



Taleo Enterprise

Taleo Compensation HR Administration Guide

**Feature Pack 12A
January 27, 2012**

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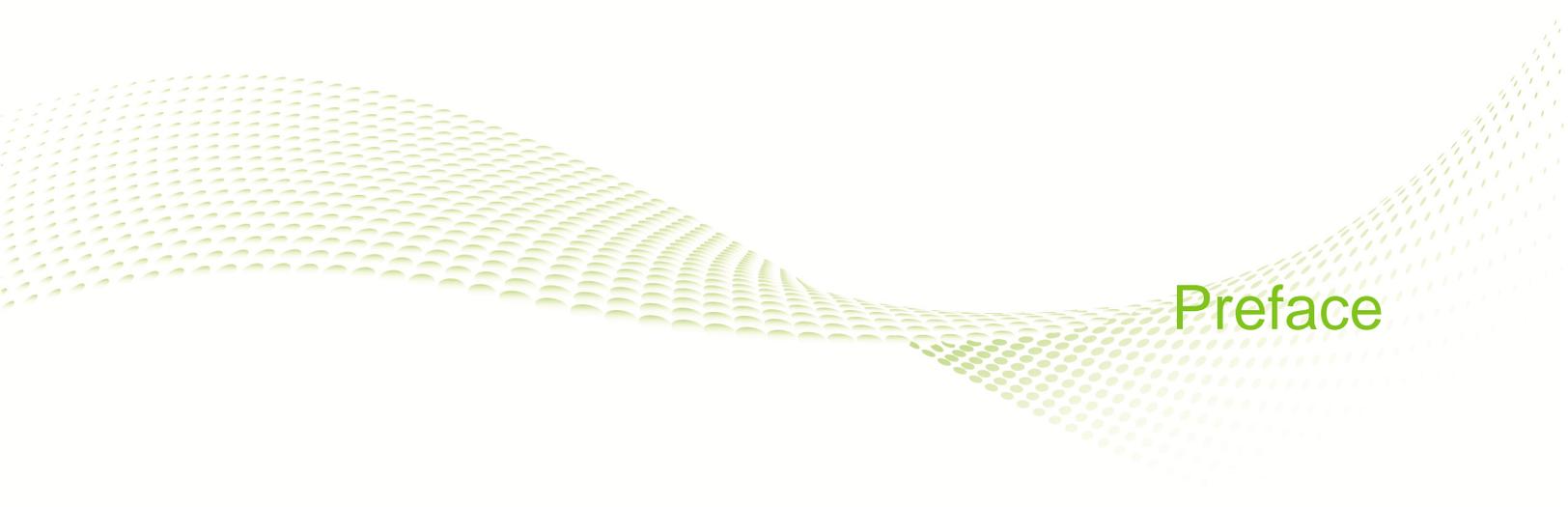
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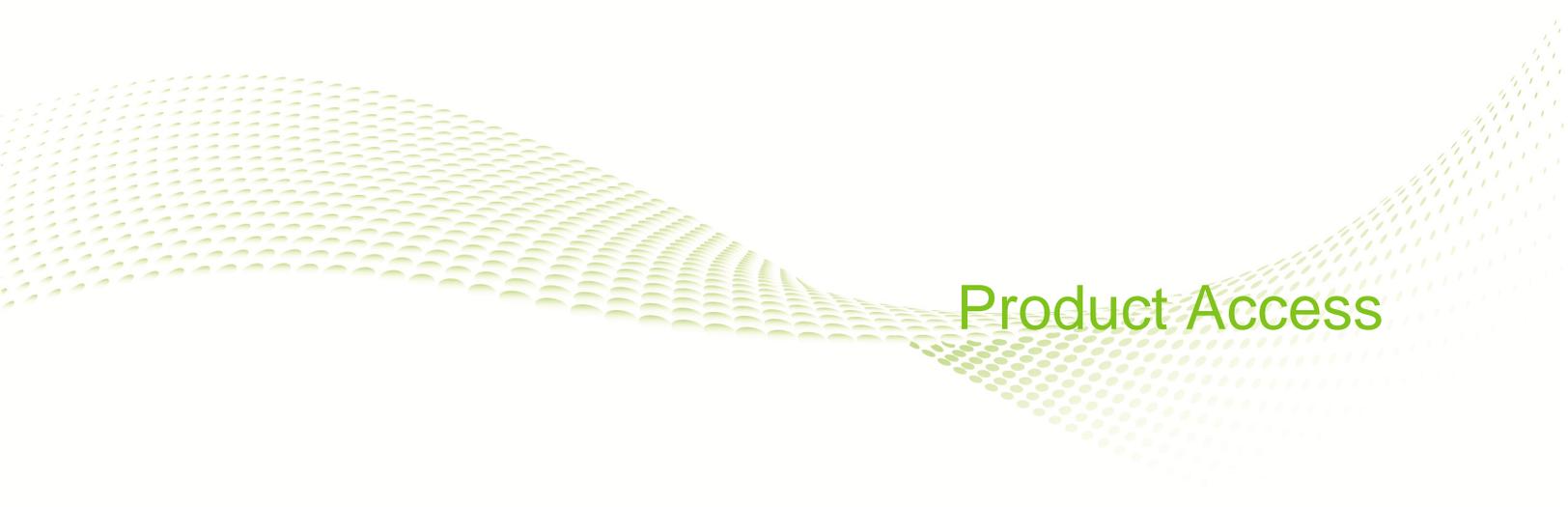
Preface

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Revision History

The Revision History lists modifications that were made to this document since the last publication.

Date	Modification	Revised Topics
August 2011	Version 1 of the Taleo Compensation FP 11B HR Administration Guide.	None
January 27, 2012	Version 1 of the Taleo Compensation FP 12A HR Administration Guide.	None



Product Access

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Login and Product Access

Allows users to sign into the application to see the list of products to which they have access.

When opening the Taleo Enterprise solution, the User Sign In page appears. Users must select the language in which they want to use the application. If a user changes the default language on the Sign In page, the page refreshes to the new language and subsequent Taleo pages are presented in the selected language. After selecting a language, users also have the ability to tell the system to remember their selection so that the next time they sign in, the User Sign In page will be presented in the selected language.

To see a list of accessible Taleo products, a user name and password must be provided on the User Sign In page. The user name and password are provided by the system administrator; however, users can change the password.

Once a user's credentials have been entered and accepted, the Table of Contents page appears and presents Taleo products purchased by the organization to which a user has access according to the associated user type and permissions.

When accessing a Taleo application, the information displayed in the home page is specific to the user who signs in. The features to which the user has access also depend on product settings enabled by the system administrator and on user type permissions granted to the user.

Logging In

Taleo Compensation users can access the site through designated URLs. Separate log in credentials are assigned for each user.

Prerequisite

The user must know the Web address and have received a user name and password from the system administrator.

Steps

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

Result

You now have access to the application.

Next Step

If logging in for the first time, you must select a new password.

Using the Forgot Password Link

In the event an authorized user forgets his or her password, a link is provided on the User Sign In page that assists in access to the Taleo application.

Prerequisite

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

Taleo URL > User Sign In

Steps

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

Result

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

Next Step

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

Changing Your Password

Prerequisite

A setting allows the activation of this feature. A user type permission grants users access to this feature.

Steps

1. Click My Setup located in the top right-hand corner.
2. In the General tab, click Edit.
3. Modify the information contained in the Account section.
4. Click Save.

User Roles

Users are assigned one or more roles associated with a set of features. If a user is assigned more than one role, the user can move to another role by clicking Change Role at the top right corner of the page and selecting the new role. The user roles available within a typical Taleo Compensation configuration are detailed below. Due to the ability for custom configuration, your zone may vary.

User Role	Description
HR Administrator	Oversees compensation planning for either all employees or a subset of employees.
Compensation Administrator	Can review user access information as well as compensation plan details for base pay and bonus.
System Administrator	Configures Compensation system access, page and report as well as views who is logged into the Compensation application.
Manager	Conducts compensation planning for direct and indirect reporting employees.

Application Timeout

Application timeout is a security feature that signs out the user when the application is idle for more than fifteen minutes.

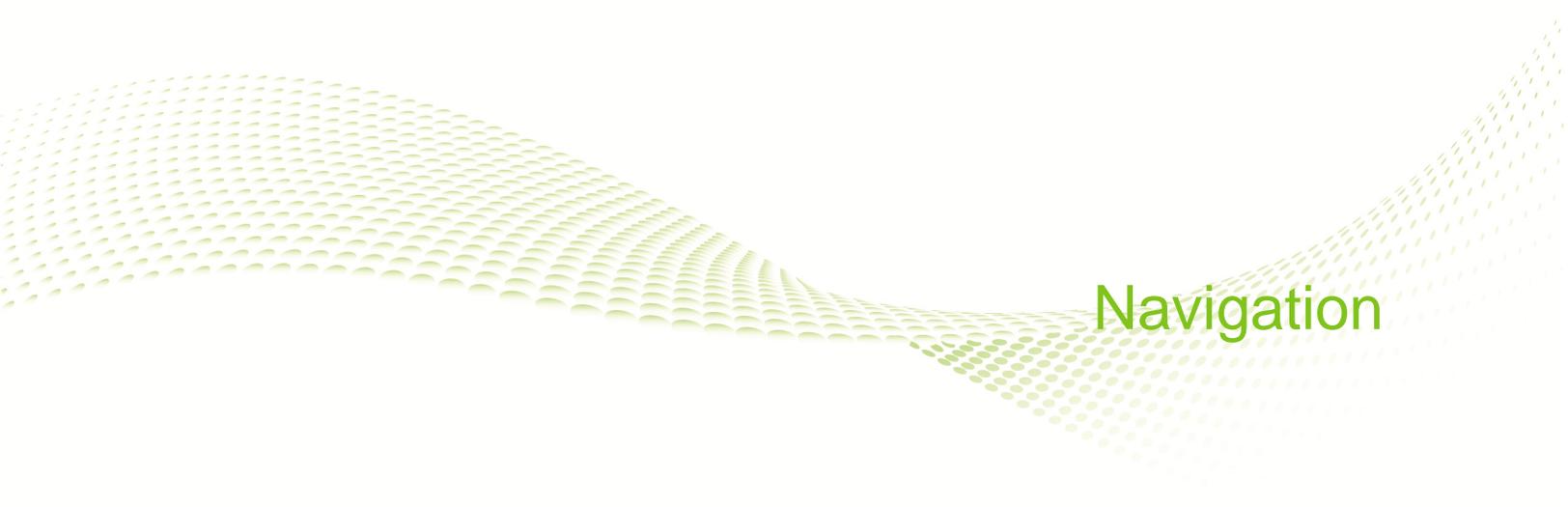
The application includes a security feature that warns the user when the application has not been used for more than fifteen minutes while a user is still signed into the application. When the timeout delay is reached, a message notifies the user that the timeout delay for the application is imminent.

Two scenarios are possible:

- **User takes action:** Clicking “Access the application” will direct the user to the application. When the user accesses the application, they 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 will be displayed, indicating that the user has been signed out of the application and will need to sign in again to use the application.

The timeout delay is set by default to fifteen minutes. The reminder displayed before timeout is set by default to five minutes before timeout.

Private settings allow the configuration of the application timeout. Contact Taleo Support for details.



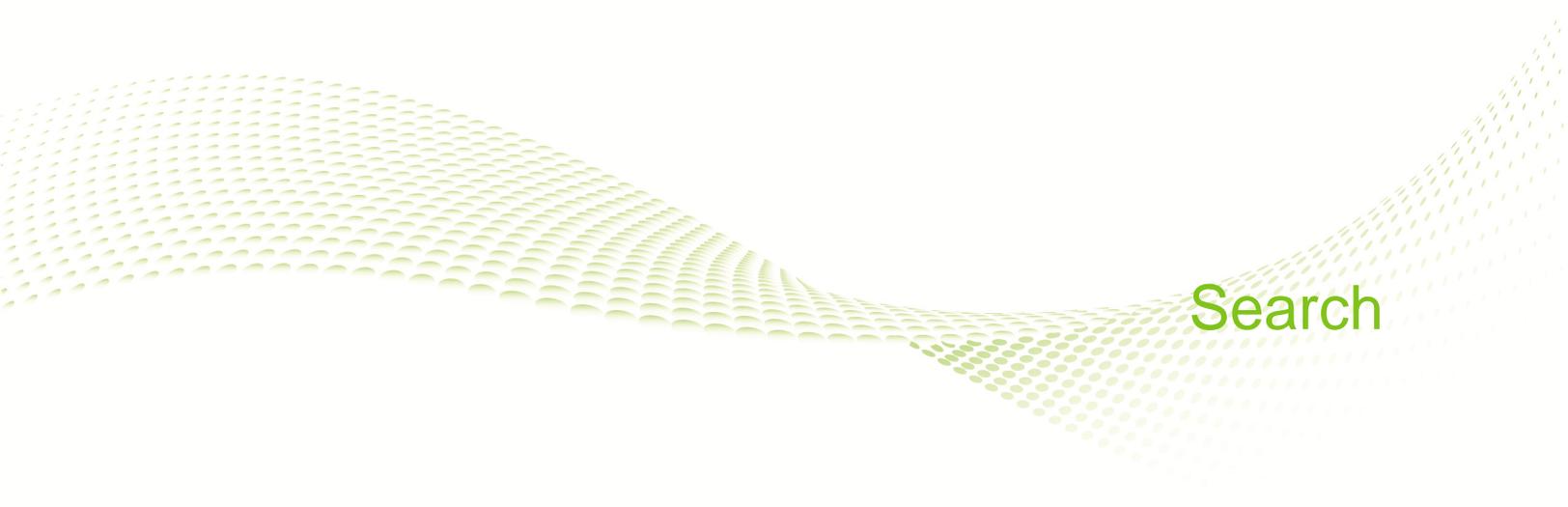
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Buttons and Icons

The following table details the buttons and icons available within Taleo Compensation

UI Element	Description
Cancel	Discards the changes on the active pane, section, or window.
Save	Saves the changes on the active pane, section, or window.
Calendar Widget	Enables user to select a date displayed in the proper format for the active field.
Search	Executes a search for the desired data using the active criteria.
Select	Refreshes the current screen to reflect the item selected within the adjacent drop-down.
Preview	Preview the item selected in the adjacent drop-down.
Copy	Copy the item selected in the adjacent drop-down.
	Expands a section on the page.
	Moves up the management hierarchy.



Search

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Member Search

The Member Search allows you to search for a specific employee in your organization without having to drill down through the Member Summary View and the All Employee View on the Manager Search page.

Employees can be searched by employee ID, last name, or first name without using the drill down feature in the Member Summary or All Employee Views on the Manager Search page. At least one character in one of these search criteria fields is required to complete a search. Wildcard characters are assumed to be appended to the entry in these fields, thus more characters refine the search results.

Using Member Search

Prerequisite

Member Page > Member Search > 

Steps

1. Enter the search criteria.
2. Click Search.

Result

The search results display.

Next Step

Click the radio button adjacent to the desired member and click Select to view the associated information in the Member View.

Member View

The Member View is where more details about each employee can be viewed.

The Member View provides more details on each employee, such as the employee profile or history. Planning can occur in the Member View.

Member View

Views within Taleo Compensation are configurable. This table details a typical configuration for the Member View.

Roll Bar Tab or Link	Description
Salary or Base Pay	The Salary roll bar tab in the Member View has three panels: Current Pay, Salary Adjustment and Guidelines, and Proposed Pay. The center panel, Salary Adjustment and Guidelines, have the same editable fields as in the Direct Team View; Salary Adjustment Percent and Amount. These values cross calculate.

Roll Bar Tab or Link	Description
	Tabbing or clicking out of the field will enable the Save button. If you enter an amount or percent that is under or over guideline for the selected rating, an alert dialog can require that you acknowledge going outside the guideline and remind you to leave a reason in the Comment panel.
History	History links display the salary, bonus, and stock history for the current employee in the Member View. This is a pop-up window and is display only. There are no editable fields for history.
Last Modified	The Last Modified link displays the details on the last modification of the salary planning for the current employee. This is a pop-up window and is display only. There are no editable fields for Last Modified.
Performance	The Performance tab can be display only for Taleo Performance customers or editable for customers that do not use Taleo Performance. It also contains performance history for prior years.
Profile	The Current Profile tab has three panels: Employee, Organization and Job. There are no editable fields in any of the three panels. If there is incorrect information displayed, please check with your Human Resources representative.
Comments	The Comments tab is required to be completed in the event any employee is awarded a salary adjustment outside of guideline. Make sure to include your name and date when entering the comment. When you are finished, tab or click outside of the test field to enable the Save button and save your comment.

Manager Search

The Manager Search allows you to search for a specific manager in your organization.

Managers can be searched by employee ID, last name, or first name. At least one character in one of these search criteria fields is required to complete a search. Wildcard characters are assumed to be appended to the entry in these fields, thus more characters refine the search results.

Using Manager Search

Prerequisite

Manager Page > Manager Search > 

Steps

1. Enter the search criteria.
2. Click Search.

Result

The search results display.

Next Step

Click the radio button adjacent to the desired manager and click Select to view the associated information in the Manager Summary View.

Manager Summary View

The Manager Summary View is for second level managers and higher in the hierarchy. The Manager Summary View gives a total budget view of the direct reporting managers and the direct team. Views within Taleo Compensation are configurable. This table details a typical configuration for the Manager Summary View.

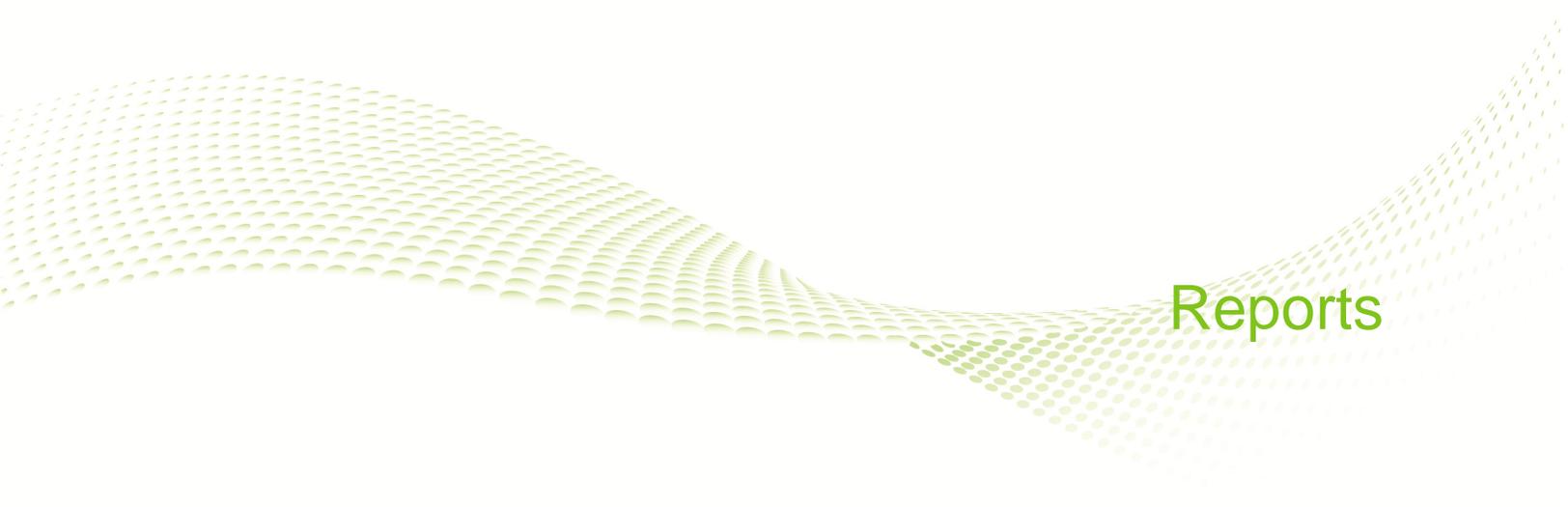
Column or Label	Description	Editable
Currency Selector	The Currency selector converts currency values in the Manager Summary View. Using this selector does not change which currency in which an employee is paid, it only changes how you view the currency values in the table.	Choose Selection
Manager Name	Displays a list of managers that report to the user. This list can be drilled down to the next lower level of the hierarchy by clicking the name of a manager. When you drill down to a first level manager, the data grid will be empty. You can move back up the hierarchy by clicking the up arrow.	No
Done Ratio	Displays the total number of employees assigned to that manager and the number where compensation planning is completed.	No

Column or Label	Description	Editable
Submit Date	Displays the date when the manager submitted their compensation plan.	No
Undo Submit	Once submitted, the submitting manager can no longer make changes unless the next higher manager clicks "Undo Submit" check box. Higher level managers can also plan for a subordinate.	No
Totals	Each manager's Total Budget, Allocated, and Available are viewable and all are totaled at the bottom of the table.	No
Save	Allows the user to save changes, but does not submit the changes to the next level in the hierarchy.	No
Submit	Sends the user's planning changes to the next higher level in the hierarchy. Users cannot submit a plan until all subordinates have completed planning and submission and planning is completed for the user's direct team. Planning can occur only on the All Employee View in Direct Team mode and the Member View section of the Budget Roll-up page.	No

All Employee View

The All Employee View is a table similar to the Direct Team View. Every employee in your organization is listed. Unlike the Direct Team View, the All Employee View has editable fields only when Direct Team has been selected from the pull-down menu.

As you drill down in the Member Summary View on the Budget Roll-up Page, the All Employee View displays the employees assigned to the manager whose name you clicked. When you click on an employee's name in the All Employee View, their details load in the Member View below. This provides editing capabilities for any employee assigned to your hierarchy within your organization. Edits in the Member View will reflect in the All Employee View, Member Summary View, and the Budget Summary.



Reports

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Reports

Native reports are available to managers and HR administrators. This feature includes population, filters, sort preferences, and custom reports.

There are reports available in Taleo Compensation; each with filter and sort options. These reports can be run one at a time.

The Reports portlet enables managers and HR admins to choose the population of employees that appear on a report. The filter and sorting options can still be applied to that population. Populations available for selection are:

- All Managers
- All Employees
- All Direct Reports

HR administrators have access to a comprehensive employee export and a new audit report. Filters include any criteria determined by the organization. The filters can be configured by contacting Taleo support.

Custom reports can be added to the native reporting feature by contacting Taleo support. These reports can include graphs, subtotals, and totals.

Running a Report

Prerequisite

Rewards Planning > Reports

Steps

1. Click the radio button adjacent to the desired report.
2. Select the desired filters.
See the section on individual reports for more information on available filters.
3. Select the desired sort order
See the section on individual reports for more information on available sort options.
4. Click Run Report.
The Progress meter will read 100% when the data is ready for viewing. The Get Report button is now activated.
5. Click Get Report.
6. Save the report to the desired location.

Result

Reports execute and can be saved to a convenient location for printing or viewing.

Manager Summary Report

This report reflects the information in the Member Summary View on the Budget Roll-up page. The output format for this report is a PDF file. Taleo Compensation is configurable and the reports in your zone may vary. The typical configuration for this report layout is detailed in the following tables:

Filter by (Population)	First Sort	Second Sort
All Managers	Employee Name	Employee Name
Direct Reporting Managers	Base Pay Budget	Base Pay Budget
All Non Direct Reporting Managers	Base Pay Allocated	Base Pay Allocated
Direct Team Only	Base Pay Available	Base Pay Available
	Bonus Funding	Bonus Funding
	Bonus Allocated	Bonus Allocated
	Bonus Available	Bonus Available
	Equity Pool	Equity Pool
	Equity Allocated	Equity Allocated
	Equity Available	Equity Available

Column Name
Manager Name
Budget
Allocated
Available

Employee Compensation Report

This report reflects the information in the Direct Team View on the Planning page. The output format for this report is a PDF file. Taleo Compensation is configurable and the reports in your zone may vary. The typical configuration for this report layout is detailed in the following tables:

Filter by (Population)	First Sort	Second Sort
All Employees	Employee Name	Employee Name
Employees Without Direct Reports	FT/PT	FT/PT
Direct Reports Only	Job Title	Job Title
	Grade	Grade
	Perf Rating	Perf Rating

Filter by (Population)	First Sort	Second Sort
	Currency	Currency
	Current Annual Base Pay	Current Annual Base Pay
	Proposed Merit %	Proposed Merit %
	Proposed Merit Amount	Proposed Merit Amount
	Total Incr %	Total Incr %
	Total Incr Amount	Total Incr Amount
	New Annual Base Pay	New Annual Base Pay
	Annual Bonus Target Amount	Annual Bonus Target Amount
	Annual Bonus Funding	Annual Bonus Funding
	Propose Bonus %	Propose Bonus %
	Propose Bonus Amt	Propose Bonus Amt
	Equity Target	Equity Target
	Propose Equity	Propose Equity

Column Name
Employee Name
Preferred Name
FT/PT
Job Title
Grade
Perf Rating
Currency
Current Annual Base Pay
Proposed Merit %
Proposed Merit Amount
Total Incr %
Total Incr Amount

Column Name
New Annual Base Pay
Annual Bonus Target Amount
Propose Bonus %
Propose Bonus Amt
Equity Target
Propose Equity

Employee Data Export

This report reflects the information in the All Employees View on the Budget Roll-up page. The output format for this report is a CSV file. Taleo Compensation is configurable and the reports in your zone may vary. The typical configuration for this report layout is detailed in the following tables:

Filter by (Population)	First Sort	Second Sort
All Employees	Employee Name	Employee Name
Employees Without Direct Reports	Preferred Name	Preferred Name
Direct Reports Only	FT/PT	FT/PT
	Job Title	Job Title
	Grade	Grade
	Perf Rating	Perf Rating
	Currency	Currency
	Current Annual Base Pay	Current Annual Base Pay
	Proposed Merit %	Proposed Merit %
	Proposed Merit Amount	Proposed Merit Amount
	Total Incr %	Total Incr %
	Total Incr Amount	Total Incr Amount
	New Annual Base Pay	New Annual Base Pay
	Annual Bonus Target Amount	Annual Bonus Target Amount
	Propose Bonus %	Propose Bonus %
	Propose Bonus Amt	Propose Bonus Amt

Filter by (Population)	First Sort	Second Sort
	Equity Target	Equity Target
	Propose Equity	Propose Equity
	Employee ID	Employee ID

Column Name
Employee Name
FT/PT
Job Title
Job Family
Grade
Perf Rating
Currency
Current Annual Base Pay
Proposed Merit %
Proposed Merit Amt
Promo/Adj Proposed %
Promo/Adj Proposed Amt
Lump Sum Amt
Total Incr Proposed %
Total Incr Proposed Amt
New Annual Base Pay
New Compa Ratio
Bonus Wages
Annual Bonus Target Amt
Proposed Bonus %
Proposed Bonus Amt
Equity Target

Column Name
Proposed Equity
Stock Options
Restricted Stock Units
Manager Name
Manager ID

Employee Letter

This report is available only after the planning process and final CEO approval is completed and made accessible by the System Administrator. You can create a single letter or one for your entire team by selecting "All Direct Reports" or an individual from the Population selector. The output format for this report is a PDF file. Taleo Compensation is configurable and the contents of the letter in your zone may vary.

Managers can print out the letters for each direct report and present the letters prior to any salary adjustments appearing on the next payroll. The download feature of the letter may be especially convenient for managers with direct reports in other locations. You can run the letter for employees and save it in a PDF format; the letter could then be sent as an email attachment to notify employees of the salary adjustment.