Overview

Welcome to SuccessFactors! This Quick Reference Guide (QRG) will provide information on completing the Onboarding Manager and HR Activities step for candidates from Recruitment or iForms. The completion of this step controls when the candidate will receive the welcome letter with a link to complete Employee Activities. This applies to external hires who are listed under the Onboarding section. Current employees moving to a new position are listed under Internal Hire and Contractors section.

PLEASE NOTE: This task must be completed or nothing goes forward.

For additional details on working with SuccessFactors, online training videos are available and can be 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.

ACCESSING ONBOARDING

1. The tool is accessible via the Duke@Work portal. Click the Candidate Selection tab.

2. On the homepage, click Home and navigate to Onboarding.
ONBOARDING TEAM

The Onboarding Team is comprised of the Hiring Manager, HR Representative and the Onboarding Coordinator that are associated with the requisition coming from recruiting or the Hire iForm coming from iForms.

ONBOARDING DASHBOARD (NEW VIEW)

From the Onboarding Dashboard you will see tasks where you are a member of the Onboarding Team. By default, the task is assigned to the Onboarding Coordinator. The other members of the Onboarding Team have visibility to the task.

In the screen shot below, the Derek Jeter task is assigned to Chris Thomas. Other Onboarding Team members can see the task by selecting the Total Tasks icon.
ONBOARDING AND INTERNAL HIRES AND TRANSFERS

Below is a screen shot of the processes listed in the Onboarding Dashboard. The menu for Internal Hires & Contractors is collapsed by default.

The highlighted number indicates there are 7 tasks under that section. Don’t miss them.

Selecting Internal Hire and Contractors will expand the menu and collapse Onboarding as noted below.
WORKING ON A TASK

ONBOARDING AND INTERNAL HIRES AND CANDIDATES

This task must be completed or nothing goes forward.

Open the task by selecting the name.

Verify the start date.

Reenter the candidate email or change to a new one if appropriate, and select Finish. This triggers the email to the candidate. The Start Date and Email address are defaulted from Recruiting or the Hire iForm.

This allows you to control when the candidate receives an email to complete the Pre-Hire paperwork. Select Cancel to close the form. It will prompt to close without saving or save and close. To save and close you will need to reenter the hires email address. It does not send the Welcome Email until you come back and select Finish.