SuccessFactors: Recruiting/Onboarding Quick Reference Guide

ONBOARDING BASIC NAVIGATION

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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:

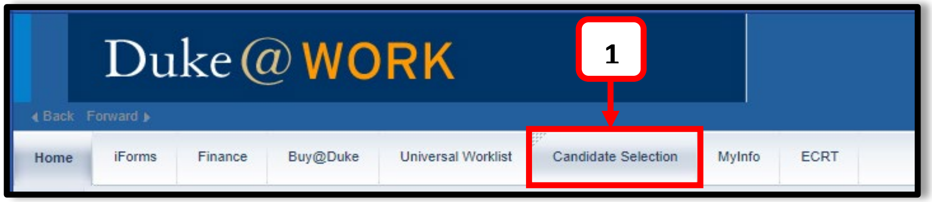
- Accessing Onboarding
- Review Basic Definitions
- One Time Set-Up
- Basic Navigation

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:

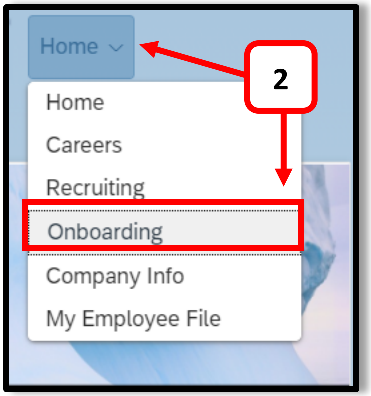
https://hr.duke.edu/managers/recruitment/successfactors.

ACCESSING ONBOARDING

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



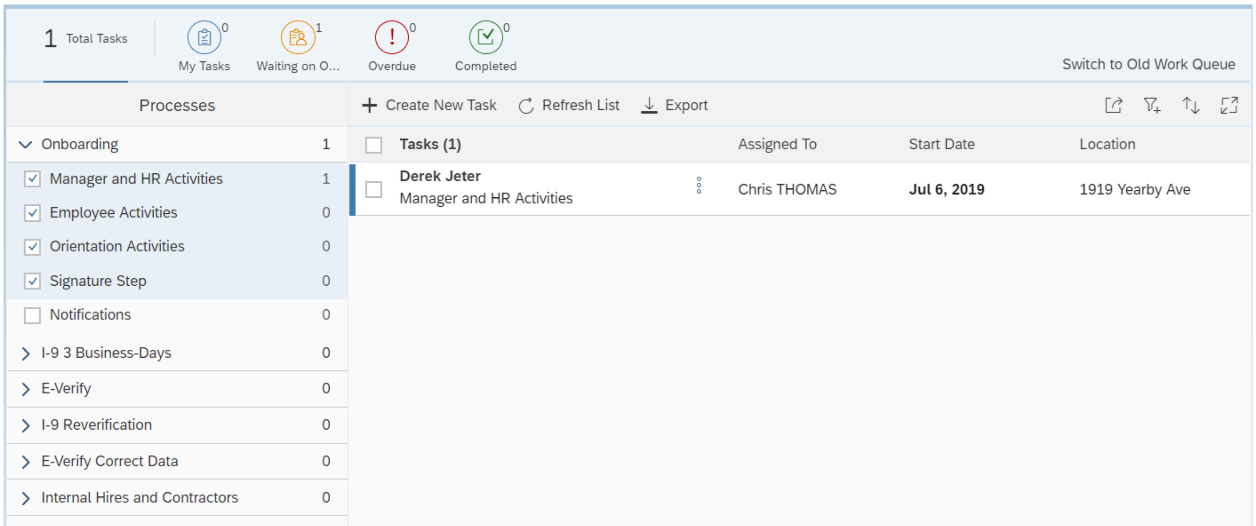
2. On the homepage, click **Home** and navigate to **Onboarding**.



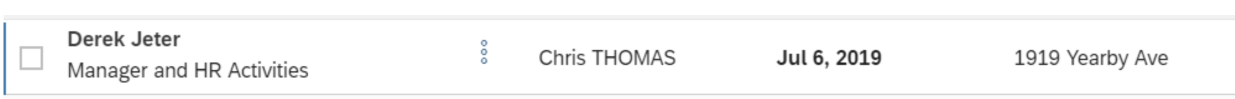
DEFINITIONS

Term	Definition/Responsibility
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.
Onboarding Dashboard	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

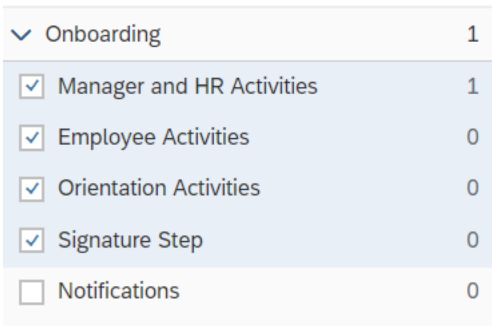
New version of Onboarding Dashboard



Task	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.



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.

<table>
<tr><th>Onboarding Steps</th><th>Internal Hires & Contractor Steps</th></tr>
<tr><td>


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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

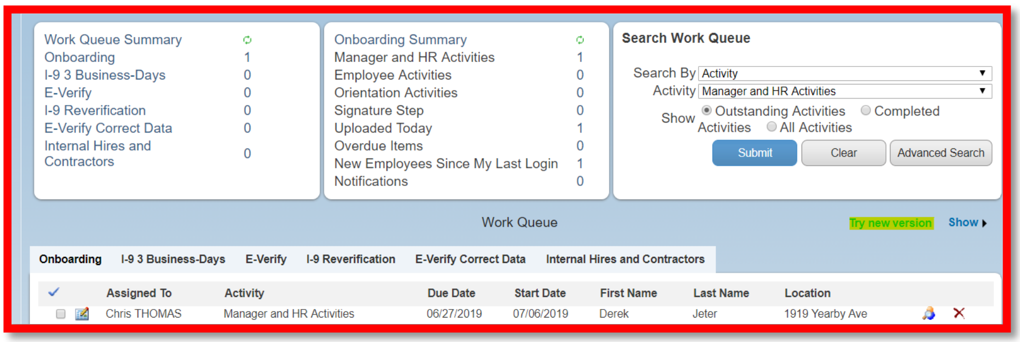
The first time you enter **Onboarding**, there are two steps to complete.

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

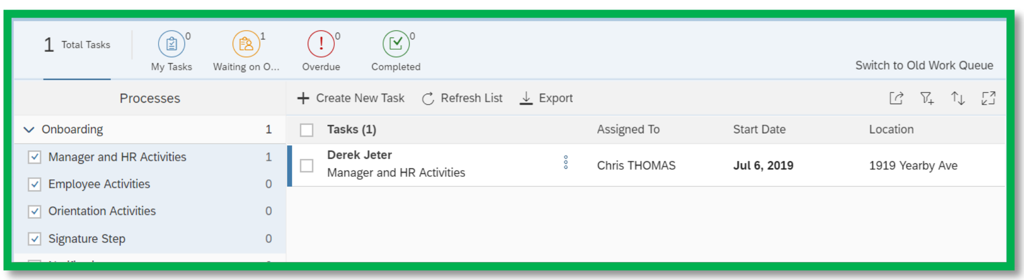
Change the View

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:

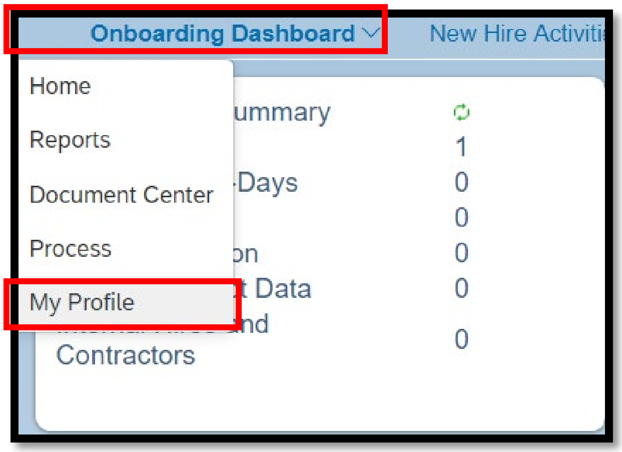


New View:

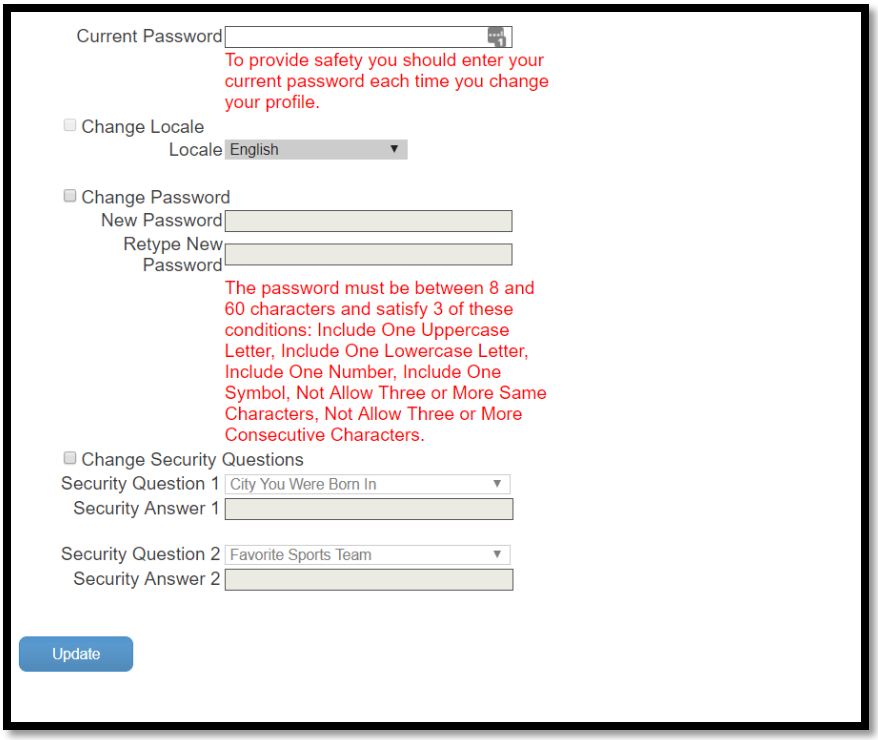


SETUP DOCUMENT SIGNING PASSWORD

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**.

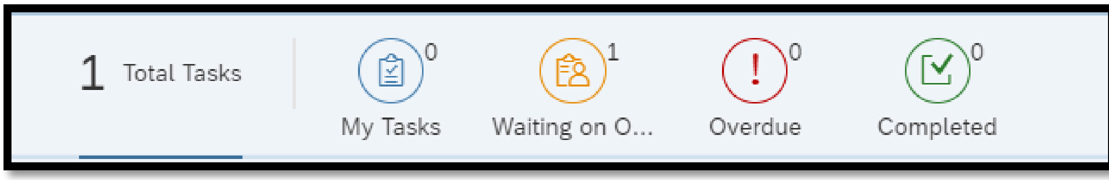


This page will walk you through setting the Document Signing Password. The current password will be defaulted to *onboardingPW77*. Retain the new password as it will be used for all subsequent Hires.



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

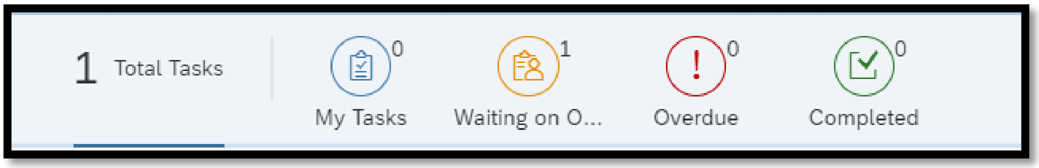
For transfers there are two steps under **< Internal Transfers and Contractors**

- Manager and HR Activities
- Employee Activities

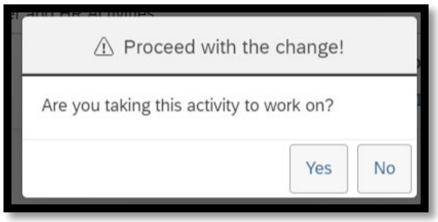
Manager and HR Activities and Orientation Activities indicate action is required by the Onboarding Coordinator, while Employee Activities indicates action is required by the candidate.

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.

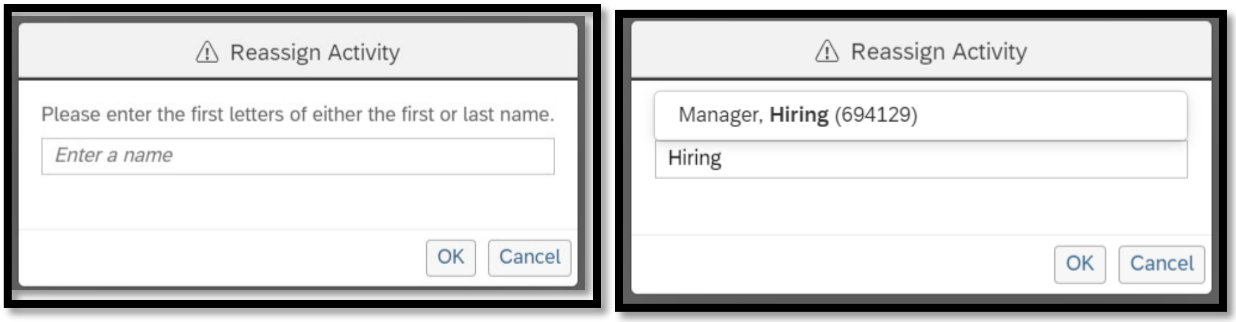


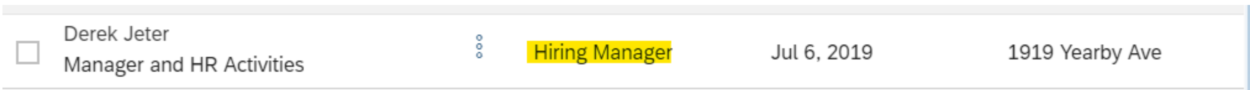
They will select the name and the popup will ask are you are you taking over this activity – **Yes** or **No**.



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

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





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