SuccessFactors: Recruiting/Onboarding Quick Reference Guide

CANDIDATE REVIEW

Last Revised: 06/18/2019

Overview

Welcome to SuccessFactors! This Quick Reference Guide (QRG) was created to provide detailed guidance on how members of the **Hiring Team** will work with candidates who were forwarded to a department for review. This guide will review the following:

- How to review information submitted by the candidate, including application, resumes and cover letters.

- How to track candidates through the Talent Pipeline process.

NOTE: Please review and watch the Onboarding Overview and General Navigation Quick Reference Guide and training video before reviewing this guide.

For additional details on working with SuccessFactors, online training videos are available and be can found on the Manager's Section of the HR Website under Recruitment and Hiring via the following link:
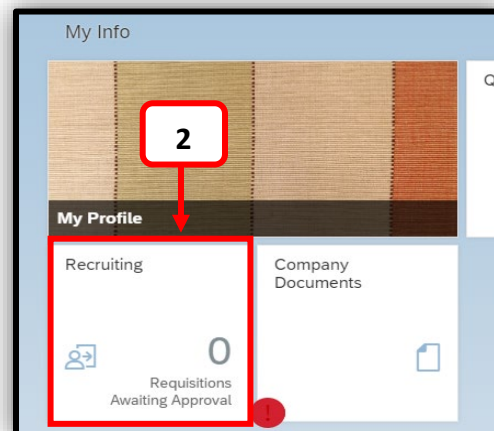
https://hr.duke.edu/managers/recruitment/successfactors.

LOG IN

1. The tool is accessible via the Duke@Work portal**.** Click the **Candidate Selection** tab.
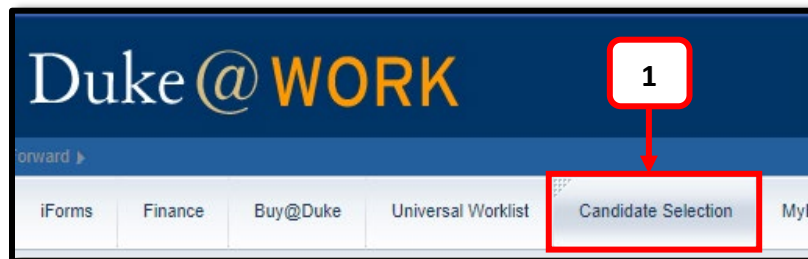
2. On the **Home** screen, locate and click on **Recruiting**.

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JOB REQUISITIONS

3. The default page, **Job Requisitions** page will display. You may be the Hiring Manager, the HR Representative, the Onboarding Coordinator or one of the supporting teams.

   a. **Filter Job Requisitions** provides a dropdown menu that allows you to change the type of requisitions displayed.

   b. Click on **Open Job Requisitions**.

Filter Option	Display
Open Job Requisitions	*All open requisitions*
All Job Requestions	*All requisitions open to you regardless of their status.*

   c. Select the **Job Title** to view the Job Requisition detail if you would like to review this information.

   d. Select the numbered hyperlink under **Candidates** to access and view candidates who have applied to the requisition.
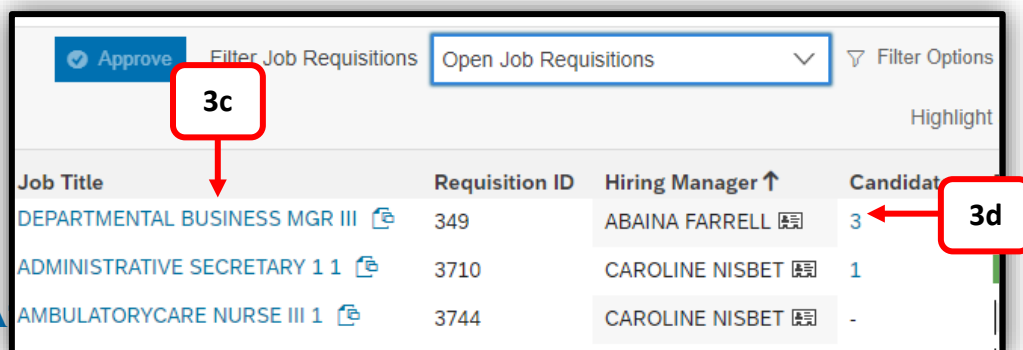
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On the, **Candidates Screen**, you will see a list of all candidates. A variety of information displays including a yellow card [image] indicate an External Candidate and a blue card [image] to indicate an Internal Candidate. Additionally, you will see the candidate's status, candidate source, phone number and the date of the last update, as well as any results entered from the interview process.

4. Click on the candidate's name to review information about the candidate.

Information on the screen is organized into sections. A "down" arrow ( ) indicates a section is open, while a "right" arrow ( ) indicates a section is closed.

The **Application Section** includes information provided by the candidate during the application process and information provided on the resume. Additionally, you will find Candidate Status dropdowns that are used to move the candidate through the Talent Pipeline.

a. Select **Resume** to review the candidate's resume.

b. Select **Cover Letter** to open a cover letter, if one is provided.

c. **Comments** are a permanent part of the record; they should be objective and job related. **NOTE:** If comments are added, do not select "Show on Profile."

d. **Candidate Status** can be used to track the status of candidates throughout the interviewing process. The top dropdown menu moves candidates to different steps in the Talent Pipeline. The second dropdown assigns a status within that Talent Pipeline step.

CANDIDATE STATUS
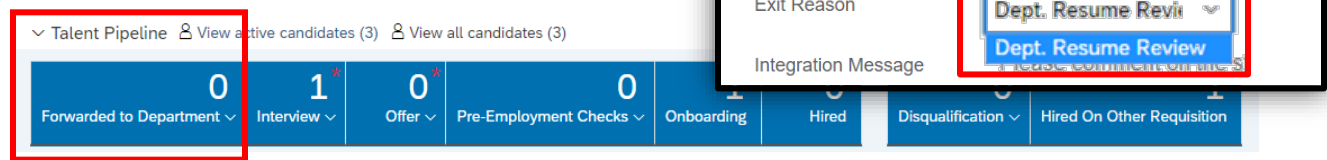
In the initial **Forwarded to Department** step of the Talent Pipeline you may select a status to define a specific action within your screening process.

Once candidate information is reviewed and a decision on next steps is made, move the candidate to the next step in the Talent Pipeline—either **Interview** or **Disqualification**.

For candidates that will be interviewed, move them to the the interview Talent Pipeline step and select the appropriate status of the interview. Comments can be added, if necessary. Comments are a permanent part of the candidate record. All comments or notes should be objective and job related.

When to Use Visa Services Candidate Status?		
Candidate Status	**Dropdown Menu**	**Use When:**
Interview	**Visa Services**	A candidate has either indicated on the job application or through conversations that Visa Services should be consulted regarding their eligibility to work in the US. This can be in the form of questions regarding sponsorship or verification that the current Visa is appropriate for the job title. **NOTE**: *Visa Services should be consulted before any offers of employment are made to the candidate.*

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5. Select **Save** to save status and move the candidate to the appropriate step in the Talent Pipeline.

NOTE: Once the step in the **Candidate Status** is saved, the candidate moves to that step in the Talent Pipeline and their information is no longer available in the most recent step. Use the Talent Pipeline to continue working with the candidate.

As the candidate moves through the department interview process, you will revisit the candidate to provide the most up-to-date status. Notice the available statuses in the **Interview** step of the **Candidate Status.**


6. Once you have completed the interview process, you **MUST** move the candidate to the **Hiring Manager Feedback Documented** step and provide any necessary comments. Comments should include what qualifies or disqualifies the candidates from further consideration. Comments are a permanent part of the record and should be objective and job-related.

***As a reminder all candidates should be evaluated based on the same criteria and asked the same questions during the interview process.
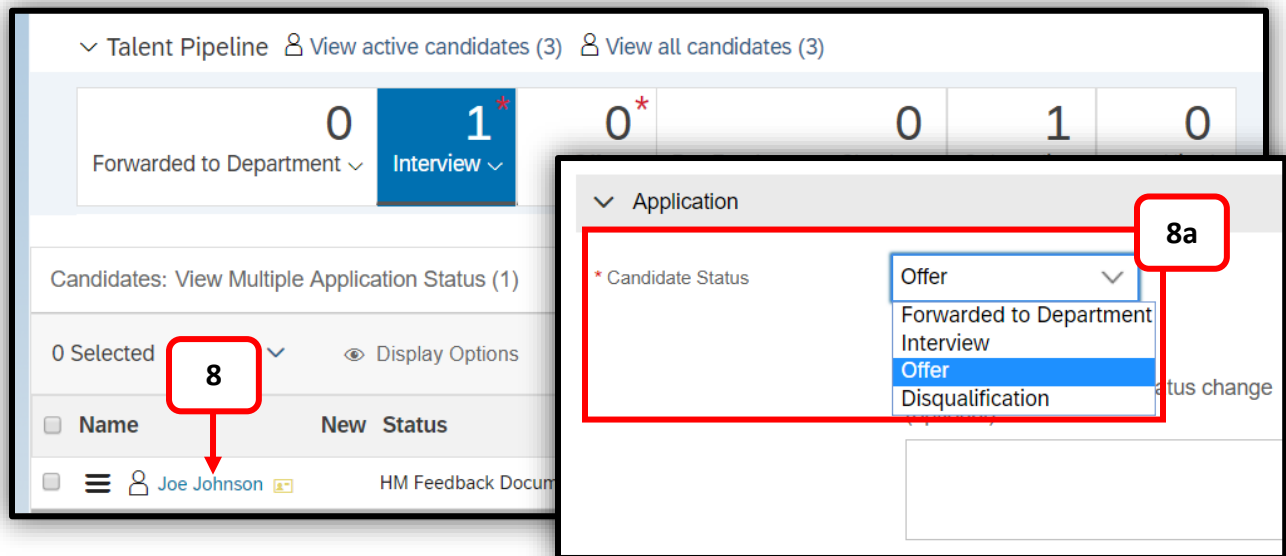
7. Select **Save** to confirm the Hiring Manager Feedback Status.
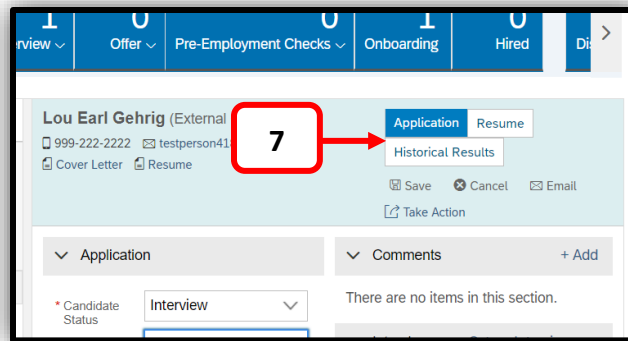
8. When you are ready to make an offer to a candidate or to disqualify a candidate, go to the interview pipeline steps and select the candidate.

    a. Change the pipeline step
        To indicate that either the candidate is being offered the position or the candidate is being disqualified.

Additional online videos demonstrate how to work with candidates when they are offered a position and how to appropriately handle candidates who are disqualified after the interview process.

If you have questions about Candidate Selection, please contact your entity HR Department or refer to the Contact Resource page, found in the Managers section of the HR Website under Recruitment and Hiring.

https://hr.duke.edu/managers/recruitment/successfactors.

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