HRIS

Employees' User Guide

7/30/2015

Contents

HRIS Core Function

Logging In

Before you can login to the Fusion Human Resources Information System (HRIS) for the first time, you receive an email from "donotreply@oracle.com" with a subject line of "New Account Information". This email contains your User ID, a temporary password, and a link to the HRIS Fusion login page. After logging in for the first time, you will change your password and register some challenge questions.

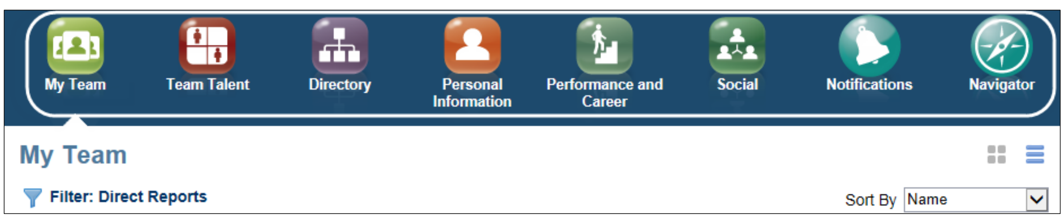
If you have not received your login credentials (or have forgotten your user name), email HRIS Support at HRIS@unitedlex.com, or contact your system administrator.

- India – Sunil Kumar (+91-9818637887)
- US – Shweta Bhatia (913-209-4820) or James Wareham (913-333-3437)

1. To login, go to https://hcek.hcm.us1.oraclecloud.com/hcmCore/faces/HcmFusionHome.
2. Enter your HRIS user name and Fusion password and click on **Sign In**.

The HRIS Fusion Welcome Screen is displayed.

On some screens, the icons on the Welcome Screen are available on a horizontal bar across the top the page. Their function is the same as on the Welcome Screen.



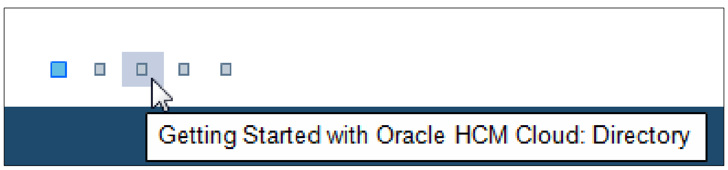
If the horizontal bar is not visible, click on the home icon to display the horizontal bar.

Getting Started

In addition to this User Guide, you can view online videos for additional training concerning your personal information, the directory, and requesting absences.

1. To view the videos, from the Welcome Screen (or the horizontal bar of other screens), click on **Getting Started**.

2. You can view the available videos by hovering your mouse over the squares at the bottom of the screen.

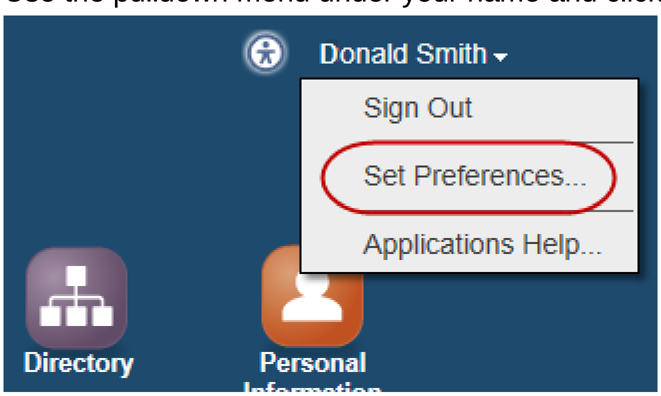


3. To watch the video (if permitted at your location), click on the square and then click on the play icon.

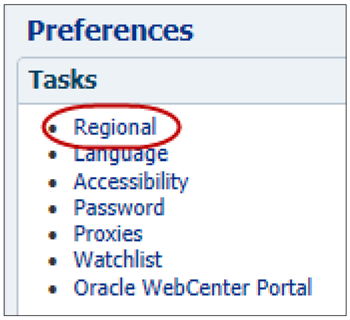
Changing Your Time Zone

The default time zone for the Fusion HRIS system is CST. If your local time zone is not CST, or if you are traveling across time zones, it may be necessary to switch the Fusion application to the appropriate time zone.

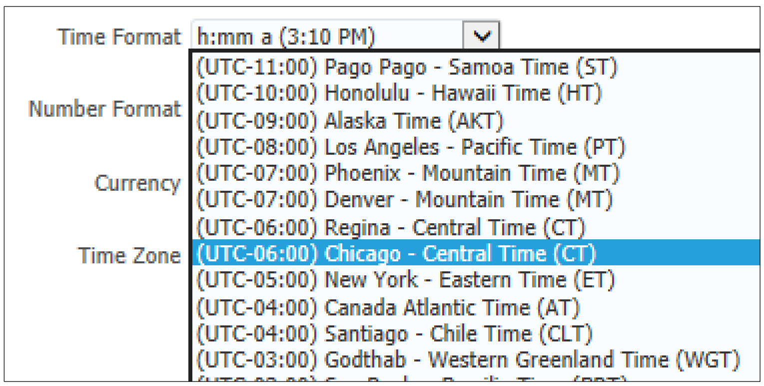
1. Use the pulldown menu under your name and click on **Set Preferences….**



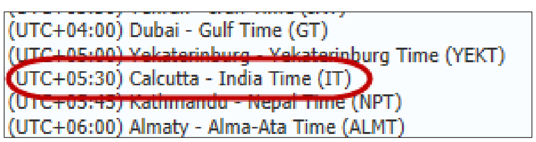
2. Under **Preferences**, click on **Regional**.



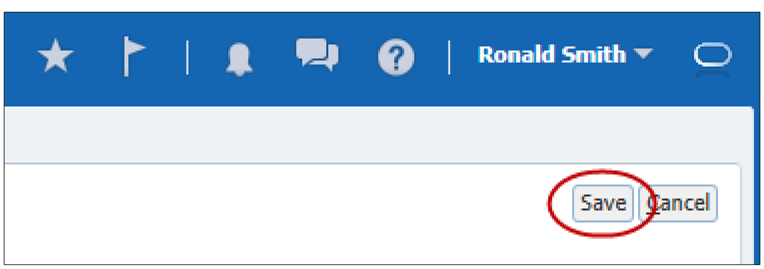
3. Use the **Time Zone** pulldown menu to select the appropriate time zone.



Note: For the India offices, select the Calcutta time zone.



4. Click on **Save**.



Viewing and Editing Personal Information

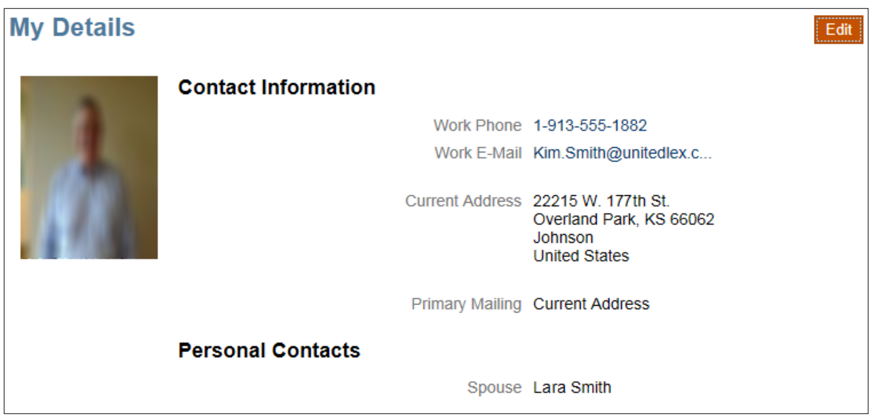
You can use the Personal Information page to view and edit personal information, such as, contact information and documents.

After you have made your edits, any change requests regarding your own personal contact information, such as your address, are forwarded to Human Resources for approval, and you will not be able to make any additional changes to your personal information until the first changes are approved.

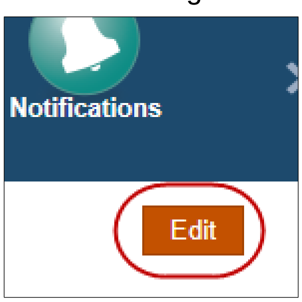
Changes involving Contact Information and Documents are updated immediately and are not forwarded to HR.

1. From the Welcome Screen (or the horizontal bar of other screens), click on **Personal Information**.

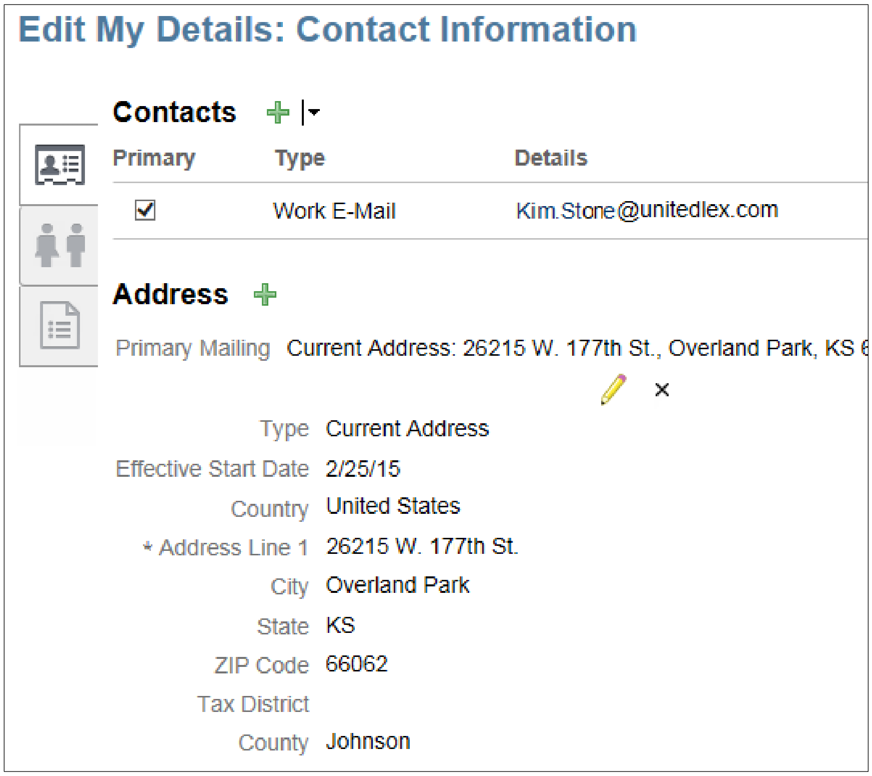
Your My Details page is displayed.



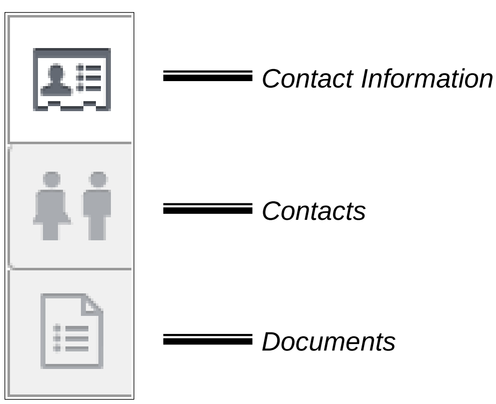
2. To make changes or additions to your personal information, click on **Edit**.



The Contact Information page is displayed.

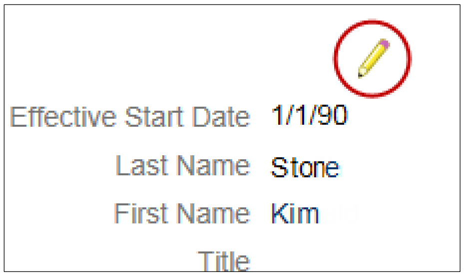


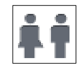
3. To view or edit other personal information pages, click on the My Information bar.

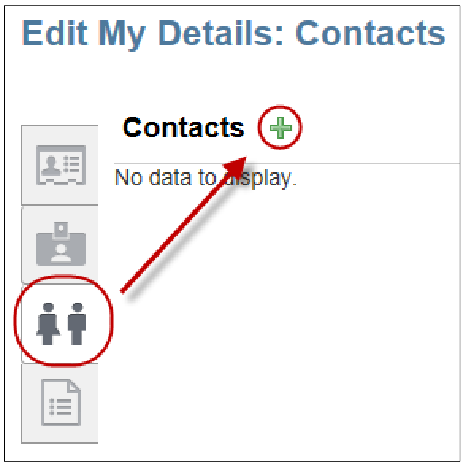


Note: *Contact Information* contains your own personal information. *Contacts* contains others' information.

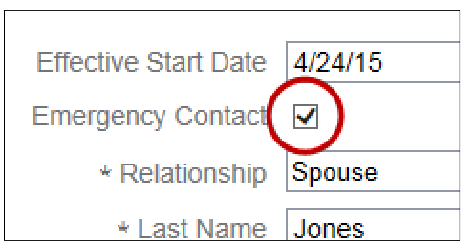
4. To edit a page, click on the pencil icon.



5. To add family members and/or an emergency contact, click on the Contacts icon , and then click on . Provide information about the contact, including phone numbers. At a minimum, you must fill out the contact's relationship to you, and their first and last name.



Note: All employees are required to have an emergency contact listed within HRIS. Be sure to add your emergency contact's phone number(s).



6. To provide information concerning your documents (citizenship papers, driver's licenses, passports, visas, and permits), click on the Documents icon , and then click on the next to the type of document about which you want to provide information.

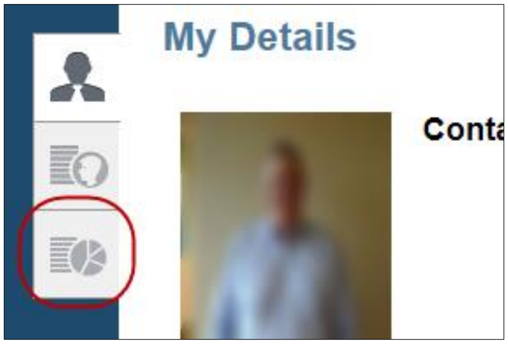
7. After making your edits, click on **Save and Close**.

Viewing Your Compensation

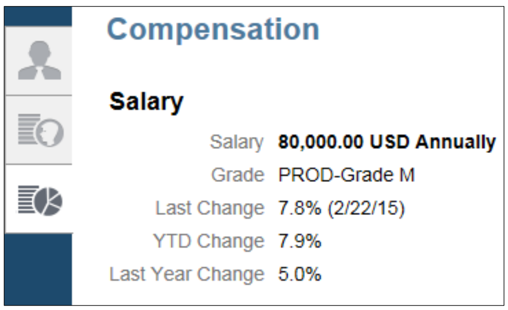
1. From the Welcome Screen (or the horizontal bar of other screens), click on **Personal Information**.

Your My Details page is displayed.

2. Click on the Compensation icon  .



Your salary information is displayed.

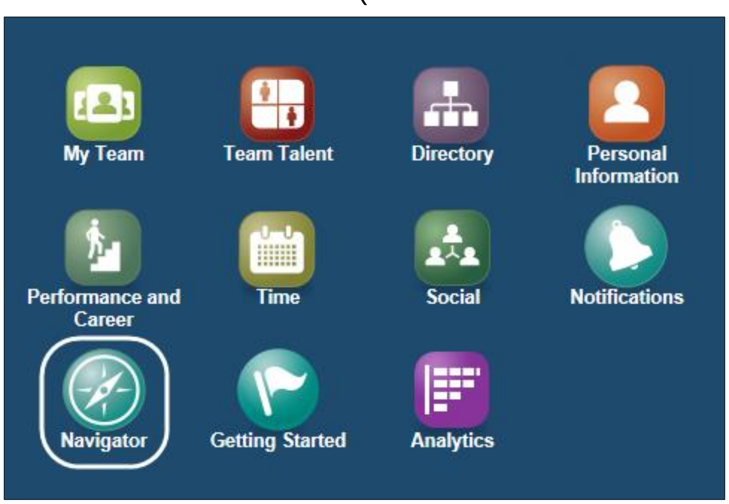


Note: India employees can view their bank account information by clicking on the Pay icon  .

Viewing Leave/Paid Time Off (PTO)/Absence Balances – US/UK

Salaried employees in UnitedLex Corp and all UK employees can view any absence balances for which they may be eligible from the Accrual Balances list. Non-exempt employees in UnitedLex Corp must continue to use their current process to view absence balances. For UnitedLex India employees, see Absence Management - India Employees on page 16.

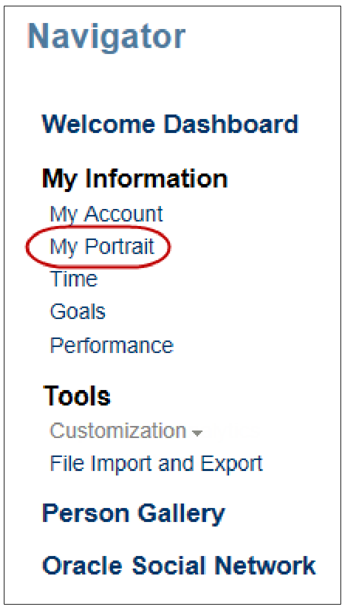
1. From the Welcome Screen (or the horizontal bar of other screens), click on **Navigator**.



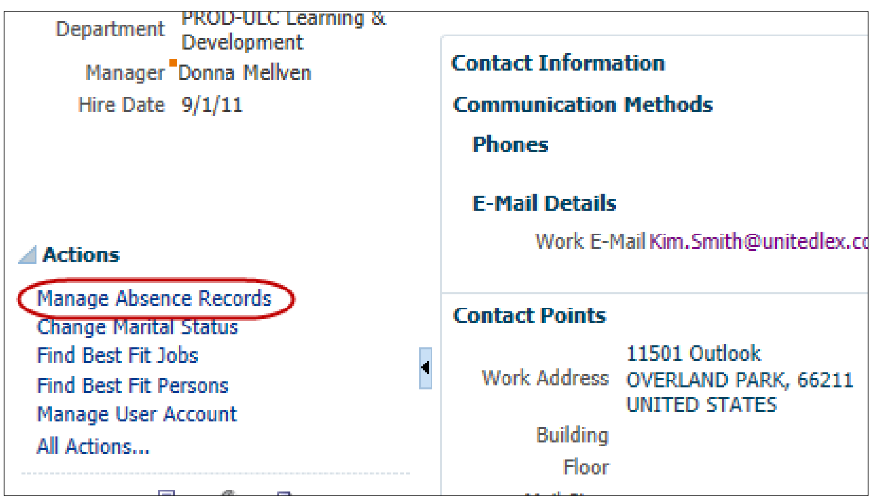
Note: You can also access your dashboard by clicking on the Navigator icon along the top of the page.

Your Dashboard is displayed.

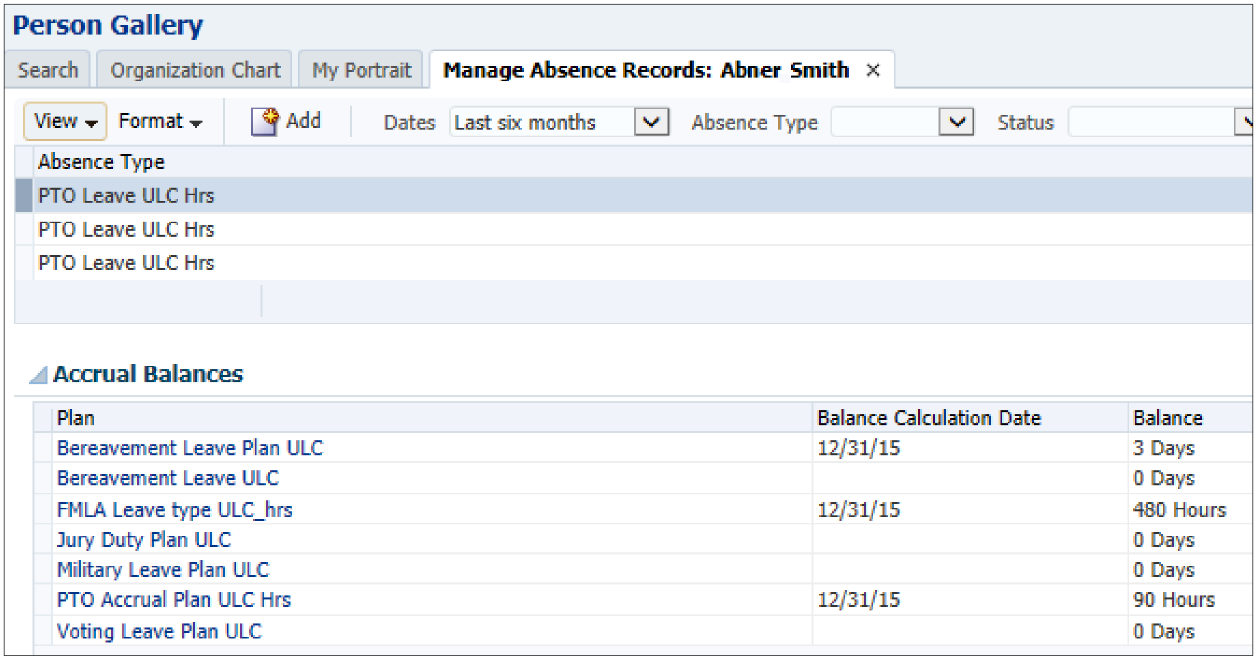
2. Click on **My Portrait**.



3. Click on **Manage Absence Records**.



Your Accrual Balances list is displayed. The plans available in the Accrual Balances list vary by location.



Requesting Leave, PTO, or Other Types of Absences

Salaried employees in UnitedLex Corp and all UK employees can request absences using My Portrait in the Fusion HRIS system. Non-exempt employees in UnitedLex Corp, must continue to use their current process to request absences. For UnitedLex India employees, see Absence Management - India Employees on page 16.

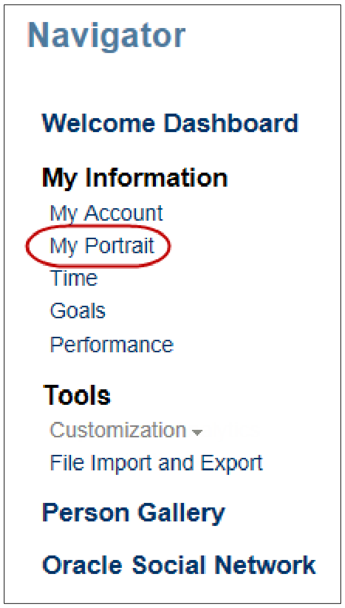
Note: You can also request an absence retroactively for unplanned absences such as illnesses or bereavement.

1. From the Welcome Screen (or any other screen), click on **Navigator**.

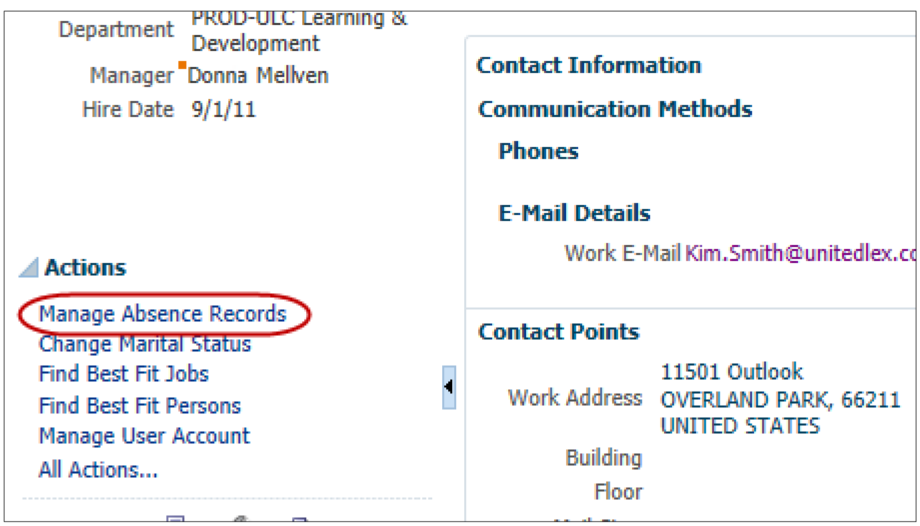
Your Dashboard is displayed.

Note: You can also access your Dashboard from other pages by clicking on the Navigator icon along the top of the page.

2. Click on **My Portrait**.

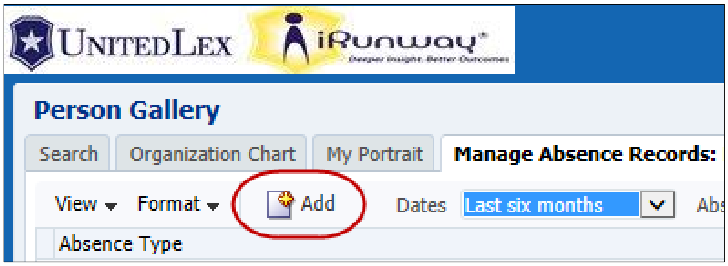


3. Click on **Manage Absence Records**.

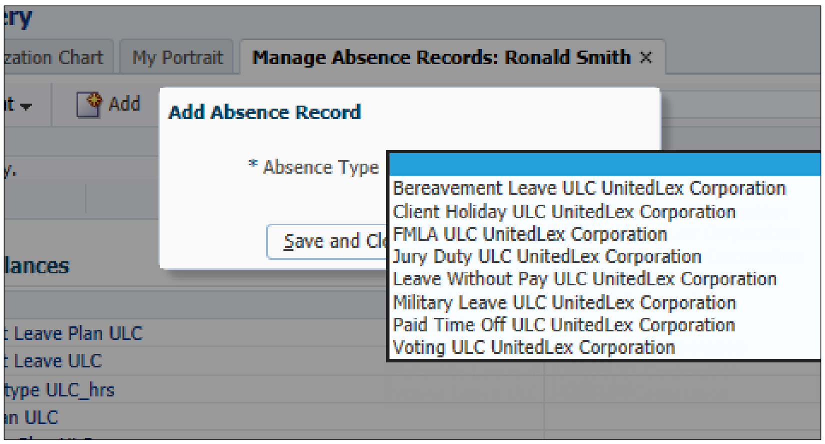


The Manage Absence Records page is displayed.

4. Click on **Add**.

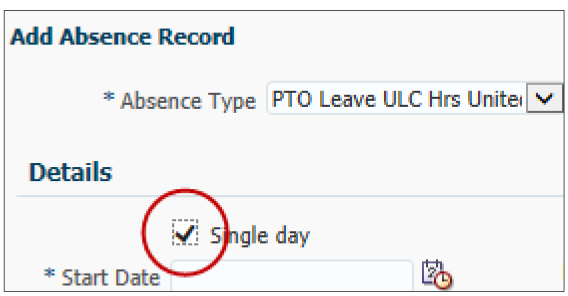


5. Click on the **Absence Type** pulldown menu and select the type of absence you are requesting. The selections available in your pulldown list vary by location.



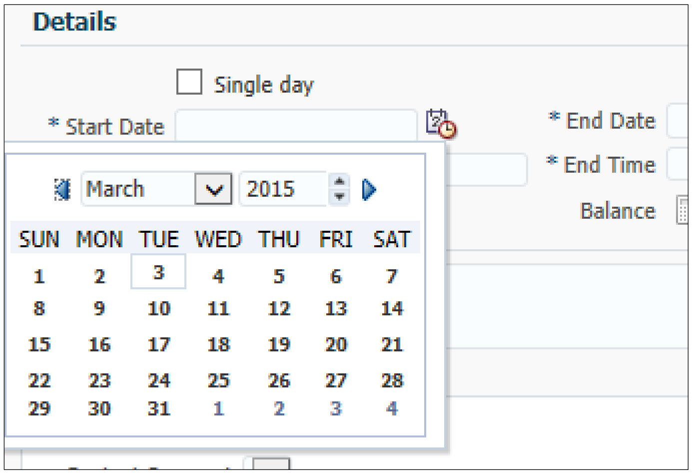
The Add Absence Record page is displayed.

6. Select **Single day** if you are requesting only one day.



Note: If your absence is recurring, click on **Advanced Mode** > **Add Weekly Recurrences**.

7. Use the **Start Date** pulldown menu to select the day you want to start your absence.



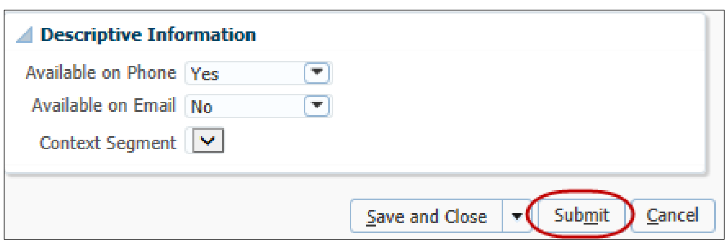
8. If you are requesting multiple days, use the **End Date** pulldown menu to select the last day of your absence.

9. If you are requesting less than 8 hours, enter the Start Time and End Time. Otherwise, leave the default entries.

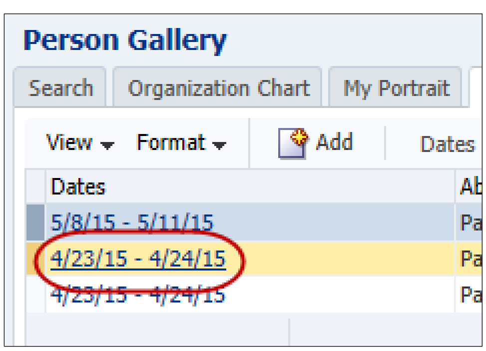
   Note: Hourly leave applies only to UnitedLex Corp employees.

10. Optionally, enter any comments concerning your request.

11. Use the **Descriptive Information** pulldown menus and select whether you will be available on phone and email, and then click on **Submit**.

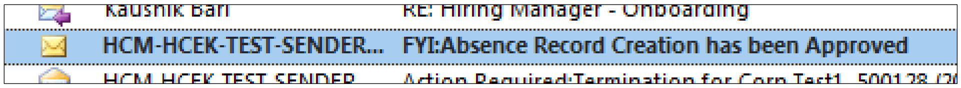


   Note: If you save and close without submitting the request, you can later open and submit the request by clicking on the request date and then **Submit**.



12. Click on **OK** to confirm.

After your request has been approved (or declined), you receive an email notification.



Deleting an Absence Request

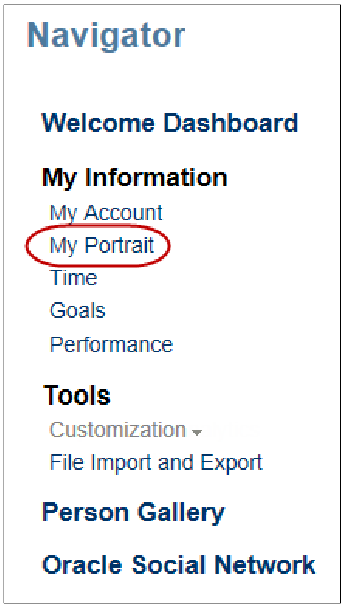
You can delete an absence request after you have submitted it, either before or after it has been approved, or even after the requested date has passed (if, for example, you requested an absence but did not take it).

To edit an absence request, delete the original request then add a new one. (To add a new request, see Requesting Leave, PTO, or Other Types of Absences on page 11.)

1. From the Welcome Screen (or the horizontal bar of other screens), click on **Navigator**.

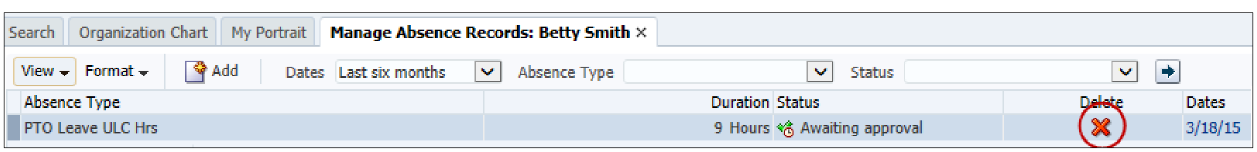
Your dashboard is displayed.

2. Click on **My Portrait**.



3. Click on **Manage Absence Records**.

4. Click on  to delete the request.



5. Click on **Yes** to confirm.

   A request to withdraw approval for the absence is forwarded to your manager.

Absence Management - India Employees

Viewing Leave, Attendance Regularization, and Absence Balances

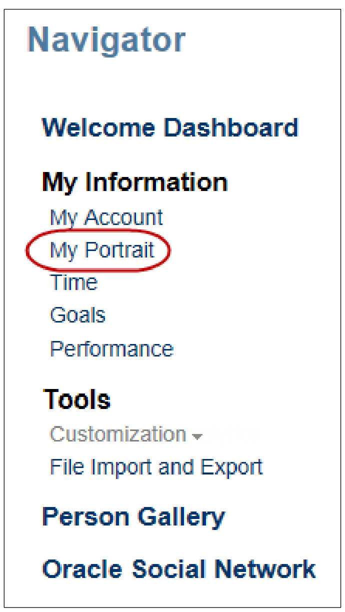
UnitedLex India employees can view any absence balances for which they may be eligible from the Accrual Balances list.

1. From the Welcome Screen (or the horizontal bar of other screens), click on **Navigator**.

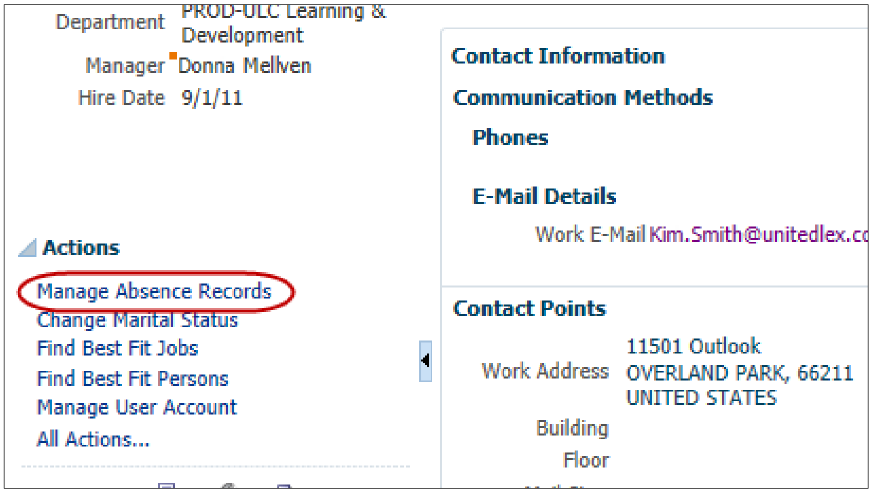
Note: You can also access your dashboard by clicking on the Navigator icon along the top of the page.

Your Dashboard is displayed.

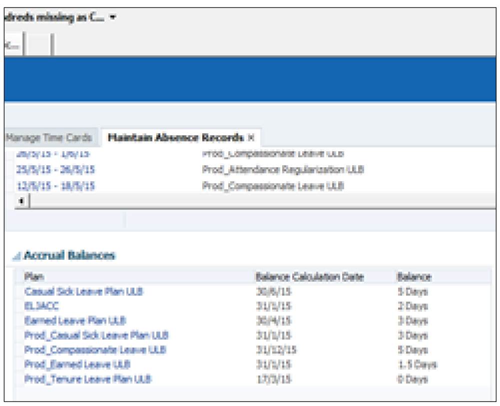
2. Click on **My Portrait**.



3. Click on **Manage Absence Records**.



You Accrual Balances list is displayed. The plans available in the Accrual Balances List vary by location.



Requesting Leave, Earned Leave, Causal Sick Leave, or Other Types of Absences

India Employees can request absences using My Portrait in the Fusion HRIS system.

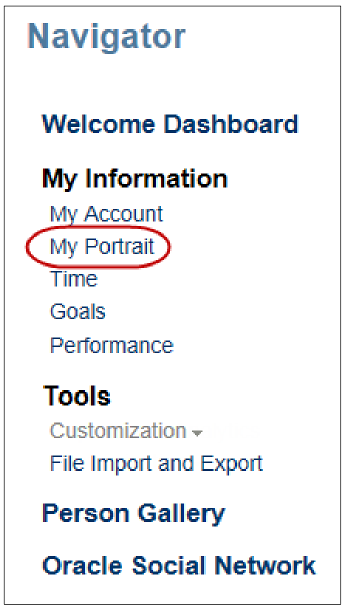
Note: You can also request an absence retroactively for unplanned absences such as Compassionate Leave, Earned Leave and Causal Leave etc.

1. From the Welcome Screen (or the horizontal bar of other screens), click on **Navigator**.

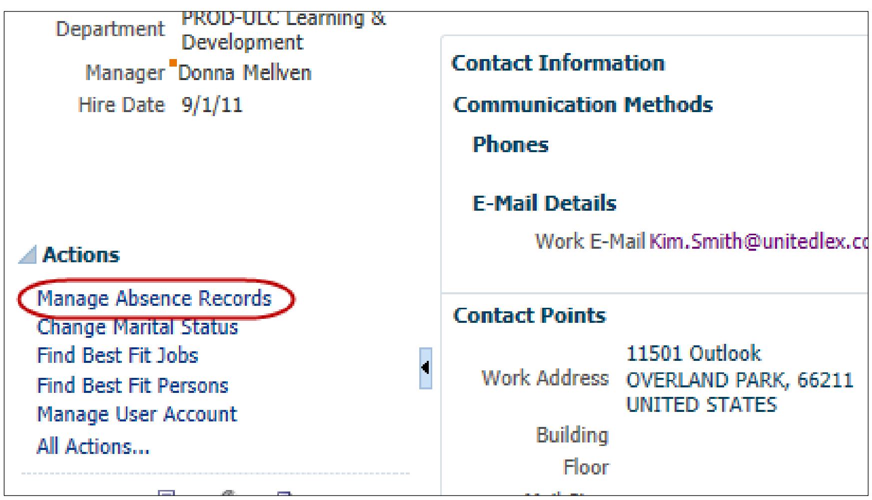
Note: You can also access your dashboard by clicking on the Navigator icon along the top of the page.

Your Dashboard is displayed.

2. Click on **My Portrait**.

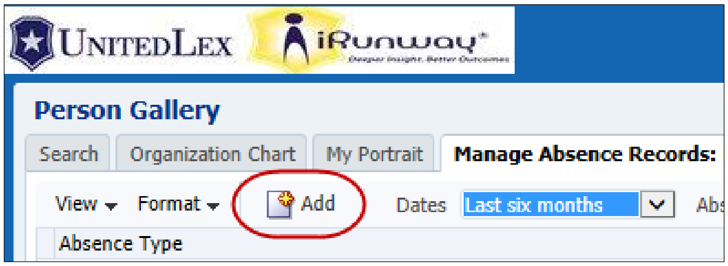


3. Click on **Manage Absence Records**.



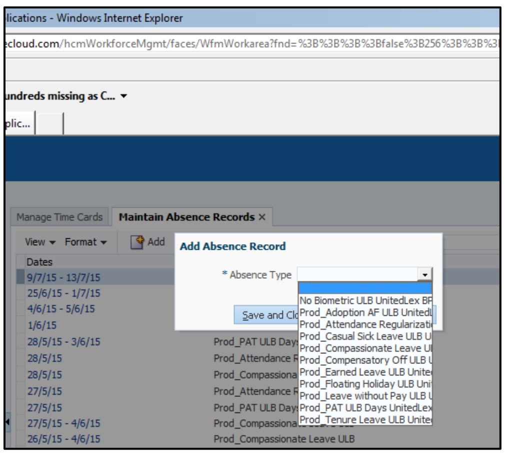
The Manage Absence Records page is displayed.

4. Click on **Add**.



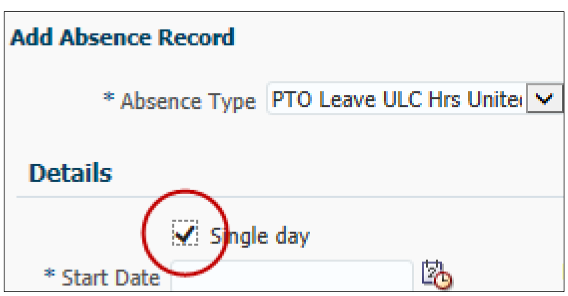
5. Click on the **Absence Type** pulldown menu and select the type of absence you are requesting. The selections available in your pulldown list vary by location.

   Note: "Floating Holiday" is listed as one of the leave types.



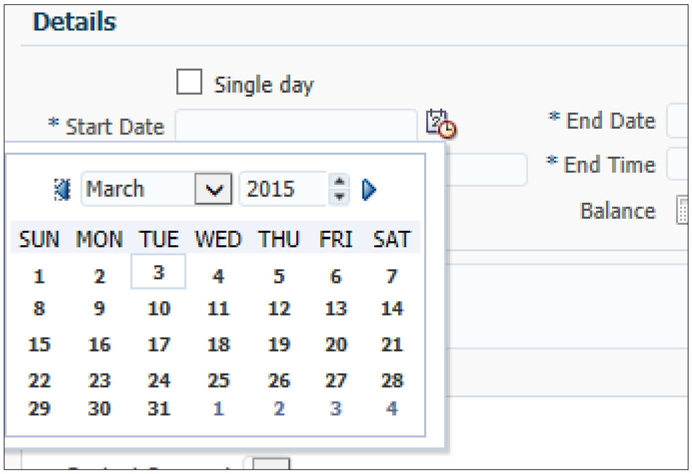
Note: You cannot apply for two leave types for the same time frame. Either cancel one leave type first and then apply the other leave type, or split the leave and then apply.

6. Select **Single day** if you are requesting only one day.



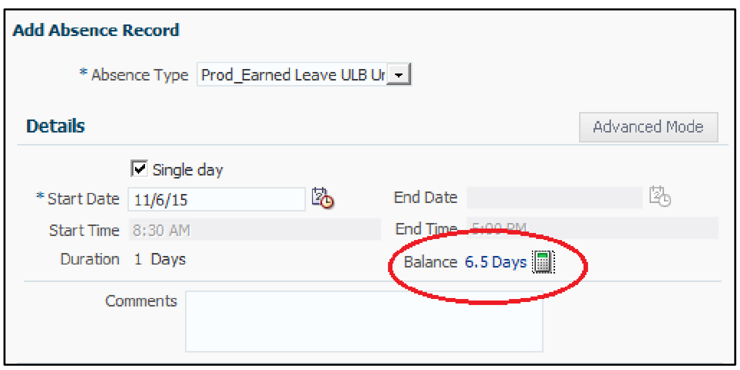
Note: If your absence is recurring, click on **Advanced Mode** > **Add Weekly Recurrences**.

7. Use the **Start Date** pulldown menu to select the day you want to start your absence.



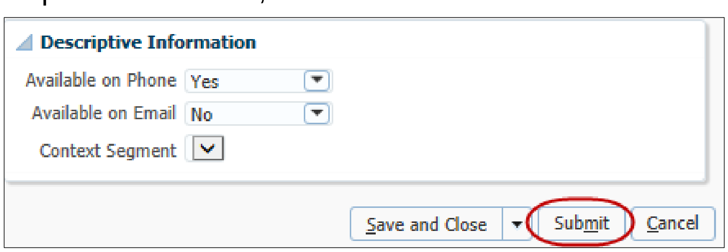
8. If you are requesting multiple days, use the **End Date** pulldown menu to select the last day of your absence.

   Your remaining balance is visible in the balance field.



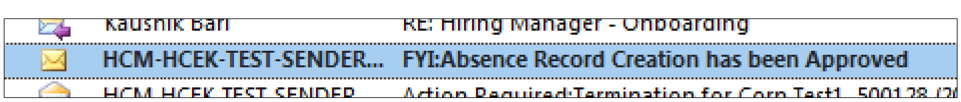
9. Optionally, enter any comments concerning your request.

10. Use the **Descriptive Information** pulldown menus and select whether you will be available on phone and email, and then click on **Submit**.



11. Click on **OK** to confirm.

After your request has been approved (or declined), you receive an email notification.



Deleting an Absence Request

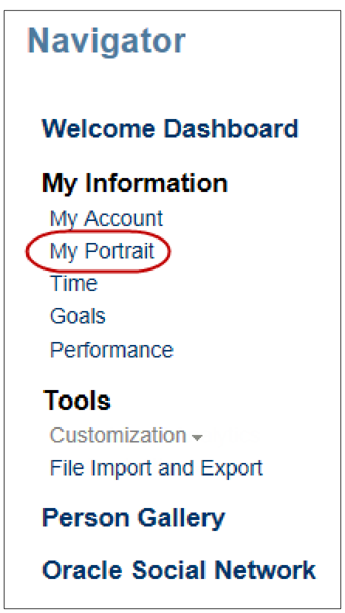
You can delete an absence request after you have submitted it, either before or after it has been approved, or even after the requested date has passed (if, for example, you requested an absence but did not take it).

To edit an absence request, delete the original request then add a new one. (To add a new request, see Requesting Leave, Earned Leave, Causal Sick Leave, or Other Types of Absences on page 18.)

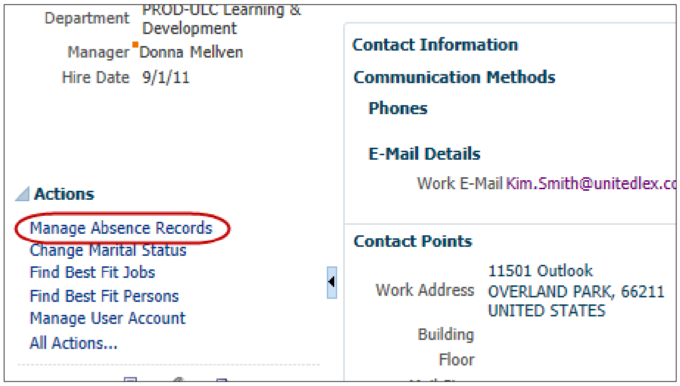
1. From the Welcome Screen (or the horizontal bar of other screens), click on **Navigator**.

Your dashboard is displayed.

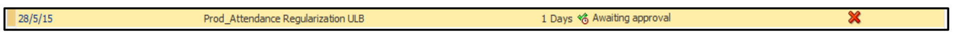
2. Click on **My Portrait**.



3. Click on **Manage Absence Records**.



4. Click on  to delete the request.



5. Click on **Yes** to confirm.

   A request to withdraw approval for the absence is forwarded to your manager.

Requesting Attendance Regularization on No Bio Metric Days

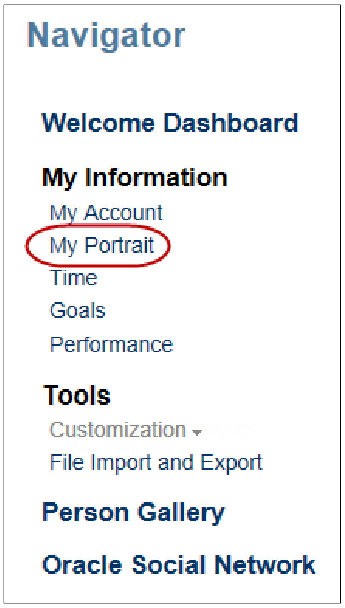
India Employees can request attendance regularization on no Bio-Metric days from My Portrait in the Fusion HRIS system.

Note: You can also request an absence retroactively for No Bio-Metric.

1. From the Welcome Screen (or the horizontal bar of other screens), click on **Navigator**.

   Your dashboard is displayed.

2. Click on **My Portrait**.



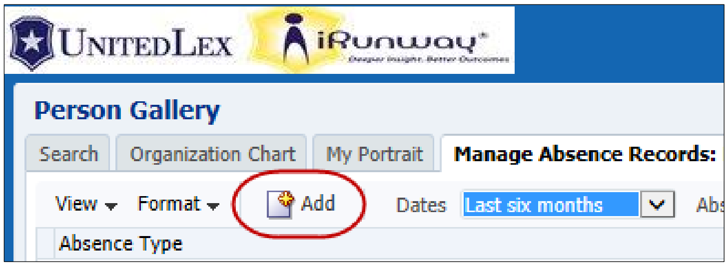
3. Click on **Manage Absence Records**.

4. Click on to delete the request on No Bio-Metric.

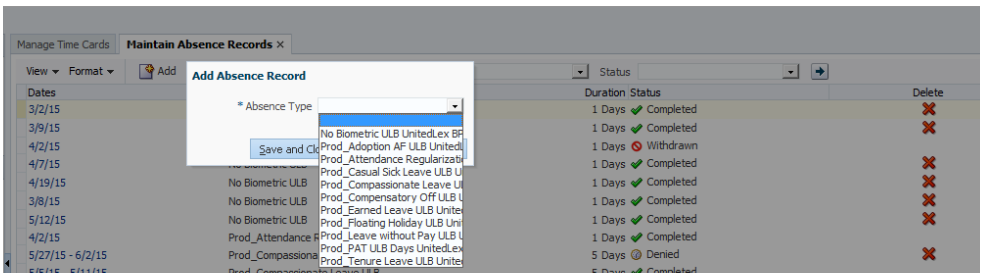
The cancellation must be approved by Manager before applying for any leave/Attendance Regularization.

Apply for Leave or Attendance Regularization

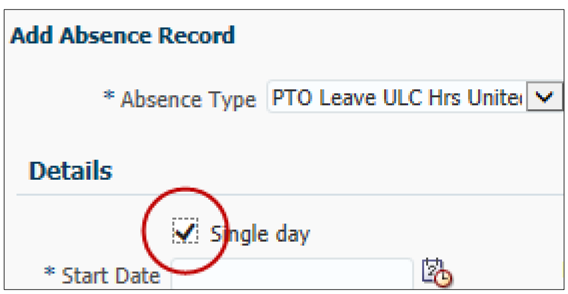
5. Click on **Add**.



6. Click on the **Absence Type** pulldown menu and select the type of absence you are requesting.

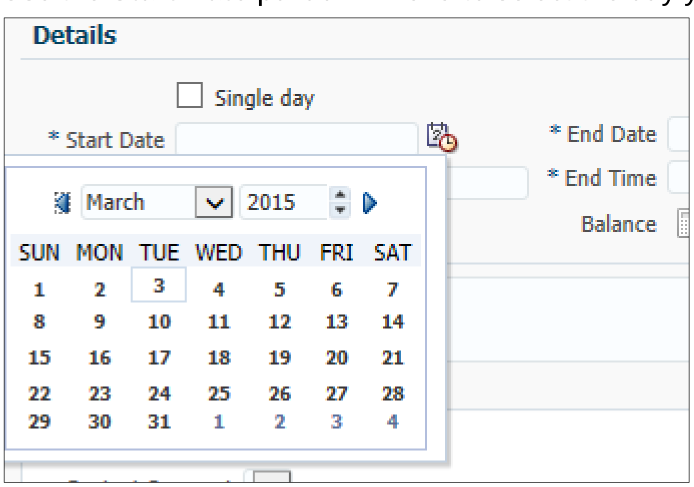


7. Select **Single day** if you are requesting only one day.

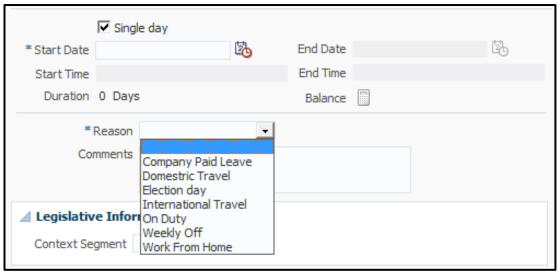


Note: If your absence is recurring, click on **Advanced Mode** > **Add Weekly Recurrences**.

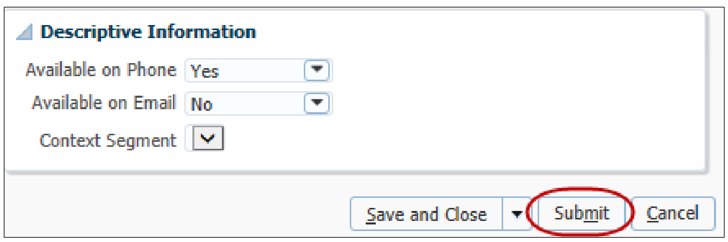
8. Use the **Start Date** pulldown menu to select the day you want to start your absence.



9. If you are requesting multiple days, use the **End Date** pulldown menu to select the last day of your absence.
10. Use the **Reason** pulldown menu to select the reason for your absence.



11. Optionally, enter any comments concerning your request.
12. Use the **Descriptive Information** pulldown menus and select whether you will be available on phone and email, and then click on **Submit**.



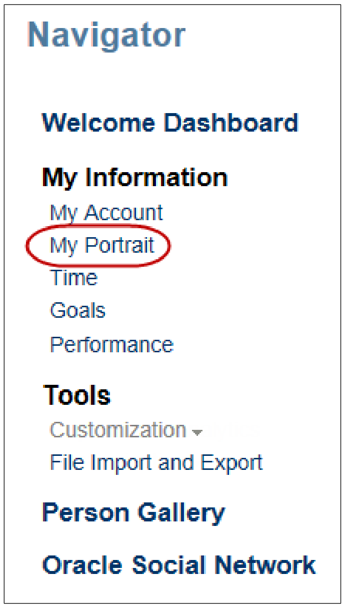
Using the Availability Calendar

You can use Fusion's Availability Calendar to quickly check the status of your absences.

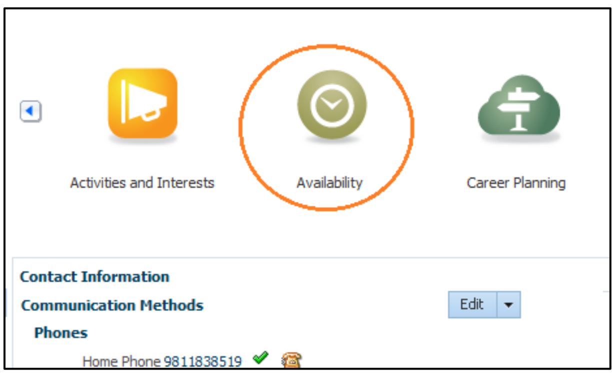
1. From the Welcome Screen (or the horizontal bar of other screens), click on **Navigator**.

Your dashboard is displayed.

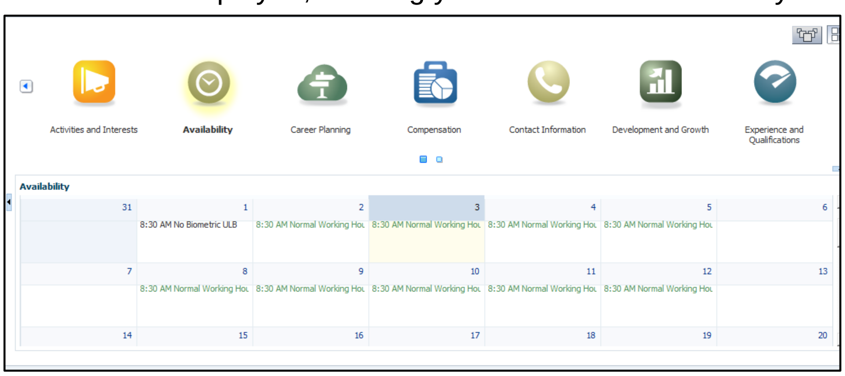
2. Click on **My Portrait**.



3. Click on **Availability**.



A calendar is displayed, allowing you to check the status of your absences.



Important Points Concerning Absence Management

- All Leave Accruals occur at the end of each month.
- Because the accrual is happening at the end of a month, Earned Leave and Casual Sick Leave can be applied negatively (1.5 and 1, respectively).

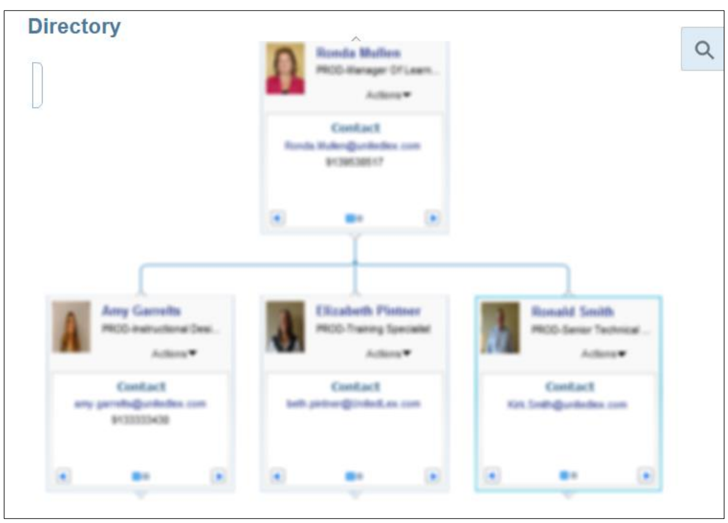
- Employee will be able to apply for future-dated, non accrued leaves within the current calendar year. (For example, if you are entitled to 18 Earned Leave days, the days accrue at 1.5 days per month. However, you may apply for up to 18 days leave anytime during the year – you do not have to wait until the leave has accrued.)

Viewing the UnitedLex Directory

You can use the directory to search for anyone in the UnitedLex enterprise (US, India, iRunway, UPS and UK) to view their organizational structure, email address, contact information, job title , and picture.

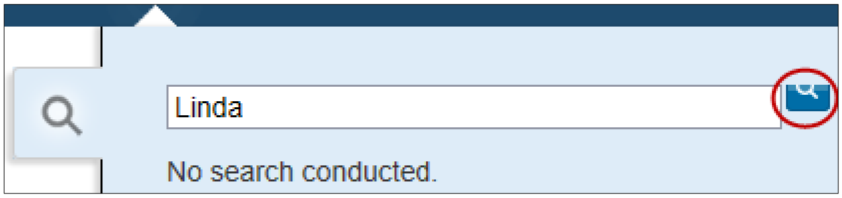
1. From the Welcome Screen (or the horizontal bar of other screens), click on **Directory**.

Your immediate organizational structure is displayed.



2. To view other employees' organizational information, click on  .

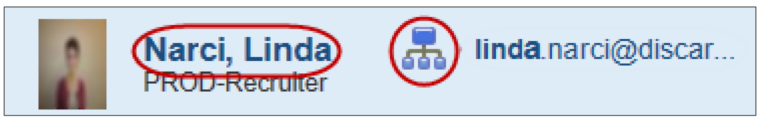
3. Enter the employee's first or last name and click on  .



Note: Click on **Advance Search** to refine your search criteria.

A list of employees is displayed that meet your search criteria.

4. Click on the employee's name to view their contact information and office location, or click on the directory icon to view their organizational structure.

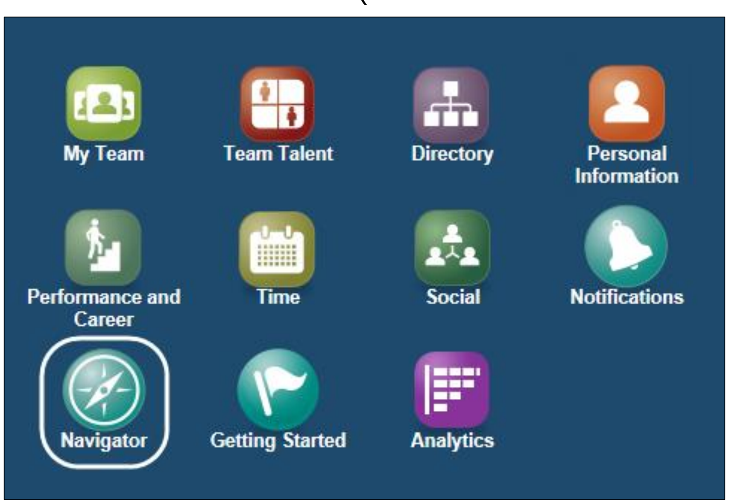


5. To expand the employee's direct reports (if any), click on the triangle below their picture.

Note: You can access a matrix view of the directory by selecting **Directory** >  > **Advanced Search** > **Organization Chart** tab > **View Matrix Chart**.

Editing Your Email and Phone Information

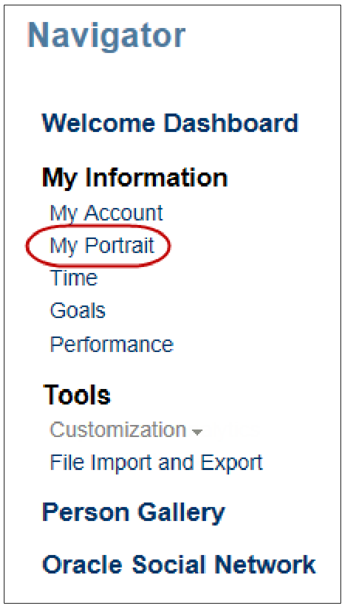
1. From the Welcome Screen (or the horizontal bar of other screens), click on **Navigator**.



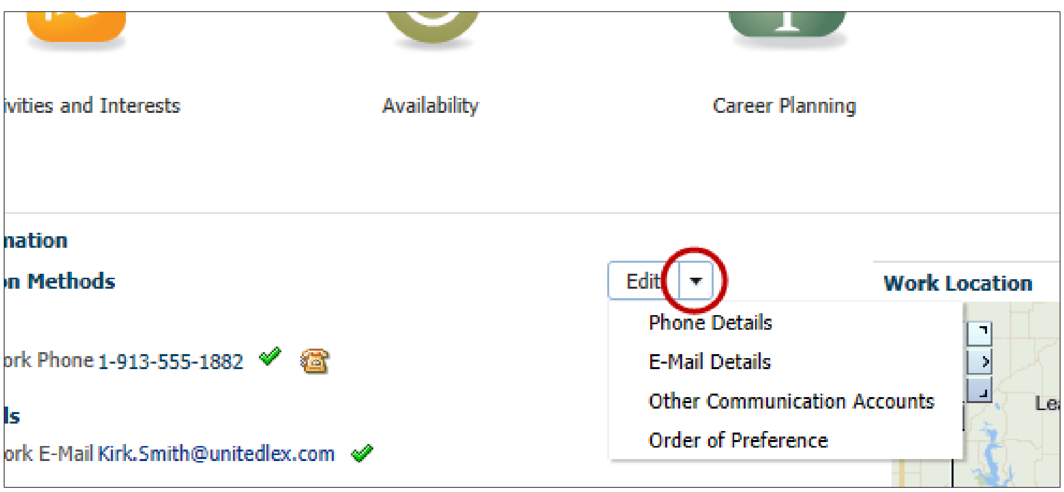
Note: You can also access your dashboard by clicking on the Navigator icon along the top of the page.

Your Dashboard is displayed.

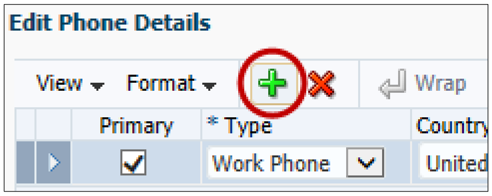
2. Click on **My Portrait**.



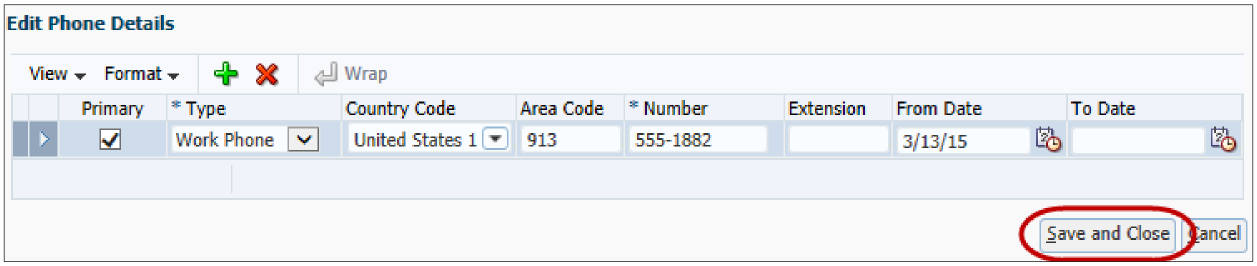
3. In the Contact Information panel, use the **Edit** pulldown menu to select the communication type you want to edit.



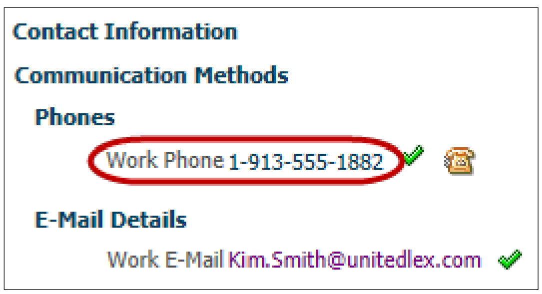
4. To enter a new phone or email address click on .



5. Enter the information and click on **Save and Close**.



6. The updated information is displayed on your **My Portrait** page.



Changing Your Marital Status

You can use My Portrait to change your marital status. Do not change your name in the system until *after* you have legally changed it.

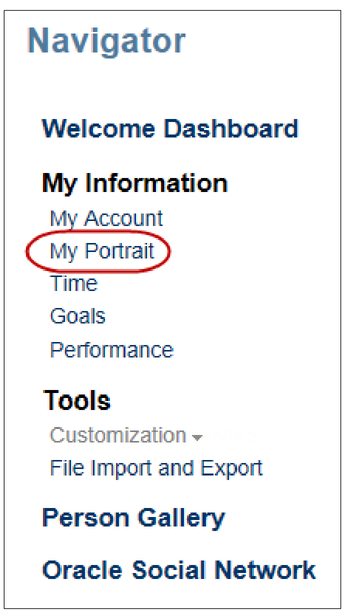
After you have made your edits, changes to your marital status and name changes are forwarded to Human Resources for confirmation, and you will not be able to make any additional changes to your marital status or name until the first changes are approved.

1. From the Welcome Screen (or any other screen), click on **Navigator**.

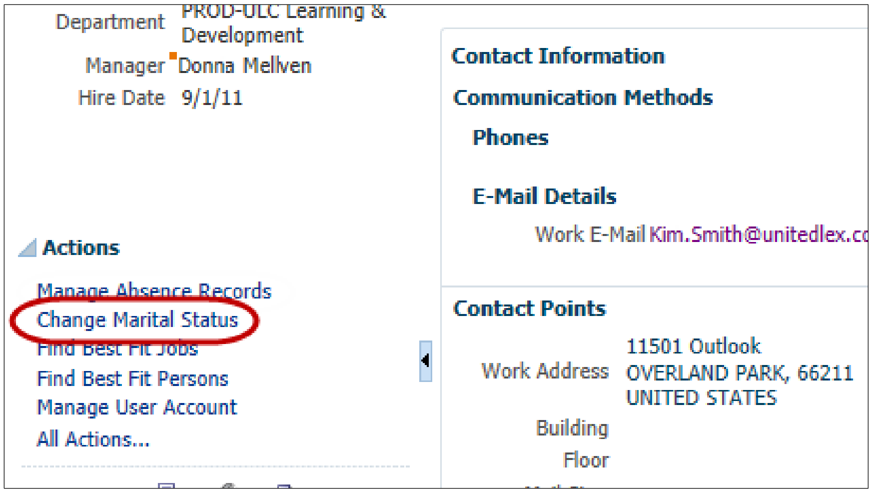
Note: You can also access your dashboard by clicking on the Navigator icon along the top of the page.

Your Dashboard is displayed.

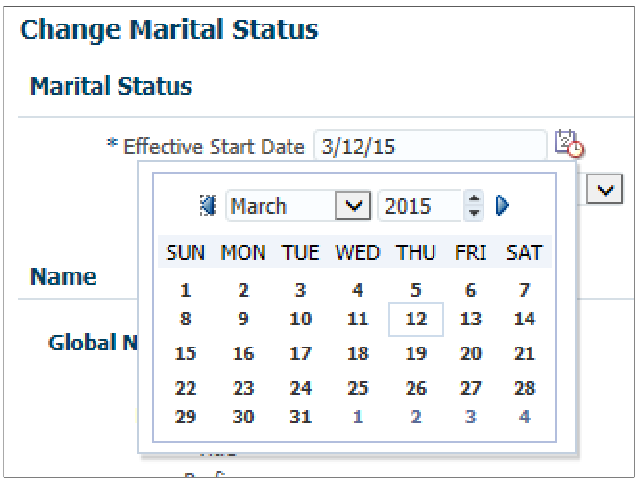
2. Click on **My Portrait**.



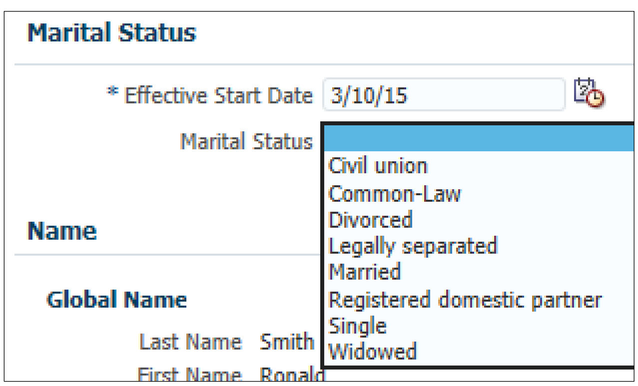
3. Click on **Change Marital Status**.



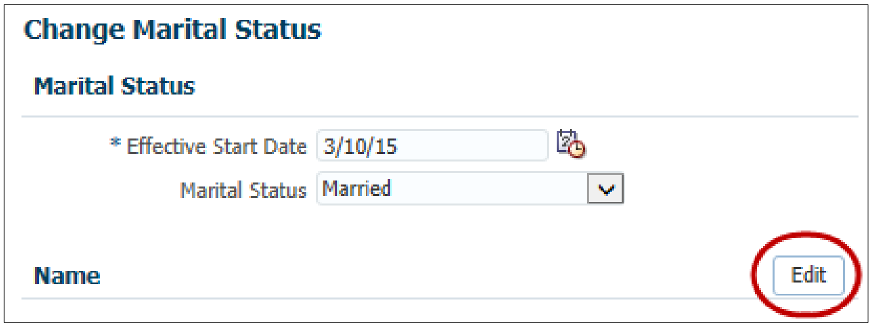
4. Use the pulldown calendar to select the date that the change was (or will be) effective.



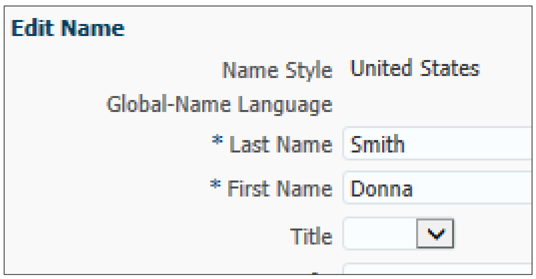
5. Use the **Marital Status** pulldown menu to select your new status.



6. If your name changed as a result of the change in marital status, click on **Edit**.



7. Make any necessary changes to your name.



8. Click on **OK**.

   The name change and marital status is forwarded to HR for confirmation. The change is not reflected in HRIS until it is approved by HR.

Goal Management

Goal management consists of creating, maintaining, and tracking your goals and the tasks that need to be performed to complete your goals.

You have two types of goals:

- **Performance Goals** – objectives established for specific duties associated with your current job position that are related to the company's overall goals. Performance goals may consist of one or more tasks. Your evaluations are based upon your completion of these goals.
- **Development Goals** – increase your knowledge and skills related to your current or future job position. Attainment of these goals are not directly related to your evaluation.

Note: BPO and iRunway employees will not be using development goals for fiscal year 2015. The US and UK will create and approve development goals at the beginning of the rating period.

Performance Goals

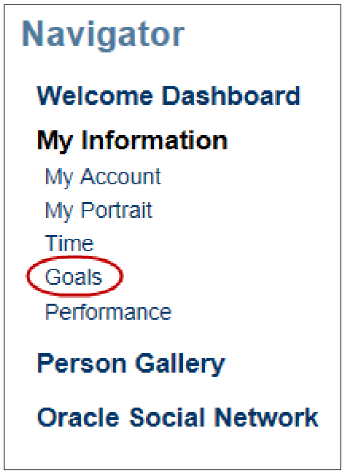
Viewing and Adding a Performance Goal

You can add new goals for yourself, or you can add a goal that already exists from the goal library.

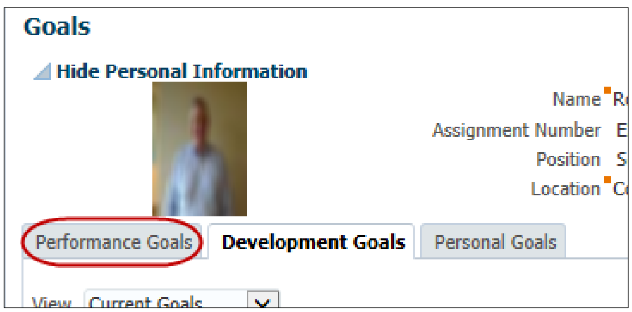
1. From the Welcome Screen (or the horizontal bar of other screens), click on **Navigator**.

Your Dashboard is displayed.

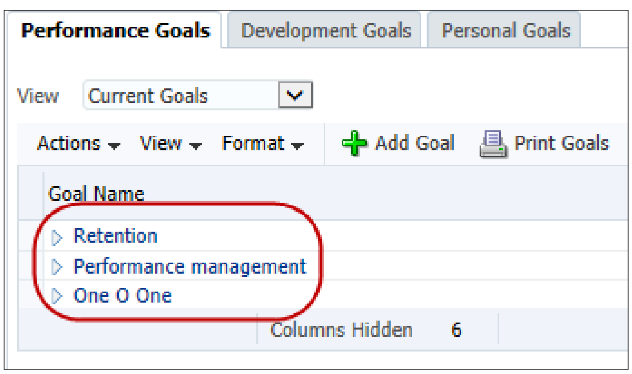
2. Under My Information, click on **Goals**.



3. Click on the **Performance Goals** tab.

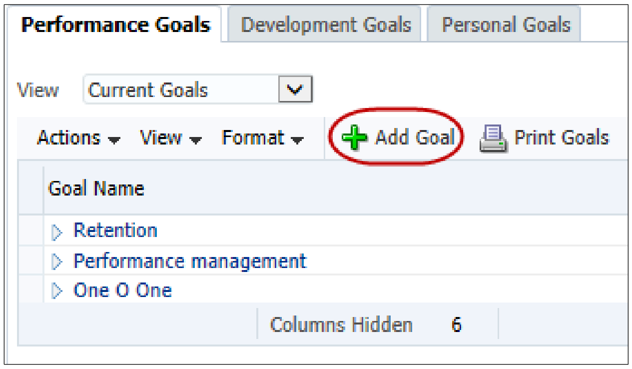


The Performance Goals page is displayed. Your current performance goals are listed.



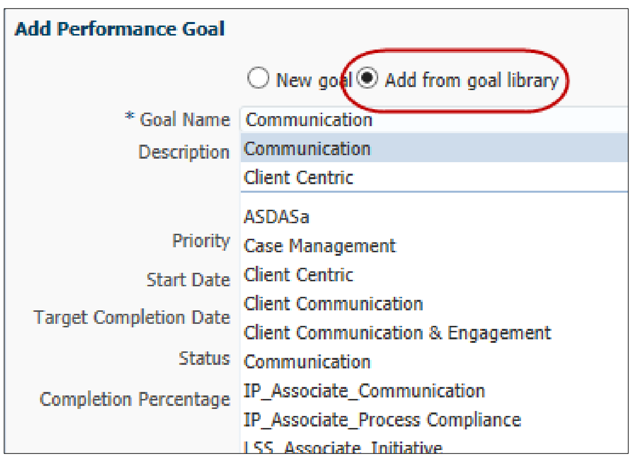
Note: The first time you view your goals, you may already have some goals listed that were submitted by your manager to HR. If no goals are listed, work with your manager to add your goals.

4. To add a performance goal, click on **Add Goal**.

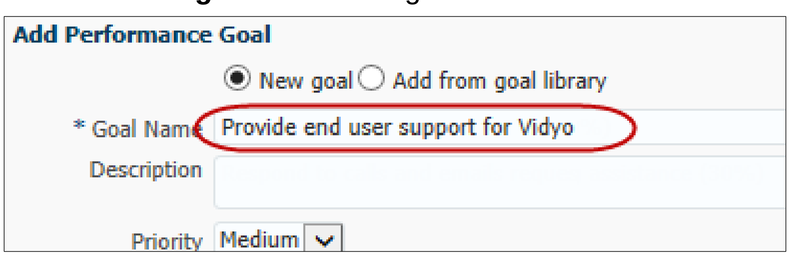


5. Perform *one* of the following:
   - **To add a goal from the goal library** - select **Add from goal library** and use the **Goal Name** pulldown menu to select a goal. See Searching the Goal Library on page 43 for instructions on using the goal library search function.

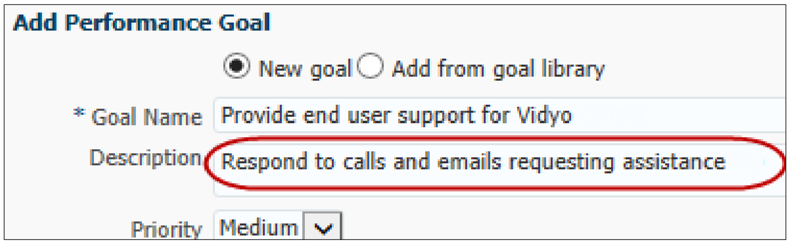
     Note: You cannot change the name of goals that have been added from the goal library.



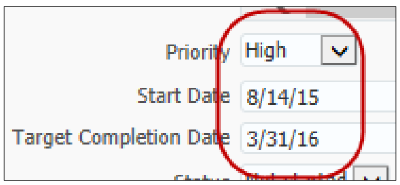
   - **To add a new goal** - enter the goal name.



6. Enter a brief description of the performance goal.

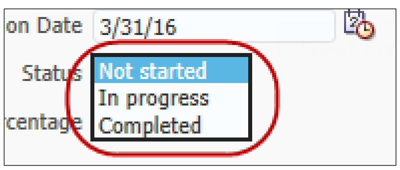


7. Select the goal's priority, and enter the start date and target completion date. Both dates must be within the current review period so that the goal can be transferred to your performance document.



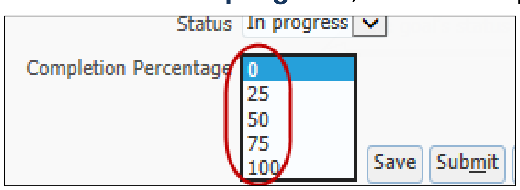
Note: If a goal is ongoing, enter the end of the rating period for the target completion date.

8. Select the goal's current status.



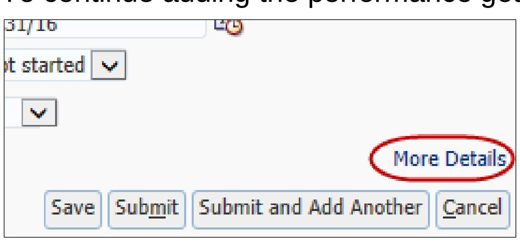
If the status is **Not Started** or **Completed**, the completion percentage is auto populated ("0" or "100", respectively).

9. If the status is **In progress**, select the approximate percentage of completion.



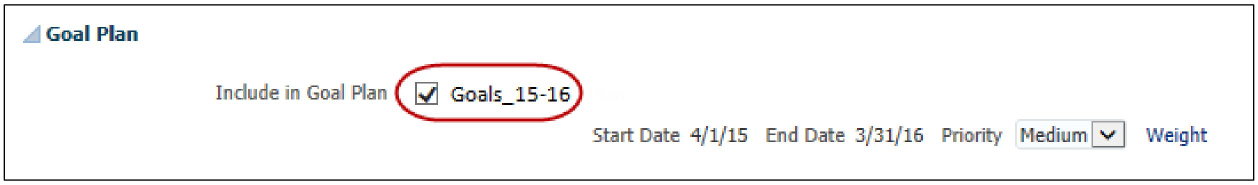
Note: You may select **Save** at any time if you do not want to submit the goal at this time and want to complete it later (you will be returned to the Performance Goals page). To return to it later, see Completing a Draft Goal on page 50.

10. To continue adding the performance goal, click on **More Details**.

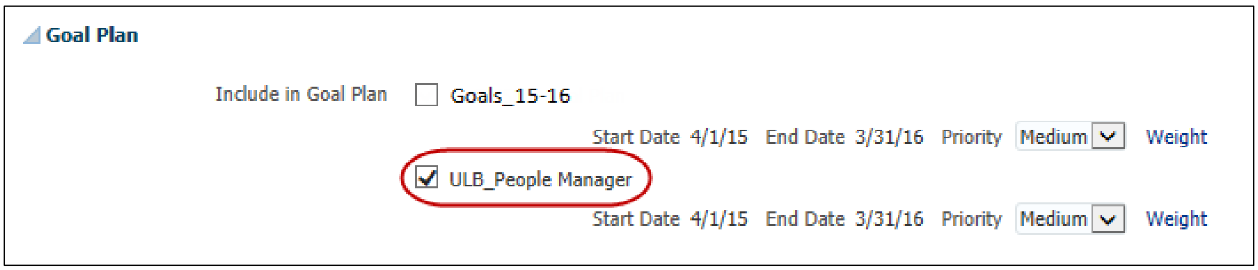


11. A **Goal Plan** is a list of goals for specific roles. Goals named "Goals_[*Rating Year*]" are blank goal plans.

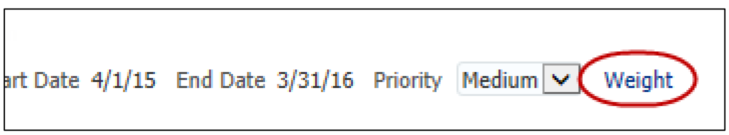
    If you only have one goal plan listed, leave it selected.



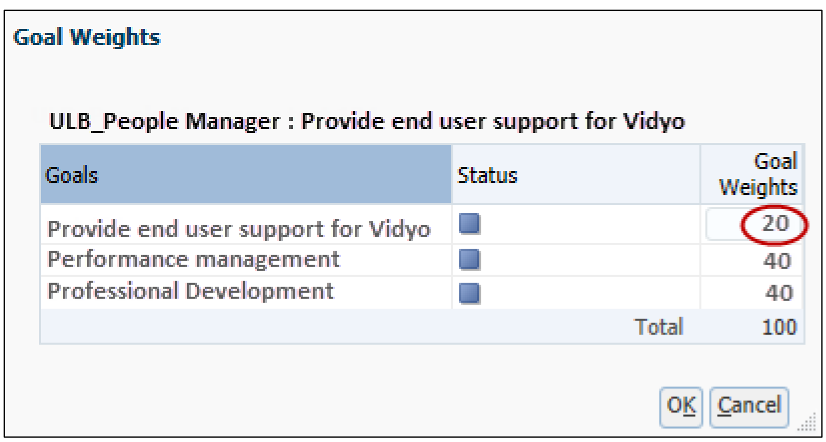
    If you have more than one goal plan listed, do *not* select the plan named "Goals_[*Rating Year*]."



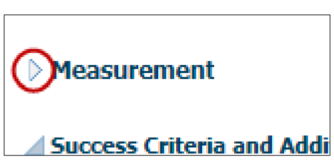
12. Click on **Weight** for the selected goal plan.



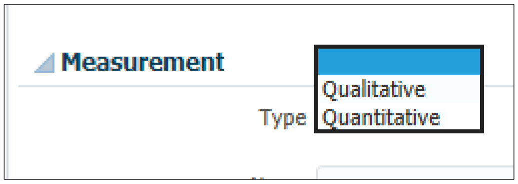
13. Enter the weight for the goal. Total goal weights must add up to 100.



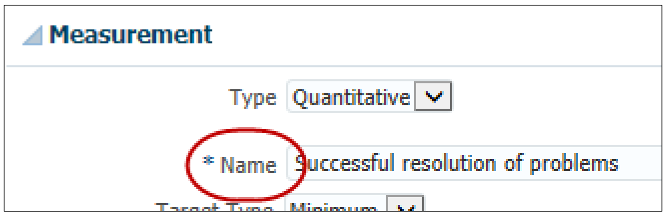
14. Click on **OK**.
15. Click on the **Measurement** expansion triangle to expand the measurement section.



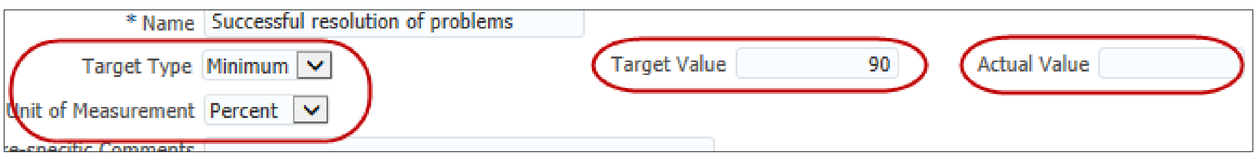
16. Click on the **Type** pulldown menu and select the type of measurement that will be used to measure success.



17. Enter a name for the measurement.

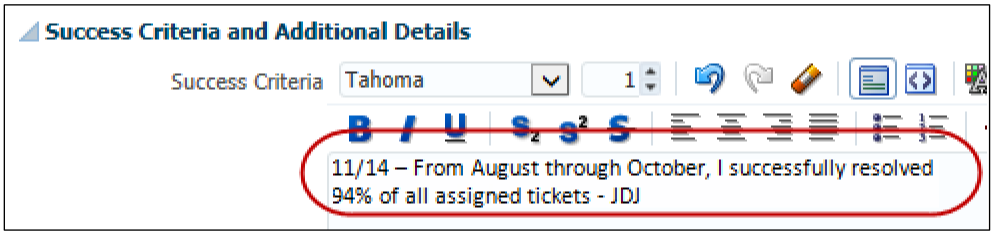


18. If the measurement is *quantitative*, complete the following fields (if the measurement is *qualitative*, skip this step):
    - **Target Type** – indicate whether the target is a “no greater than” (Maximum) value, or a “no less than” (Minimum) value.
    - **Target Value** – enter the numerical value of the qualitative measurement
    - **Actual Value** – leave blank initially (unless you already have measurable data for the goal). Enter the actual value as you begin to achieve measurable results.
    - **Unit of Measurement** – indicate whether the target value is a Currency, a quantity (Number), or a Percentage.



19. Enter any comments to clarify the measurement.

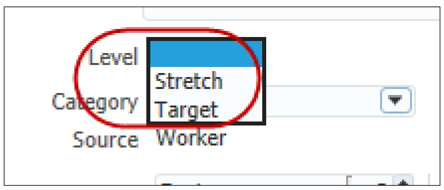
20. In the **Success Criteria** field, enter an explanation of how you have accomplished this performance goal and a summary of how your individual tasks were accomplished. To ensure that it is clear who wrote the comment, add your initials after the comment.



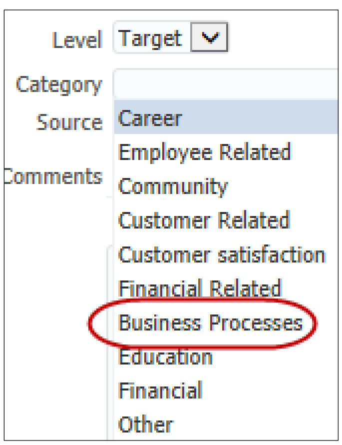
Note: BPO and iRunway employees use this field to list tasks and update the accomplishments of the tasks.

21. Use the Level pulldown menu to select **Stretch** or **Target**.

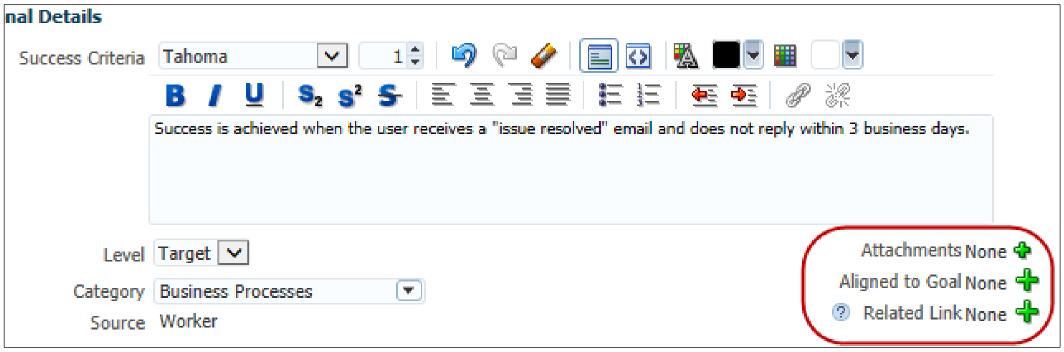
- **Stretch** – difficult or complex goals that are outside what is normally expected.
- **Target** – goals that fall under normal job responsibilities.



22. Optionally, use the **Category** pulldown menu to select the type of company goal that is supported.

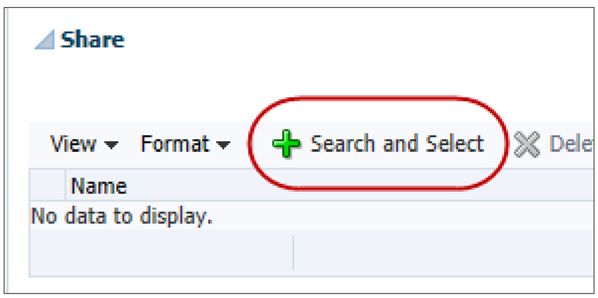


Note: You can add one or more attachments or links to additional information by clicking on the appropriate link.

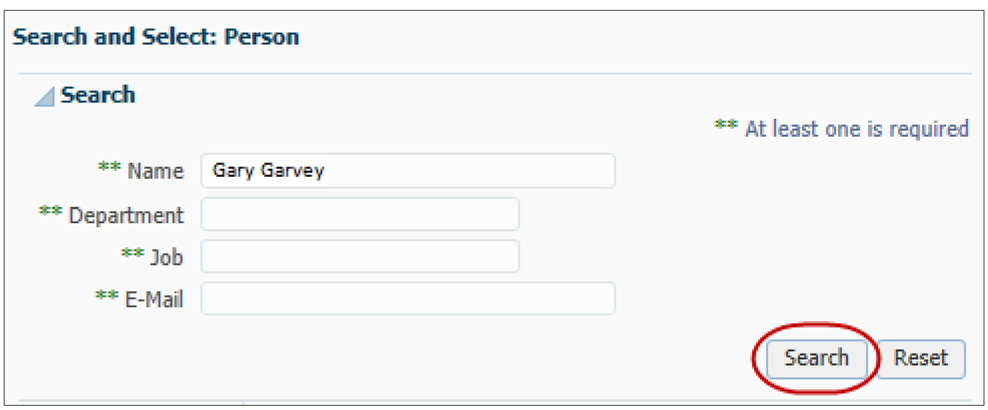


23. Optionally, you may share the goal with another employee. The employee determines whether to accept the goal into their set of goals.

   a. To share a goal with another employee, click on **Search and Select**.

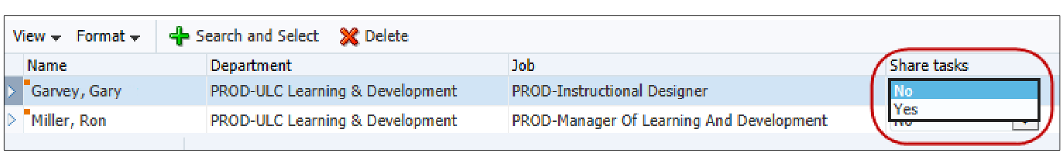


   b. Enter the search criteria for the employee and click on **Search.**



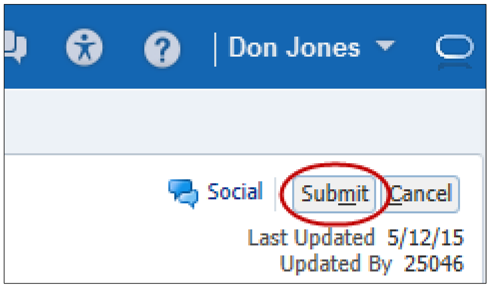
   c. Highlight the employee with whom you want to share the goal, and click on **Done**.

   d. Use the **Share tasks** pulldown menu to select **Yes** if you also want to share the associated tasks.



Note: The employee with whom you share the goal has the option of accepting or declining the goal. They can also edit everything except the goal name.

24. Click on **Submit** (in the upper-right corner).

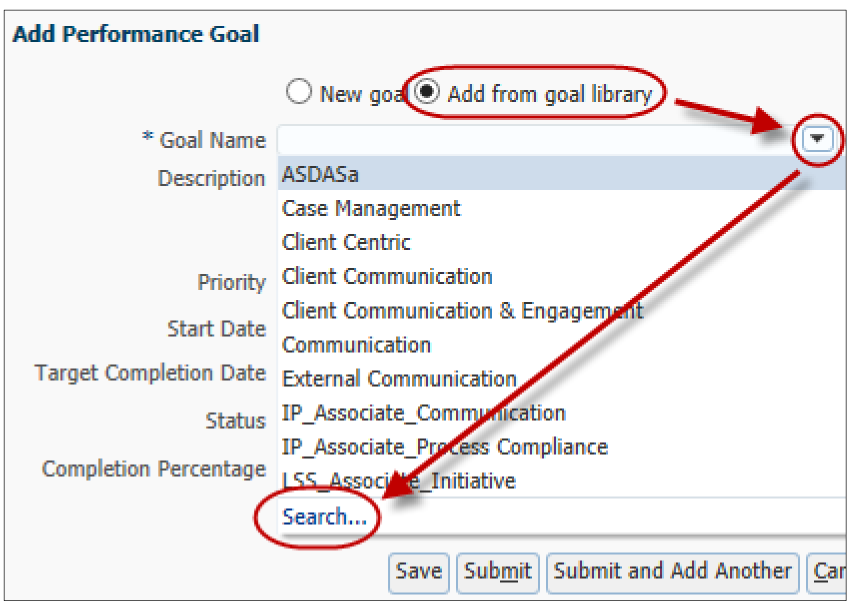


25. Click on **OK** to confirm. You receive an email indicating that the goal has been forwarded to your manager for approval.

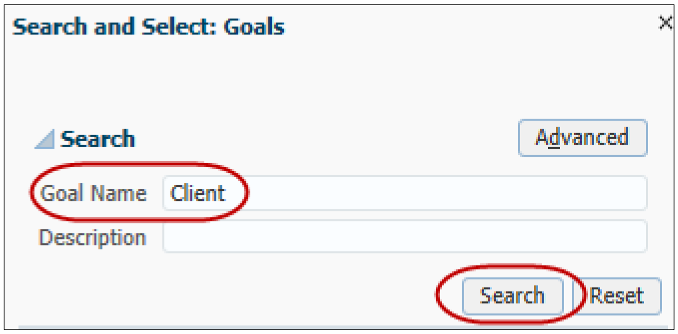
    You receive another email notification after your manager either approves or rejects your goal.

Searching the Goal Library

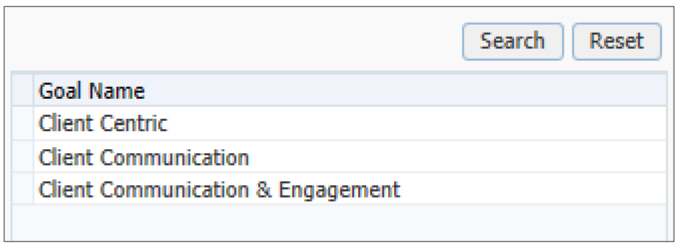
1. From the Add Performance Goal window, select **Add from goal library** and use the **Goal Name** pulldown menu to select **Search…**.



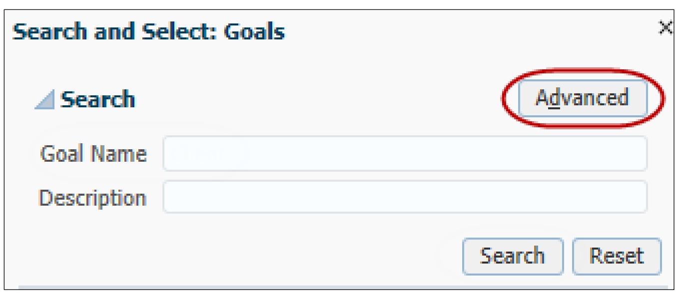
2. If you know a portion of the goal name or the description, enter it and click on **Search**.



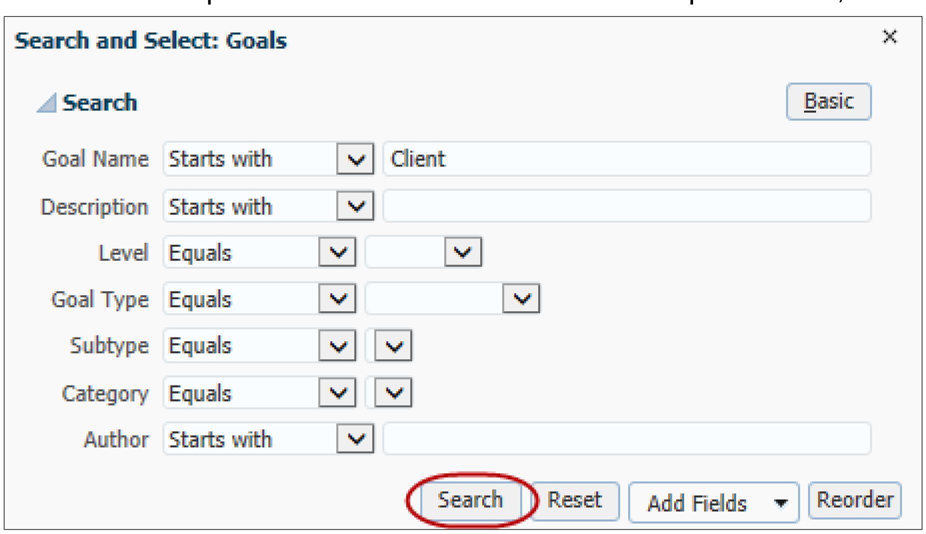
The results of the search are displayed.



3. If the goal you are searching for is listed, highlight it and click on **OK**.
4. To use the advanced search, click on **Advanced**.



5. Use the search pulldown menus to select the search parameters, and then click on **Search**.

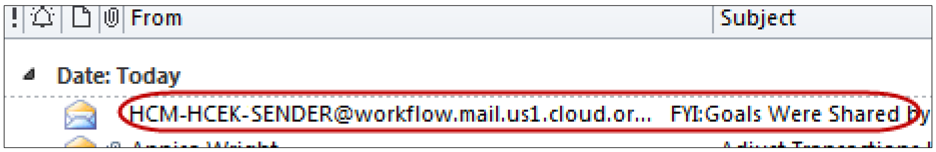


6. Highlight the goal you are searching for and click on **OK**.

Accepting a Shared Goal

Other employees, including your manager, can share goals with you. If you accept the goal, it is added to your list of goals.

1. You are notified via email that a goal was shared with you. Open the email.



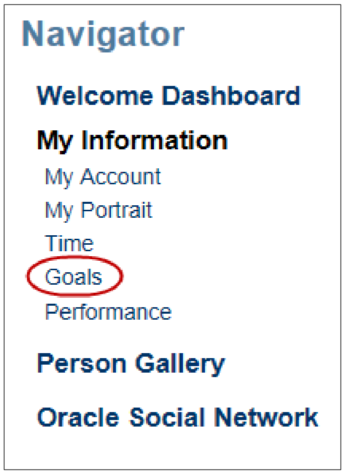
A brief summary of the goal is displayed.

Goal Name	Description	Start Date	Target Completion Date	Status	Priority
Provide end user support for Vidyo	Respond to calls and emails requesting assistance	6/11/15	8/28/15	Not started	High

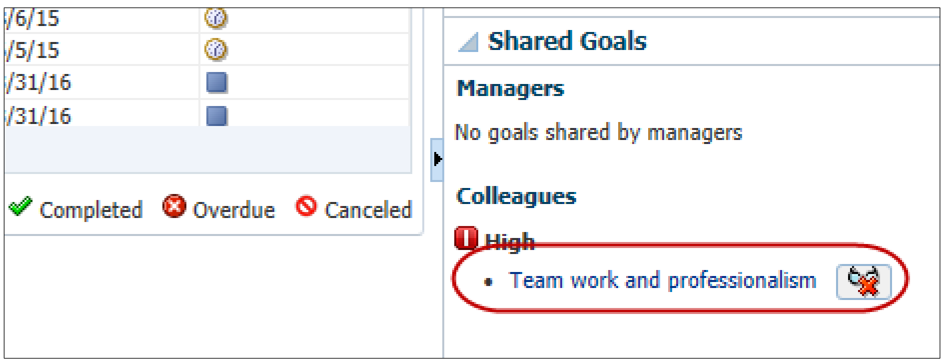
2. From the Welcome Screen (or the horizontal bar of other screens), click on **Navigator**.

Your Dashboard is displayed.

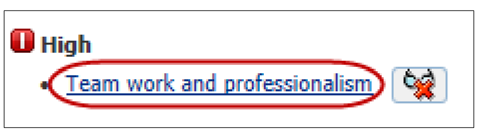
3. Click on **Goals**.



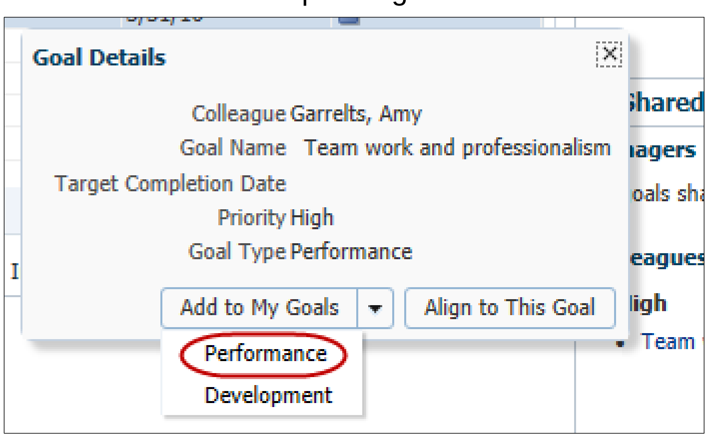
4. Click on the **Performance Goals** tab. The shared goal is displayed in the page's right column.



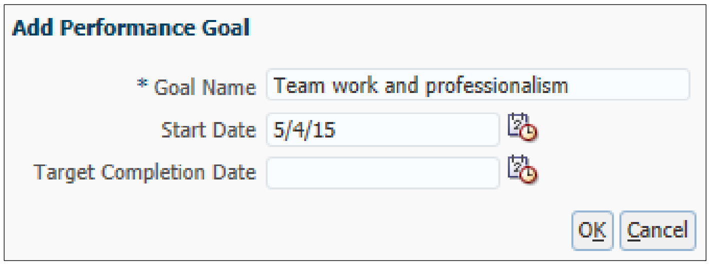
5. To accept the goal, click on it.



6. Use the **Add to My Goals** pulldown menu and select whether the goal will be a Performance or Development goal.



7. If necessary, change the goal name and enter the start and target completion dates.



8. Click on **OK**. You receive an email indicating that the goal has been forwarded to your manager for approval.

   You receive another email notification after your manager either approves or rejects your goal.

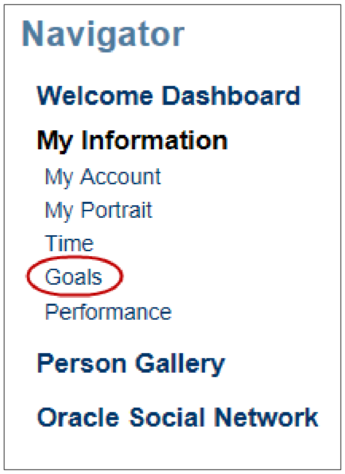
Editing a Performance Goal

You can make changes to the performance goals in your goals list. Changes that you make are forwarded to your manager for approval.

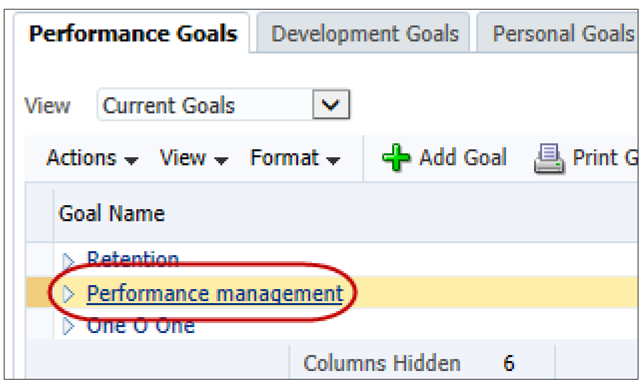
Note: You cannot change the name of goals that have been added from the goal library.

1. From the Welcome Screen (or the horizontal bar of other screens), click on **Navigator**.

2. Click on **Goals**.



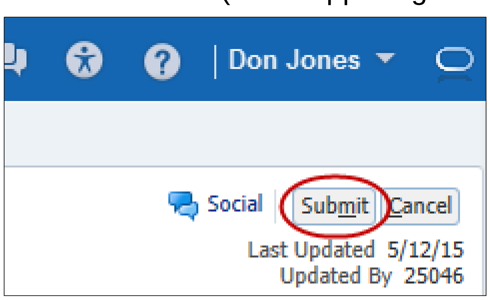
3. Click on the **Performance Goals** tab.
4. Click on the goal you want to edit.



5. Make the necessary edits.

   Note: When a goal is complete, enter the date it was completed in the **Actual Completion Date** field. If the goal is ongoing, the completion date is the end of the rating period.

6. Click on **Submit** (in the upper-right corner).



7. Click on **OK** to confirm. You receive an email indicating that the edit has been forwarded to your manager for approval.

   You receive another email notification after your manager either approves or declines your edit.

Note: If the only edits you made were to the **Measure-specific Comments** field or to the success criteria **Comments** field, your manager is *not* notified.

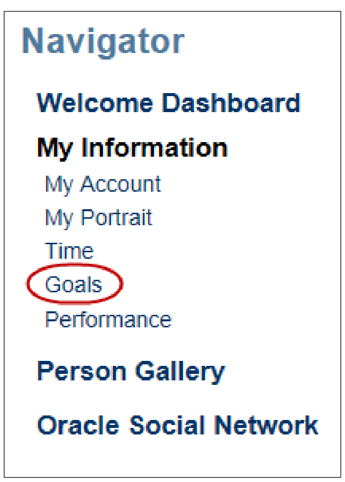
Deleting or Cancelling a Performance Goal

You cannot delete or cancel performance goals that were assigned to you, but you *can* delete or cancel goals that you created. Also, after a goal has been used to create a performance document, you cannot cancel it or delete it.

When a goal is deleted, it is completely removed from HRIS. When a goal is canceled, it remains on your goal list with a status of "Canceled."

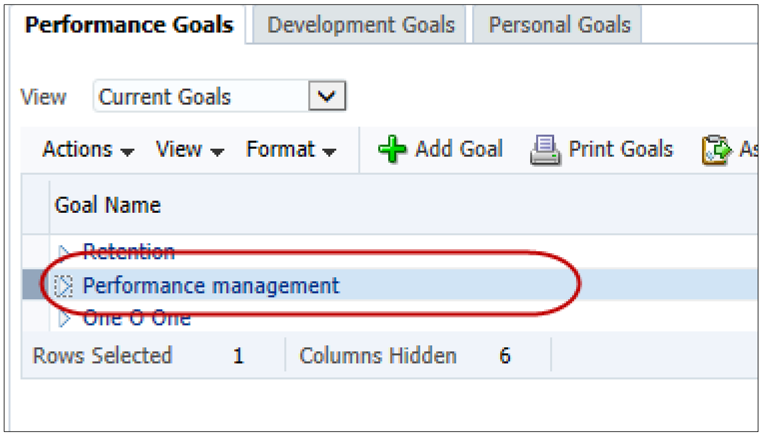
1. From the Welcome Screen (or the horizontal bar of other screens), click on **Navigator**.

2. Click on **Goals**.

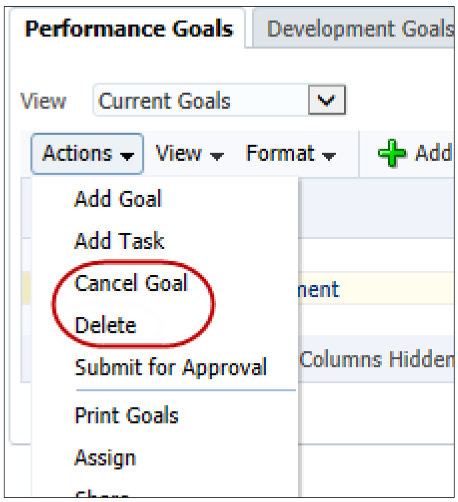


3. Click on the **Performance Goals** tab.

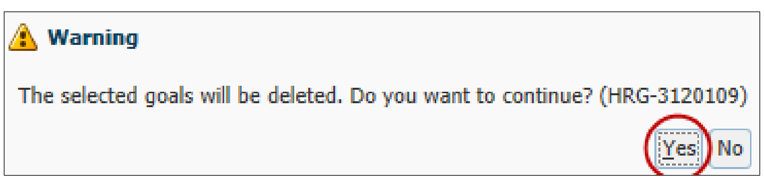
4. Highlight the goal you want to delete. (Do not click on the name of the goal, just highlight it.)



5. Use the **Actions** pulldown menu to select **Cancel Goal** or **Delete**.



6. Click on **Yes** to confirm that you want to delete (or cancel) the goal.



7. Click on **OK** to confirm. The request is sent to your manager for approval. If you requested to delete the goal, it remains on your list until it is approved for deletion by your manager.

   If you requested to cancel the goal, it remains on your list until it is approved by your manager. It then remains on your list, but its status is listed as "Canceled."

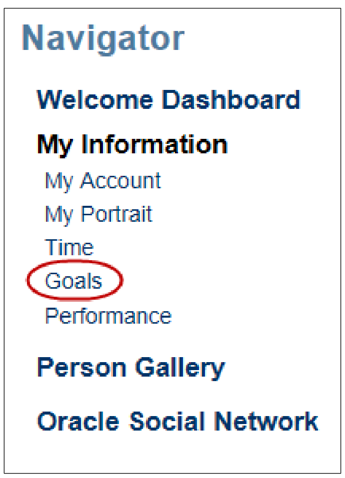
Sharing a Goal

You can choose to share a goal while you are creating the goal (see Viewing and Adding a Performance Goal on page 35), or you can share it after the goal has been approved. After you share the goal with the employee, they are notified via email and can choose to accept (or reject) the goal.

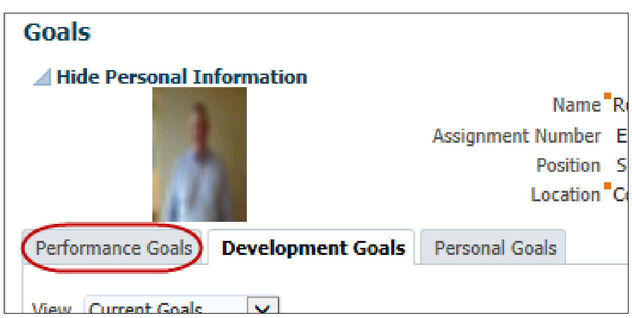
1. From the Welcome Screen (or the horizontal bar of other screens), click on **Navigator**.

Your Dashboard is displayed.

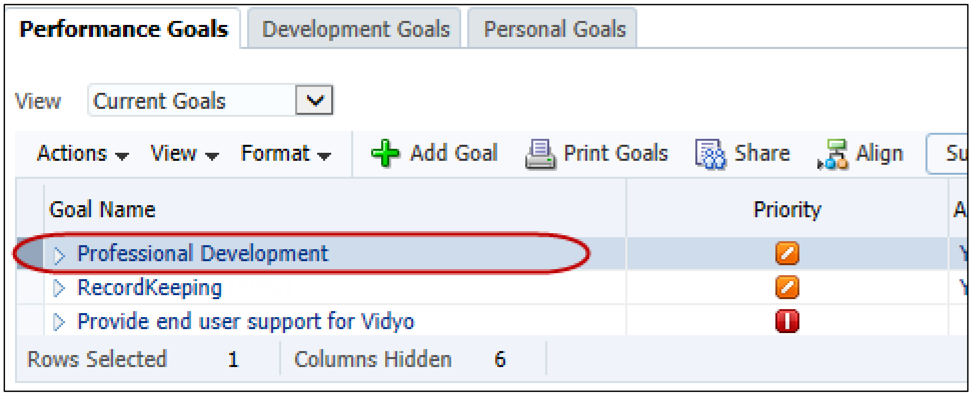
2. Click on **Goals**.



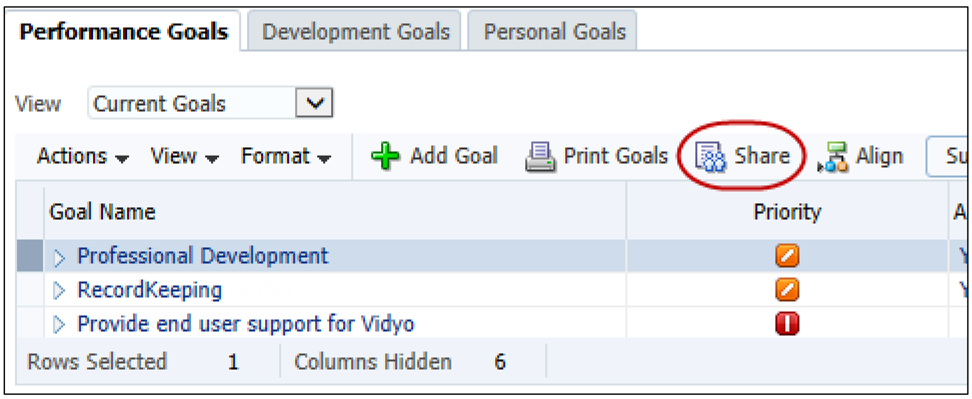
3. Click on the **Performance Goals** tab.



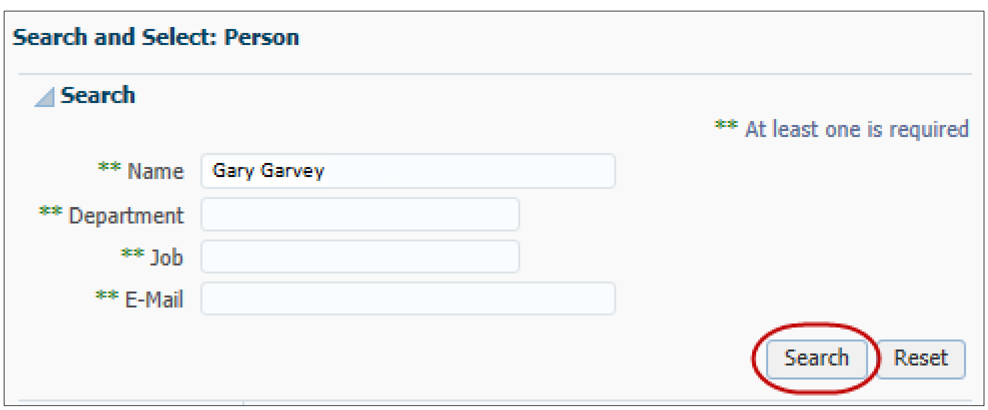
4. Highlight the goal that you want to share. (Do not click on the name of the goal, just highlight it.)



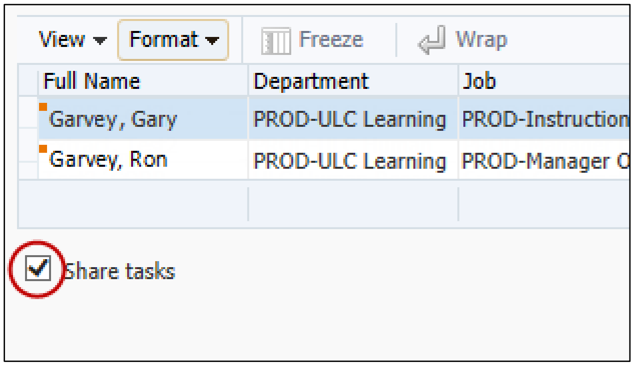
5. Click on **Share**.



6. Enter the search criteria for the employee and click on **Search.**



7. Highlight the employee with whom you want to share the goal. If you want to share the tasks associated with the goal, select **Share tasks**.



8. Click on **Done**.
9. Click on **OK**.

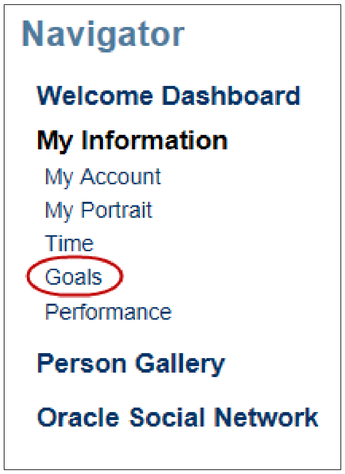
Completing a Draft Goal

A draft goal is a goal that you started to add, but instead of submitting it, you saved it.

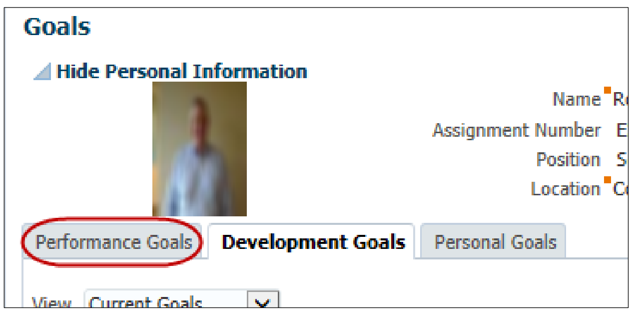
1. From the Welcome Screen (or the horizontal bar of other screens), click on **Navigator**.

Your Dashboard is displayed.

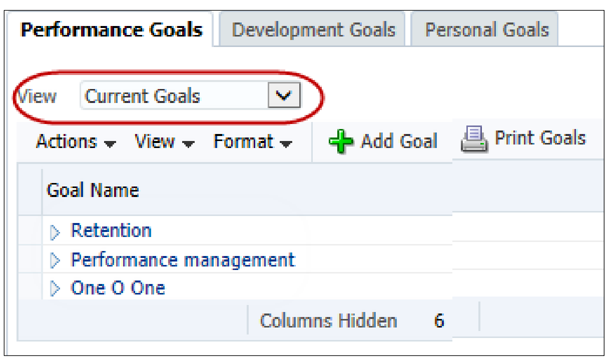
2. Click on **Goals**.



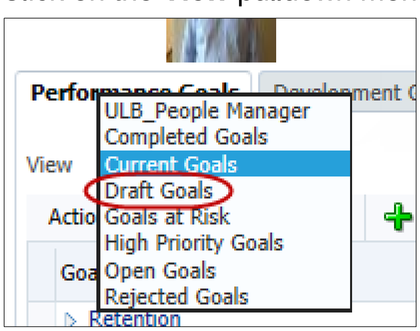
3. Click on the **Performance Goals** tab.



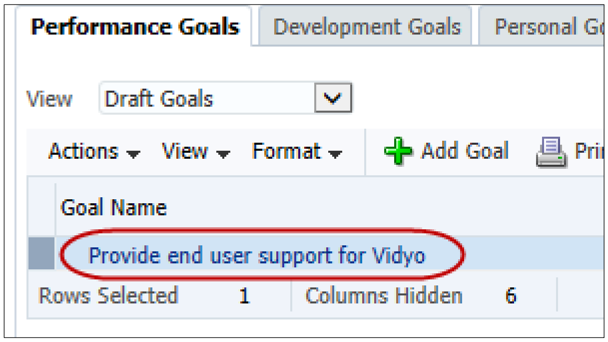
The Performance Goals page is displayed. Your current goals are listed.



4. Click on the **View** pulldown menu and select **Draft Goals**.



5. Your draft goals are listed. Select the draft goal you want to edit.



6. Complete the goal and submit it as described in Viewing and Adding a Performance Goal on page 35.

Tasks

Tasks are the action steps that need to be done in order to complete goals. You may have one or more tasks to support the completion of each of your performance goals.

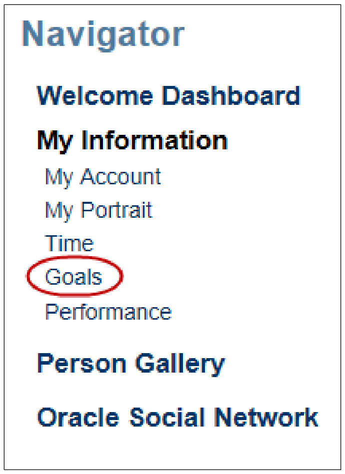
Tasks may be added by your manager, or you can add your own tasks, which must then be approved by your manager.

Note: Currently, only US and UK employees add tasks using this method. BPO and iRunway add tasks using the **Success Criteria** field (refer to step 17 of Viewing and Adding a Performance Goal on page 41).

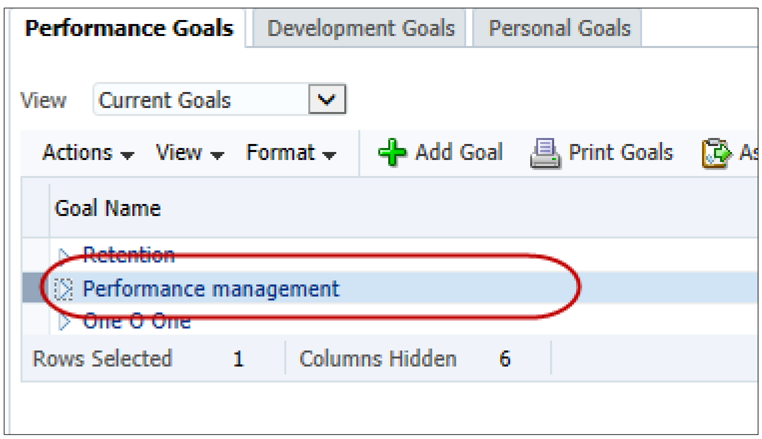
Viewing and Adding a Task

1. From the Welcome Screen (or the horizontal bar of other screens), click on **Navigator**.

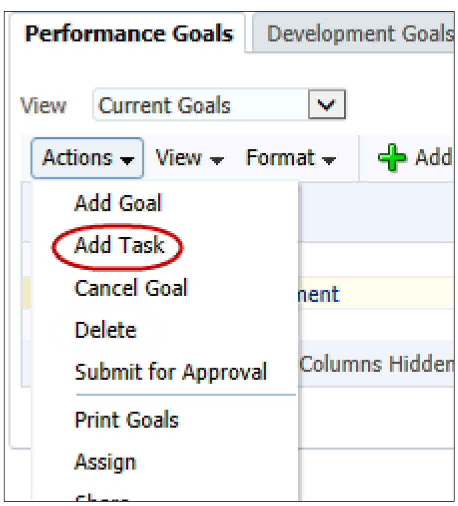
2. Click on **Goals**.



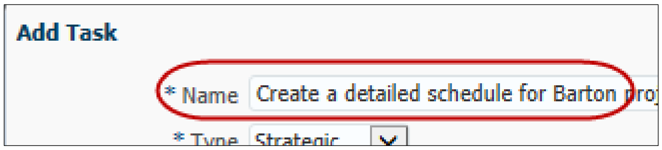
3. Click on the **Performance Goals** tab.
4. Highlight the goal you for which you want to add a task. (Do not click on the name of the goal, just highlight it.)



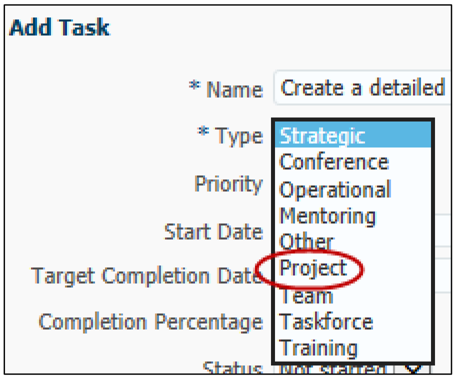
5. Use the **Actions** pulldown menu to select **Add Task**.



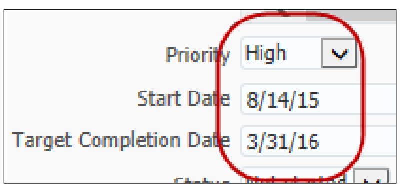
6. Enter a brief description of the task.



7. Use the **Type** pulldown menu to select the task type. (Some of the task types overlap – try to select the one that best fits the task overall.)

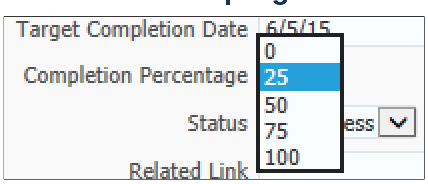


8. Select the task's priority, and enter the start date and target completion date.

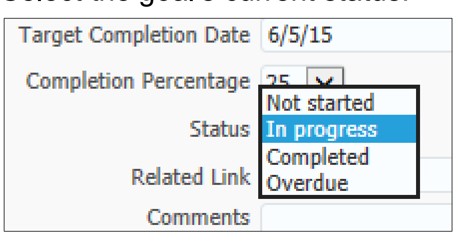


Note: If a goal is ongoing, enter the end of the rating period for the target completion date.

9. If the status is **In progress** or **Overdue**, select the approximate percentage of completion.

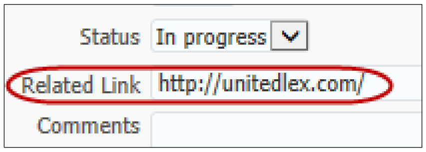


10. Select the goal's current status.

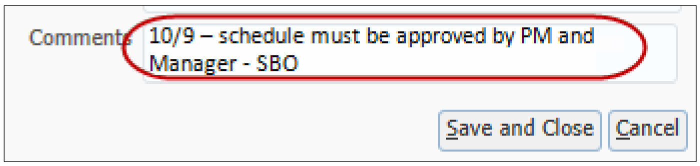


If the status is **Not Started** or **Completed**, the Completion Percentage is auto populated ("0" or "100", respectively).

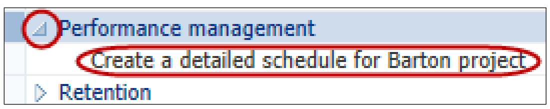
11. Optionally, you can enter a link in the **Related Link** field that can provide additional information about the task.



12. Enter any task comments. To ensure that it is clear when the comment was written and by whom, add today's date before the comment and your initials after the comment.



13. Click on **Save and Close**.
14. Click on **OK** to confirm.
15. To confirm that the task has been added, click on the goal's expansion triangle to view the task.

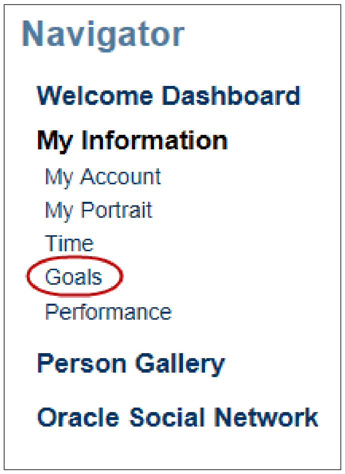


Editing a Task

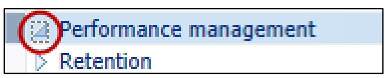
You can edit or make status updates to a task.

1. From the Welcome Screen (or the horizontal bar of other screens), click on **Navigator**.

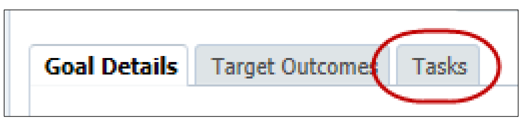
2. Click on **Goals**.



3. Click on the **Performance Goals** tab.
4. Click on the name of the goal you for which you want to edit a task. The Goal Details page is displayed.

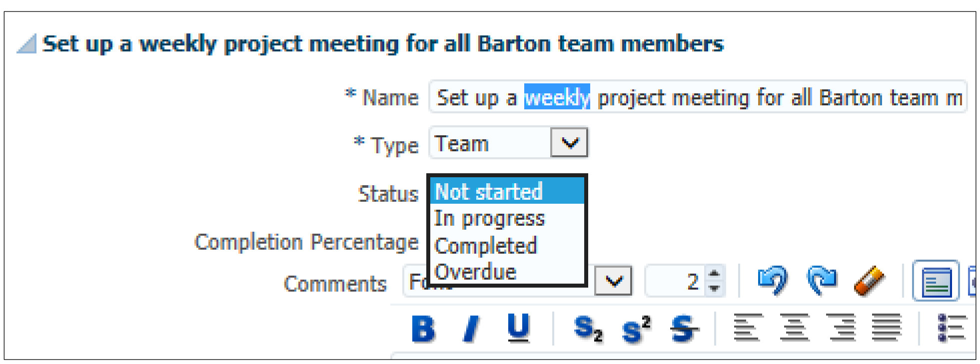


5. Click on the **Tasks** tab.

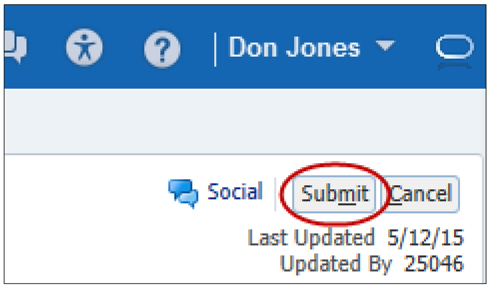


All of the tasks associated with the goal are displayed.

6. Make the desired updates or edits to the task.



7. Click on **Submit** (in the upper-right corner).

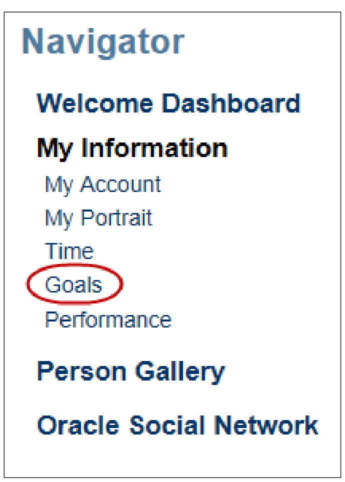


8. Click on **OK** to confirm.

Deleting a Task

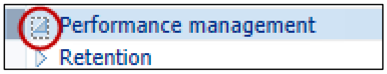
1. From the Welcome Screen (or the horizontal bar of other screens), click on **Navigator**.

2. Click on **Goals**.

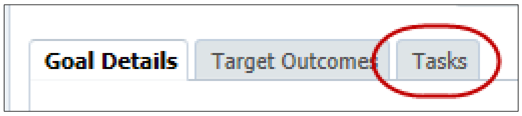


3. Click on the **Performance Goals** tab.

4. Click on the name of the goal you for which you want to edit a task. The Goal Details page is displayed.

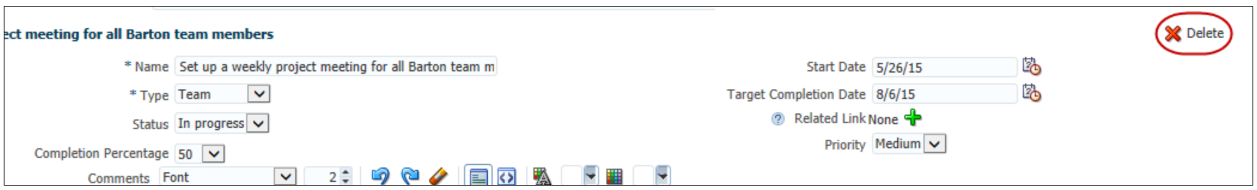


5. Click on the **Tasks** tab.

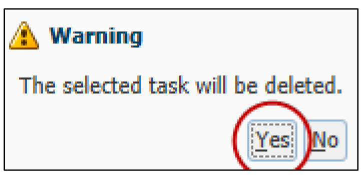


All the tasks associated with the goal are displayed.

6. Locate the task you want to delete and click on the **Delete** button to the right of the task.



7. Click on **Yes** to confirm that you want to delete the task.



The task is deleted.

Development Goals

Development goals increase your knowledge and skills related to your current or future job position. Attainment of these goals are not directly related to your evaluation.

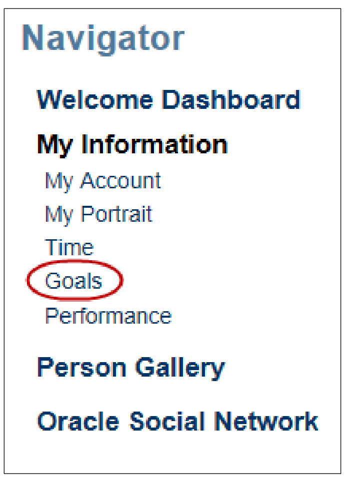
Note: BPO and iRunway employees will not be using development goals for fiscal year 2015. The US and UK will create and approve development goals at the beginning of the rating period.

Viewing and Adding a Development Goal

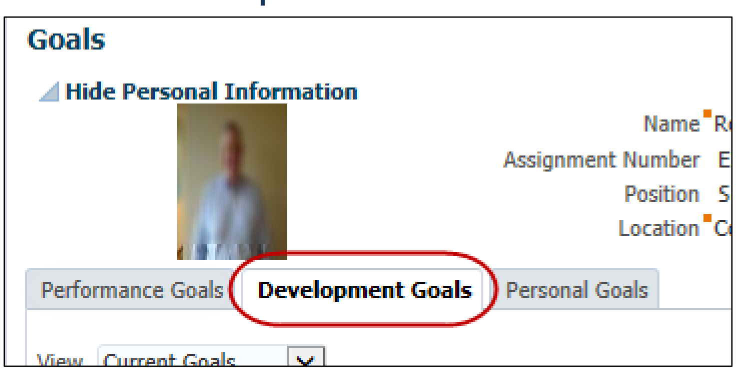
1. From the Welcome Screen (or the horizontal bar of other screens), click on **Navigator**.

   Your Dashboard is displayed.

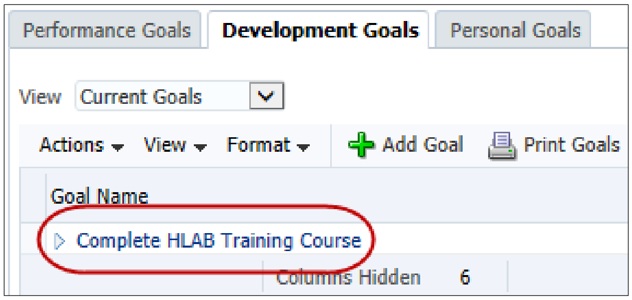
2. Click on **Goals**.



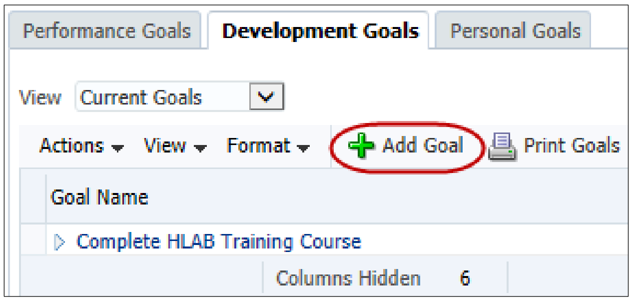
3. Click on the **Development Goals** tab.



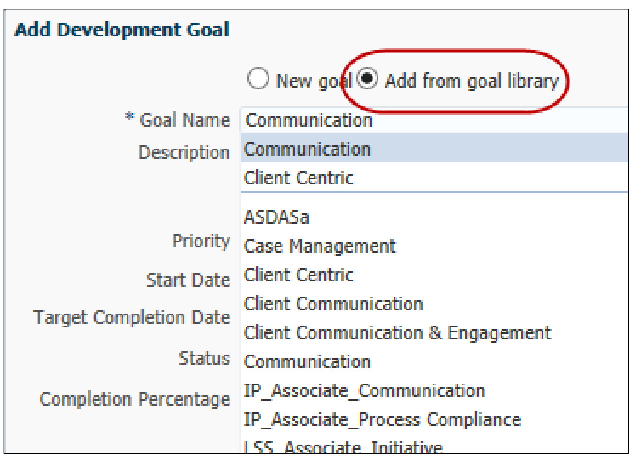
The Development Goals page is displayed. Your current development goals are listed.



4. To add a development goal, click on **Add Goal**.

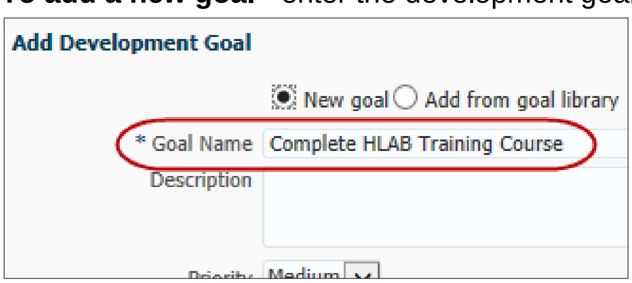


5. Perform *one* of the following:
   - **To add a goal from the goal library** - select **Add from goal library** and use the **Goal Name** pulldown menu to select a goal.

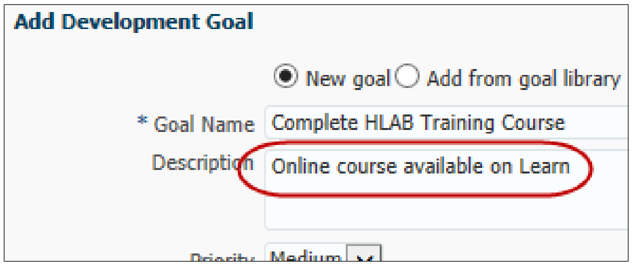


Note: You cannot change the name of goals that have been added from the goal library.

   - **To add a new goal** - enter the development goal name.

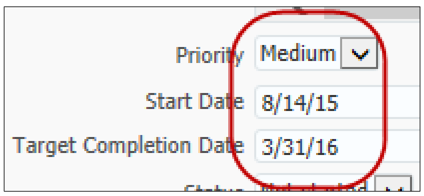


6. Enter a brief description of the development goal.



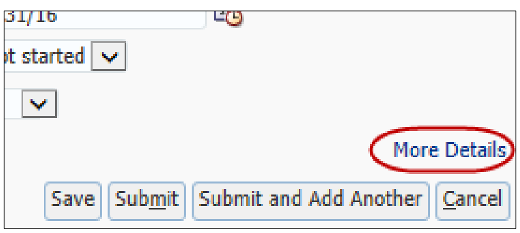
7. Select the goal's priority, and enter the start date and target completion date.

   Note: If a goal is ongoing, enter the end of the rating period for the target completion date.

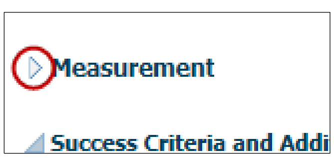


   Note: You may select **Save** at any time if you do not want to submit the goal at this time and want to complete it later. However, you will be returned to the Development Goals page, and the goal becomes a Draft Goal. To return to it later, see Completing a Draft Goal on page 50.

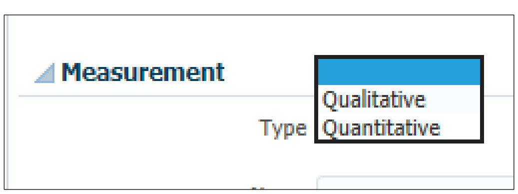
8. To continue adding the goal, click on **More Details**.



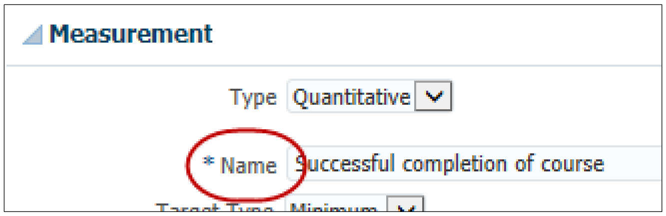
9. Click on the **Measurement** triangle to expand the measurement section.



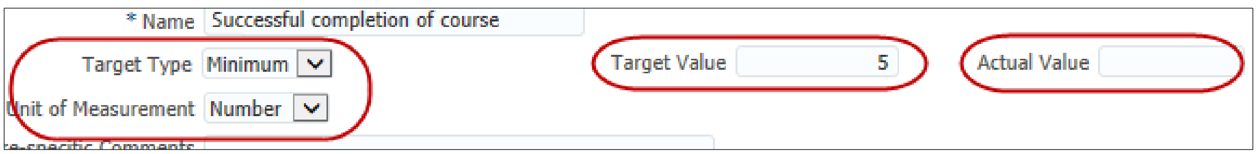
10. Click on the **Type** pulldown menu and select the type of measurement that will be used to measure success.



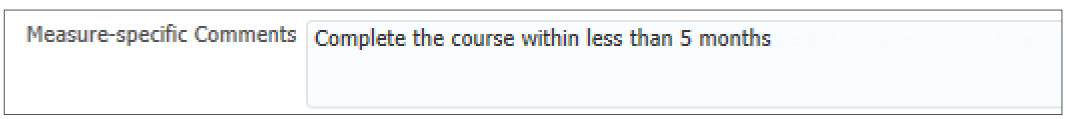
11. Enter a name for the measurement.



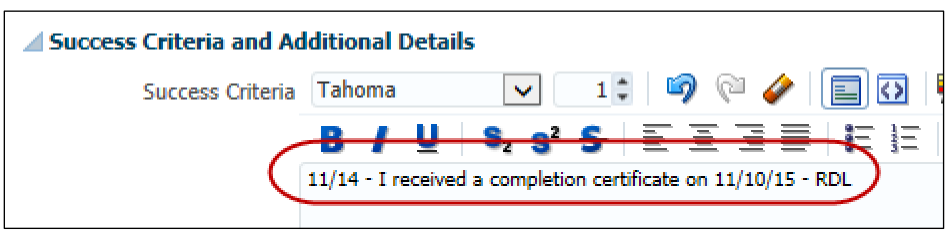
12. If the measurement is quantitative, complete the following fields (if the measurement is qualitative, skip this step):
    - **Target Type –** indicate whether the target is a "no greater than" (Maximum) value, or a "no less than" (Minimum) value.
    - **Target Value** – enter the numerical value of the qualitative measurement
    - **Actual Value** – leave blank initially (unless you already have measurable data for the goal). Enter the actual value as you begin to achieve measurable results.
    - **Unit of Measurement –** indicate whether the target value is a Currency, a quantity (Number), or a Percentage.



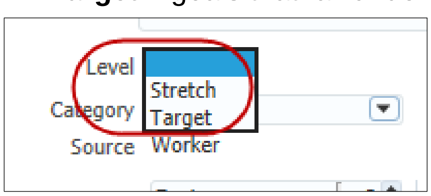
13. Enter any necessary comments to clarify the measurement.



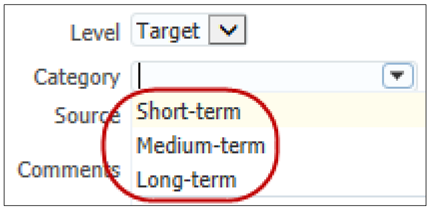
14. In the **Success Criteria** field, enter an explanation of how you have accomplished this development goal and a summary of how your individual tasks were accomplished. To ensure that it is clear who wrote the comment, add your initials after the comment.



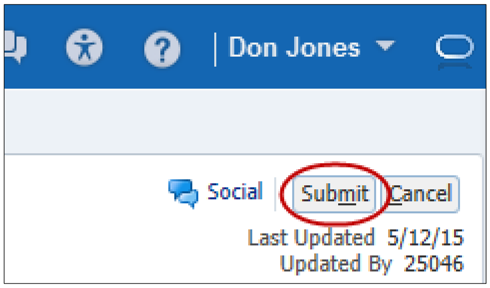
15. Use the Level pulldown menu to select **Stretch** or **Target**.
    - **Stretch** – difficult or complex goals that are outside what is normally expected.
    - **Target** – goals that fall under normal job responsibilities.



16. Use the **Category** pulldown menu to select the type of company goal that is supported.



17. Click on **Submit** (in the upper-right corner).



18. Click on **OK** to confirm. You receive an email indicating that the goal has been forwarded to your manager for approval.

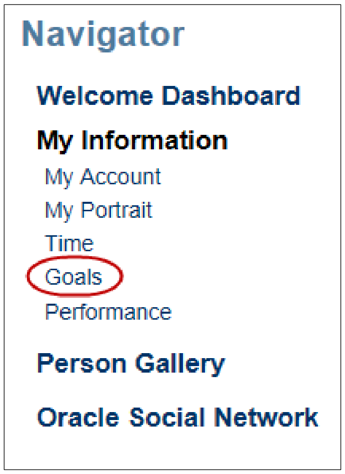
    You receive another email notification after your manager either approves or rejects your development goal.

Editing a Development Goal

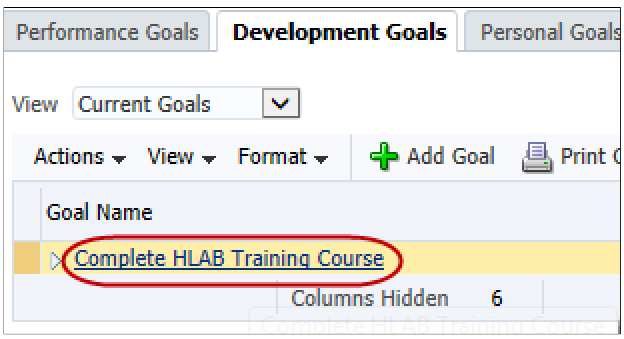
You can make changes to or update the development goals in your goals list. Changes that you make are forwarded to your manager for approval.

1. From the Welcome Screen (or the horizontal bar of other screens), click on **Navigator**.

2. Click on **Goals**.



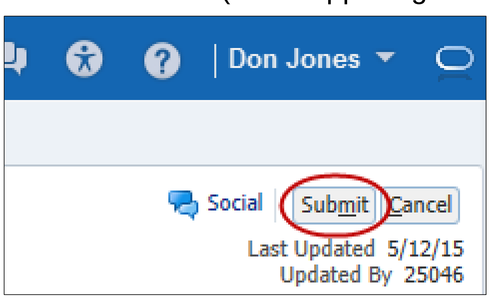
3. Click on the **Development Goals** tab.
4. Click on the goal you want to edit.



5. Make the necessary edits.

   Note: When a goal is complete, enter the date it was completed in the **Actual Completion Date** field. If the goal is ongoing, the completion date is the end of the rating period.

6. Click on **Submit** (in the upper-right corner).



7. Click on **OK** to confirm. You receive an email indicating that the edit has been forwarded to your manager for approval.

   You receive another email notification after your manager either approves or declines your edit.

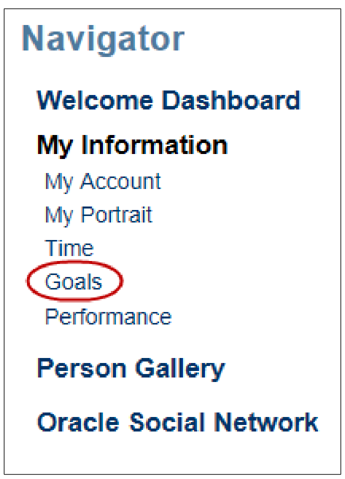
Note: If the only edits you made were to the **Measure-specific Comments** field or to the success criteria **Comments** field, your manager is *not* notified.

Deleting a Development Goal

You cannot delete development goals that were assigned to you, but you *can* delete goals that you added.

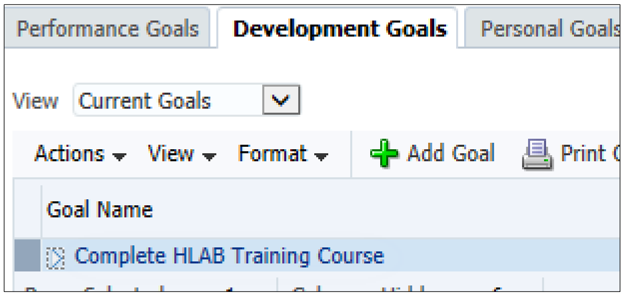
1. From the Welcome Screen (or the horizontal bar of other screens), click on **Navigator**.

2. Click on **Goals**.

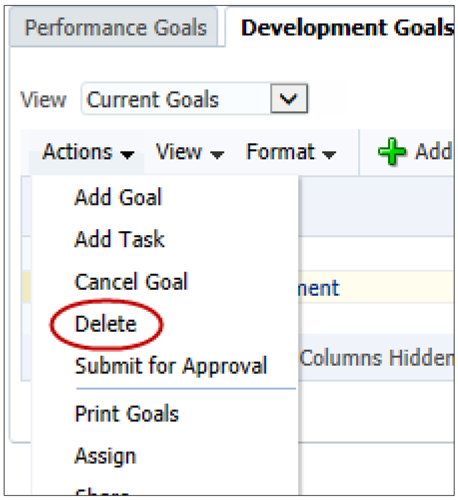


3. Click on the **Development Goals** tab.

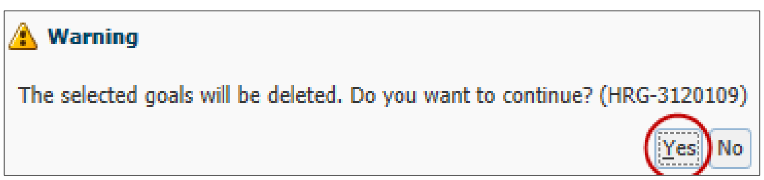
4. Highlight the goal you want to delete. (Do not click on the name of the goal, just highlight it.)



5. Use the **Actions** pulldown menu to select **Delete**.



6. Click on **Yes** to confirm that you want to delete the goal.



7. Click on **OK** to confirm. The request to delete the goal is sent to your manager for approval. The goal remains on your list until it is approved for deletion by your manager.

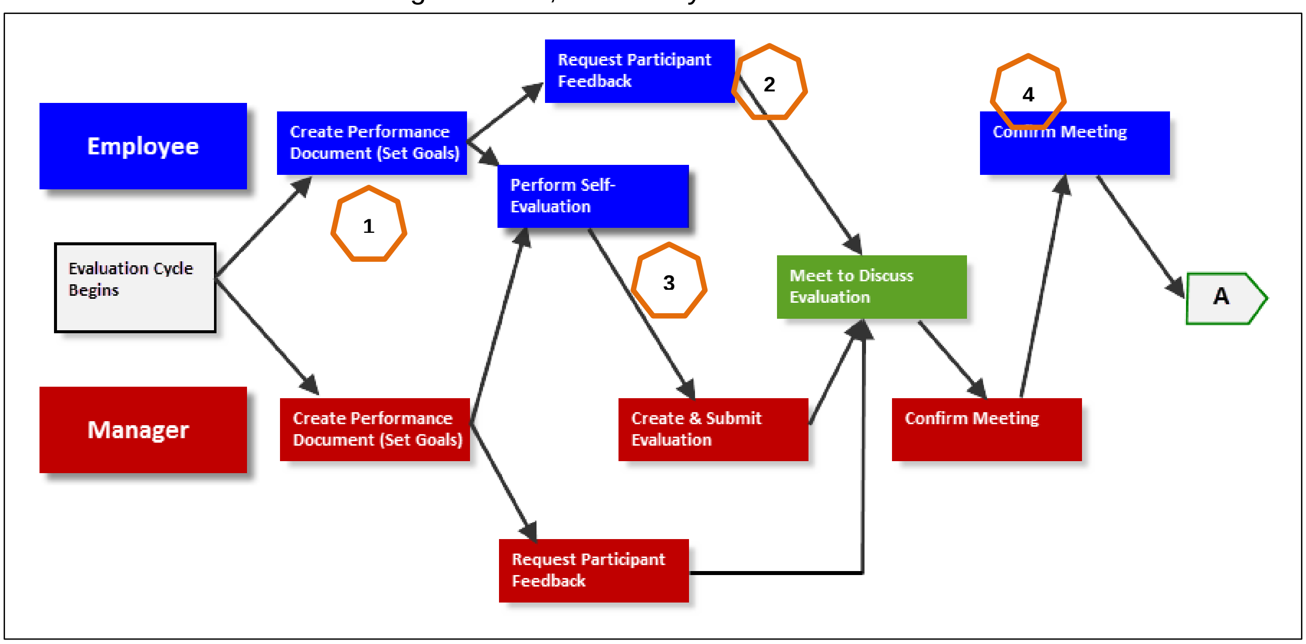
Performance Management

Performance management is the process of administering and recording your manager's evaluation of your performance.

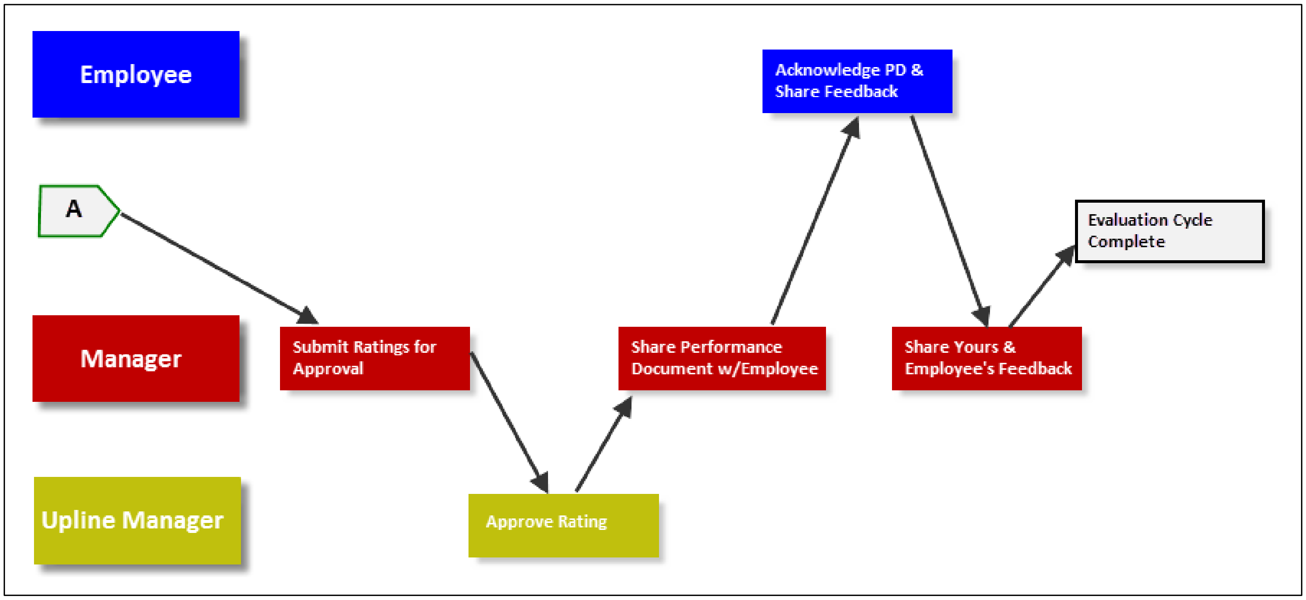
Performance Management Overview

The evaluation cycle begins with an email with a subject line of "*FYI:Performance Notification Upcoming Performance Review*." The following paragraphs provide a brief overview of the process.

1. After you receive the email, create the Performance Document as described in Creating Your Performance Document on page 71. Both you and your manager work to create the document.
2. After the Performance Document is created, you can request feedback from coworkers as described in Requesting Participant Feedback on page 74. Your manager may also request feedback from additional employees that you have worked with.
3. You can begin your self-evaluation as described in Performing Your Self-Evaluation on page 78. You will provide a summary of your accomplishments and challenges and then rate yourself. When your self-evaluation is complete, your manager creates the evaluation and then submits it to their manager.
4. After the evaluation has been submitted, you meet with your manager to discuss the evaluation. Ratings are not provided during this meeting. After the meeting, your manager confirms that the meeting occurred, and then you do the same.

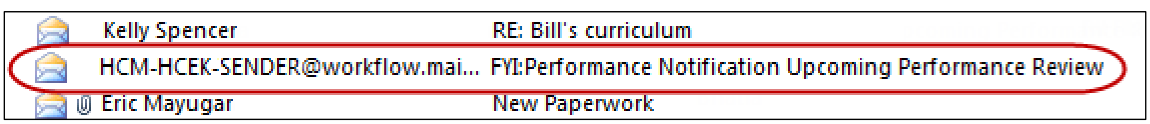


5. After you have both confirmed the meeting, your manager submits the ratings for approval to their upline manager. After their manager has approved the ratings, they share the ratings with you. You acknowledge the Performance Document and share your feedback as described in Acknowledging Your Performance Document and Sharing Feedback on page 86. After your manager shares (submits) yours and their feedback, the evaluation cycle is complete.

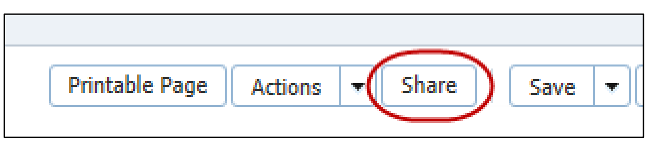


Creating Your Performance Document

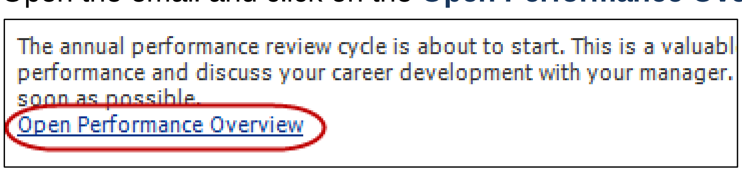
The evaluation cycle begins when you receive an email with a subject line of "*FYI:Performance Notification Upcoming Performance Review*." Before evaluations can begin, you must create the performance document and set your goals.



Note: As you create your performance document, you can click on **Share** to provide your manager with access to the document.



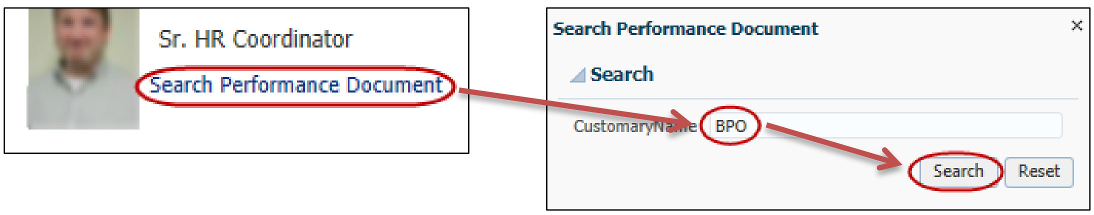
1. Open the email and click on the **Open Performance Overview** link.



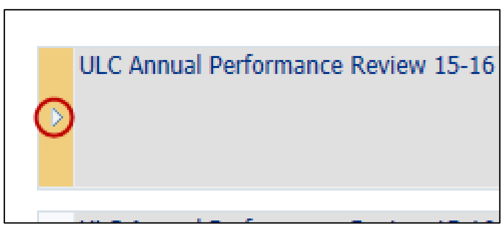
2. Login to HRIS. Your Evaluations page is displayed. (You can also access the Evaluations page by clicking on **Navigator** > **My Information** > **Performance**.)

   Throughout the review cycle process, your next task is always indicated.

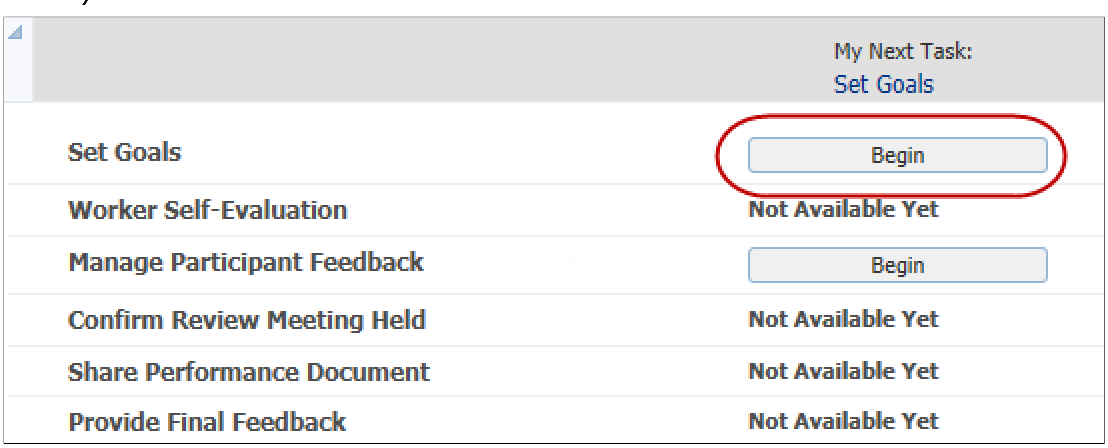
Note: If you do not see the performance document you are looking for, click on **Search Performance Document** and enter either "ULC" (for US or UK) or "BPO" (for India) and then click on **Search**.



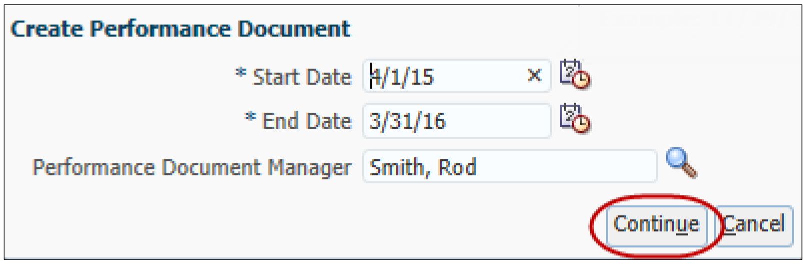
3. Click on the triangle to expand the review cycle tab.



4. All of the steps in your evaluation process are displayed. Click on **Begin** (across from **Set Goals**).



5. Unless instructed otherwise, leave the default start and end dates. Click on **Continue**.

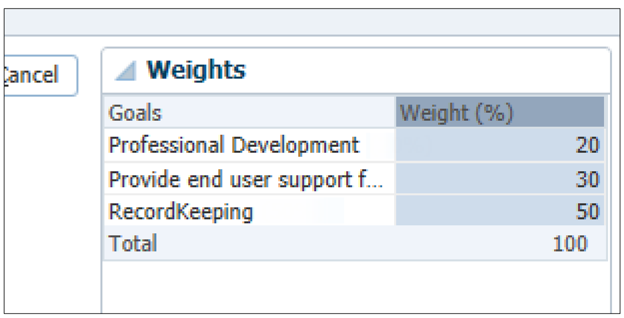


6. Click on **OK** to confirm. The performance document is created.

   Your manager is notified via email that the document has been created.

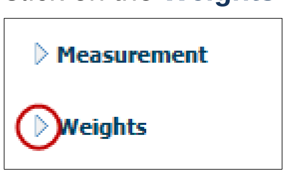
7. Review your Performance Document to ensure that the goal information is correct. Do not change or add goals in the Performance Document. (If you edit a goal or add a new goal within the Performance Document, the change does *not* flow back to the goals section.) If edits need to be made, refer to Updating Goals or Importing New Goals to Your Performance Document on page 74.

8. Check your goal weights in the upper-right corner to ensure they are correct and add up to 100%. If the weights are correct, skip to step 12. If you need to edit the weights, continue with step 9.



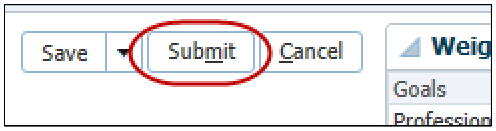
9. Click on the goal whose weight you want to change. The currently selected goal is bolded.

10. Click on the **Weights** triangle to expand.



11. Enter the correct weight in the **Weight** field.

12. If necessary, repeat this process for additional goals.
13. When all your goals appear to be up-to-date, click on **Submit** (upper-right corner).



14. Click on **Yes** > **OK** to confirm.

    Your manager is notified via email that your goals have been set.

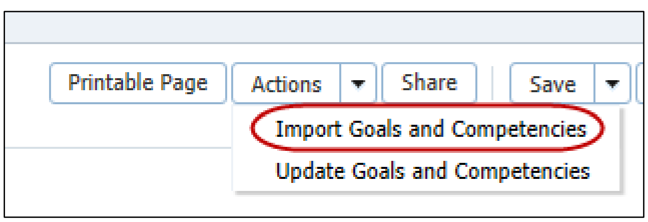
Updating Goals or Importing New Goals to Your Performance Document

If you add a new goal or update an existing goal (in the goal management section of HRIS) after your performance document has been created, you must use **Update Goals and Competencies** or **Import Goals and Competencies** to update the goals in the performance document.

- **Import Goals and Competencies** – adds new goals to the performance document.
- **Update Goals and Competencies** – changes existing goals, competencies, or other goal details.

Caution: Go to the goal management section of HRIS to edit your goals or add new ones. If you edit goals or add new goals within the performance document, the change does *not* flow back to the goals section.

1. After adding or updating a goal or goals, use the **Actions** pulldown menu to select **Import Goals and Competencies** or **Update Goals and Competencies**.



2. Click on **OK**.
3. A confirmation window appears. Click on **OK**.

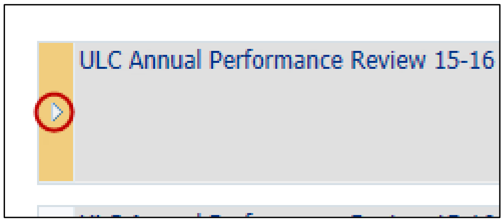
   Goals in your performance document are updated, or new goals that you have added are imported into your performance document.

Requesting Participant Feedback

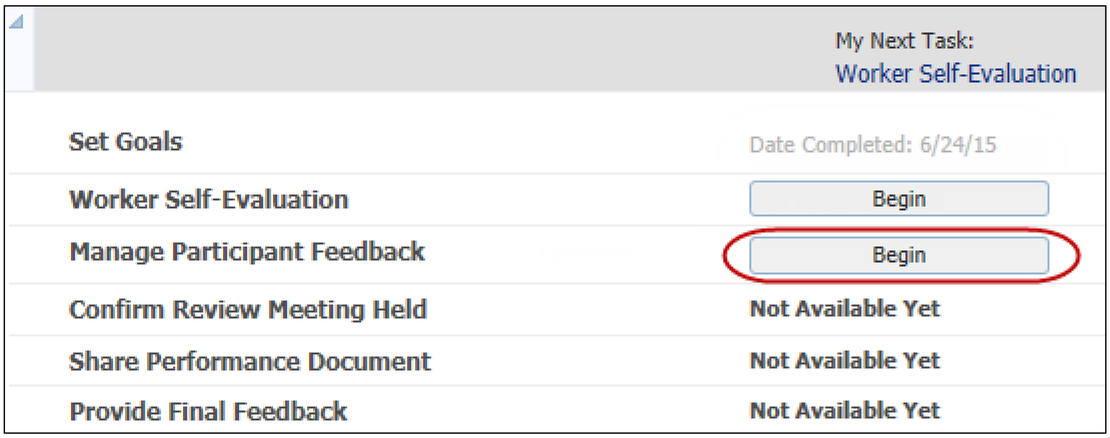
You can request feedback from other employees that you have worked with during the review cycle. The employee completes a questionnaire, which is then forwarded to your manager. You will *not* be able to view the feedback.

You can request participant feedback any time after the performance document is created.

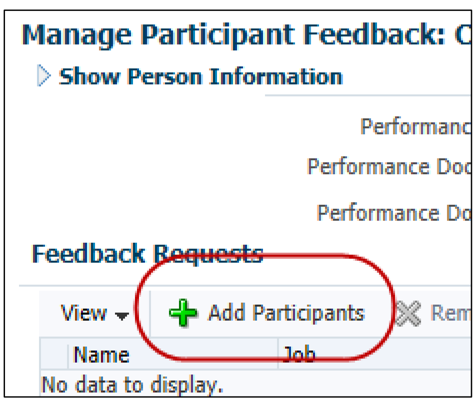
1. From the My Evaluations page, click on the triangle to expand the review cycle tab.



2. All of the steps in your evaluation process are displayed. Click on **Begin** (across from Manage Participant Feedback).

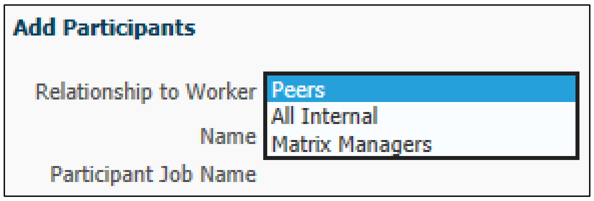


3. The Manage Participant Feedback page is displayed. Click on **Add Participants**.

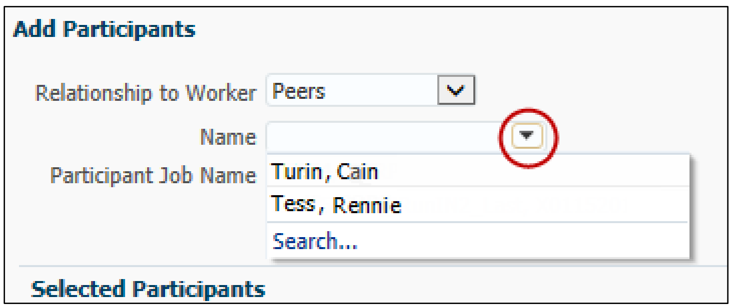


4. The **Add Participants** window is displayed. Use the **Relationship to Worker** pulldown menu and select the relationship that the participant has with you.

    - **Peers** – Employee who reports directly to your manager.
    - **All Internal** – All UnitedLex/iRunway employees.
    - **Matrix Managers** – Project managers to whom you report for specific projects. This is applicable only if a Matrix Manager(s) has been defined for you in Fusion.

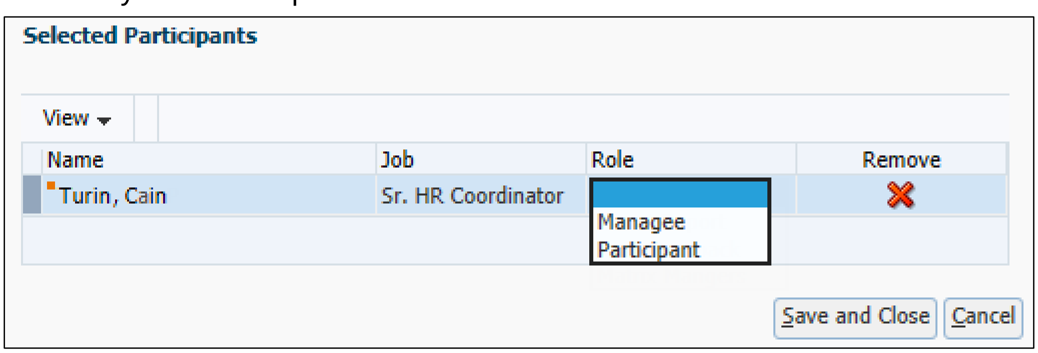


5. Use the Name field to select the person to whom you want to provide feedback, or click on **Search…** to search for employees that are not in the pulldown menu.

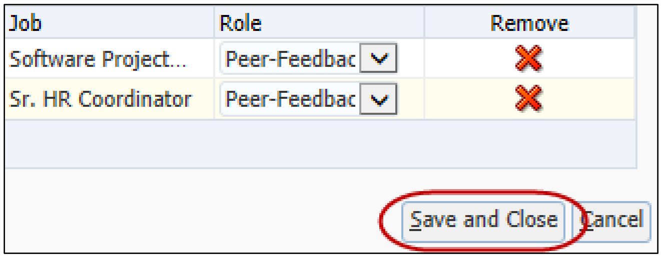


6. Click on **Add** to add the employee's name to the list of participants.

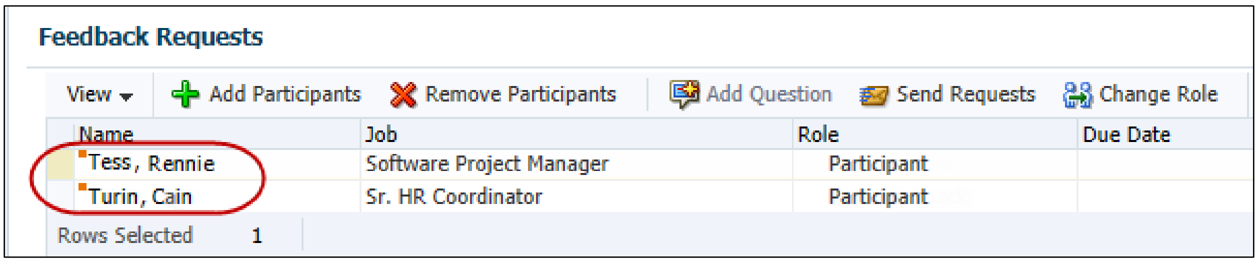
7. Use the **Role** pulldown menu to select the feedback role that the participant is performing. This field determines the type of questions that are provided to the participant. A "Managee" is one of your direct reports.



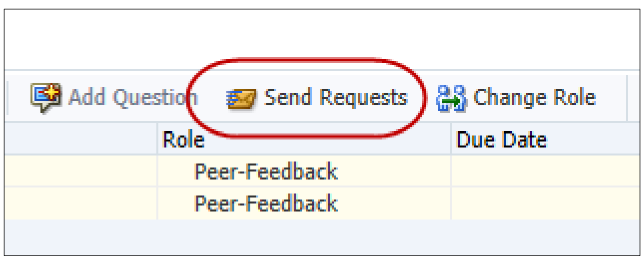
8. Repeat steps 4 through 7 to add additional participants.
9. When you have finished selecting participants, click on **Save and Close**.



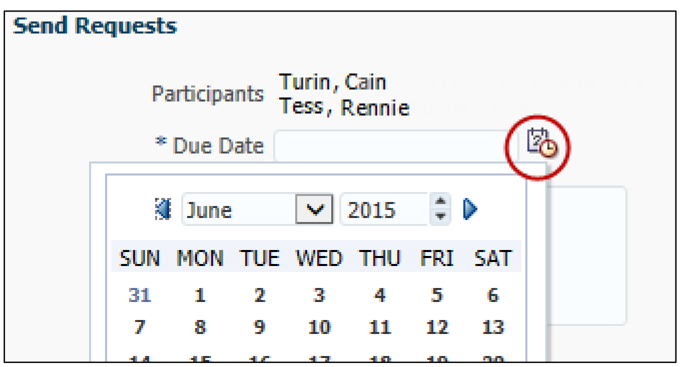
10. Highlight one or more participants to whom you want to send the request.



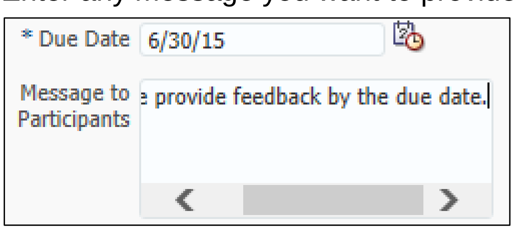
11. Click on **Send Requests**.



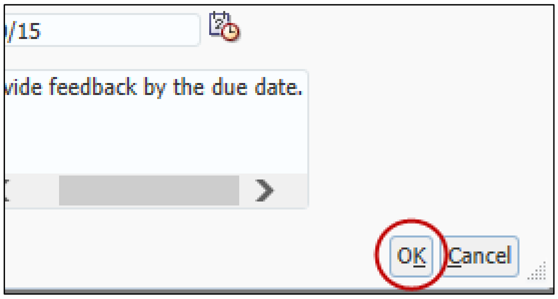
12. Use the Calendar pulldown icon to select the due date.



13. Enter any message you want to provide to the participants.



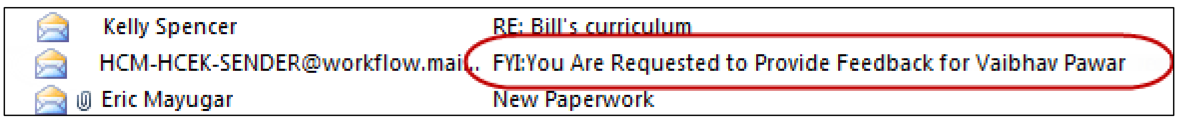
14. Click on **OK**.



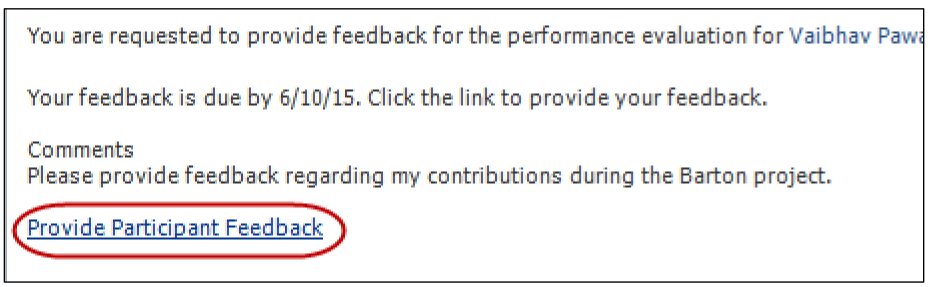
15. Click on **OK** to confirm. An email notification is sent to the participants.

Providing Feedback for Other Employees

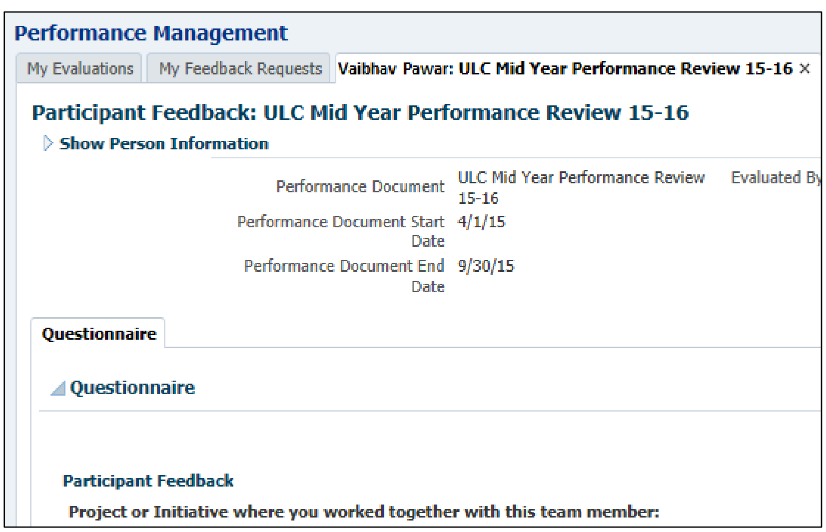
When another employee requests feedback from you, you receive an email with a subject line of, "*FYI:You are Requested to Provide Feedback for* [Requester Name]."



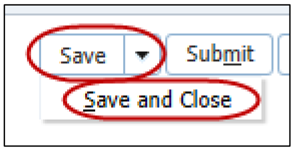
1. Open the email and click on **Provide Participant Feedback**.



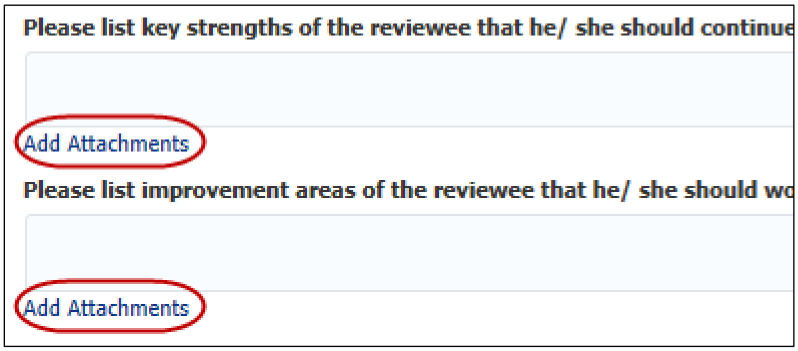
2. Login to HRIS. The Feedback Questionnaire is displayed. Provide feedback by filling out the form.



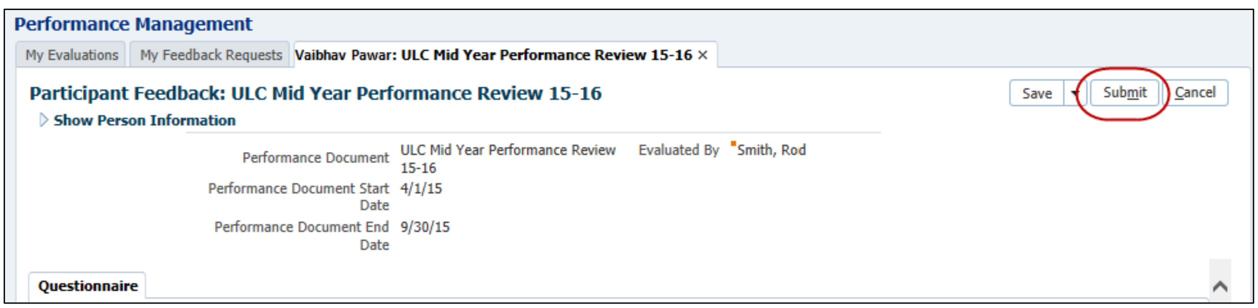
Note: If you need to save the form and complete it later, you can click on **Save** or **Save and Close** (located in the upper-right corner) at any time. To reopen the feedback, see Opening a Saved Feedback Form on page 80.



3. If necessary, you can provide attachments for some of the questions.



4. When you have completed your feedback, click on **Submit** (located in the upper-right corner).

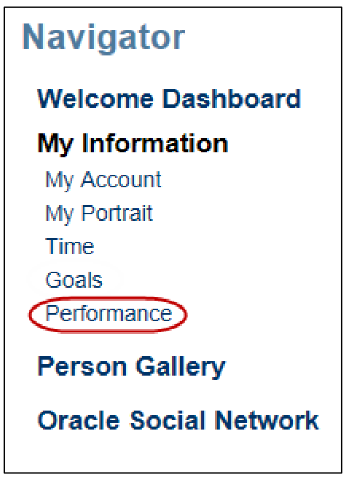


Opening a Saved Feedback Form

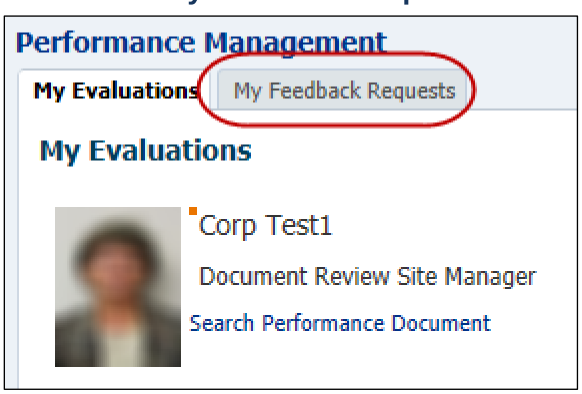
1. From the Welcome Screen (or the horizontal bar of other screens), click on **Navigator**.

Your Dashboard is displayed.

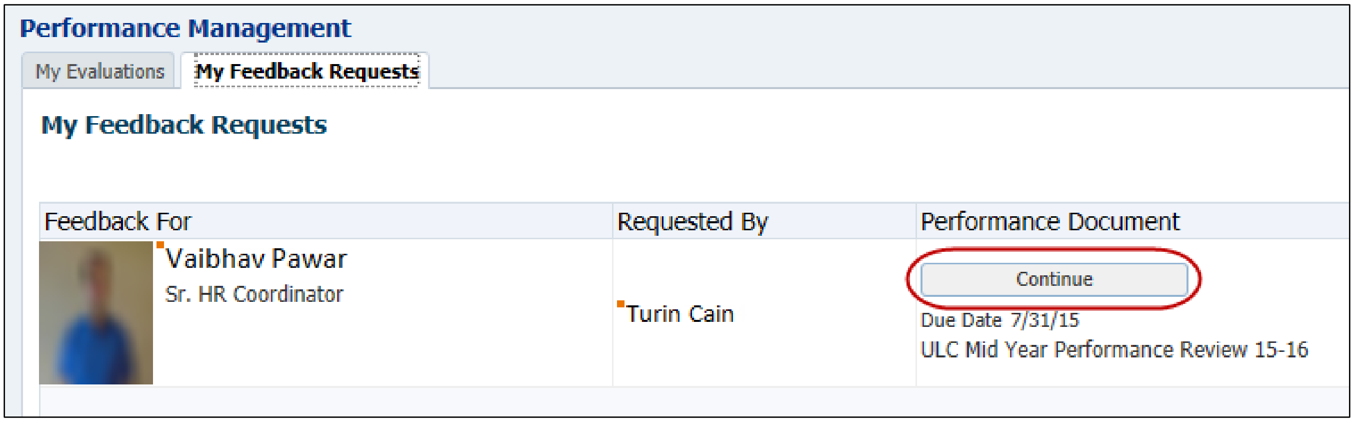
2. Under My Information, click on **Performance**.



3. Click on the **My Feedback Requests** tab.



4. Click on **Continue**.



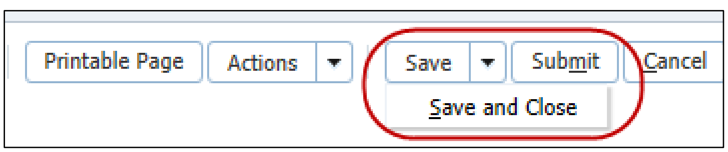
5. Continue filling out the feedback form.

Performing Your Self-Evaluation

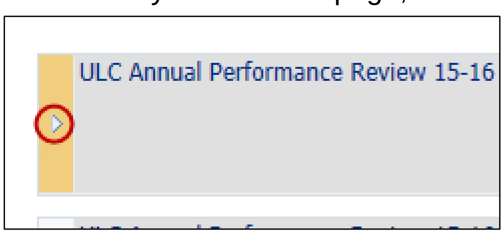
Once your goals are set by your manager, you can perform your self-evaluation, which will be forwarded to your manager. You are notified via email when you can begin your self-evaluation.

You must rate yourself (and provide comments) for all goals. You then provide an overall summary, consisting of a rating and supporting comments.

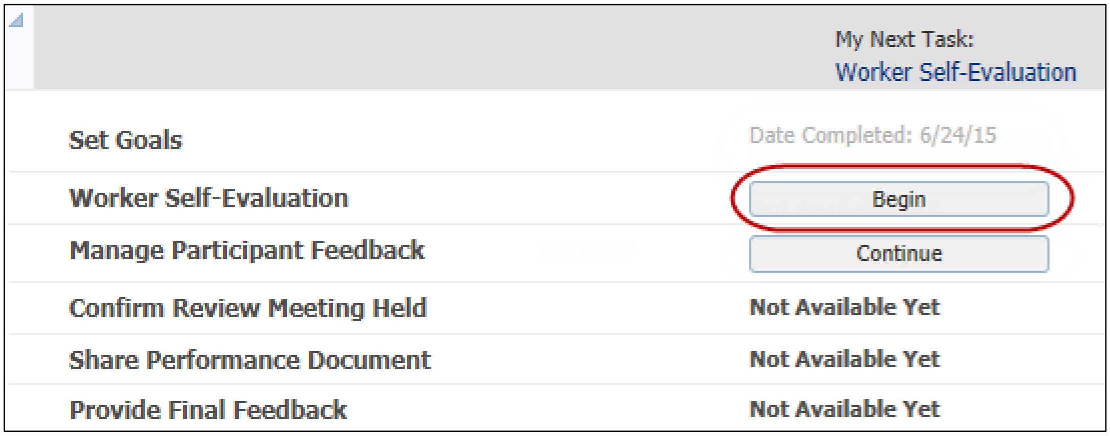
While preparing your self-evaluation, you can click on **Save** or **Save and Close** to close the evaluation and return to it later.



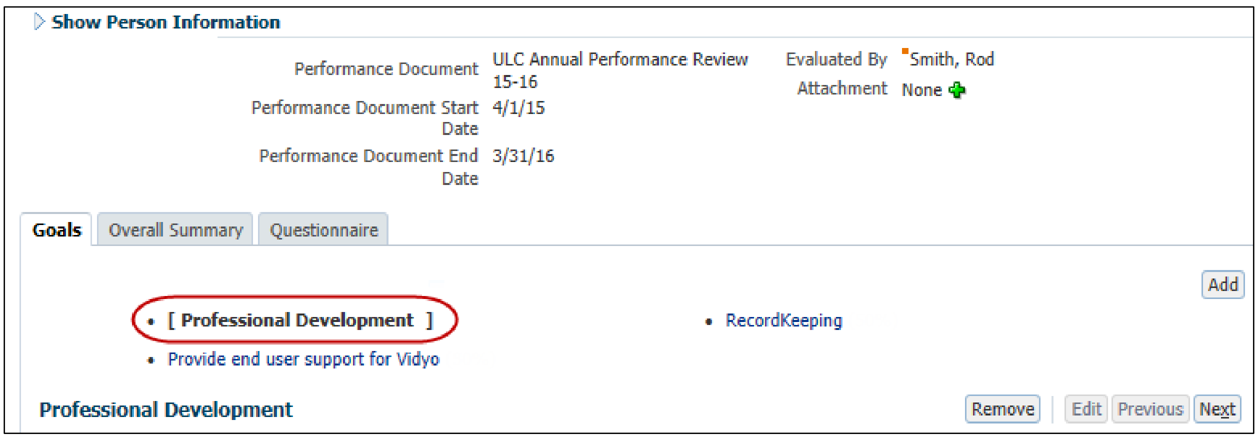
1. From the My Evaluations page, click on the triangle to expand the review cycle tab.



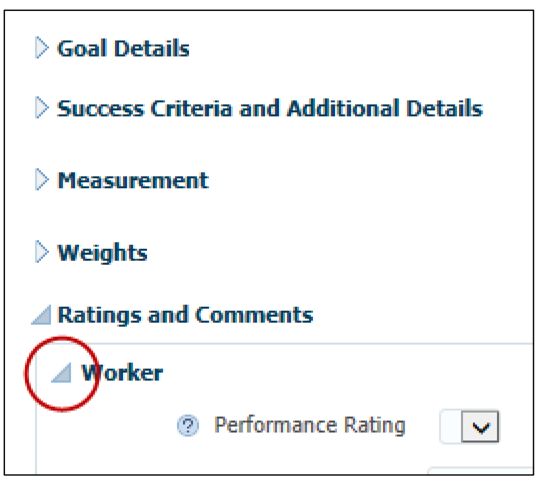
2. All of the steps in your evaluation process are displayed. Click on **Begin** (across from Worker Self-Evaluation).



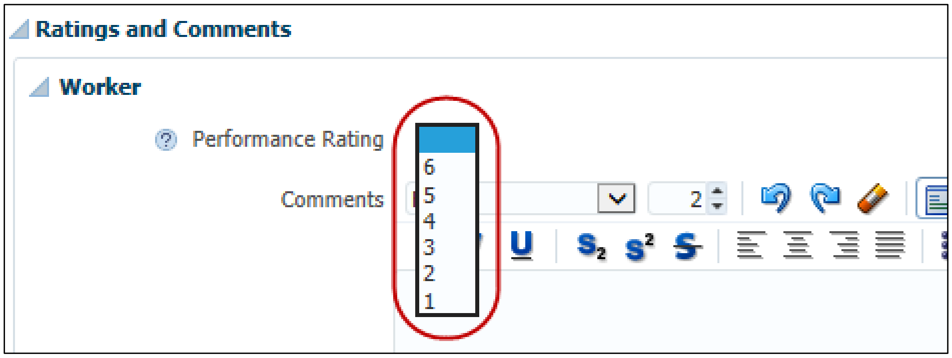
3. Select the first goal that you want to evaluate. The currently selected goal is bolded.



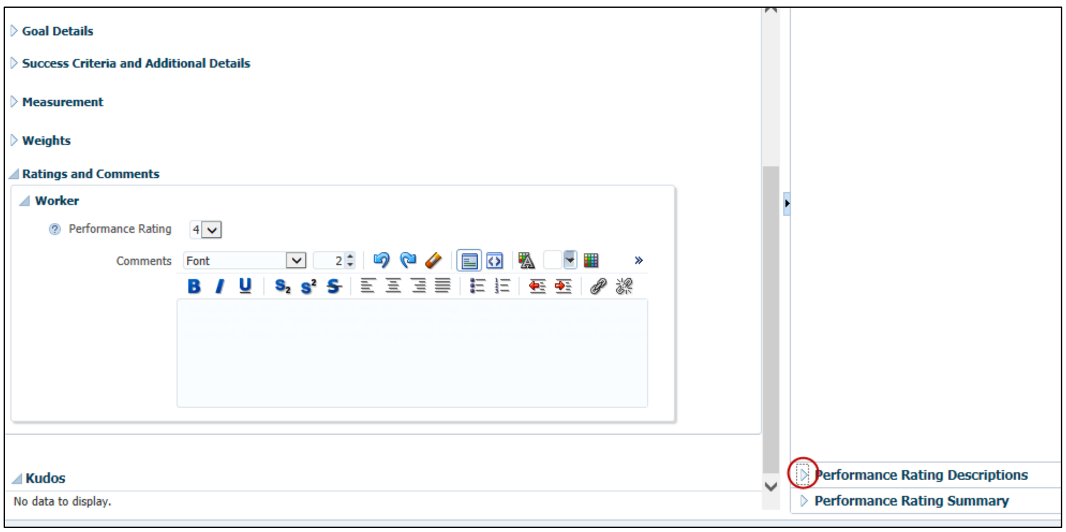
4. If the Worker tab is not already open, click on the triangle to open it.



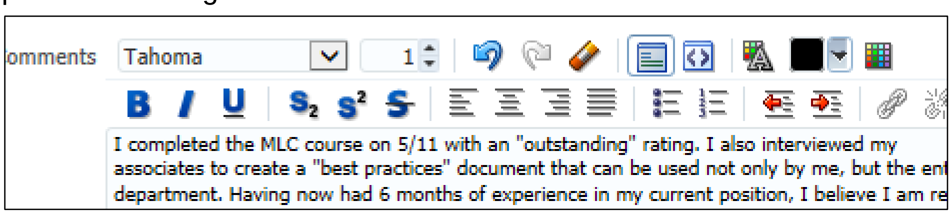
5. Use the Performance Rating pulldown menu to select what you believe your performance rating should be for this goal (1 = lowest; 6 = highest).



Note: To view a description of what the ratings mean, click on the Performance Rating Descriptions triangle.

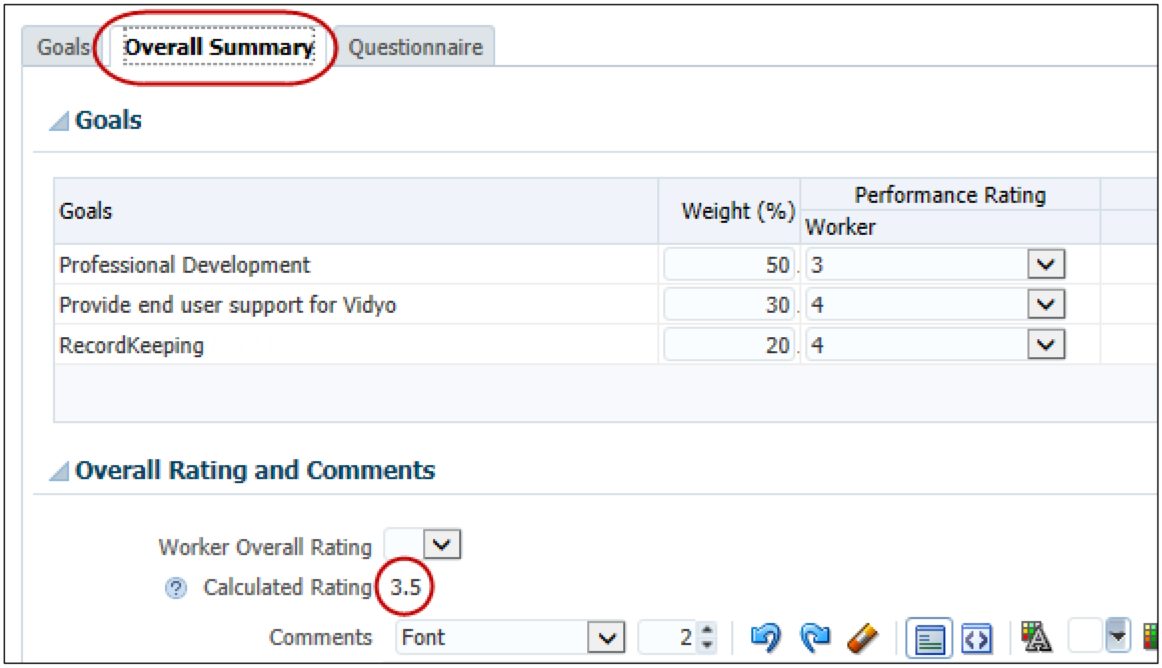


6. Enter detailed text in the comments section to justify your rating. Comments must be provided for all goals.

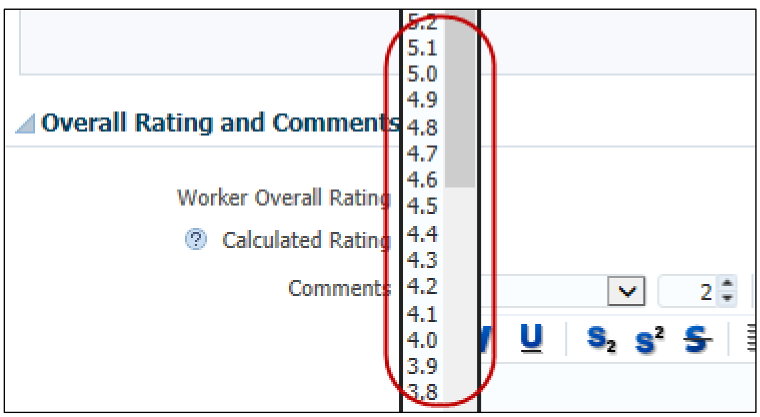


7. Repeat steps 3 through 6 until all goals have ratings and comments.

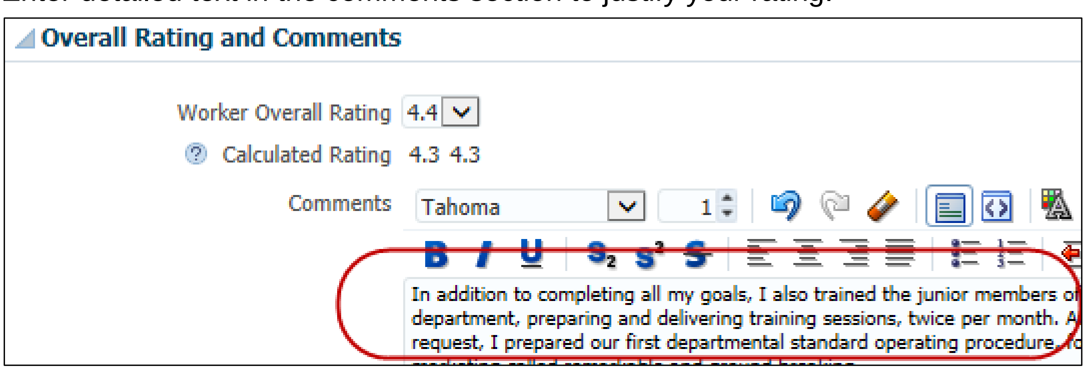
8. When all goals have been rated, click on the **Overall Summary** tab. The calculated average of your ratings is displayed.



9. Use the **Worker Overall Rating** pulldown menu to select what you believe your overall rating should be. This rating should equal or be close to your Calculated Rating.



10. Enter detailed text in the comments section to justify your rating.



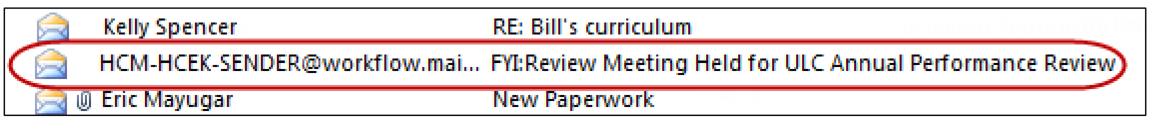
11. When you are ready to submit your self-evaluation to your manager, click on **Submit** (located in the upper-right corner).

12. Click on **OK** to confirm. Your manager is notified via email that you have completed your self-evaluation.

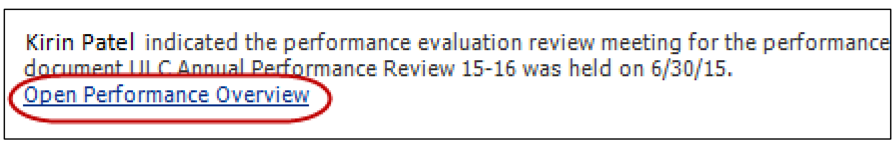
Confirming Your Review Meeting with Your Manager

After your manager submits your performance document to their manager for approval, your manager schedules a meeting with you to discuss your evaluation. The actual ratings are not presented during this meeting, just general feedback concerning your performance.

After the meeting, your manager confirms that the meeting was held. You will receive an email with a subject line of "*FYI:Review Meeting held for BPO* (or ULC) *Annual Performance Review* [Rating Year]."

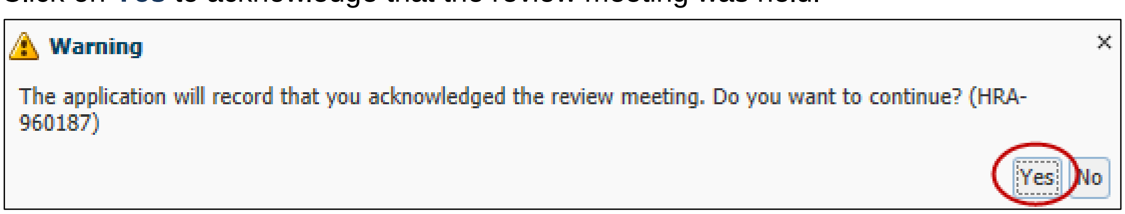


1. Open the email and click on the **Open Performance Overview** link.



2. Login to HRIS. The Evaluations page is displayed. Click on **Confirm Review Meeting Held**.

3. Click on **Yes** to acknowledge that the review meeting was held.

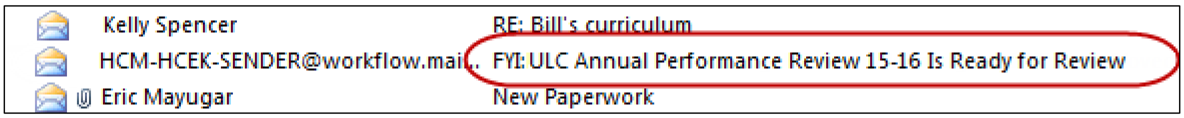


4. Click on **OK** to confirm. Your manager is notified via email that you have confirmed that the meeting was held.

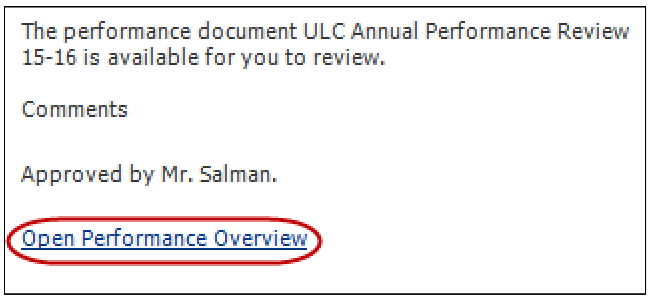
Acknowledging Your Performance Document and Sharing Feedback

After your performance document ratings have been approved, your manager can share your ratings with you.

After the ratings are shared, you receive an email with a subject line of "*FYI: BPO* [or ULC] *Annual Performance Review 15-16 is Ready for Review.*"

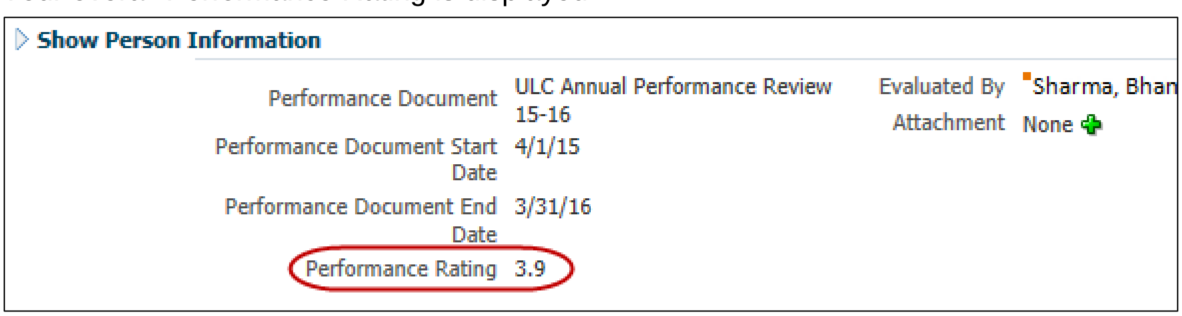


1. Open the email and click on the **Open Performance Overview** link.

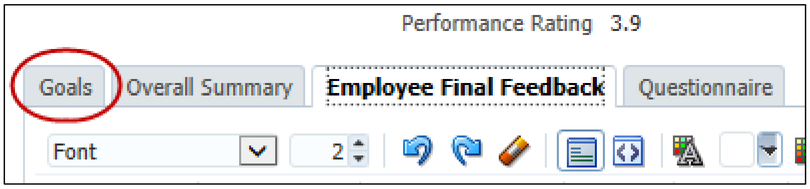


2. Login to HRIS. The Evaluations page is displayed. (You can also access the Evaluations page by clicking on **Navigator** > **My Information** > **Performance**.)
3. Click on **Acknowledge and Provide Final Feedback**.

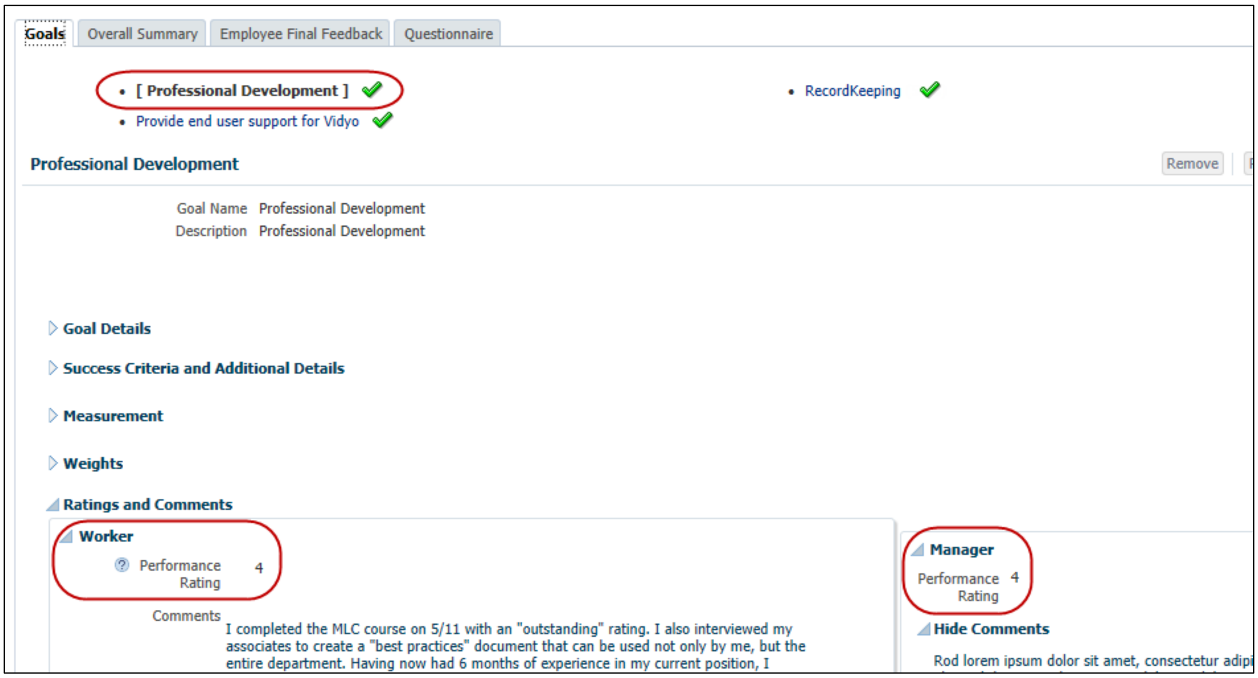
Your overall Performance Rating is displayed.



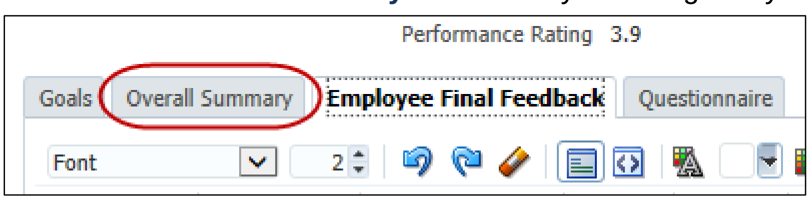
4. Click on the **Goals** tab to view your ratings for your individual goals.



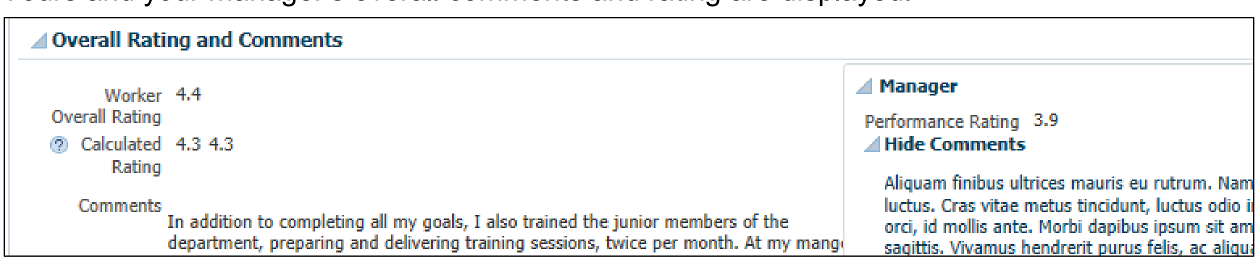
5. Click on a goal to view yours and your manager's rating and comments. (The bolded goal is the goal that is currently selected.)



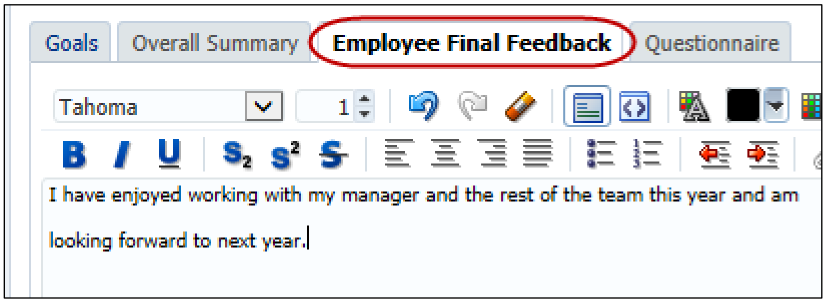
6. Click on the **Overall Summary** tab to view your ratings for your individual goals.



Yours and your manager's overall comments and rating are displayed.



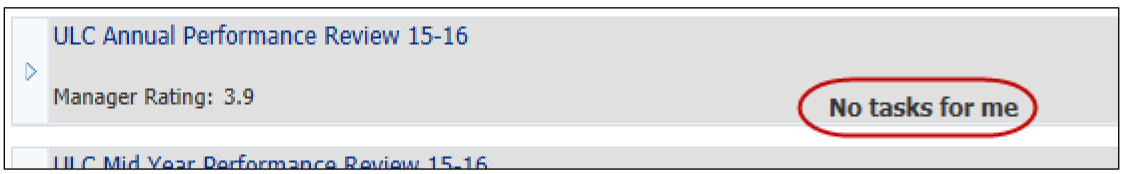
7. Click on the **Employee Final Feedback** tab, and provide your final feedback.



8. When you are ready to submit your feedback and acknowledgement to your manager, click on **Submit** (located in the upper-right corner).

Click on **Yes** > **OK** to confirm. Your manager is notified via email that you have provided final feedback.

Your evaluations page indicates that you have no more tasks to perform for this evaluation.



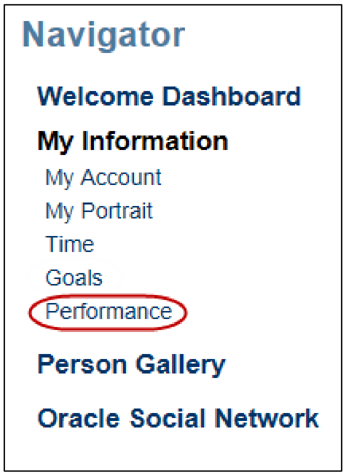
Viewing Past Performance Documents

You can view past performance documents, but you are not able to edit them.

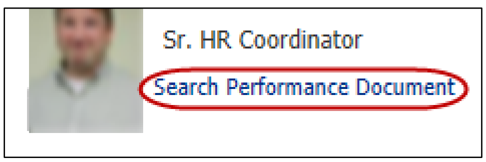
1. From the Welcome Screen (or the horizontal bar of other screens), click on **Navigator**.

Your Dashboard is displayed.

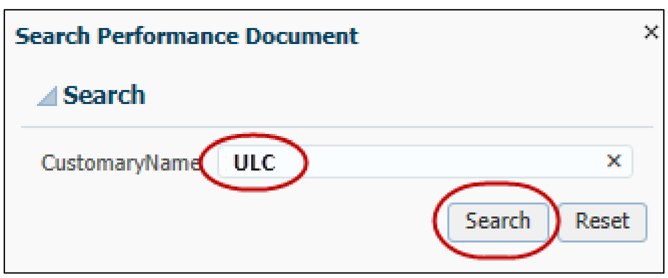
2. Under My Information, click on **Performance**.



3. Click on **Search Performance Document**.



4. Enter appropriate search criteria, such as site abbreviations ULC or BPO, and then click on **Search**.



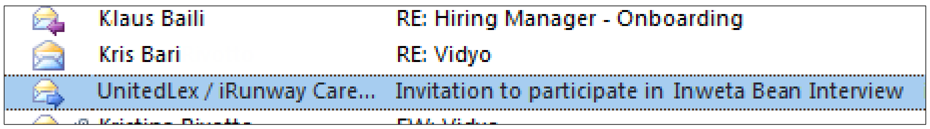
5. If the Performance Document is not displayed, it may be necessary to click on **Load More Items** to view additional Performance Documents.

Interviewing Job Candidates

To interview job candidates, you must accept an invitation, interview the candidate, and then provide an assessment of the candidate.

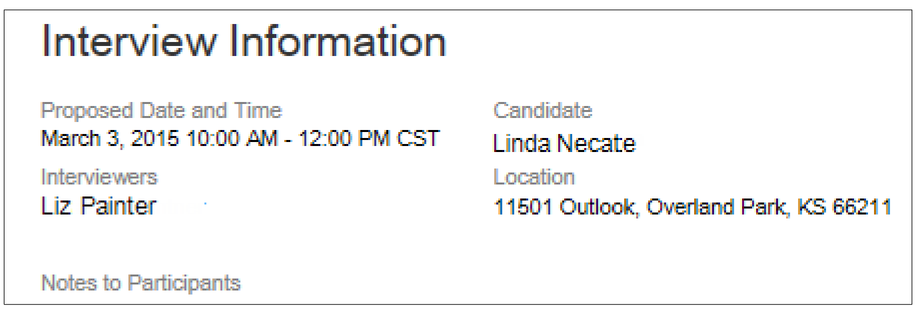
Accepting or Declining a Request for an Interview

The Talent Acquisition department initiates interviews within HRIS. You are notified via email that an interview is scheduled to which you are invited.

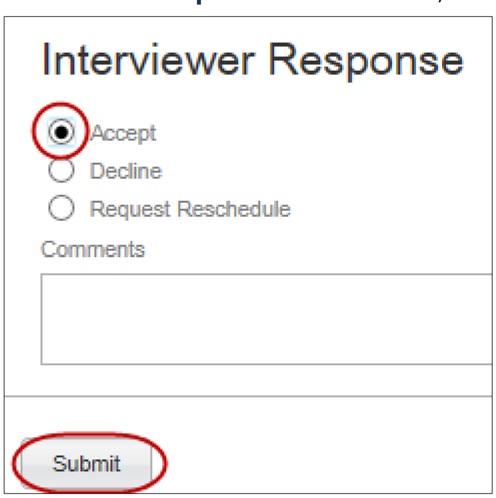


1. Open the email and click on **Interview URL**.

The Interview Information is displayed.

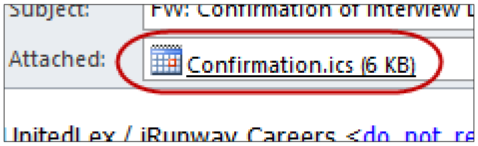


2. Select **Accept**, **Decline**, or **Request Reschedule**, and click on **Submit**. If you click on **Decline** or **Request Reschedule**, enter an explanation in the comments field.



After you have submitted your response, you receive an interview confirmation email.

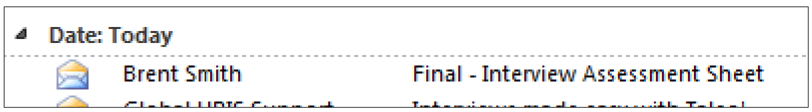
3. To add the meeting to your MS Outlook Calendar, double-click on the Confirmation.ics file attached to the interview confirmation email.



Completing an Assessment Sheet

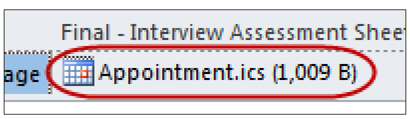
After the interview is complete, you will be sent an email containing a link to the assessment form, which you will use to provide your evaluation of the candidate's interview.

1. Open the assessment email.

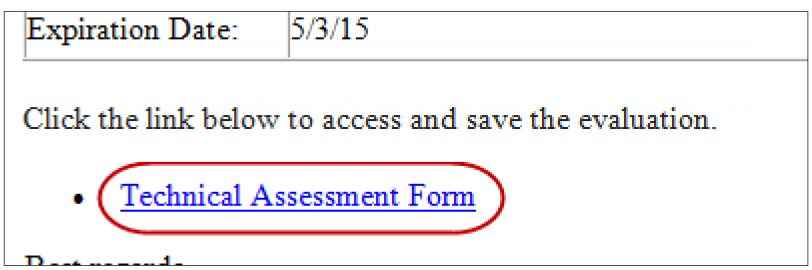


A link to the assessment form is displayed, along with a due date for the assessment.

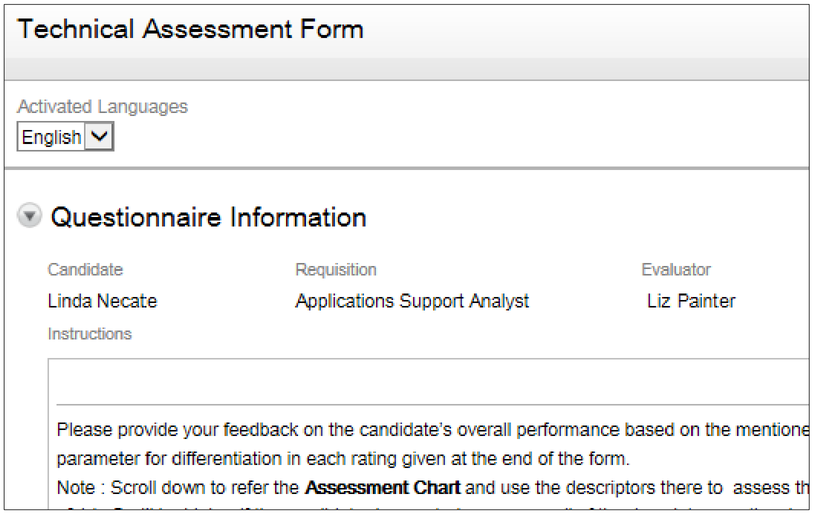
Note: To add the due date to your MS Outlook Calendar, double-click on the Confirmation.ics file attached to the assessment email.



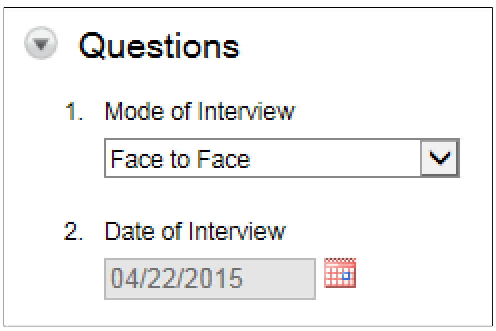
2. Click on the link to the assessment form.



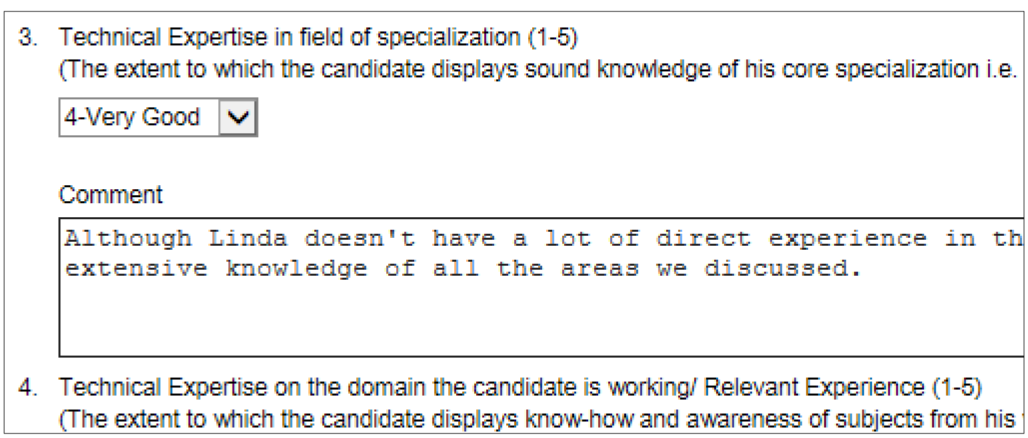
The Technical Assessment Form is displayed. Questionnaire Information provides definitions of the ratings (1 through 5).



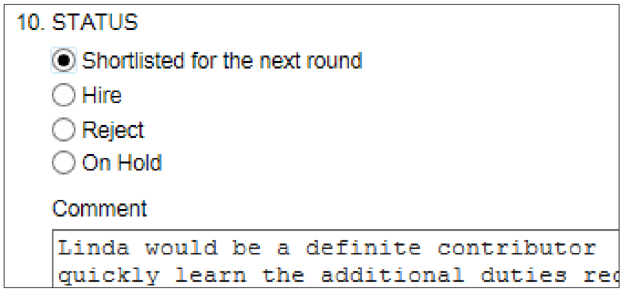
3. Use the pulldown menus to enter the type and date of the interview.



4. Use the pulldown menus to provide ratings for the first category. If applicable, provide justification for your ratings in the Comment fields. Repeat the process for all categories.

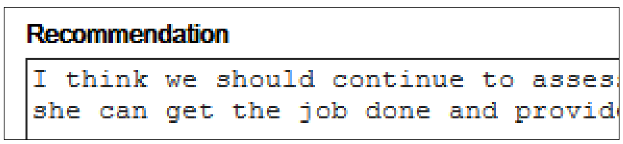


5. When all categories have been rated, select your recommendation regarding the status of the interviewee and provide comments in the field below.



Note: Prior to the final interview, use the “Shortlisted for the next round” option to continue to consider a candidate (not the “Hire option). The “Hire” option should be used only by the hiring manager after the last round of interviews.

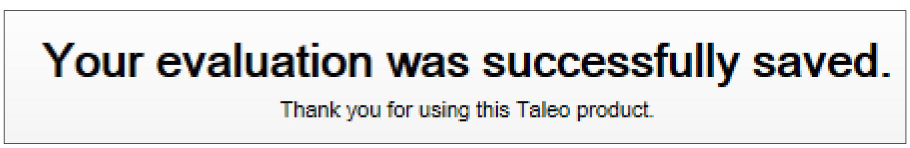
6. Enter your overall recommendation for the interviewee.



7. When you have completed your evaluation, click on **Save**.

Note: After you click on **Save**, you cannot access or edit your assessment.

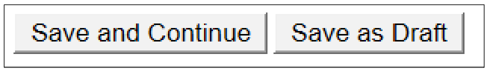
A confirmation window indicates that you have completed the assessment. You also receive an email notification.



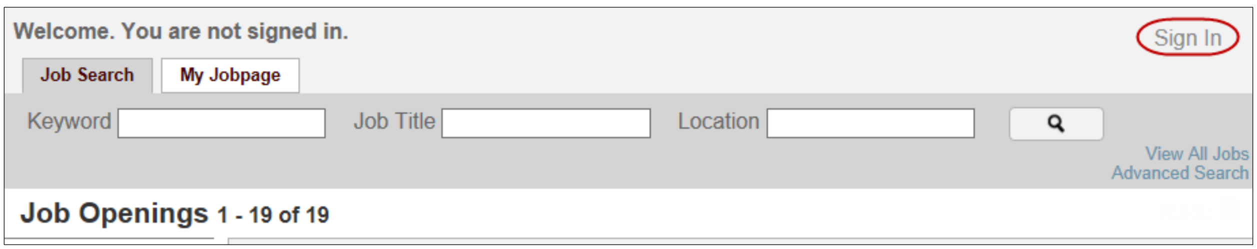
Applying for an Internal Job Posting

You can use HRIS to apply for a UnitedLex internal job posting (IJP).

While completing the application, you can click on **Save and Continue** or **Save as Draft** at any time to save your work.



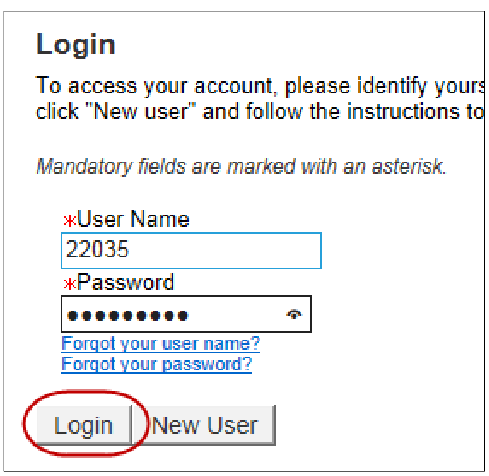
1. Go to the appropriate website:
   - UnitedLex - https://unitedlex.taleo.net/careersection/ulxinijp/jobsearch.ftl?
   - iRunway - https://unitedlex.taleo.net/careersection/ulxirinijp/jobsearch.ftl?
2. Click on **Sign In**.



3. Enter your HRIS (Taleo) user name and password and click on **Login**.

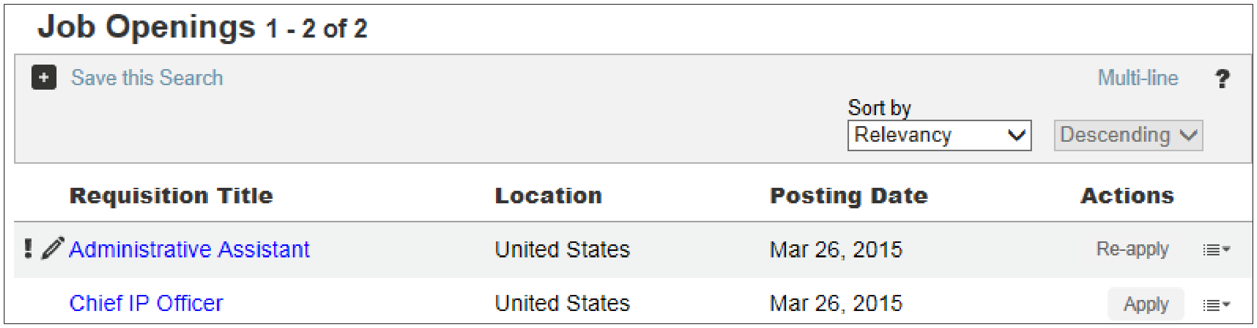
   If you have not created your IJP login credentials, refer to Creating a Password for Internal Job Postings or Referring a Candidate on page A-2.

   - India – Sunil Kumar (+91-9818637887)
   - US – Shweta Bhatia (913-209-4820) or James Wareham (913-333-3437)



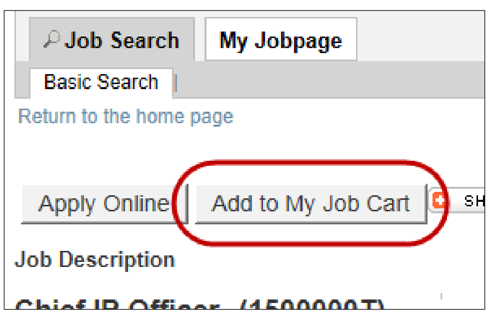
4. A list of the current UnitedLex job openings is displayed. Click on the job in which you are interested to view details of the position.

   Note: To ensure you are seeing all the latest postings, press **F5** or click on **View All Jobs** in the upper-right corner. It is also a good idea to occasionally clear your cache, as described in the Appendix, Deleting Your Browser History on page A-5.

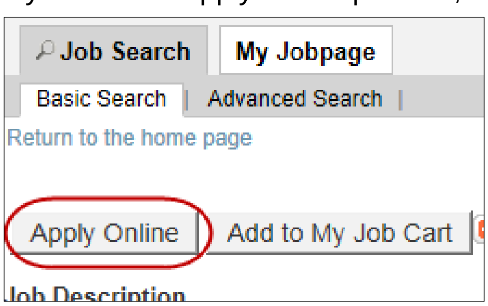


   A brief job description is displayed.

   Note: If you want to store a job so that you can compare several jobs, or if you want to apply for more than one job, click on **Add to My Job Cart**. To go back to your job cart, click on **My Job Cart** in the upper-right corner. Jobs stored in your job cart expire after the duration for which an internal job posting concludes.



5. If you want to apply for the position, click on **Apply Online**.

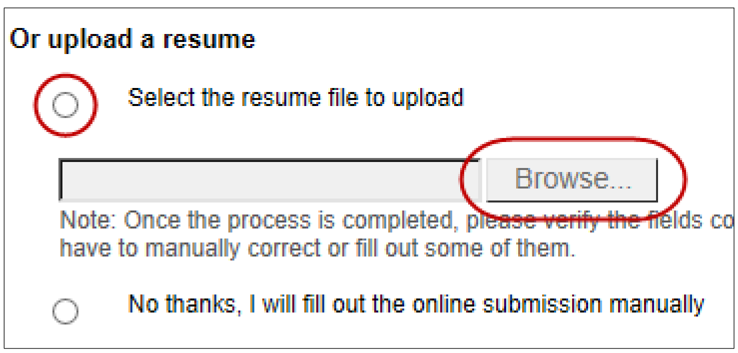


6. Read the Privacy Agreement and click on **I Accept**.

Uploading a Résumé

You can upload a résumé in a Word or PDF format. If you have already uploaded your résumé, you can skip to the following section (Manually Complete an Online Submission).

1. Select **Select the resume file to upload** and then click on **Browse…**.



Note: The Profile Upload option allows you to upload your résumé from LinkedIn. However, you cannot use this option if you are connecting to the job site through the UnitedLex or iRunway network.

2. Browse to your résumé and click on **Open**.
3. Click on **Save and Continue**.

   Note: If you later apply for a different position, you will not have to reload your résumé.

Manually Complete an Online Submission

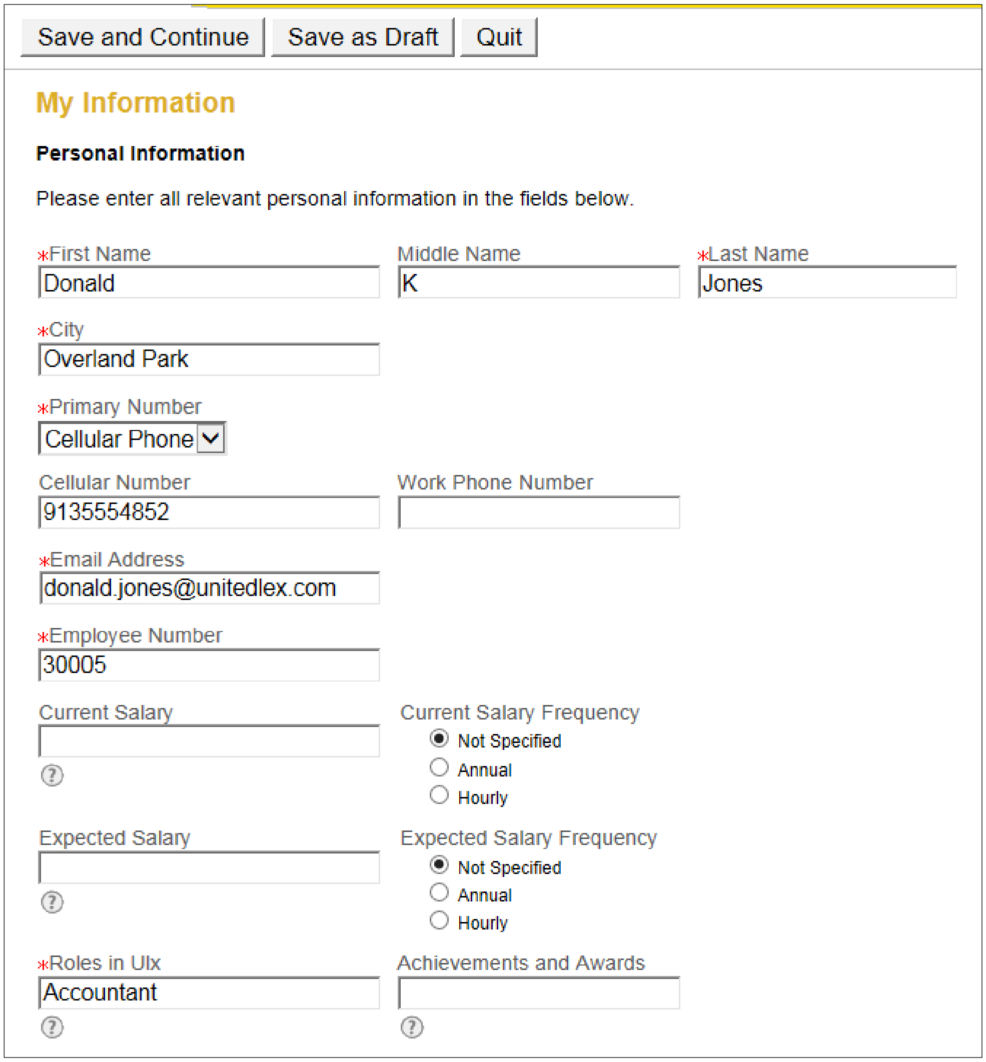
Note: If you have previously applied for a position or have uploaded a résumé, your personal information is automatically loaded and you need only check the fields and edit if necessary.

1. Select **No thanks, I will fill out the online submission manually**.
2. Click on **Save and Continue**.

3. Enter the required fields in the *Personal Information* section (indicated by *).

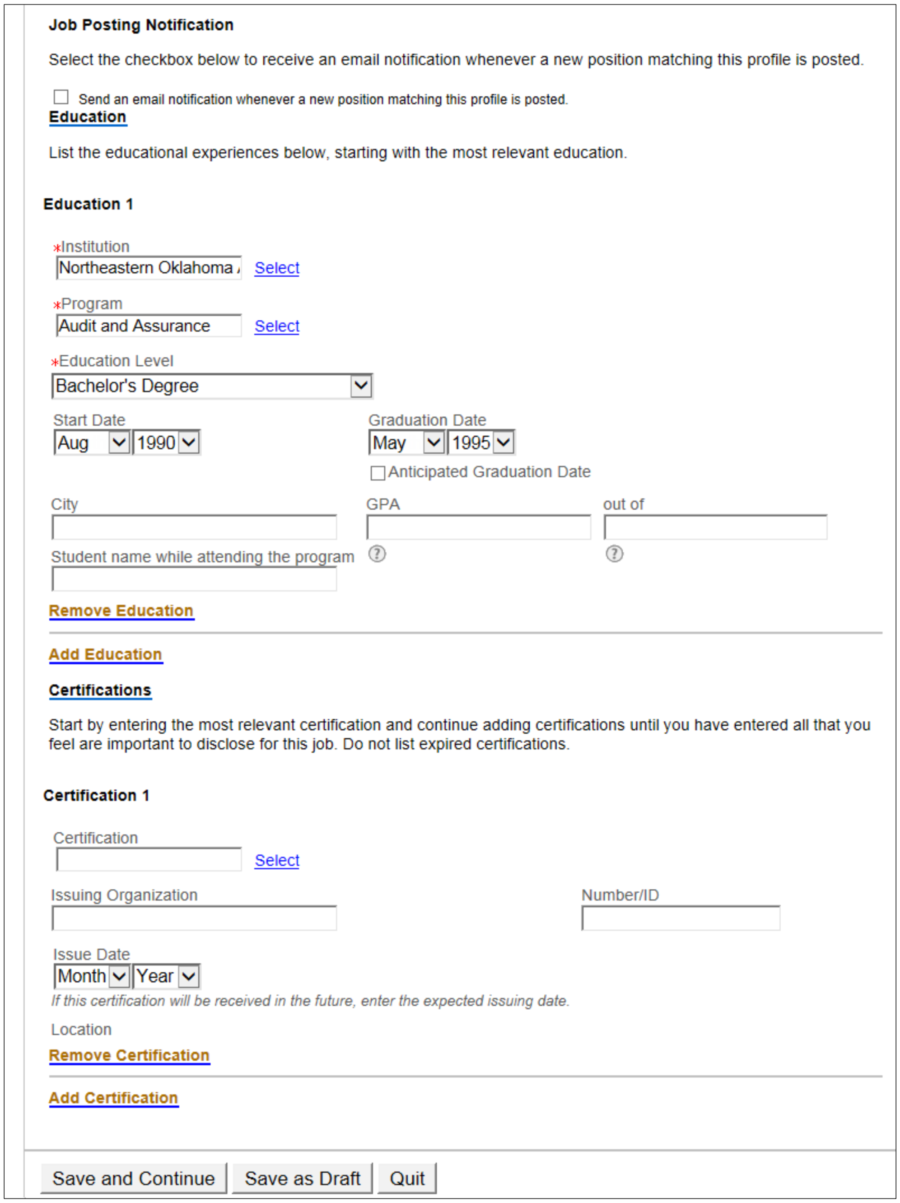
   Note: The **City** field refers to your residence, not your current work location.

   Note: The **Roles in ULX** field refers to current job title or function.



4. Optionally, enter your work and/or cell phone numbers. If you select either Work Phone or Cellular Phone, you must enter the number for that phone in the appropriate field. You may also enter your employee number (which is the same as your HRIS login name), and your current salary.
5. Click on **Save and Continue**.

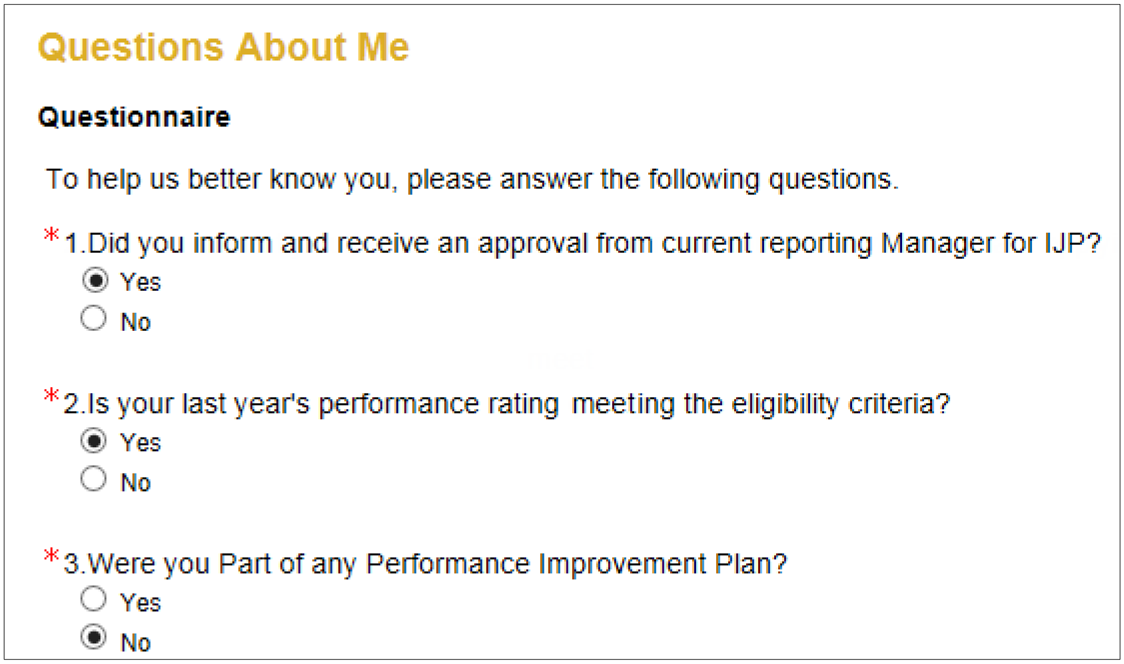
6. Enter at least the required fields in the *Job Posting Notification* and *Education* sections (indicated by *).



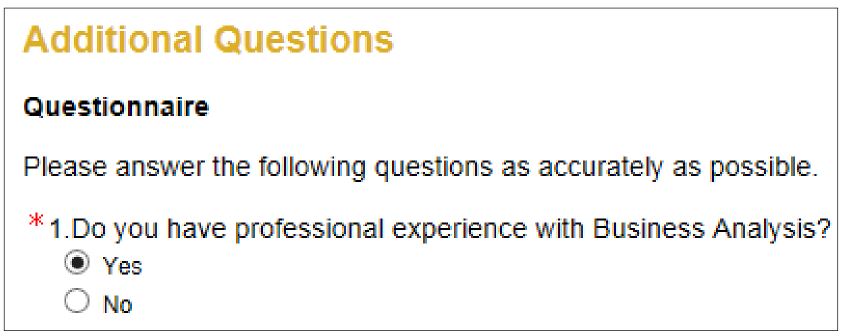
Note: To add additional schools you attended, click on **Add Education.**

7. Click on **Save and Continue**.

8. Answer the four questions in the *Questions About Me* section. All questions must be answered.



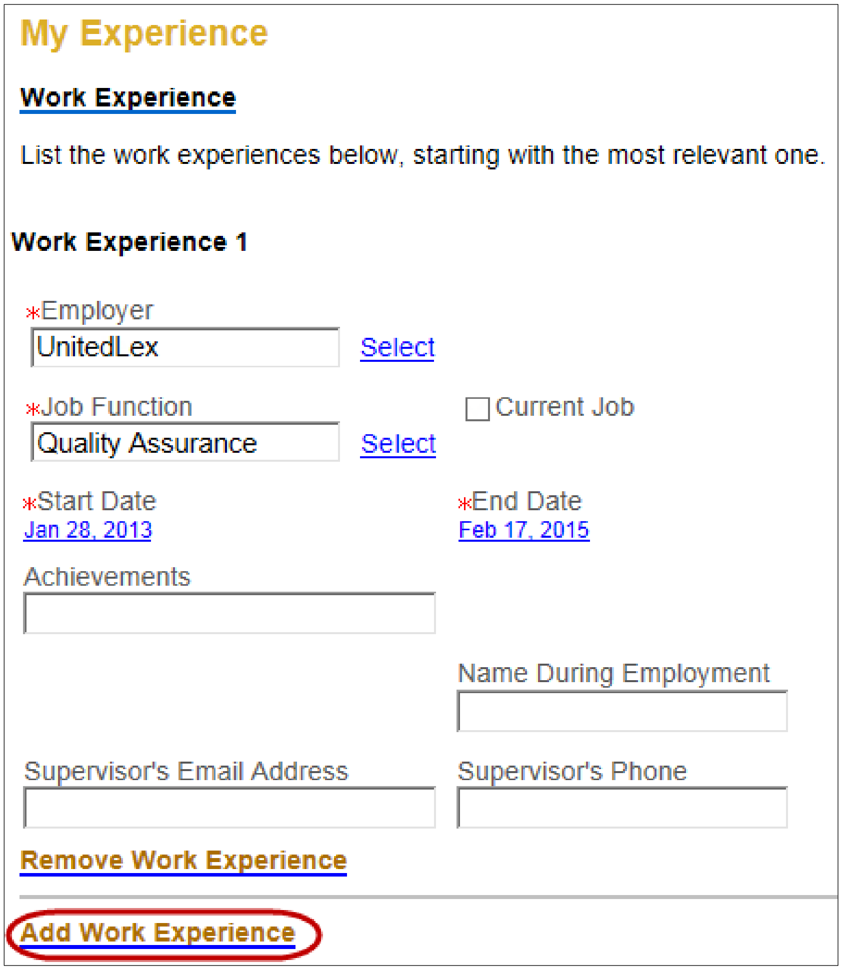
9. Click on **Save and Continue**.
10. If Additional Questions are displayed, you must answer all of them.



Note: Additional Questions includes prescreening questions and competencies. If these questions and competencies are not part of the job posting, this page does not appear.

11. Click on **Save and Continue**.

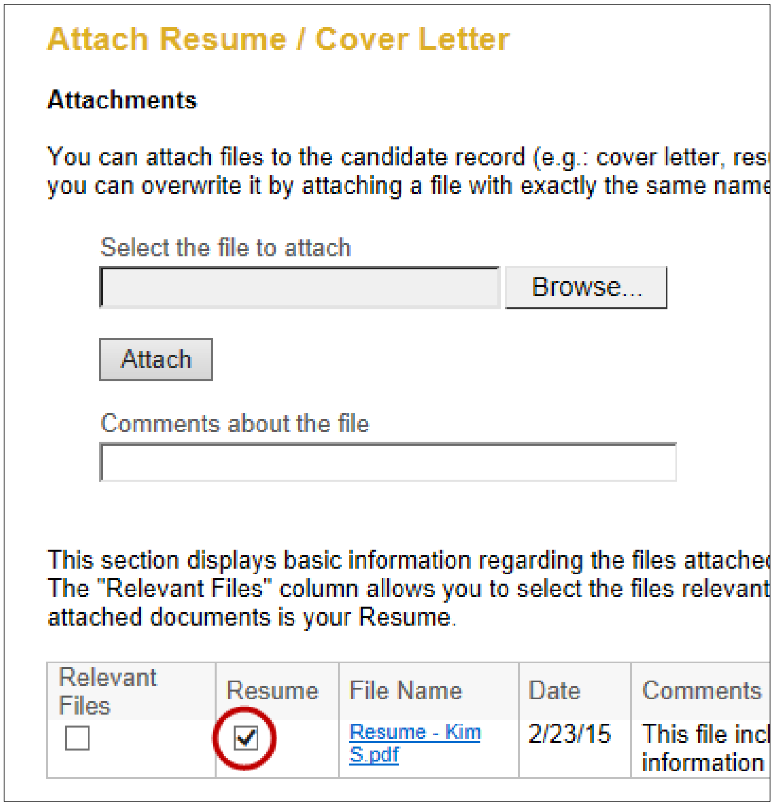
12. Enter all required fields concerning your work experience. If applicable, click on **Add Work Experience** to add additional relevant jobs.



Note: If you select **Current Job**, leave the **End Date** blank. If you do not select **Current Job**, enter the date that the job ended.

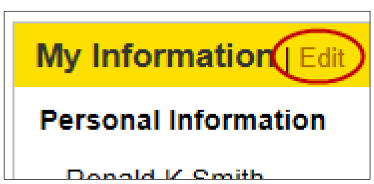
13. When finished, click on **Save and Continue**.

14. If you have files, such as a résumé, cover letter, transcripts, etc. click on **Browse…** and browse to and attach the file. If the file is a résumé, select the **Résumé** box.

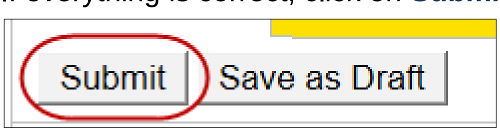


Note: If you previously attached your résumé, it is already shown in the area at the bottom of the screen.

15. The Summary section is displayed. If anything needs to be changed, click on **Edit** in the appropriate section.



16. If everything is correct, click on **Submit**.



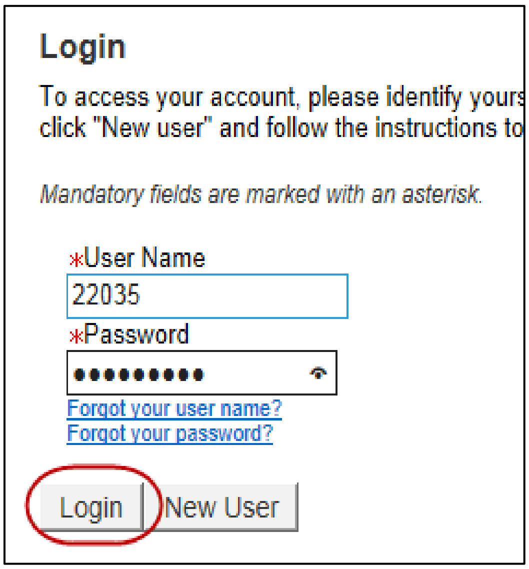
You receive an email verifying that your submission was received.

Referring a Candidate for a Job Posting

1. Go to the appropriate website:
   - UnitedLex - https://unitedlex.taleo.net/careersection/ulxinref/jobsearch.ftl?
   - iRunway - https://unitedlex.taleo.net/careersection/ulxirinref/jobsearch.ftl?
2. Enter your user name and password and click on **Login**.

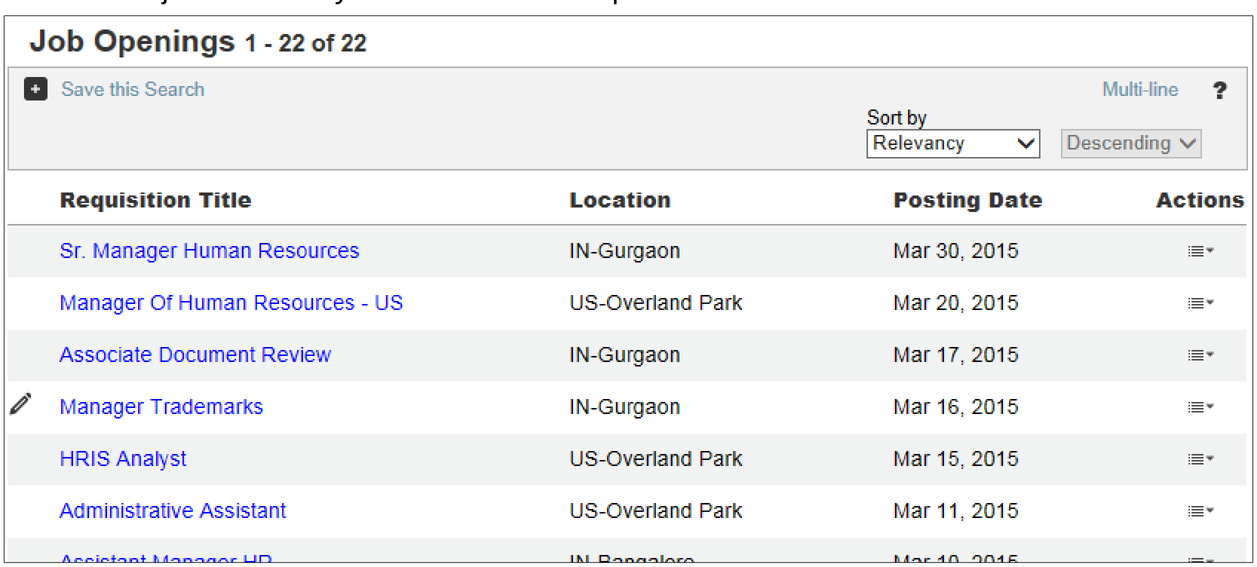
   If you have not received your login credentials (or have forgotten your user name), email HRIS Support at HRIS@unitedlex.com, or contact your system administrator.

   - India – Sunil Kumar (+91-9818637887)
   - US – Shweta Bhatia (913-209-4820) or James Wareham (913-333-3437)

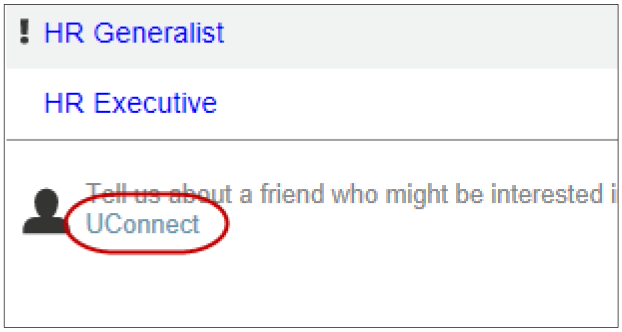


   A list of the current UnitedLex job openings is displayed.

3. Click on the job for which you want to make a specific referral.



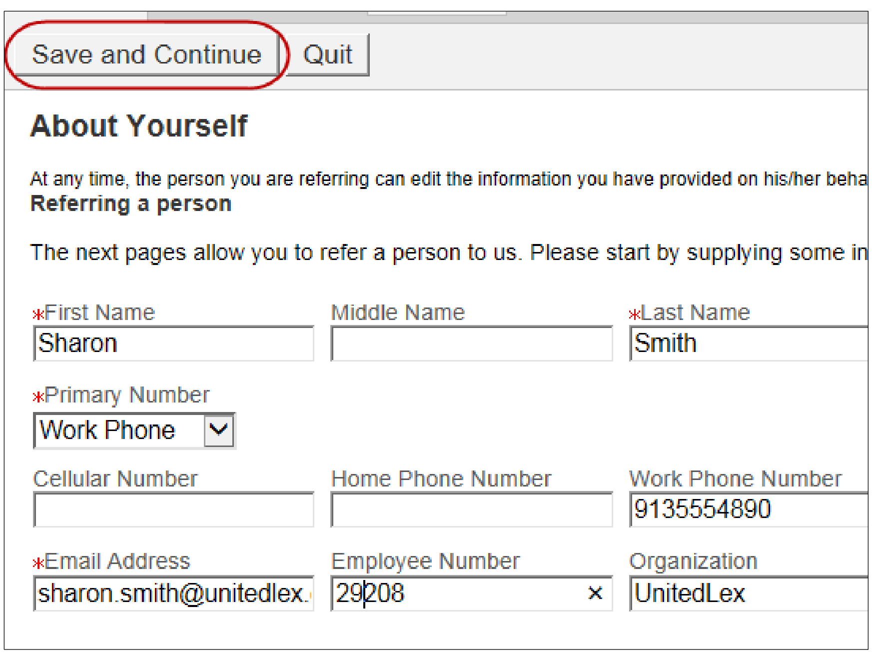
Note: If you want to refer a candidate for consideration, but don't see a current, specific posting, click on **UConnect** located at the bottom of the page.



4. The Job Details page is displayed. Click on **Refer a Friend**.

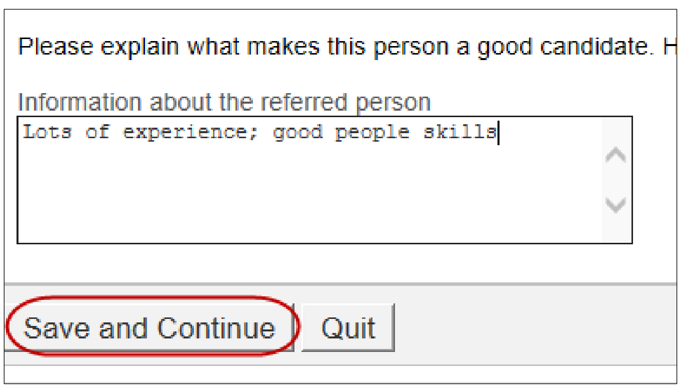
5. The About Yourself window is displayed. Required information is auto populated. Optionally, you can edit or add additional information to the fields.

   After entering your information, click on **Save and Continue**.



6. Enter the email address of the person being referred, and click on **Save and Continue**.

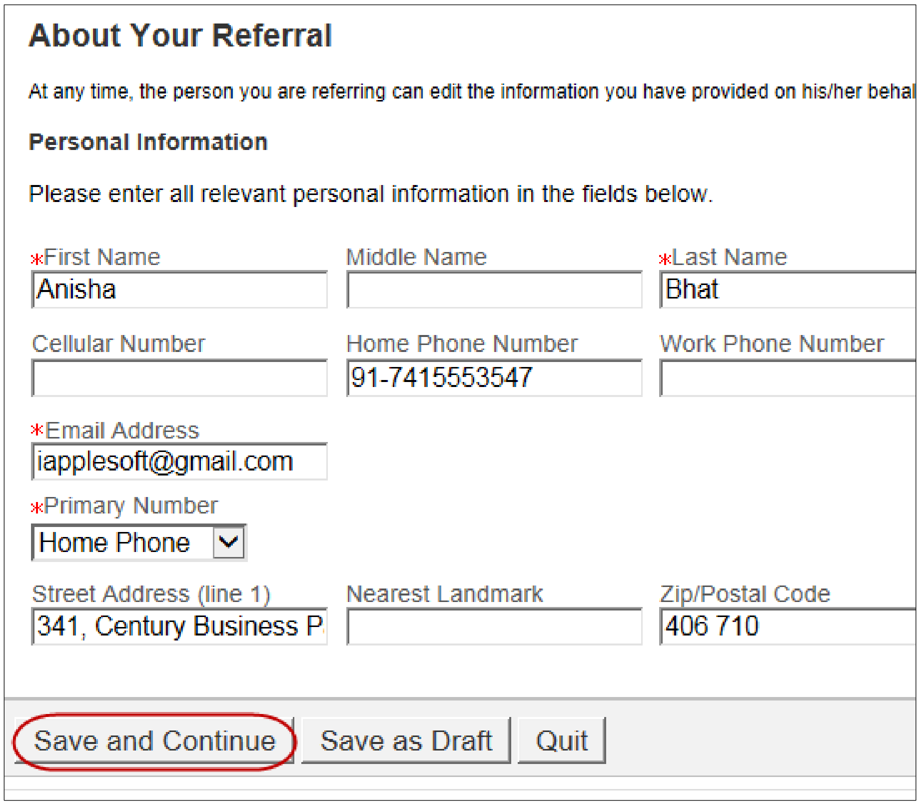
7. Write a brief description of what makes the referral a good candidate, and click on **Save and Continue**.



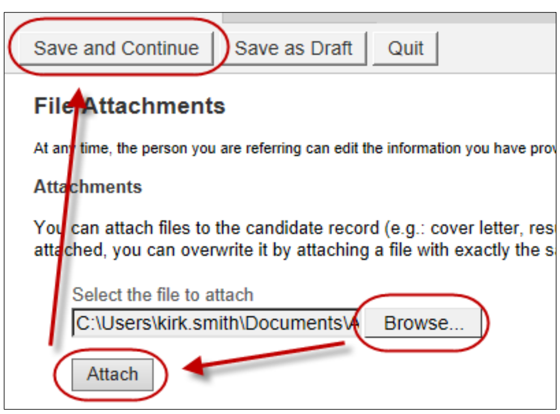
8. The About Your Referral window is displayed. The email address is auto populated. Add additional information to the required fields. After you select their Primary Number type, you must enter the number for that phone in the appropriate field.

   Optionally, you can enter alternate phone numbers and their address.

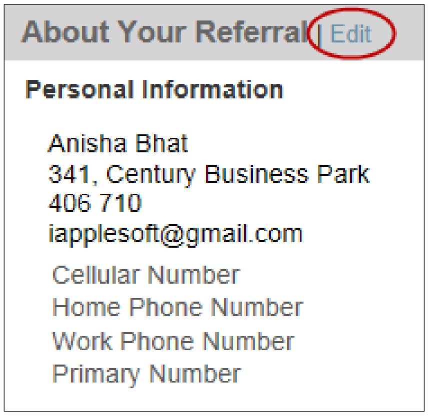
   After entering the referral's information, click on **Save and Continue**.



9. If you have files, such as a résumé to attach, click on **Browse…**, browse to and select the file. Click on **Attach** and then **Save and Continue**.



10. The summary page is displayed. If you want to edit an item, click on **Edit**. If everything is complete, click on **Submit**.



The process is complete. Both you and the person you have referred receive a notification email.

Appendix

HRIS Links and Logins

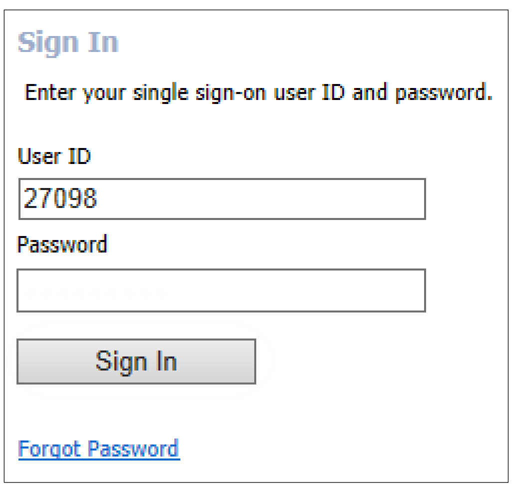
There are 2 main applications comprising HRIS – Fusion and Taleo. Your user name on both sites is the same, but your passwords may be different. When you change a password on one application, it does not change the password on the other application.

Fusion Links and Logins

Fusion contains the "core" HR functions of HRIS. The following are some of the tasks performed in Fusion:

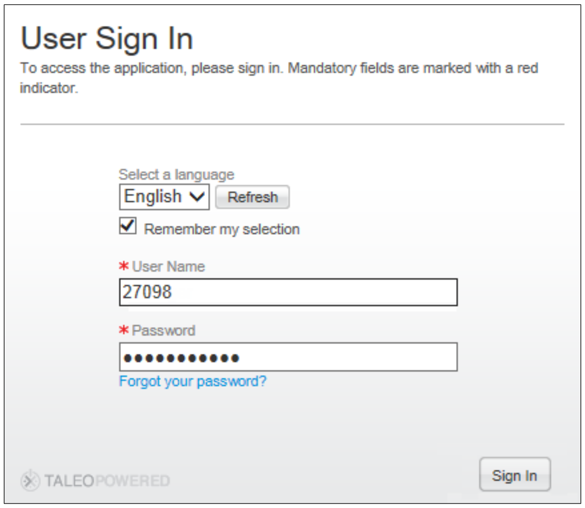
- Viewing/editing your personal information, including emergency contacts, email addresses, and phone numbers
- Viewing compensation
- Viewing and requesting absences (only for salaried employees in UnitedLex Corp and all UK employees)
- Viewing the UnitedLex directory
- Changing marital status
- Accessing UnitedLex social network

The Fusion login site is https://hcek.hcm.us1.oraclecloud.com/hcmCore/faces/HcmFusionHome.



Taleo Links and Logins

Taleo contains functions such as recruiting and internal job applications. The Taleo login site is https://unitedlex.taleo.net.



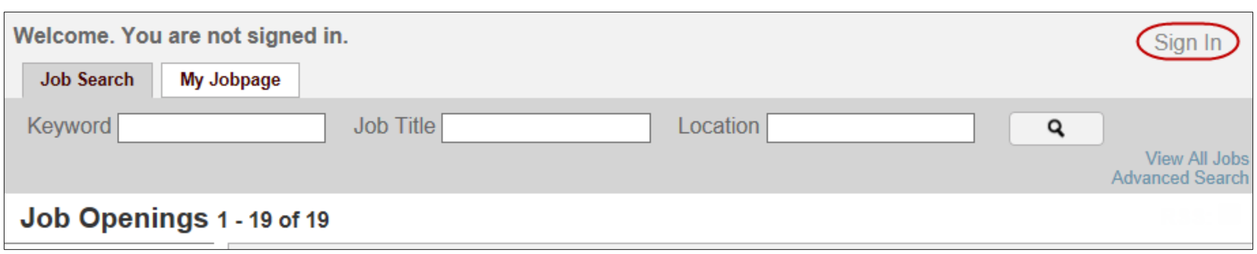
Job Postings Links and Logins

There are two ways to apply for UnitedLex or iRunway job postings, using either the internal website or the external website. For more information about applying for internal postings, see Applying for an Internal Job Posting on page 94.

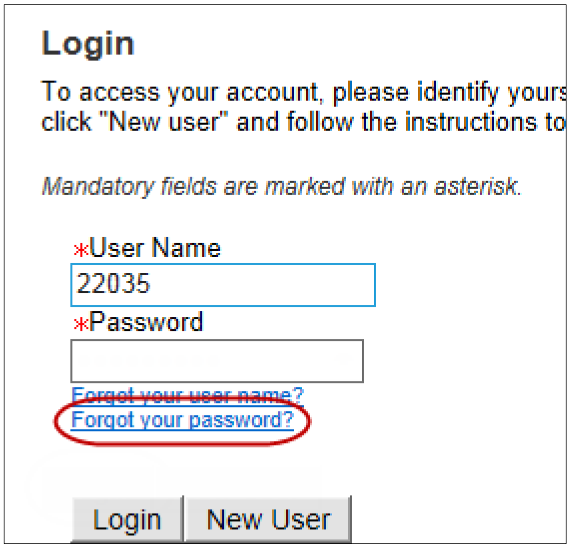
Creating a Password for Internal Job Postings or Referring a Candidate

In order to apply for an internal job posting, or to refer a candidate for a position, you must create an additional Taleo password that is used to access either of these functions.

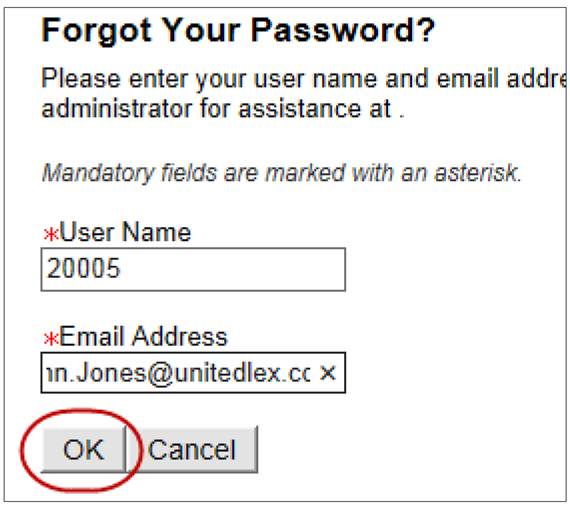
1. Go to the appropriate website.
   - UnitedLex - https://unitedlex.taleo.net/careersection/ulxinijp/jobsearch.ftl?
   - iRunway - https://unitedlex.taleo.net/careersection/ulxirinijp/jobsearch.ftl?
2. Click on **Sign In**.



3. Enter your User Name and click on **Forgot your password?**.

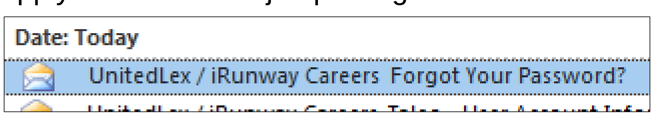


4. Enter your email address and click on **OK**.



A message is displayed, indicating that an email has been sent to you.

5. Open the email and complete the steps to create a password that can be used to both apply for an internal job posting and to refer a candidate.



Internal Website

If you are connected to the UnitedLex network, either directly or by VPN, you can go to

- UnitedLex - https://unitedlex.taleo.net/careersection/ulxinijp/jobsearch.ftl?
- iRunway - https://unitedlex.taleo.net/careersection/ulxirinijp/jobsearch.ftl?

Use your IJP user name and password to login.

External Website

If you are not connected to the network, you can apply the same as an external candidate. Use one of the following links:

- iRunway - https://unitedlex.taleo.net/careersection/ulxirin/default.ftl.
- UnitedLex - https://unitedlex.taleo.net/careersection/ulxexin/default.ftl.

You do not need to login initially, but can create your own user account, including a user name and password.

Troubleshooting

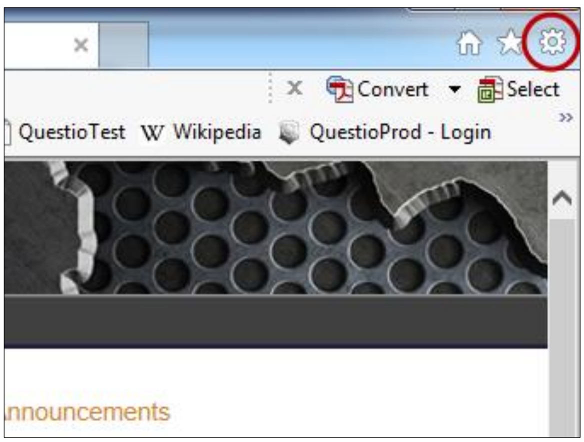
Deleting Your Browser History

Internet browsers use caches of websites you have previously visited to make subsequent visits to the same website faster. However, as these caches continue to grow over time, your PC can become bogged down and sometimes the latest data for a site may not be displayed, so you may want to occasionally empty those caches.

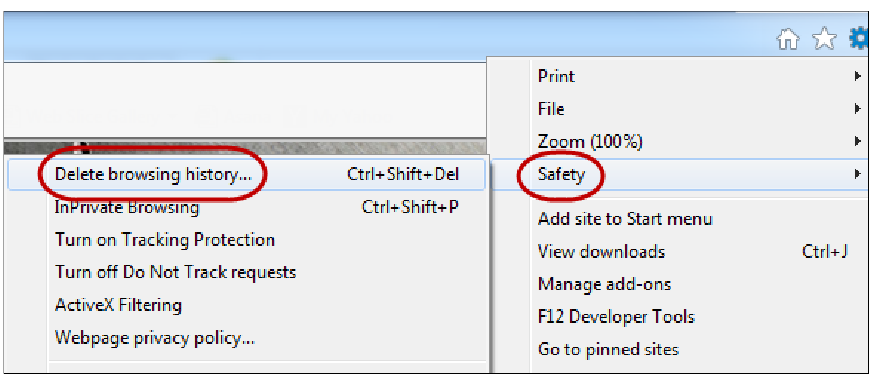
Internet Explorer 11

Note: Other versions of IE use a similar process.

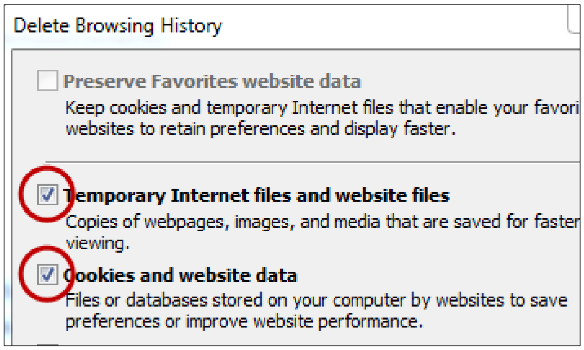
1. Open Internet Explorer and click on the Tools icon  in the upper-right corner of your browser window.



2. Select **Safety** > **Delete browsing history….**



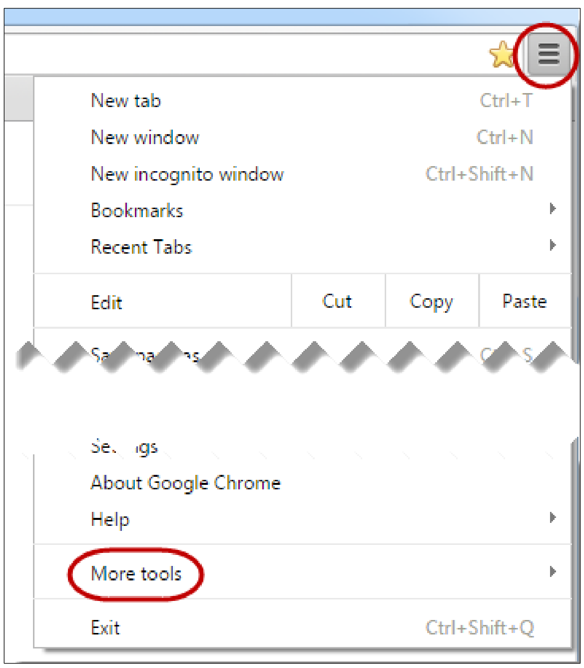
3. Select **Temporary Internet files and website files**. and **Cookies and website data**.



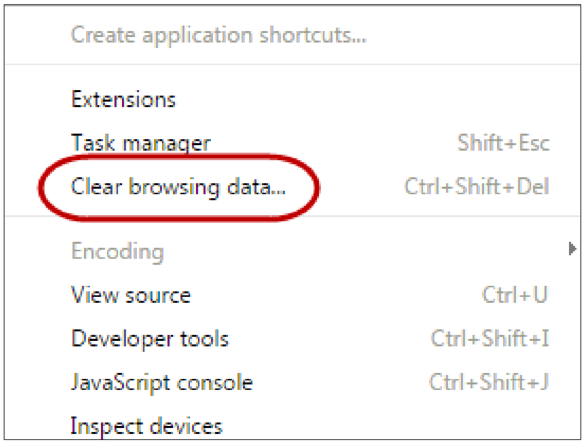
4. Click on **Delete**.

Google Chrome

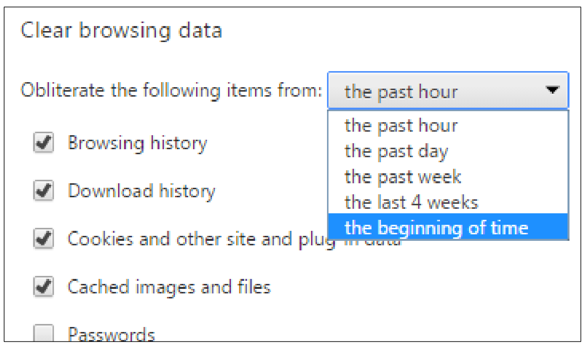
1. Click on the Chrome menu icon  in the upper-right corner of your browser and select **More Tools**.



2. Click on **Clear browsing data….**



3. Select the beginning of time and then select the items you want to delete



Click on **Clear browsing data**.

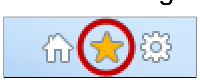
Fusion – Blank Screen

If you get a blank screen after clicking on your Fusion bookmark, you may need to replace the Fusion login URL with the following link:

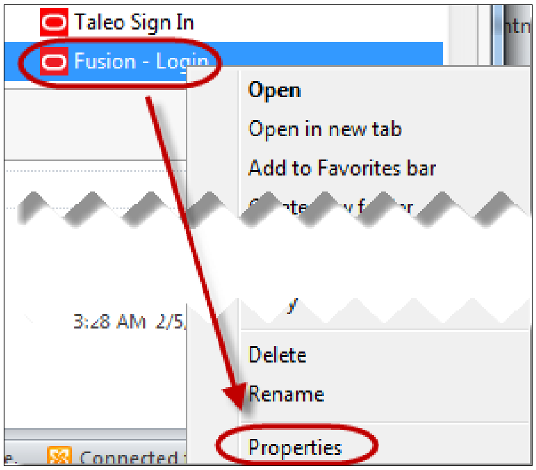
https://hcek.hcm.us1.oraclecloud.com/hcmCore/faces/HcmFusionHome

After performing the following procedure, you should not have to repeat it.

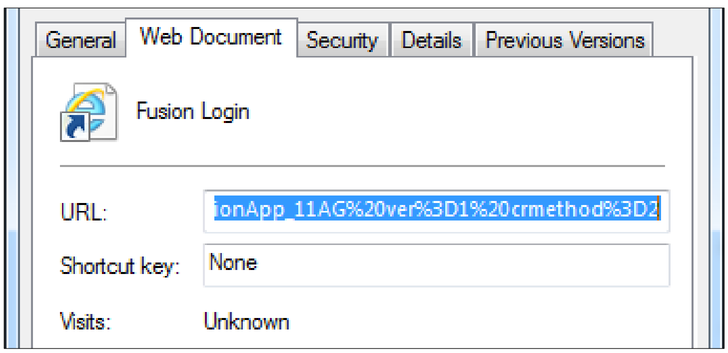
1. After creating a bookmark for the Fusion login screen, click on your Favorites icon



2. Right-click on the Fusion Login bookmark and select **Properties**.

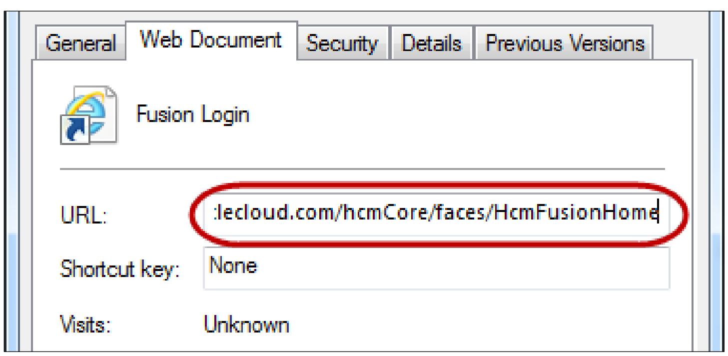


3. Highlight the bookmark's URL and delete it.



4. Copy and paste the following URL or enter it into the URL field.

   https://hcek.hcm.us1.oraclecloud.com/hcmCore/faces/HcmFusionHome



5. Click on **OK**.