

# SuccessFactors: Recruiting/Onboarding Quick Reference Guide

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**ONBOARDING BASIC NAVIGATION**

*Last Revised: 06/25/2019*

**Duke** | HUMAN RESOURCES

705 Broad St. Box 90496  
DURHAM, NC 27705 | (919) 684-5600

## SUCCESSFACTORS: ONBOARDING BASIC NAVIGATION

### Overview

Welcome to SuccessFactors! This Quick Reference Guide (QRG) will provide a general overview and basic navigation of the Onboarding module in SuccessFactors. In this guide we will cover:

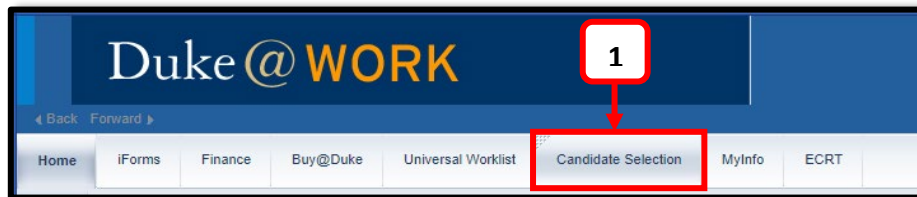
- Accessing Onboarding
- Review Basic Definitions
- One Time Set-Up
- Basic Navigation

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:

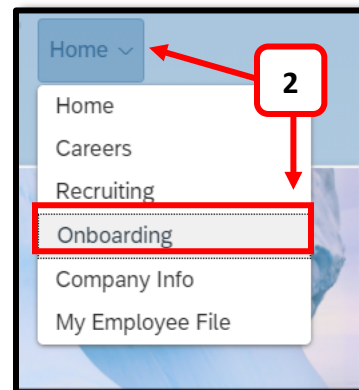
<https://hr.duke.edu/managers/recruitment/successfactors.>

### 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**.



**DEFINITIONS**

Term	Definition/Responsibility
<b>Onboarding Team</b>	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.
<b>Onboarding Dashboard</b>	The Onboarding Dashboard is the landing page in onboarding and displays a list of tasks were you are a member of the Onboarding Team. There is one task per candidate

**New version of Onboarding Dashboard**

The screenshot shows the Onboarding Dashboard interface. At the top, there are navigation icons for 'Total Tasks' (1), 'My Tasks' (0), 'Waiting on O...' (1), 'Overdue' (0), and 'Completed' (0). A 'Switch to Old Work Queue' link is on the right. Below the navigation is a 'Processes' section with a list of tasks: Onboarding (1), Manager and HR Activities (1), Employee Activities (0), Orientation Activities (0), Signature Step (0), Notifications (0), I-9 3 Business-Days (0), E-Verify (0), I-9 Reverification (0), E-Verify Correct Data (0), and Internal Hires and Contractors (0). To the right, a 'Tasks (1)' table is displayed with columns for 'Assigned To', 'Start Date', and 'Location'. The table contains one entry for 'Derek Jeter' assigned to 'Chris THOMAS' on 'Jul 6, 2019' at '1919 Yearby Ave'.

<b>Task</b>	When a candidate is moved from Recruiting or iForms to Onboarding a task is created that is visible to the Onboarding Team members in the Onboarding Dashboard. The task is assigned to the Onboarding Coordinator.
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<input type="checkbox"/>	<b>Derek Jeter</b> Manager and HR Activities	⋮	Chris THOMAS	Jul 6, 2019	1919 Yearby Ave
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Term	Definition/Responsibility
Steps	The Onboarding Process is divided into steps. The steps are completed by members of the Onboarding Team or the Candidate. The steps for New Hires are listed under Onboarding and Transfers are listed under Internal Hires and Contractors.

Onboarding Steps	Internal Hires & Contractor Steps
<ul style="list-style-type: none"> <li> <input type="checkbox"/> Onboarding 1                     </li> <li> <input checked="" type="checkbox"/> Manager and HR Activities 1                     </li> <li> <input checked="" type="checkbox"/> Employee Activities 0                     </li> <li> <input checked="" type="checkbox"/> Orientation Activities 0                     </li> <li> <input checked="" type="checkbox"/> Signature Step 0                     </li> <li> <input type="checkbox"/> Notifications 0                     </li> </ul>	<ul style="list-style-type: none"> <li> <input checked="" type="checkbox"/> Internal Hires and Contractors 0                     </li> <li> <input checked="" type="checkbox"/> Manager and HR Activities 0                     </li> <li> <input checked="" type="checkbox"/> Employee Activities 0                     </li> <li> <input type="checkbox"/> Notifications 0                     </li> </ul>

**Onboarding Steps including Faculty and Students from iForms:**

- Manager and HR Activities
- Employee Activities
- Orientation Activities (Part 2 of the I9)
- Signature

A member of the **Onboarding Team** will complete the Manager and HR Activities step which sends an email to the candidate to complete the Employee Activities section. When the candidate completes the Employee Activities step, the information will be sent to SAP and the Hire iForm can be submitted. The Hire iForm will wait until the Orientation Activities and Signature steps are completed before updating SAP.

**Internal Hires and Contractor Steps**

- Manager and HR Activities
- Employee Activities

When the **Onboarding Team** member completes the Manager and HR Activities step, the information will be sent to SAP and the Transfer iForm can be submitted.

## ONE TIME SETUP

The first time you enter **Onboarding**, there are two steps to complete.

- Change the View
- Set-Up your Document Signing Password

### Change the View

Change the Dashboard view by selecting “**Try New Version**” located on the right side of the screen and is highlighted in yellow below. In the pop-up box, select “**Yes**” to choose the new version. This view provides better functionality and once changed becomes the default view.

### Old View:

The 'Old View' dashboard displays a summary of work queue items in two columns. The left column lists categories like 'Onboarding', 'I-9 3 Business-Days', 'E-Verify', etc., with counts. The right column lists 'Onboarding Summary' items like 'Manager and HR Activities', 'Employee Activities', etc., with counts. A 'Search Work Queue' section on the right includes a search dropdown, radio buttons for 'Outstanding Activities' and 'Completed Activities', and buttons for 'Submit', 'Clear', and 'Advanced Search'. A 'Work Queue' section at the bottom has a 'try new version' button highlighted in yellow and a 'Show' dropdown. Below this is a table with columns: Assigned To, Activity, Due Date, Start Date, First Name, Last Name, Location.

Assigned To	Activity	Due Date	Start Date	First Name	Last Name	Location
Chris THOMAS	Manager and HR Activities	06/27/2019	07/06/2019	Derek	Jeter	1919 Yearby Ave

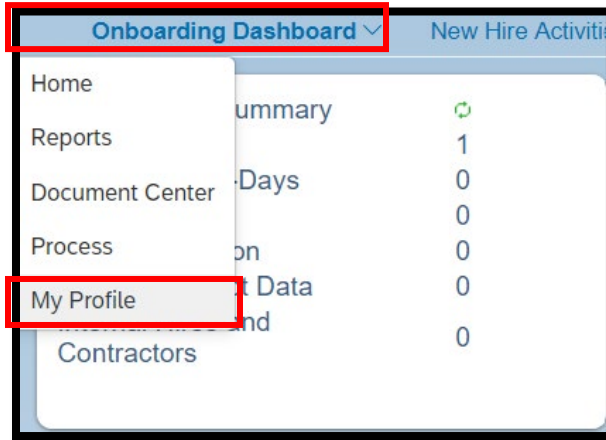
### New View:

The 'New View' dashboard features a top navigation bar with '1 Total Tasks' and filters for 'My Tasks', 'Waiting on O...', 'Overdue', and 'Completed'. A 'Switch to Old Work Queue' link is on the right. Below is a 'Processes' section with a list of tasks: 'Onboarding' (1), 'Manager and HR Activities' (1), 'Employee Activities' (0), 'Orientation Activities' (0), and 'Signature Step' (0). A 'Tasks (1)' table is shown with columns: Assigned To, Start Date, Location.

Assigned To	Start Date	Location
Chris THOMAS	Jul 6, 2019	1919 Yearby Ave

## SETUP DOCUMENT SIGNING PASSWORD

Before a member of the **Onboarding Team** can complete the Orientation Activities, he or she will need to set a password for signing documents or use the default. From the Onboarding Dashboard menu, select **My Profile**.

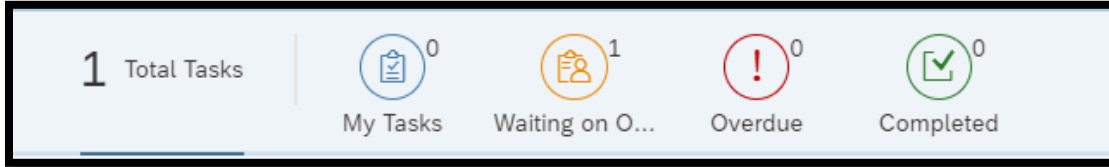


This page will walk you through setting the Document Signing Password. The current password will be defaulted to *onboardingPW77*. Retain the new password as it will be used for all subsequent Hires.

The screenshot shows the 'Change Password' form. It includes a 'Current Password' field, a 'Change Locale' section with a dropdown set to 'English', and a 'Change Password' section with 'New Password' and 'Retype New Password' fields. A red warning message states: 'To provide safety you should enter your current password each time you change your profile.' Below the password fields, another red warning message states: 'The password must be between 8 and 60 characters and satisfy 3 of these conditions: Include One Uppercase Letter, Include One Lowercase Letter, Include One Number, Include One Symbol, Not Allow Three or More Same Characters, Not Allow Three or More Consecutive Characters.' There are also 'Change Security Questions' fields for 'Security Question 1' (City You Were Born In) and 'Security Question 2' (Favorite Sports Team), each with an answer field. An 'Update' button is at the bottom left.

**BASIC NAVIGATION**

Notice the Navigation Bar with icons for **Total Tasks**, **My Tasks**, **Waiting on Others**, **Over Due** and **Completed**.



- **Total Tasks** are all tasks where you are part of the Onboarding Team
- **My Tasks** are the tasks assigned to you
- **Waiting on Others** are tasks assigned to the Candidate or other members of the Onboarding Team
- **Over Due Tasks** are tasks that are deemed late based on the start date
- **Completed** shows all tasks where all steps have been completed

The left side navigation allow you to filter tasks by step. The current step for the task is also visible under the candidate’s name. Check or uncheck the activity to remove them from the view.

For new hires, there are four steps under **Onboarding**:

- Manager and HR Activities
- Employee Activities
- Orientation Activities
- Signature



For transfers there are two steps under < **Internal Transfers and Contractors**

## SUCCESSFACTORS: ONBOARDING BASIC NAVIGATION

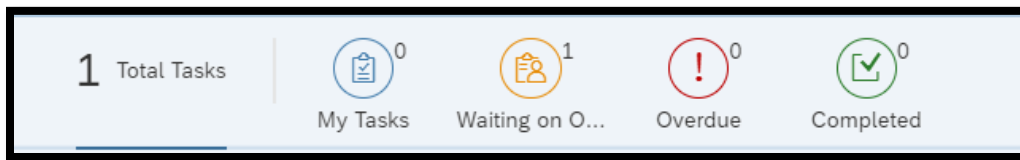
- Manager and HR Activities
- Employee Activities



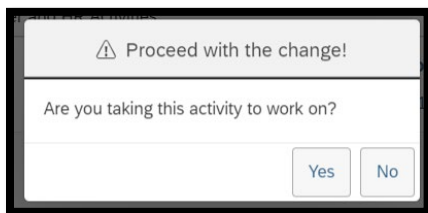
Manager and HR Activities and Orientation Activities indicate action is required by the Onboarding Coordinator, while Employee Activities indicates action is required by the candidate.

### Taking over Tasks

In the event the Hiring Manager or the HR Representative need to complete onboarding, they will select the Total Tasks icon and find the candidate.



They will select the name and the popup will ask are you are you taking over this activity – Yes or No.



You can also reassign tasks to others from the task view by selecting the highlighted area below. This triggers a popup menu. Choose reassign.





## SUCCESSFACTORS: ONBOARDING BASIC NAVIGATION

This is a type ahead box with names presenting a list. Select the name to make the reassignment.

The image shows two side-by-side screenshots of a 'Reassign Activity' dialog box. The left screenshot shows the dialog with a text input field containing the placeholder text 'Enter a name'. The right screenshot shows the same dialog with a dropdown menu open, displaying two options: 'Manager, Hiring (694129)' and 'Hiring'. Both screenshots include 'OK' and 'Cancel' buttons at the bottom right.

<input type="checkbox"/>	Derek Jeter Manager and HR Activities	⋮	Hiring Manager	Jul 6, 2019	1919 Yearby Ave
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Click the name to take over the task again.

### Other Steps

These steps are visible but will not be typically used by departments.

- I-9 3 Business-Days
- E-Verify
- I-9 Reverification
- E-Verify Correct Data