SuccessFactors: Recruiting/Onboarding Quick Reference Guide

CANDIDATE REVIEW

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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 <u>Duke@Work</u> portal. Click the **Candidate Selection** tab.



2. On the **Home** screen, locate and click on **Recruiting**.



CANDIDATE REVIEW

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.

Duke Job Requis	2	ting ∨ Interview Central Marketing				
Job Req	uisitions	3a				
Approve	Filter Job Requisitions	Open Job Requisitions \checkmark				
Job Title		All job requisitions Job requisitions pending approval	→ 3b ↑			
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ADMINISTRATIVE	SECRETARY 1 1 🕞	Open and Pending Job Requisitions	CAROLINE NISBET 原則			
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b. Click on Open Job Requisitions.

Filter Option	Display		
Open Job Requisitions	All open requisitions		
All Job Requestions	<i>All requisitions open to you regardless of their status.</i>		

- 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.

	Approve Eilter Job Requisitions Open Job Requisitions				
	30		Highlight		
	Job Title	Requisition ID	Hiring Manager 🕇	Candidat	
	DEPARTMENTAL BUSINESS MGR III 🖻	349	ABAINA FARRELL 愿	3 3 d	
	ADMINISTRATIVE SECRETARY 1 1 🖆	3710	CAROLINE NISBET 愿	1	
CANDIDA	AMBULATORYCARE NURSE III 1 🔁	3744	CAROLINE NISBET 顧		

SUCCESSFACTORS: CANDIDATE REVIEW

On the, **Candidates Screen**, you will see a list of all candidates. A variety of information displays including a yellow card indicate an External Candidate and a blue card 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.

Candidates: View all candidates (3)					
0 Selectec 4	Display Options				
🗆 Name	New Status	Forwarded By	Candidate Type		
🔲 🗮 😤 Lou Gehrig 📧	Onboarding		External		
🔲 🗮 🔗 Sam Smith 📧	Hired On Other Requ	lisition	External		

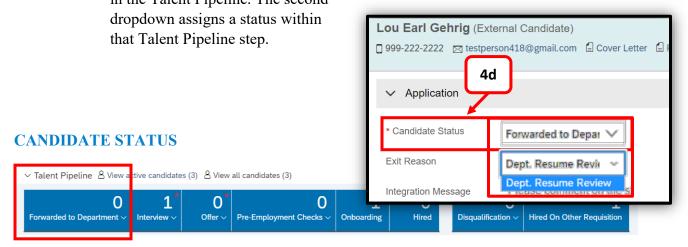
Information on the screen is organized into sections. A "down" arrow () in vates a section is open, while a "right" arrow () indice value a section is closed.

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."

Lou Earl Gehrig (Ex		Application	on Resume Histo	orical Results
☐ 999-222-2222 ⊠ testpe	erson418@gmail.com 🔓 Cover 4b	Resume 🖫 Save 🙁	Ca 4a Email	C Take Action
✓ Application		✓ Comments		+ Add
* Candidate Status	Onboarding V	Author: ABAINA FARREL	_	4c
Exit Reason		New comment:		
Integration Message			***Do Not	
	NEW HIRE DATA FROM SAP	Show on profile	this box.	***

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



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 : <i>Visa Services should be consulted before any offers of employment are made to the candidate.</i>				

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

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Lou Earl Gehrig (External Candidate) 999-222-2222 testperson418@gmail.com Cover Letter Resume 5 5 Cover Letter Candidate) 5 Cover Cancel Cancel Candidate) Cover Letter Candidate)						Email
\sim /	Application		~	Comments		+ Add
* Car Stat		nterview 🗸	The	re are no items	in this section	n.

NOTE: Once the step in

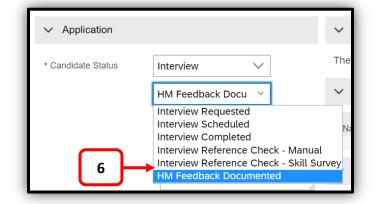
the **Candidate Status** is saved, the candidate moves to that step in the Talent Pipeline and their information is no longer available in the most recent step. Use the Talent Pipeline to continue working with the candidate.

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.**

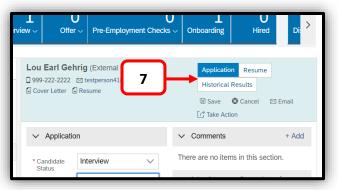
6. Once you have completed the interview process, you <u>MUST</u> move the candidate to the Hiring Manager
Feedback Documented step and provide any necessary comments. Comments should include what qualifies or disqualifies the candidates from further consideration. Comments are a permanent part of the 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.

* Candidate Status	Interview V
	Interview Requester 🗸 💙
Salutation	Interview Requested Interview Scheduled Interview Completed
Known As	Interview Reference Check - Manual
Suffix	Interview Reference Check - Skill Survey HM Feedback Documented



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.

\sim Talent Pipeline $\stackrel{\circ}{\sim}$ View active candidates (3)	$\stackrel{\rm O}{=}$ View all candidates (3)			
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Candidates: View Multiple Application Status (1)	* Candidate Status	Offer	→ ed to Departm	$\mathbf{\mathbf{u}}$
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Name New Status		Disquati	y Y	
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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.