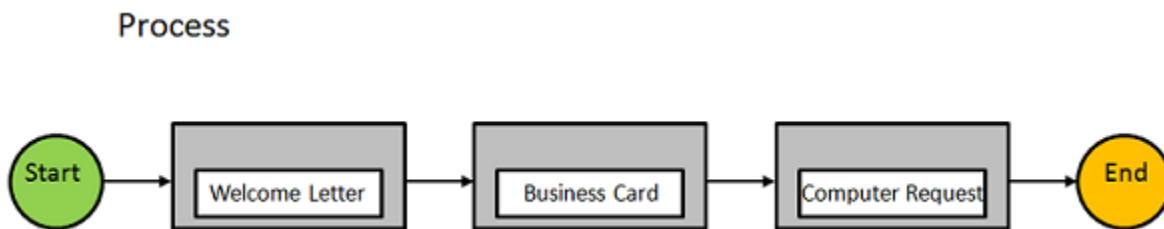
A process contains several components:

- 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):

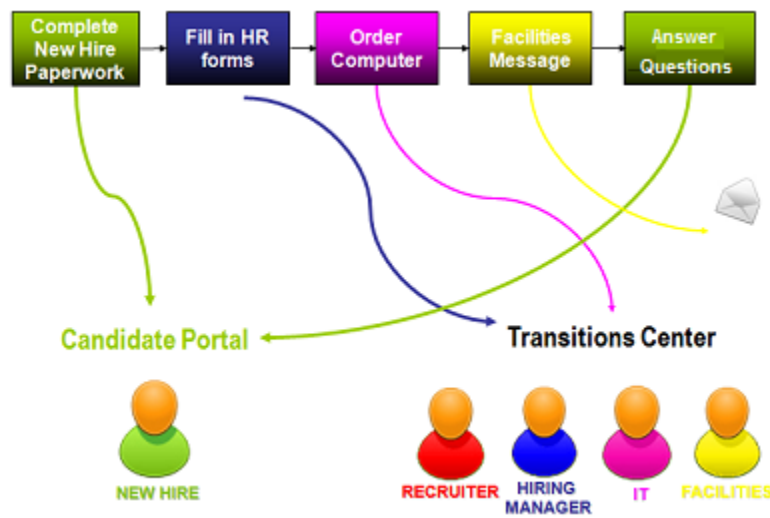
- **Pre-Hire:** A process used when the organization requires more information from new hires before the latter begin working, or when the organization wants to request paid external third-party services in a configurable, logical flow. A Pre-Hire process can be launched from the Recruiting Center for 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 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.

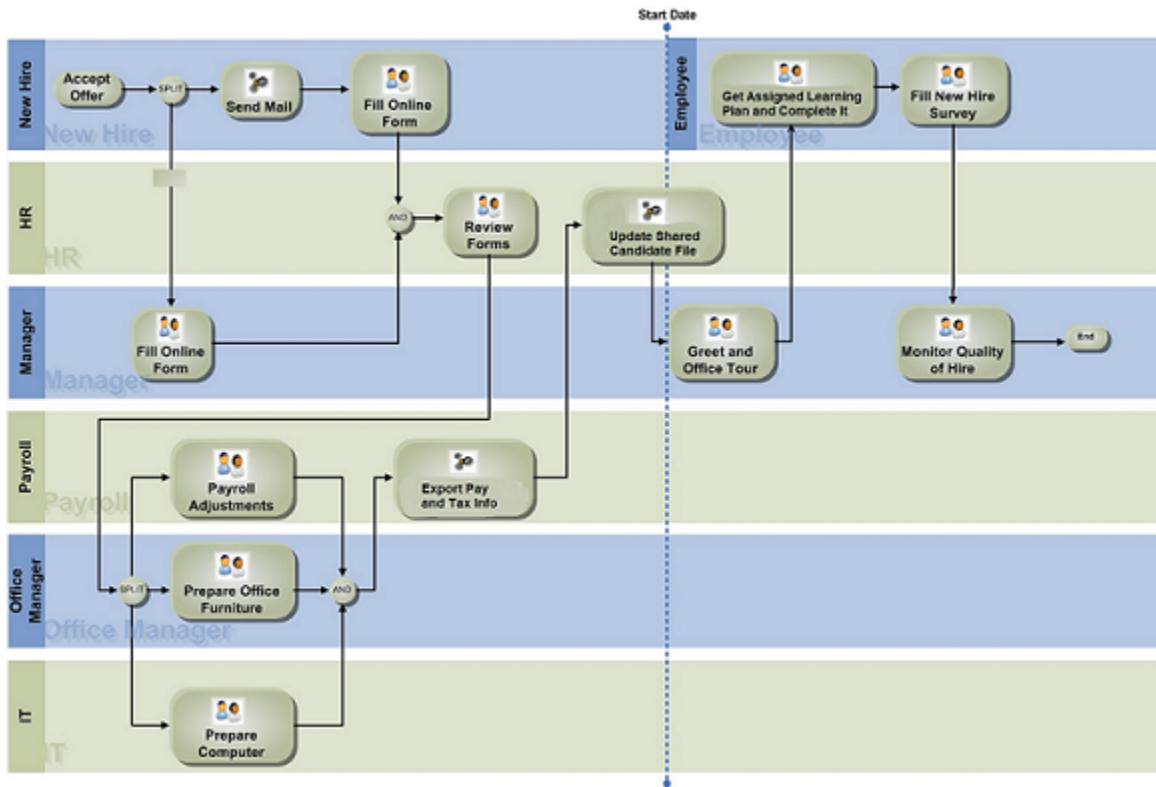


The process assigns tasks to the correct roles in the correct order. The tasks in this example are configured such that each one can only be performed after the previous one has been performed.

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

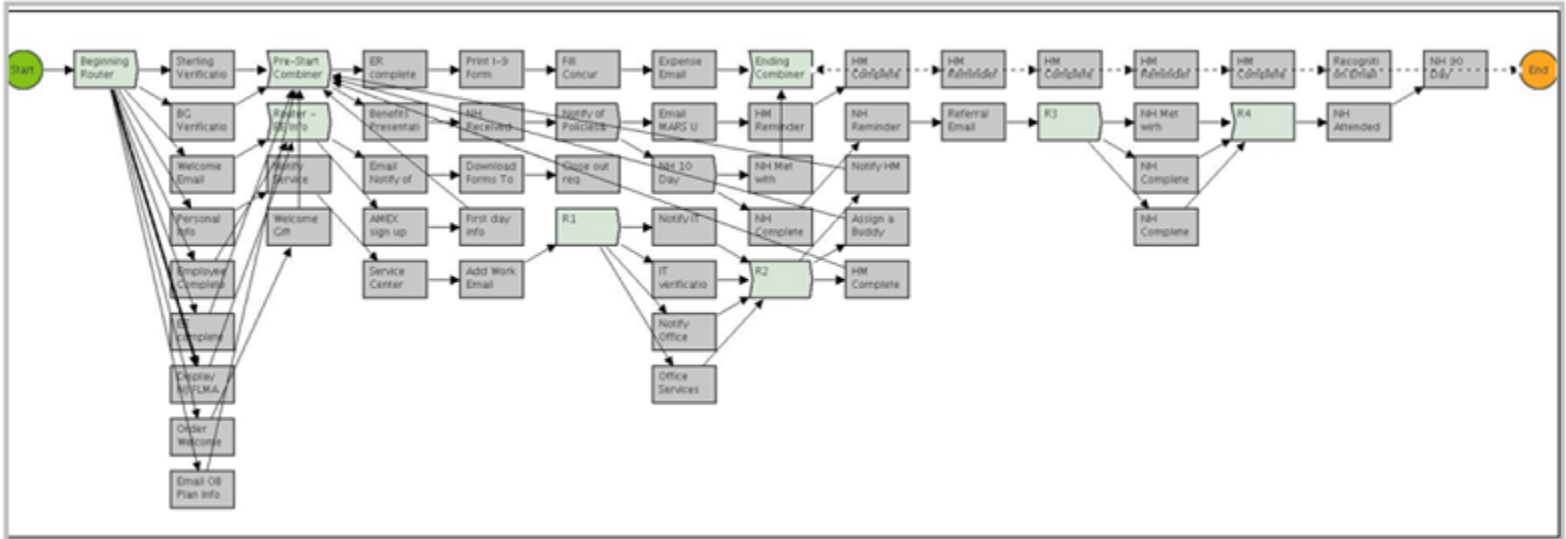
The following illustration depicts a complex Onboarding (Transitions) process.



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.

- 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 Starting Onboarding (Transitions) Processes

### Starting an Onboarding (Transitions) Process

Depending on the type of Onboarding (Transitions) process, a process can be started from the Recruiting Center or using Taleo Connect or Web Services.

There are four types of Onboarding (Transitions) processes: Pre-Hire, New Hire, E-Offer and Offboarding. The first three types can be started in the Recruiting Center.

#### Pre-Hire and New Hire Processes

Candidate Selection Workflows can be configured such that users who have the necessary permissions can start or cancel Onboarding (Transitions) prehire and new hire processes from the Recruiting Center for candidates on requisitions. When candidates reach a step and status (in a Candidate Selection Workflow) configured for Onboarding (Transitions) processes, the following Onboarding (Transitions) actions become available for selection in the More Actions list:

- Start Onboarding (Transitions) Pre-Hire Process
- Cancel Onboarding (Transitions) Pre-Hire Process
- Start Onboarding (Transitions) New Hire Process
- Cancel Onboarding (Transitions) New Hire Process

These types of Onboarding (Transitions) process can be launched from any step of a Candidate Selection Workflow provided the step was configured for these actions and the Recruiting Center users have the required user type permissions.

When a Transition process is started, the event is recorded on the History tab of the candidate file. No event is recorded on the History tab, however, when a process is completed, suspended and resumed, or canceled.

These processes can also be started or canceled using Taleo Connect.

#### Starting Transition Process and Impact on SmartOrg User Accounts

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 Onboarding (Transitions) Processes). Such problematic situations can be avoided if Recruiting Center users perform the Check for Duplicates action and merge candidate files that refer to the same person before starting an Onboarding (Transitions) process.

### E-Offer Processes

In the Recruiting Center, two E-Offer processes are available if your administrator has configured them. The standard E-Offer process simply allows candidates to accept or refuse offers. The advanced E-Offer process, which requires Onboarding (Transitions), allows candidates to accept or refuse offers, and provides additional tasks, forms, electronic signatures, etc. Provided all the right settings and permissions have been configured, the E-Offer process can be started from the Recruiting Center when an offer is extended to a candidate. If an E-Offer is rescinded in the Recruiting Center, the process is automatically canceled in the Onboarding (Transitions) Center. For details on E-Offer, refer to the *Recruiting User Guide*.

E-Offer processes can also be started or canceled using Taleo Connect.

### Offboarding Processes

Offboarding processes can be started and canceled using Taleo Connect or via Web Services from other software products. They can also be canceled in the Onboarding (Transitions) Center.

## Starting an Onboarding (Transitions) Pre-Hire Process

1. In the Candidates list, select a candidate.
2. In the More Actions list, select Start Onboarding (Transitions) Pre-Hire Process.
3. Select a process.
4. Click Done.

## Starting an Onboarding (Transitions) New Hire Process

1. In the Candidates list, select a candidate.
2. In the More Actions list, select Start Onboarding (Transitions) New Hire Process.
3. Select a process.
4. Click Done.

## Extending an Offer Electronically

### Before you start

The Electronic Offer feature must be enabled.

The offer must have been created and approved.

The candidate submission must be in the status Approved (if an approval cycle is needed) or Draft (if an approval cycle is not needed or is configured to be skipped).

### Here's what to do

1. Open a candidate submission.
2. In the More Actions list, select Extend Offer.
3. In the Extend Offer window, the Extend in writing option is selected by default. Click Next.
4. In the Send Offer Letter window, the E-Offer option is selected by default. Click Next.
5. Click Send.

### Results:

When an offer is extended electronically, a tracking event is created in the candidate file History tab indicating that an electronic offer was extended.

## Canceling an Onboarding (Transitions) Pre-Hire Process

1. In the Candidates list, select a candidate.
2. In the More Actions list, select Cancel Onboarding (Transitions) Pre-Hire Process.
3. Click Done.

## Canceling an Onboarding (Transitions) New Hire Process

1. In the Candidates list, select a candidate.
2. In the More Actions list, select Cancel Onboarding (Transitions) New Hire Process.
3. Click Done.



# 3 Onboarding (Transitions) Center

## Onboarding (Transitions) Center

The Onboarding (Transitions) Center is used by recruiters and managers typically and consists of two main sections: Tasks and Processes.

The Onboarding (Transitions) Center contains a list of Onboarding (Transitions) tasks assigned to the user, tasks the user owns and other tasks the user's permissions enable him/her to view (HR directors might have the permission required to view all tasks, for example).

A task is a request for action and can be assigned to an actor—a person or system involved in an Onboarding (Transitions) process. candidates or employees can also be actors who have tasks to complete in an Onboarding (Transitions) process. Tasks can consist of providing information, supervising the candidate or employee or providing things such as an email address, telephone and computer.

Provided users have the required permissions, the Onboarding (Transitions) Center also provides information about the Onboarding (Transitions) processes they launched or are involved in. They can see the name of the candidate or employee, and the corresponding process name, job title and process progression.

## Accessing the Onboarding (Transitions) Center

You can access the Onboarding (Transitions) Center in a number of ways.

### The Welcome Center

From the Welcome Center, you can click the Onboarding (Transitions) link in the Quick Access section.

### The Recruiting Center

Provided you have the required permissions, you can access the Onboarding (Transitions) Center from several channels in the Recruiting Center home page:

- New Hire
- Pre-Hire
- Onboarding (Transitions)

If the New Hire, Pre-Hire or Onboarding (Transitions) channels are displayed, you can click the title of any of those channels to go to the Onboarding (Transitions) Center.

In the New Hire and Pre-Hire channels, if you click a status, that action opens the Processes section in the Onboarding (Transitions) Center. The process type and the status you clicked are displayed. Click Refresh to update the candidate-process list using those criteria.

If the Onboarding (Transitions) section is displayed in the Tasks channel, you can click any link in that section to go to the Onboarding (Transitions) Center. That action opens the Onboarding (Transitions) Center and, in the Tasks section, the status you selected is displayed in the Refine by list. Click Refresh to update the task list using that criterion.

## 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 image is an example of how the task might be displayed on the Tasks tab to new hires.

The screenshot shows the 'Tasks' tab in the Onboarding (Transitions) Center. At the top, there are tabs for 'Job Search', 'My Jobpage', and 'Tasks'. Below the tabs, a progress bar indicates '1 of 2 Tasks Completed'. The task list on the left includes 'a21 - Welcome task' (Completed) and 'a6 - Academic transcripts' (Due Date: Mar 6, 2015). The main content area displays the task details for 'Job: Horticulturist 5'. The task description states: 'Hi Mister Testerson, we require a copy of your academic transcripts, please. You can upload a digital copy of your transcripts using one of the supported formats listed below. Once you have done this, we will contact you again for the next step.' The task instructions specify: 'Select a file and click Attach to upload it. The maximum allowable size is 5120 KB. Supported formats are: Word (.doc, .docx), Excel (.xls, .xlsx), Text (.txt), Rich Text Format (.rtf), Portable Document Format (.pdf), WordPerfect (.wpd), OpenOffice Writer (.odt). It is mandatory to attach a file.' Below the instructions, there is a 'Select the file to attach' section with a text input field and a 'Browse...' button. An 'Attach' button is also present. At the bottom, there are 'Complete' and 'Skip Task' buttons.

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.

New hires may upload a file for up to twenty-five categories when completing a single Content Page Task depending on how the Administrator has set up the Content Page Task. A Category selector shows all the categories which are configured by the Administrator. The list of categories may include both mandatory and optional categories, and

appears in an order prescribed by the Administrator. The mandatory categories configured by the Administrator are listed on the page and indicated with an asterisk. When a category has been fulfilled through the uploading of a file, that category automatically hides from the Category selector. Deleting a file allows the File Category associated to that file to reappear on the Category selector, allowing a new file to be uploaded for that category. A table shows the uploaded files with a Delete function. These File Categories now have descriptions with labels in every activated content language. These multilingual labels are displayed to New Hires in the Tasks tab and in the Onboarding Center. At upgrade, the existing unilingual code for each category is propagated to the multilingual translation for each activated content language.

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   | <span>Delete</span> |

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   | <span>Delete</span> |
| <a href="#">SCarolinaDriversLicense.docx</a> | Driver's license    | Mar 16, 2015, 2:24:57 PM | 14 | KB   | <span>Delete</span> |

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 | [Previous](#) [Next](#) **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 | [Previous](#) [Next](#) **1**

**Candidate Files**

1-3 out of 3 | [Previous](#) [Next](#) **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="#">Reg-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.

The Attached Files section is now called System Documents (see earlier screen shots) to help distinguish between documents originating from the organization and documents submitted by new hires during an onboarding process.

# 4 Managing Tasks in the Onboarding (Transitions) Center

## Tasks

Tasks are assignments that you complete as part of a process involving someone.

The default filter "My Opened Tasks" in the Tasks section of the Onboarding (Transitions) Center enables you to view all opened tasks, assigned to you, as those tasks come into play. They continue to be displayed until they are completed or until you choose a different filter in the Refine by list. Other filters enable you to view additional tasks subject to your user type permissions.

An Onboarding (Transitions) process (a pre-hire, new hire or other type of process) can contain different types of tasks.

| Tasks and Actions   |                                                                                                                                                                                                                                                                   |                                                                                                                                                                                                                |                               |
|---------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------|
| Task Type           | How to complete the task                                                                                                                                                                                                                                          | Description                                                                                                                                                                                                    | Related Source                |
| Form Task           | Click the corresponding Execute link to display the form. The form might contain mandatory fields and fields that can be edited. The form can be submitted when all required fields have been filled. Submitting the form completes the task.                     | Assignee is asked to complete a user-defined form. In the case of multiple people assigned to the same form task, as soon as one them submits the form, the task is completed automatically for all assignees. | Read-only view of the task.   |
| Correspondence Task | This task is completed automatically when the correspondence is sent. It is displayed in the Tasks list when users select All Tasks in the Refine by list. Users can click the task name and then click the link in the Related Source field to view the message. | An email message is sent to one or more recipients.                                                                                                                                                            | Link to the message template. |
| Manual Task         | Click the Complete link.                                                                                                                                                                                                                                          | A task that does not require any support i.e. no form, PDF, correspondence, etc. It can only be completed or canceled. Instructs the assignee to perform an action                                             | N/A                           |

| Tasks and Actions |                                                                                                         |                                                                                                                                                                                               |                        |
|-------------------|---------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|
| Task Type         | How to complete the task                                                                                | Description                                                                                                                                                                                   | Related Source         |
|                   |                                                                                                         | outside the system, such as phoning the candidate.<br><br>Details regarding the task are contained in the task description field.)                                                            |                        |
| PDF Task          | Clicking the PDF name opens the file and completes the task. You can save the file locally or print it. | The system administrator assigns a PDF file, which can contain variables to personalize the text, to the assignee as a task. The assignee completes the task by opening and reading the file. | List of PDF documents. |

Each task can be configured to have a standard or customized email sent to assignees when the task first obtains In Progress status. Additionally, each task can have a standard or customized email sent to the process owner upon completion of the task. For both of these actions, the Onboarding (Transitions) Center user can designate a message template different from the one that was initially designated.

Completed tasks trigger various actions that ensure the process progresses automatically. Once tasks are completed, they cannot be undone.

All Onboarding (Transitions) tasks whose status is In Progress have a due date by which they should be completed. The due date is based on the date on which the task was assigned (to the participant(s)) and the expected duration the administrator specified for the task.

All tasks displayed in the Tasks list originate from running processes unless Onboarding (Transitions) Center users have the user type permission required to create their own self-assigned tasks. Self-assigned tasks are not part of any process configured by the Onboarding (Transitions) administrator but rather are created by the users themselves to remind them to take some action. After they perform the action, they indicate that their task is complete. There is no entry in the History section for this type of task.

## Task Statuses

Provided Onboarding (Transitions) Center users have the required user type permission, they can view all the steps/tasks included in a person's process. The status of each step is also displayed.

Step statuses are:

- Completed - Steps that have been performed.
- In Progress - Steps that are assigned to at least one person (regardless of whether the participants have viewed or started the task).
- Error - Steps that had In Progress status but then encountered a problem that prevented completion (for example, communication problems with an external service provider).

- **Not Started** - Steps that have never been assigned to anyone and therefore have never had In Progress status.

As soon as a task obtains Completed status, the next task(s) in the process are typically assigned immediately to the relevant participant(s) and these tasks typically have In Progress status.

When a task status changes from Not Started to In Progress, it can never return to Not Started afterward. When a task status changes from In Progress to Completed, it cannot return to In Progress or Not Started afterward with one exception. It is possible to reassign a task with In Progress status to a participant provided the Onboarding (Transitions) administrator has configured this behavior. Any incorrect or omitted information submitted on a form task cannot typically be corrected by redoing the form unless the error is so common and foreseen that a double-check has been configured into the process.

A task can go from Error status to In Progress status if the situation that caused the error is fixed before the user clicks Retry.

## Task List

The tasks displayed in the task list are determined by the selection in the Refine by list and your user type permissions.

Tasks are sorted by name by default. To sort tasks by a different criterion, click the corresponding column header (except the Assigned to, Owned by, and Actions column headers).

| Task List Columns  |                                                                                                                                                                                                                                                                                                                                                                                                                           |
|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Column             | Description                                                                                                                                                                                                                                                                                                                                                                                                               |
| Name               | The name of the task. Click the name to view details of the task.                                                                                                                                                                                                                                                                                                                                                         |
| Due Date           | Date by which the task must be completed.                                                                                                                                                                                                                                                                                                                                                                                 |
| Candidate/Employee | The name of the candidate or employee related to the task.                                                                                                                                                                                                                                                                                                                                                                |
| Priority           | Displays the priority level of the task: <ul style="list-style-type: none"><li>• Low</li><li>• Medium</li><li>• High</li></ul>                                                                                                                                                                                                                                                                                            |
| Status             | Displays the status of the task. Statuses are: <ul style="list-style-type: none"><li>• Completed: The task was completed with success.</li><li>• In Progress: The task is assigned and ready to be completed.</li><li>• Error: The task had In Progress status but then encountered a problem that prevented completion.</li></ul>                                                                                        |
| Assigned to        | The assignees are the individuals who will complete the task.<br>In the case of multiple people assigned to the same form task, as soon as one of them submits the form, the task is completed automatically for all assignees.                                                                                                                                                                                           |
| Owned by           | Owner of the process—determined by the system administrator—is the person ultimately responsible for completion of the process overall. Able to view and execute all of the tasks including those that are not assigned to them, owners can intervene when necessary to keep the process moving forward. For a self-created task that is not part of any process, the name of the user who created the task is displayed. |

| Task List Columns |                                                                                                                                                                                                                                                                                                                                                                                                                              |
|-------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Column            | Description                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Actions           | <p>Actions that can be performed on a task. Actions are:</p> <ul style="list-style-type: none"> <li>Execute</li> </ul> <p>This action displays the form that the individual is to fill out and submit.</p> <ul style="list-style-type: none"> <li>Reassign</li> </ul> <p>This action enables the user to assign a single assignee to the task from among all SmartOrg users who have access to Onboarding (Transitions).</p> |

You can apply filters in the Tasks section to display only tasks of a certain type. Your permissions determine which of the following filters is displayed in the Refine by list. After making a selection from the Refine by list, you click Refresh to apply the filter.

| Task List "Refine by" Filters |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|-------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Filter                        | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| All Tasks                     | Displays all tasks in the system (provided you have the Onboarding (Transitions) user type permission "View and execute all tasks assigned to anyone").                                                                                                                                                                                                                                                                                                                                                                                                  |
| All Opened Tasks              | Displays all tasks in the system that have In Progress status (provided you have the Onboarding (Transitions) user type permission "View and execute all tasks assigned to anyone").                                                                                                                                                                                                                                                                                                                                                                     |
| All Tasks with Errors         | Displays all tasks in the system that have Error status (provided you have the Onboarding (Transitions) user type permission "View all tasks").                                                                                                                                                                                                                                                                                                                                                                                                          |
| My Tasks                      | Displays all tasks assigned to you or initiated by you.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| My Opened Tasks               | Displays tasks assigned to you or initiated by you and that have In Progress status. My Opened Tasks is the default filter.                                                                                                                                                                                                                                                                                                                                                                                                                              |
| My Tasks with Errors          | Displays tasks assigned to you or initiated by you and that have Error status.                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Overdue                       | Displays tasks assigned to you or initiated by you and whose due date precedes the current date.                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Due Today                     | Displays tasks assigned to you or initiated by you and are due on the current date.                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Due in the Next Week          | Displays tasks assigned to you or initiated by you and are due in the next week.                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Keyword                       | <p>After you submit a keyword (a complete word or part of a word), the search engine searches the (task) Name, Candidate/Employee, Assigned to and Owned by fields and then updates the task list accordingly (after you click Refresh).</p> <p>Recall that the results are subject to your permissions. For example, if you had the permission to view only tasks assigned to you or initiated by you, the updated task list would contain only tasks that reflected both your keyword criteria and were assigned to your or were initiated by you.</p> |

If the Onboarding (Transitions) administrator set the Activate Secure Login setting to Yes (Configuration > [Career Section] Settings) and users click a task list item that uses the message template (typically General Validation Request) in the OVI service used to invite candidates/employees and then click the corresponding link, the users are redirected to the OVI partner's site. If they later attempt to return to the career section and the task list by clicking the Back button

in their browser, this action is unsuccessful. The users must log into the career section or portal again if they wish to go there. This is by design.

If the Onboarding (Transitions) administrator set the setting to No or if the message template in the OVI service used for inviting people is configured to open in a new window, clicking the Back button typically returns the person to the career section and the task list.

## 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 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 Enterprise Edition in the OVI exchange. |
| Provider Status    | Value passed to Oracle Taleo Enterprise Edition 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.                                                                                                                                                              |

| Request Field Name          | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|-----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Results Expiration Date     | <p>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 Enterprise Edition 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.</p> <p>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 Enterprise Edition system would not contact the partner to resubmit the request. Instead, the existing results would be 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.</p> |
| Reference Number (Internal) | A unique identification number used by Oracle Taleo Enterprise Edition 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 Enterprise Edition 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 Enterprise Edition 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

# External Service Tasks Can Be Retried Ten Times in the Onboarding (Transitions) Center

Users can retry external service tasks up to ten times when the task's status is Error.

External service request tasks are unable to be completed occasionally due to events outside of the control of Onboarding (Transitions). An incomplete task obtains Error status and the status of the step is Canceled. While a task is in Error status, a Retry button is displayed on the Task page for that task. The user can attempt to resolve the issue by "retrying" the task up to ten times. After the tenth attempt, the Retry button is no longer displayed on the Task page. A History entry is created for each "retry" attempt.

Correspondence tasks with Error status can also be retried up to ten times.

## Managing Tasks

### Filtering Tasks

1. In the Onboarding (Transitions) Center, Tasks section, click the Refine by list.
2. Click the filter you want to apply.
3. Click Refresh.

**Results:**

The task list is updated such that only the tasks that correspond to your selection (and your user type permissions) are displayed.

### Performing a Task

1. In the Onboarding (Transitions) Center, Tasks list, find the task you want to perform and click the corresponding Execute link.
2. Follow the on-screen instructions.  
The steps vary depending on the type of task (correspondence, PDF file, form, etc.).

**Results:**

The task is completed and it is no longer displayed in the Tasks list.

### Reassigning a Task

**Before you start**

The person to whom you want to assign the task must be an Onboarding (Transitions) user.

### Here's what to do

1. In the Onboarding (Transitions) Center, Tasks list, find the task you want to reassign and click the corresponding Reassign link.  
The Reassign a Task page is displayed.
2. Click Search.
3. In the Users list, find the person to whom you want to reassign the task and click the corresponding radio button.  
If the user list spans a number of pages, you can use the Refine by filter to find the user more quickly.
4. Click Select.  
The name of the person you selected is displayed in the Assigned to field.
5. Click Save.

### Results:

The task will be displayed in the task list of the person you selected and consequently the task is no longer displayed in your task list.

## Creating a Task for Yourself

1. In the Onboarding (Transitions) Center, Tasks section, click Create.
2. Complete the fields on the New Task page.  
Mandatory fields are marked by an asterisk.
3. Click Save.  
The information you entered is displayed on the Task page. Fields in the Notifications section might contain default values.
4. You can perform any or all of the following actions on the Task page:
  - Edit the task properties that you configured.
  - Edit notifications associated with the task.
  - Create a reminder.
  - Send an immediate reminder.

### Results:

To see your new task in the task list, click the Onboarding (Transitions) breadcrumb at the top of the page to go to the Onboarding (Transitions) Center.

## Modifying a Task

1. In the Onboarding (Transitions) Center, Tasks section, click the name of the task you want to modify.

**2.** You can perform any of the following actions:

- To modify the task properties, click Edit in the Properties section and make your changes.
- To modify task notifications, click Edit the Notifications section and make your changes.
- To modify a reminder, click View next to the reminder in the Reminders section, click Edit and make your changes.

**Results:**

Your changes are displayed on the Task page. You can click Onboarding (Transitions) in the breadcrumb trail to go to the Onboarding (Transitions) Center.

## Viewing a Task's Related Source

**1.** In the Onboarding (Transitions) Center, Tasks section, click the name of the task you want to display.

**2.** Click Edit in the Properties section.

The Task page is displayed.

**3.** Click the link displayed in the Related Source field.

**Results:**

The content of the related source is displayed.

## Notifications and Reminders

Notifications and reminders are sent by email to assignees and process owners inviting them to complete tasks.

A reminder is an email alert sent to one of the task assignees, to all of them or to the owner of the task (in an Onboarding (Transitions) process). Reminders can be configured by the Onboarding (Transitions) administrator such that they are sent before or after the task due date and contain a specific notification message.

Onboarding (Transitions) Center users can also configure reminders provided they have the appropriate user type permissions. The message in the email must be one of the predefined message templates in the system. An unlimited number of reminders can be sent, as frequently as one per day if desired, at any number of days before the task's due date. As well, an unlimited number of reminders can be sent, as frequently as one per day, at any number of days after the task's due date. As soon as the task's status is Complete, no more reminders are sent. Lastly, Onboarding (Transitions) Center users can send immediate reminders (chosen from predefined message templates) to all task assignees at any time.

A notification can be sent to task assignees and the task owner. One message template can be chosen for the assignees and it will be sent to them when the task is assigned. Another message can be selected for the process owner and it will be sent upon completion of the task. Notifications are optional and tasks can be configured by Onboarding (Transitions) administrators so that no messages are sent.

## Sending a Notification

**1.** In the Onboarding (Transitions) Center, Tasks section, click the name of the task for which you want to send notification.

2. Click Edit next to Notifications.
3. Click Search next to the Task Assignment Correspondence (sent to assignees) field.
  - a. Click the radio button next to the message template you want to use.
  - b. Click Select.
4. Repeat step 3 including substeps for the Task Completion Correspondence (sent to owner) field.
5. Click Save.

**Results:**

Your selections are displayed in the Notifications section of the Task page. The first correspondence will be sent to all assignees of the task while the second correspondence will be sent to the process owner when the task is completed.

## Creating a Task Reminder

1. In the Onboarding (Transitions) Center, Tasks section, click the name of the task that you want to create a reminder for.
2. Click Create next to Reminders.
3. In the Assignees field, click Owner or Assignees or individual assignees.
4. Select a triggering time.
5. Select a notification message.
6. Click Save.

**Results:**

A reminder entry is displayed in the Reminders section. On the day that corresponds to your triggering time selections, the message you specified will be sent by email to the person.

## Viewing a Task Reminder Details

1. In the Onboarding (Transitions) Center, Tasks section, click the name of the task that has a reminder whose details you want to view.
2. In the Reminders section, find the reminder and click the corresponding View link.

## Modifying a Task Reminder

1. In the Onboarding (Transitions) Center, Tasks section, click the name of the task that has a reminder whose details you want to view.
2. In the Reminders section, find the reminder and click the corresponding View link.
3. Click Edit.

The link is not displayed if the reminder has already been sent.
4. Make your changes.
5. Click Save.

Your changes are displayed on the Reminder Properties page and on the Task page (Reminders section).

**Results:**

The reminder will be sent on the date that corresponds to the selections you made.

## Deleting a Task Reminder

1. In the Onboarding (Transitions) Center, Tasks list, click the name of the 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.

**Results:**

The reminder is no longer displayed in the Reminders section of the Task page and the email will not be sent.

## Sending a Task Reminder Immediately

1. In the Onboarding (Transitions) Center, Tasks section, click the name of the task that you want to create and send a reminder for.
2. In the Reminders section, click Send Immediate Reminder.  
The Immediate Reminder page is displayed.
3. Click Search.
4. Click the radio button next to the message template you want to include in the message.  
If the list of message templates spans a number of pages, you can use the Refine by section to find a specific template more quickly.
5. Click Select.  
The name of the message template you selected is displayed in the Notification Message field.
6. Click Send.

**Results:**

The message is sent to all of the people assigned to the task.



# 5 Monitoring Processes in Onboarding (Transitions) Center

## 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. In a single process, multiple steps might be configured to be assigned concurrently or a task might have to be completed before the process can continue.

"Transitions" exist between steps. For example, a process might require that the "Complete personal information" task is to be performed *before* the "Send thank you correspondence" task. This "transition" would guarantee that you will have the new hire's information needed to populate the correspondence.

Different processes specific audiences according to Organizations, Locations and Job Fields. One interesting thing about supervisors is that they can be multiple people at once (this is different from the single process owner). This means that a big team of coordinators or HR specialists can all share the responsibility to monitor a whole group of their candidates' processes, to send reminders or reassign or execute tasks when any delays occur.

## 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.

From the point of view of the Onboarding (Transitions) administrator, the same task can be used in different steps and a task must be placed in a step if it is to be used in a process.

From your point of view as an Onboarding (Transitions) Center user, you can consider a step and a task to be essentially the same thing with one exception. If you have the permission required to view processes, you also view the names of all the steps in processes. To view details about the unit of work that is assigned, you require the additional permission to view tasks.

Tasks are assigned in a sequence to you or to others and these tasks are always "contained" within steps. Occasionally there are routing steps, which are placeholders that have no content, that serve to push the workflow along to the next step. Occasionally, there might be subprocesses, which are collections of tasks with assignees with logic between each subprocess but that appear as a single-line item in the list and as a single box in the preview diagram.

### Assignee

In Onboarding (Transitions), the work in a step's task can be assigned to one person or to a number of people.

- 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 might be able to execute the task or reassign it to other people.
- If more than one person is assigned, any of those people can complete the task. It appears on each person's open task list. As soon as someone completes the task, it is no longer displayed on any open task lists and is displayed only in Completed lists.

## Processes List

The Processes section in the Onboarding (Transitions) Center lists all candidates and employees who are or who were involved in a process that your user type permissions allow you to view.

Processes serve the purpose of assigning the right tasks to the right people at the right time. The Processes list shows candidates and employees who are and/or were assigned to a process. For each candidate and employee, the list also includes the corresponding process name, job title, start date and current process status. The progression column indicates the progress of each process (expressed as a percentage) toward completion. The progression bar is green if the due date of all related "In Progress" tasks has not been exceeded. The bar is red if the due date of any related "In Progress" tasks has been exceeded.

As soon as a process is started (i.e. "In Progress" status), either in the Recruiting Center or through Taleo Connect, the person's name, process and other information are displayed in the Processes list.

The candidates and processes displayed are dependent on the filter you apply in the Processes section and the filters available for selection are dependent on your user type permissions.

Each row contains the following information regarding the candidate or employee and the corresponding process.

| Process List Columns |                                                                                                                                                                            |
|----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Column               | Description                                                                                                                                                                |
| Candidate/Employee   | The candidate or employee who is in a process.                                                                                                                             |
| Process              | The process involving the candidate or employee.                                                                                                                           |
| Job Title            | In the case of a candidate, the job title is the one recorded in the requisition. In the case of a new hire or employee, the job title is the position held by the person. |
| Start Date           | The candidate start date as specified in the offer.                                                                                                                        |
| Status               | The current status of the process. Statuses are: In Progress, Pre Start Date, Post Start Date, Delayed, Suspended, Completed, Canceled, New Hire.                          |

| Process List Columns |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Column               | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Progression          | <p>The progression bar is an approximation of the percentage of tasks completed in the process. The bar is divided into 10 blocks, each representing 10% of the total number of tasks in the process. Blocks have no color or are green or red.</p> <ul style="list-style-type: none"> <li>A progression bar that has no colored blocks indicates one of the following things: that the current date is later than the due date of the first task in the process; that less than 10% of the tasks have been completed; that the process was canceled.</li> <li>Green blocks indicate that the current date does not exceed the due date for uncompleted tasks.</li> <li>Red blocks indicate that the task whose current status is "In Progress" has not been completed and the current date exceeds the due date of the task. Consequently, the process is behind schedule.</li> </ul> <p>Two criteria are used to calculate the numerical representation of task completion (e.g. 25%): the number of uncompleted tasks compared with the total number of tasks in the process; the duration of each task—tasks that take longer to complete being weighted more than tasks that take less time. If a process includes tasks that do not apply to a particular candidate or employee (for example, location-specific forms), the process is typically configured to advance in spite of these irrelevant tasks. These tasks are considered to be incomplete tasks in the calculation of task completion. As soon as the last relevant task in the process obtains "Completed" status, however, task completion changes automatically to 100%.</p> |

The list can be filtered by type of process.

| Process Type        |                                                                                                                                                                                                                                                 |
|---------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Type                | Description                                                                                                                                                                                                                                     |
| Pre-Hire Validation | Process that prepares for a candidate who the organization plans to hire. A process of this type could be created to obtain additional information from candidates that was not obtained from the candidate profile or interviews, for example. |
| New Hire            | Onboarding process that ensures that everything is in place such that a new hire becomes productive quickly.                                                                                                                                    |
| Offboarding         | Process that ensures that all tasks related to the termination of an employee's employment at the organization are performed.                                                                                                                   |
| E-Offer             | Process suitable for complex electronic offers (online offers). Some organizations might use E-Offer flows that require multiple approvers, for example.                                                                                        |

The list can be further filtered by the status of the process.

| Refine by   |                                                                                                    |
|-------------|----------------------------------------------------------------------------------------------------|
| Status      | Description                                                                                        |
| All         | Displays all Onboarding (Transitions) processes to which the user has access.                      |
| In Progress | Displays Onboarding (Transitions) processes that are in progress and to which the user has access. |

| Refine by         |                                                                                                                                                                                                          |
|-------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Status            | Description                                                                                                                                                                                              |
| Suspended         | Displays Onboarding (Transitions) processes that were interrupted and to which the user has access.                                                                                                      |
| Completed         | Displays Onboarding (Transitions) processes that were completed and to which the user has access.                                                                                                        |
| Canceled          | Displays Onboarding (Transitions) processes that were canceled and to which the user has access.                                                                                                         |
| Post Start Date   | Displays Onboarding (Transitions) processes that have started and for which the Job Start Date has not yet arrived.                                                                                      |
| Past Start Date   | Displays Onboarding (Transitions) processes that have started and for which the Job Start Date is in the past.                                                                                           |
| Delayed           | Displays Onboarding (Transitions) processes that were delayed. A process has Delayed status when the current task was due before the current date and has not been completed.                            |
| Keyword           | Retrieves Onboarding (Transitions) processes that have the word in the New Hire, Process or Job Title fields.                                                                                            |
| New Hire          | Searches for new hires by name.                                                                                                                                                                          |
| Process Initiated | Allows you to target the onboarding processes that began within a specific date range.<br><br>You can select the provided recent ranges, or set up a custom range. The maximum custom range is one year. |

You can click a candidate name in the Processes section to view the process details such as the process owner, process steps and attached files.

## Process Page

The Process page displays information about the candidate, new hire or employee, in particular detailed information regarding the associated Onboarding (Transitions) process and files.

The Process page contains up to five sections. These sections are:

- General Information
- Process
- Steps
- System Documents (depending on your user permissions)
- History

The General Information section contains information about the candidate, new hire or employee: phone number, email address (if the person has one), job manager name and job start date. A Details link might also be available in this section if your organization uses such a configuration. Clicking the link displays a read-only form containing various fields about the candidate or employee. These fields were chosen by your Onboarding (Transitions) administrator.

The Process section displays the process to which the candidate or employee is associated, the process supervisor, the start date of the process, and the percentage of the process completed. You can share, suspend, restart or cancel the process, or view a preview of the process.

The Steps section shows closed steps, remaining steps to be completed and the people responsible for completing a step. If the step is in progress, the section shows the date the step is due, based on the duration configured by the Onboarding (Transitions) administrator for the task associated with the step. You can click a step to view step details and from there perform actions related to the step.

With the appropriate user type permissions, you can view the System Documents section. This section displays a list of PDF files associated with the candidate or employee and the process. These documents can be printed individually, printed in a batch, or exported from Onboarding (Transitions).

Finally, you can create and send correspondence from the Process page.

The History section is a log of actions taken on sections of the Process page, as well as the task completions and errors for each step in the process.

## Processes Section of Process Page

The Process section on the Process page displays general process information regarding the candidate or employee.

You can perform a number of actions on processes provided you have the relevant user type permissions.

| Process Actions |                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|-----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Action          | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Preview         | Displays a graphical representation of the process steps. See <a href="#">Process Preview</a> .                                                                                                                                                                                                                                                                                                                                                                             |
| Share           | Shares the process with another user. Users with whom a process is shared become supervisors.                                                                                                                                                                                                                                                                                                                                                                               |
| Revoke Sharing  | Removes a supervisor.                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Suspend         | Suspends a process. All related tasks that had In Progress status now have On Hold status instead. These tasks cannot be performed (hence cannot be completed) until the process is resumed.                                                                                                                                                                                                                                                                                |
| Resume          | Resumes a suspended process and all related tasks that had On Hold status while the process was suspended now have In Progress instead.                                                                                                                                                                                                                                                                                                                                     |
| Restart         | Cancels the running process and immediately restarts the process at step one for the candidate or employee. All information that was previously entered into Onboarding (Transitions) for this process is retained and no new information is taken from Recruiting. All onboarding forms that were completed before the process was restarted can be reviewed and updated if necessary, and submitted. See <a href="#">Restarting an Onboarding (Transitions) Process</a> . |
| Cancel          | Cancels the process and all related steps and tasks display the Terminated status. You can display the canceled process in the Onboarding (Transitions) Center by selecting Canceled from the Refine by list in the Processes section (and clicking Refresh). The "percentage-                                                                                                                                                                                              |

| Process Actions |                                                                                                                                                                                                                                                                                                                                                                                                                         |
|-----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Action          | Description                                                                                                                                                                                                                                                                                                                                                                                                             |
|                 | completed" immediately prior to cancelation of process is retained. The Processes progression bar displays no colors.                                                                                                                                                                                                                                                                                                   |
| Delete          | Deletes the process as it relates to the candidate or employee. Only completed or canceled processes can be deleted. In some cases, if the last process associated with a candidate, new hire or employee is deleted, the person's record is also deleted from Onboarding (Transitions). Record deletion is configured by the Onboarding (Transitions) administrator. Please contact Oracle Taleo for more information. |

## Managing Processes

### Filtering Processes

1. In the Onboarding (Transitions) Center, Processes section, click the Process Type list.
2. Click the filter you want to apply.
3. In the Processes section, click the Refine by list.
4. Click the filter you want to apply.
5. Click Refresh.

**Results:**

The list in the Processes section is updated such that only the candidates, new hires and employees that match your process type, status selections and your process initiated date range (and your user type permissions) are displayed.

### Accessing a Process page

In the Onboarding (Transitions) Center, Processes section, click the name of the candidate, new hire or employee.

**Results:**

The process page for the process in which the person is involved is displayed.

## Working with Processes

### Process Preview

The Process Preview feature allows Onboarding (Transitions) Center users to obtain a flow chart-like illustration of a process.

This feature provides users with an overall view of the process and of the relationships among its steps.

| Element      | Description                                                                                          |
|--------------|------------------------------------------------------------------------------------------------------|
| Start        | Circle with arrow pointing to the right. "Start" is displayed in the circle.                         |
| End          | Circle with arrow with dotted line pointing to the right. "End" is displayed in the circle.          |
| Task         | Rectangle.                                                                                           |
| Subprocess   | Small rectangle inside of a larger rectangle.                                                        |
| Step         | Rectangle.                                                                                           |
| Routing step | Light green box (this type of step cannot contain actions assigned to a participant).                |
| Transition   | Arrow. A thin arrow indicates there are no conditions. A thick arrow indicates there are conditions. |

## Previewing a Process

1. In the Onboarding (Transitions) Center, Processes section, click the name of the candidate, new hire or employee.
2. Click Preview.

## Sharing a Process

### Before you start

The user you select requires a user type necessary for his or her role in the process.

### Here's what to do

1. In the Onboarding (Transitions) Center, Processes section, click the name of the candidate, new hire or employee.
2. On the Process page, click the Share link.
3. On the User Selector page, find the name of the new user you want to select.  
You can use the Refine by and accompanying field to find the user more quickly.
4. Click the check box next to the name of the user you want to select.
5. Repeat steps 3 and 4 for each user you want to select.
6. Click Select.

### Results:

The people with whom you shared the process will be able to view it and perform actions on it.

## Revoking Sharing a Process

1. In the Onboarding (Transitions) Center, Processes section, click the name of the candidate, new hire or employee.
2. Click the Revoke Sharing link.
3. On the User Selector page, find the name of the new user you want to select.  
You can use the Refine by and accompanying field to find the user more quickly.
4. Click the check box next to the name of the user you want to select.
5. Repeat steps 3 and 4 for each user you want to select.
6. Click Select.

### Results:

The process is no longer shared with the user(s) you selected.

## Suspending a Process

1. In the Onboarding (Transitions) Center, Processes section, click the name of the candidate, new hire or employee.
2. Click Suspend.

### Results:

The process is suspended immediately.

All the tasks associated with the process that had In Progress status now have On Hold or Suspended status. They are no longer displayed in the Tasks section of assignees with the My Opened Tasks filter and the tasks cannot be completed until the process is resumed. Suspending a process also "stops the clock" with regard to task due dates.

### What to do next

The process can be resumed later.

## Resuming a Suspended Process

1. In the Onboarding (Transitions) Center, Processes section, click the name of the candidate, new hire or employee.
2. Click Resume.

### Results:

The process is resumed immediately and all tasks related to the process that had On Hold or Suspended status now have In Progress status. The tasks are displayed anew in the Tasks section of assignees with the My Opened Tasks filter. The "timer" resumes with regard to task due dates.

## Canceling a Process

1. In the Onboarding (Transitions) Center, Processes section, click the name of the candidate, new hire or employee.
2. Click Cancel.
3. Click Yes.

### Results:

The process is canceled and all the tasks associated with the process that had In Progress status now have Canceled or Terminated status. They are no longer displayed in the Tasks section of assignees with the My Opened Tasks filter. Tasks that had Completed or Not Started status retain their respective status.

To display the canceled process, select Canceled from the Refine by filter in the Processes section of the Onboarding (Transitions) Center.

The percentage-completed value immediately prior to cancelation is retained but the progression bar contains no color.

## Deleting Onboarding (Transitions) Processes

Onboarding (Transitions) users who have the required permission can "delete" a process: its start date, completion date, status, task assignees, task completion status, etc.

If users have the "Delete processes that are completed or canceled" permission, and the process status is Canceled or Completed, the Delete button is displayed on the process details page.

In addition, the Onboarding (Transitions) administrator can configure a Onboarding (Transitions) setting such that processes that have been completed or canceled at least x days ago are permanently and automatically deleted from the database. This action does not delete other information such as values in candidate fields.

## Deleting a Process

### Before you start

The process must have Completed or Canceled status.

### Here's what to do

1. In the Onboarding (Transitions) Center, Processes section, click the name of the candidate, new hire or employee.
2. Click Delete.
3. Click Yes.

### Results:

The process is "deleted": all information about which tasks were completed and by which participants is removed from the system as well as process start and end dates and information about any PDF files attached to the process.

Information about the candidates or employees is not removed from the system however. The candidates' name and address, as well as values in all standard and user-defined fields remain available in the Oracle Taleo Enterprise Edition

system. If candidates later apply for jobs, personal information that they updated on onboarding forms before the process was deleted remains in the system. The Onboarding (Transitions) administrator can remove all information related to old and completed processes and can remove candidate files entirely (those procedures is not described in this document).

## Restarting a Process

In Onboarding (Transitions), you can restart Onboarding (Transitions) processes from the beginning (provided you have the necessary user type permission).

There is no way to make a correction to a task or form after the task or form has been submitted as part of a running Onboarding (Transitions) process (unless the process was configured to enable corrections to a form later in the process). If an error is committed at some point in the process, the latter can be restarted from the beginning from the Onboarding (Transitions) Center, the Recruiting Center, or using Taleo Connect.

To restart a running process in the Onboarding (Transitions) Center, users open the process details page and click Restart.

Whenever a process is restarted in Onboarding (Transitions), the process uses the most up-to-date information. The process starts at the beginning, assigning each task to the right participant(s). This typically means that the same forms will be assigned to the same people again. Fortunately, the system retains almost all the information the participants entered on forms they submitted. Most information regarding the candidate or employee, the requisition or the offer is retained. This means that most fields will already contain values when the assignees receive the form the second time as part of the restarted process. On the other hand, if a form contains fields that require information that is unique to a process (an electronic signature field, for example), assignees must reenter the information each time the form is presented.

There are three ways to restart an Onboarding (Transitions) process, each of which has a slightly different effect on the data that is stored in Onboarding (Transitions).

- Restart the process from the Onboarding (Transitions) page. This action maintains all the existing information in Onboarding (Transitions) that had been used in the prior Onboarding (Transitions) process prior to restarting the process.
- Start the process again from Recruiting after data was updated. The effect of this action is like undoing the changes that had been made in the Onboarding (Transitions) process prior to restarting the process.
- Start the process again from Recruiting without updated data. The effect of this action is that only information about Assignment, Position and Application used in Onboarding (Transitions) will be reproduced in the new process.

**Note:** If an Onboarding (Transitions) process is currently running for candidates or employees but the process has since been disabled by the Onboarding (Transitions) administrator, users cannot restart the process for those individuals. This is by design and is perhaps best explained by an example. Take the case of a new hire process that a Recruiting Center user starts for a new hire. Some time afterward, the organization decides to replace the process with a somewhat different one. Consequently, the Onboarding (Transitions) administrator disables the original process and enables the new process. The new hire, to whom the original process is still assigned, submits a form that contains an important mistake. Onboarding (Transitions) Center users and Recruiting Center users can still cancel the new hire's process. It is not possible, however, to restart the original process because it was disabled by the administrator. For this reason, the Restart button is not displayed on the process details page of the new hire in the Onboarding (Transitions) Center. The new process, or any other process the administrator enabled, can be started for the new hire from the Recruiting Center or using Taleo Connect.

## Restarting a Process from the Onboarding (Transitions) Center

1. In the Onboarding (Transitions) Center, Processes section, click the name of the candidate, new hire or employee whose process you want to restart.
2. Click Restart.

### Results:

Cancels the current process and immediately restarts it for the candidate or employee starting with the first step. All information that was previously entered in Onboarding (Transitions) for this process is retained and no new information is taken from Recruiting.

### What to do next

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

## Working with Steps

### Steps on the Process Page

The Steps section on the Process page lists all the steps in the Onboarding (Transitions) process.

Detailed information regarding the task associated with a step can be obtained on the Task page. When the Task page is displayed for a completed step, any related source is shown with information filled in about the candidate or employee. Additionally, notifications and reminders can be sent from the Task page.

| Steps      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Column     | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Name       | Name of a step associated with the process. The name might be a link that leads the user to a page where the associated task can be acted upon. The main actions that can be performed on a task are accessible from this link. Routing tasks are not displayed as a link.                                                                                                                                                                                                                                                                                                     |
| Start Date | Date when the step was assigned and the step obtained In Progress status.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Due Date   | Date by which the step must be completed. This date is based on the date the previous step was completed plus the amount of time that the Onboarding (Transitions) administrator specified was necessary to complete this step. Reminders can be configured based on the due date. If the task is not completed by the due date, the entire process is designated Overdue in the following places: <ul style="list-style-type: none"><li>• Onboarding (Transitions) channel in the Recruiting Center</li><li>• Process filter in the Onboarding (Transitions) Center</li></ul> |

| Steps     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|-----------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Column    | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|           | <ul style="list-style-type: none"> <li>Progression bar in the Processes section in the Onboarding (Transitions) Center is displayed in red.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Status    | <p>Status of the step. Statuses are:</p> <ul style="list-style-type: none"> <li>Completed: The step was completed with success.</li> <li>In Progress: The step is assigned and ready to be completed.</li> <li>Terminated: The step was ended before normal completion.</li> </ul> <p>When the current task is impossible to complete or inappropriate, termination of the step is a way to enable the process to continue. A task (step) that is terminated is skipped and the assignees do not have to complete it. The next task(s) in the process are assigned to the corresponding assignees i.e. the process advances.</p> <p>Be mindful, however, that if the terminated task is a form intended to gather information to be used later in the process, the absence of that information might have undesirable consequences.</p> |
| Assignees | Name of the actors, person or system who must perform the step.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Actions   | Actions that are not accessible from the Task page and can be performed on the step, such as Terminate.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |

### Sorting steps

In cases where a process is composed of a large number of steps, the list of steps in a candidate's or employee's process might span a number of pages in the Onboarding (Transitions) Center. To enable Onboarding (Transitions) Center users to find a step quickly in a long list of steps, sorting capabilities were added to the following columns: Name, Start Date, Due Date and Status.

To sort the list of steps by a column header, users click the corresponding column header (Name, Start Date, Due Date and Status). The list is resorted automatically to reflect the user's selection. In addition, users can click a column header repeatedly to switch between ascending and descending order.

## Viewing a Task from a Step on the Process page

1. In the Processes section, click the name of the candidate or employee.
2. In the Steps section, click name of the step.

### Results:

The Task page is displayed for that Step.

## Terminating a Step

1. In the Processes section, click the name of the candidate or employee.

2. In the Steps section, locate the step you want to terminate and click the corresponding Terminate in the Actions column.

If you have Administrator privileges, tasks with a status of In Progress can also be terminated using Taleo Connect (TCC). The Terminate Task method is available within the Transition Process entity. You should download the latest PIP file containing the method to be able to terminate steps using TCC. You can enter the process code, step name, process status and task code to uniquely identify the step to be terminated.

A message is displayed confirming that the step was terminated.

## Working with System Documents

### System Documents

Users who have the necessary user type and permissions can view, print and save locally PDF documents associated with a candidate or employee and listed in the System Documents section of a Process page.

The Onboarding (Transitions) administrator can configure PDF documents such that they contain personalized information about the current candidate or employee. In such cases, the data is dynamic: the documents display the latest data from fields in the Onboarding (Transitions) system. Each time the PDFs are accessed, information in these fields is updated and displayed in the document.

When a PDF task is assigned in an Onboarding (Transitions) process and any participant accesses the task, the PDFs (there can be one or more) become available automatically in the System Documents section of the Process page. In addition, Onboarding (Transitions) Center users can add PDF files from the Onboarding (Transitions) library on the process details page.

Attached PDF files can be saved locally individually or in a batch. You can print files individually and your organization might allow batch printing of files. These print and batch-print actions are recorded in the History section of the process.

System documents can be exported from Onboarding (Transitions) using Taleo Connect Client. For instance, an organization might want to export all of the completed non-disclosure agreement forms for all new employees in a department as soon as each onboarding process reaches the end of the first week. A consulting engagement would be required to create an automated nightly export of this personalized PDF from every employee's process, which could then be stored in a document management system or HRMS. Contact an Oracle Taleo consultant or your organization's client executive for more information.

| System Documents |                                                                             |
|------------------|-----------------------------------------------------------------------------|
| Column           | Description                                                                 |
| Name             | Name of the PDF document.                                                   |
| Code             | Unique identifier set by the Onboarding (Transitions) system administrator. |
| Size             | Size of the document in kilobytes (KB).                                     |
| Delete           | Removes the PDF from the process's System Documents list.                   |

## E-Offer Letter PDF Attachments with the Advanced E-Offer Process

The Onboarding (Transitions) administrator can include in processes a task that starts automatically (and is transparent to both candidates and Onboarding (Transitions) Center users) after candidates accept or refuse an offer originating from an advanced E-Offer process. The task creates a PDF that includes the offer letter and a cover page. The offer letter portion of the PDF includes the candidate'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. Provided they have the required permissions, Onboarding (Transitions) Center users can 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 Onboarding (Transitions) process.

## Attaching a System Document Manually

1. In the Processes section, click the name of the candidate, new hire or employee.
2. In the System Documents section, click Add.  
The File-based Document Selector window is displayed.
3. Select the check box next to the document you want to add.  
You can use the Refine by and accompanying field to find the file more quickly.
4. Click Select.

### Results:

The PDF document is added to the System Documents section and it can be viewed, printed, saved locally or exported using Taleo Connect. If the document template included variables, the corresponding candidate or employee information is displayed in their place.

## Viewing a System Document

1. In the Onboarding (Transitions) Center, Processes section, click the name of the candidate, new hire or employee.
2. In the System Documents section, click the name of the file you want to view.
3. Click the name of the PDF file.

### Results:

The content of the PDF file is displayed in a new browser window. If the document template included variables, the corresponding candidate or employee information is displayed in their place.

### What to do next

The user can print or save the PDF file locally.

## Deleting a System Document

1. In the Onboarding (Transitions) Center, Processes section, click the name of the candidate, new hire or employee.
2. In the System Documents section, locate the file you want to delete and click the corresponding Delete.

### Results:

The file name is no longer displayed in the System Documents section. The PDF file is no longer associated with any personal information of the candidate or employee. The PDF file can no longer be exported by Taleo Connect for long-term storage. The PDF file remains available for selection in the File-based Document Selector window.

## PDF Batch Printing

Multiple documents for a candidate or employee can be printed simultaneously provided your administrator has enabled this feature.

Batch printing of PDF documents enables Onboarding (Transitions) users to select PDF files associated with a candidate or employee involved in a process and print them as a single document through an Adobe product. When the feature is enabled, a check box is displayed next to each document in the System Documents list (provided this section is displayed on the Process page). Each page can display up to 15 file attachments. The number of PDF documents the user can select for batch printing depends on the maximum batch file size setting.

The system administrator sets the maximum batch file size. The default value is 10MB. If a PDF batch size exceeds the maximum size allowed, the system displays an error message. The error message indicates to the user that the limit has been exceeded and displays the size of the batch the user is attempting to print.

The PDF documents selected are combined into a single document and sent to either Acrobat or Acrobat Reader, depending on what is installed and configured on the user's computer. The Onboarding (Transitions) system creates a generic name for each combined file and opens the Adobe application so the user can print all documents selected at once. During the print session, Onboarding (Transitions) remains available for use.

A record is created in the History section of the Process page. The record includes the codes of the documents that were sent to the Adobe product for printing but does not show if printing was successful.

## Printing PDF Documents as a Batch

### Before you start

Batch printing of PDF documents must be enabled by Oracle Taleo Support.

### Here's what to do

1. In the Processes section, click the name of the candidate or employee.
2. In the System Documents section, click the check box next to each document you want to print.
3. Click Batch Print.

### Results:

Acrobat Reader is launched in a new browser window and the content of the PDF files is displayed. If the document templates included variables, the corresponding candidate, new hire or employee information is displayed in their place. You can print the documents, save them to another location or include them in an email.

# Correspondence

## Send Correspondence

Onboarding (Transitions) Center users can send immediate correspondence to candidates and employees and the action is tracked in the History section of the Process page.

The Send Correspondence link on the Process page enables users to send emails directly to a candidate or employee using the Onboarding (Transitions) Center. The message is tracked in the system and is associated with the recipient. The header is completed automatically with the recipient's email address and additional recipients can be added.

## Sending Correspondence

1. In the Onboarding (Transitions) Center, Processes section, click the person's name.
2. Click Send Correspondence.
3. Complete the fields.
4. Click Continue.
5. Click Send.
6. Click Close.

### Results:

The message is sent and the action is recorded in the History section of the Process page.

# 6 Using the Response Center

## Response Center

The Response Center is a simplified user experience suitable for participants 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 Enterprise Edition system. 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. 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.



# 7 Login, Help, Navigation and Other Tools

## Login

### Login Procedure

When users open the Oracle Taleo Enterprise Edition 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 Oracle Taleo Enterprise Edition 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 Oracle Taleo Enterprise Edition 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 Oracle Taleo Enterprise Edition product and the Display Welcome Center setting is set to "Yes", the product is displayed directly.

## Accessing an Oracle Taleo Enterprise Edition Application

### Before you start

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

### Here's what to do

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.

## The Welcome Center

The Welcome Center is the page displayed immediately after you sign in.

The Welcome Center is organized in these areas:

- The auxiliary navigation bar provides links to the online help and your personal setup options.
- The core navigation bar contains tabs to Oracle Taleo Enterprise Edition products.
- The Quick Access panel provides a "one-click" access to the same products available in the core navigation bar. It also provides access to specific content such as a requisitions and submissions.
- In the central panel, your organization can put information of interest to all product users.

## Getting Help

### Online Help

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

### Before you start

The release notes message must have been enabled.

### Here's what to do

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

### Results:

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.

## Navigation Tools

### 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 Enterprise Edition 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> |
| Talent Grid | Access to Solution Exchange, Knowledge Exchange.                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Sign Out    | Terminates the session and you are automatically signed out of all Oracle Taleo Enterprise Edition products.                                                                                                                                                                                                                                                                                                                                                                                                                  |

## 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.    |
|  | 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. |

## Languages

Oracle Taleo Enterprise Edition products are available in different optional languages.

Not all languages are available for all Oracle Taleo Enterprise Edition 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 Oracle Taleo Enterprise Edition products. If a product does not support the same set of content languages, it will have its own preference configuration.

In Oracle Taleo Enterprise Edition 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.

## Activating a Language

### Before you start

The item must be in Edit mode.

### Here's what to do

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

### Results:

Activated languages appear in the Language drop-down list of item.

### What to do next

Once a new language has been enabled, values for some related fields (most often Name) will need to be provided.

## Supported Languages

The languages supported for Oracle Taleo Enterprise Edition 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.

- Assessment: All listed languages are supported except Indonesian (Bahasa).
- OAS (Oracle Analytics): All listed languages are supported except Indonesian (Bahasa), Lithuanian, Malaysian (Malay), Serbian, Slovenian.
- Resume Parsing: Resume parsing is delivered using a third party partner service. The functionalities are delivered as-is. Customers needing additional or different resume parsing capabilities should explore partner services.

| Language           | Locale | Recruiting and Onboarding | Performance | Mobile    | Sourcing  | Resume Parsing |
|--------------------|--------|---------------------------|-------------|-----------|-----------|----------------|
| Bulgarian          | bg     | Available                 | Available   |           |           |                |
| Simplified Chinese | zh_CN  | Available                 | Available   | Available | Available |                |

| Language              | Locale  | Recruiting and Onboarding | Performance | Mobile    | Sourcing  | Resume Parsing |
|-----------------------|---------|---------------------------|-------------|-----------|-----------|----------------|
| Traditional Chinese   | 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 | Limited        |
| English               | en      | Available                 | Available   | Available | Available | Supported      |
| English (U.K.)        | en_GB   | Available                 | Available   | Available | Available | Supported      |
| Finnish               | fi      | Available                 | Available   |           | Available |                |
| French (Canada)       | fr      | Available                 | Available   | Available |           | Limited        |
| French (France)       | fr_FR   | Available                 | Available   | Available | Available | Limited        |
| German                | de      | Available                 | Available   | Available | Available | Limited        |
| Greek                 | el      | Available                 | Available   |           |           |                |
| Hungarian             | hu      | Available                 | Available   |           | Available |                |
| Italian               | it      | Available                 | Available   | Available | Available | Limited        |
| 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 | Limited        |
| 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   |           |           |                |

| Language            | Locale | Recruiting and Onboarding | Performance | Mobile    | Sourcing  | Resume Parsing |
|---------------------|--------|---------------------------|-------------|-----------|-----------|----------------|
| Spanish (Worldwide) | es     | Available                 | Available   | Available | Available | Limited        |
| Swedish             | sv     | Available                 | Available   | Available | Available |                |
| Thai                | th     | Available                 | Available   |           | Available |                |
| Turkish             | tr     | Available                 | Available   |           | Available |                |

## Selecting the Base Language

### Before you start

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

### Here's what to do

1. Open an item.
2. Select Configure next to the Language drop-down list.
3. In the Language Configuration page, select the Base option for the desired language.
4. Set the language to Active if that is not already the case.
5. Click Save.

### Results:

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

### What to do next

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

## 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, the user 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.

