SuccessFactors: Recruiting/Onboarding Quick Reference Guide

OVERVIEW & BASIC NAVIGATION

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Duke | HUMAN RESOURCES

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Overview

Welcome to SuccessFactors! This Quick Reference Guide (QRG) was created to provide a general overview of the SuccessFactors tool to include definition of key terms and 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.

Quick Tips!

- SuccessFactors users will receive a warning in advance of timing out. Make sure to **Save Actions** as you work. Users will be timed out after **10 minutes** of inactivity.
- Throughout the tool, users will find several places to both **Save Results** and **Move Candidates Forward** in the candidate selection/onboarding processes. While this quick reference guide and the online learning demonstrates one method of saving/moving through action steps, any available method is acceptable and will deliver the desired results.

SUCCESSFACTORS ROLES

There are **six main roles** in the SuccessFactors System:

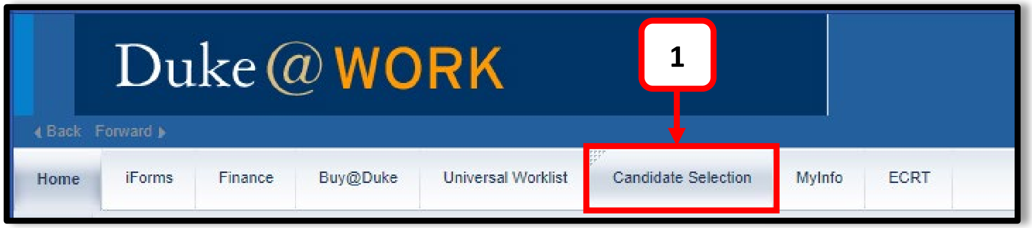
Role	Definition/Responsibility
Hiring Manager	**The person responsible for making the hiring decision.** Any Duke employee can fill this role and have access to requisitions that are assigned specifically to them. The Hiring Manager **can view and work with a candidate through the candidate selection and onboarding processes**. This individual may be assisted by a Hiring Manager Team who can view information and take action on behalf of the Hiring Manager. **NOTE**: *The Hiring Manager is still the responsible person even if candidates are processed by members of the Hiring Team.*
Role	**Definition/Responsibility**
Recruiting Team	**This individual(s) can view information and take action on behalf of the Hiring Manager**.

	NOTE: *The Hiring Manager is still the responsible person even if candidates are processed by members of the Hiring team.*
HR Representative & HR Team	**The HR Representative and HR Team may collaborate with the Hiring Manager during the selection process.** Any Duke employee who is an iForms user can be an HR Representative and has access to requisitions that are assigned specifically to them. **The HR Representative can view and work with a candidate through the candidate selection and onboarding processes.**
Onboarding Coordinator	**This individual is responsible for working with the candidate through the onboarding process.** Any iForms user can be an Onboarding Coordinator and has access to candidates for requisitions assigned to them. While the Onboarding Coordinator typically works with candidates only during onboarding, this individual will have access to the Recruiting section of SuccessFactors.
Onboarding Team	**The Hiring Manager, HR Representative, and Onboarding Coordinator are considered the Onboarding Team**. While each role has specific responsibilities, each person in the role will have access to work with a candidate at any point in the recruiting, hiring or onboarding process. When candidates are moved to Onboarding, they will be automatically assigned to the Onboarding Coordinator and can be reassigned as necessary.

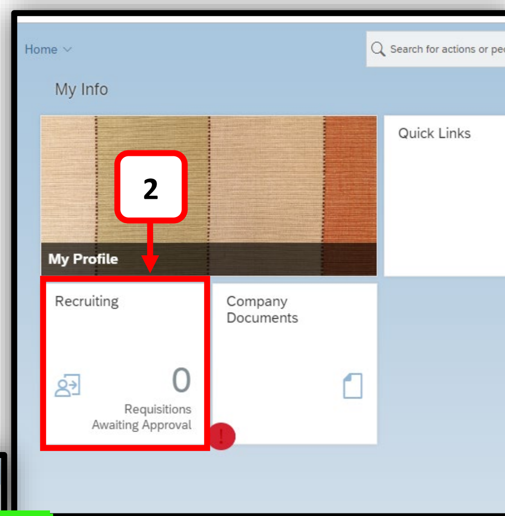
BASIC NAVIGATION

LOG IN

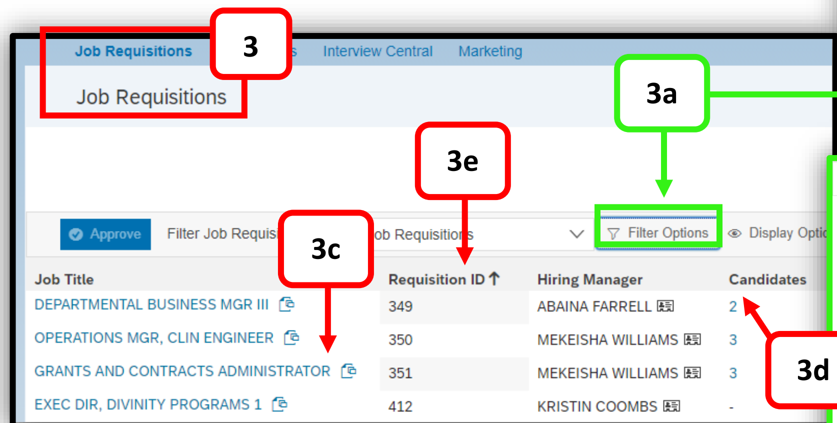
1. The tool is accessible via the Duke@Work portal**.** Click the **Candidate Selection** tab.

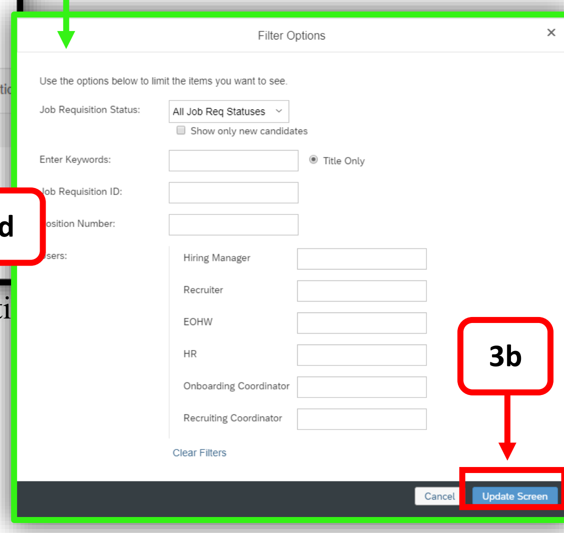


JOB REQUISITIONS



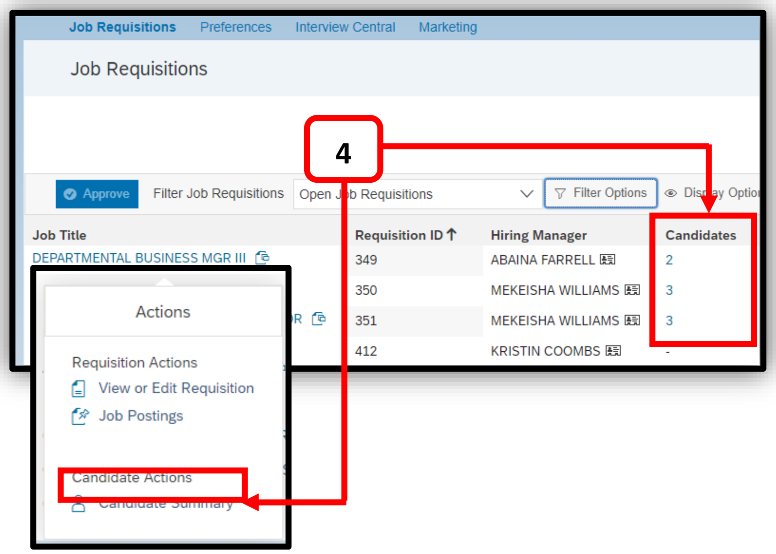
2. On the **Home** screen, locate and click on **Recruiting**.
3. The default page, **Job Requisitions** page will display.
   a. On this screen, **Filter Options** allow users to change how information is displayed.
   b. In order for a filter to be applied, remember to click **Update Screen** on the **Filter Options** dialogue box.





   c. **Arrow Arrow Hyperlinks** provide access to additi information. Selecting a **Job Title** hyperlink provides access to view or edit a requisition, see a summary of candidates or search for a particular candidate.
   d. **Candidates** hyperlink provides the link to the candidate list.
   e. Select a **column heading** to sort in ascending or descending order.

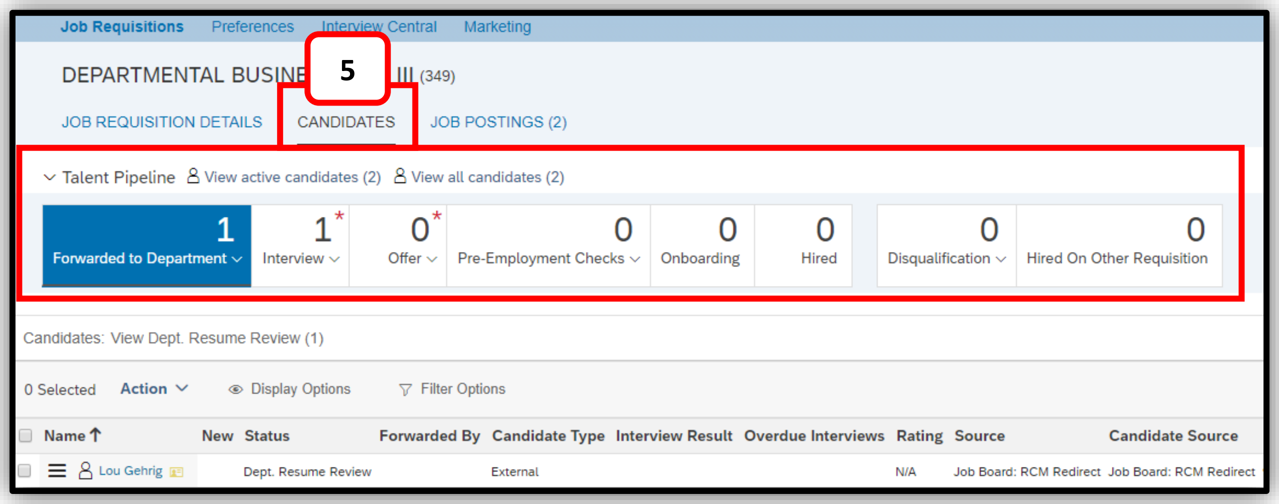
CANDIDATE SUMMARY

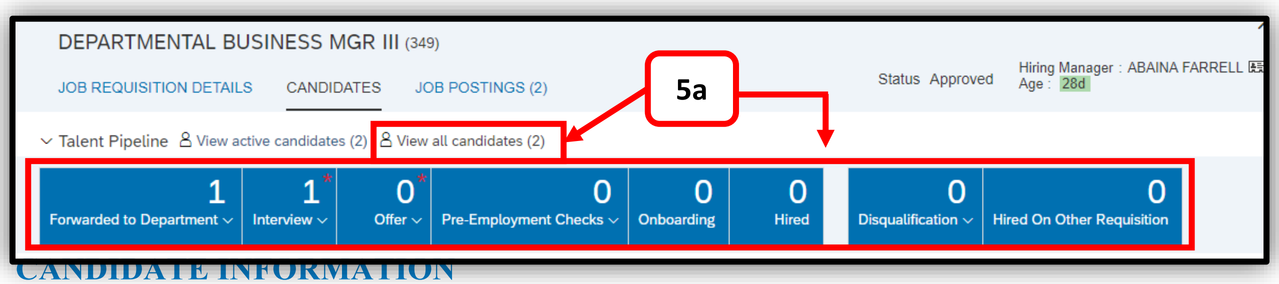


4. Hover over the **Job Title** and click **Candidate Summary** from the grey pop-up box
   OR
   click the hyperlinked number under the **Candidates** column.

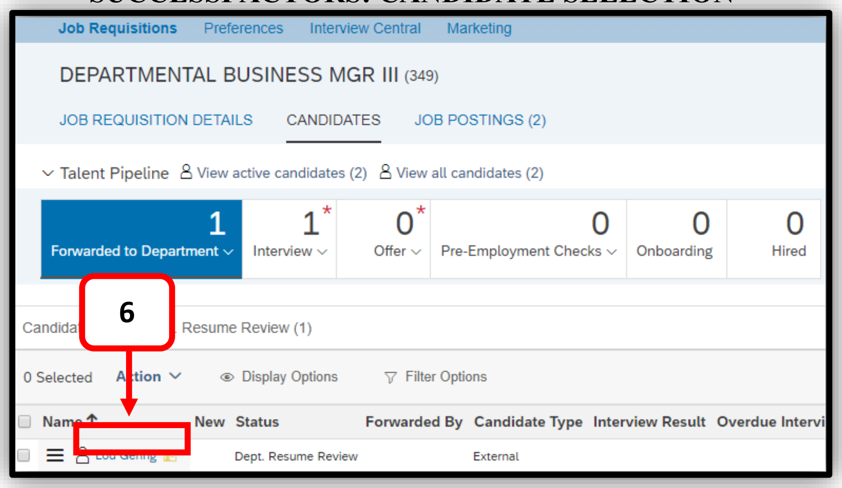
5. On the **Candidates** page, the **Talent Pipeline** is the default view and **visually displays the steps in the recruiting process.** As you work with candidates through the selection and onboarding process, they will move through the **Talent Pipeline**. Candidates will display for each of the pipeline steps highlighted in blue.

   a. If **View all Candidates** is selected, all candidates will display and all the steps will be highlighted blue.





CANDIDATE INFORMATION

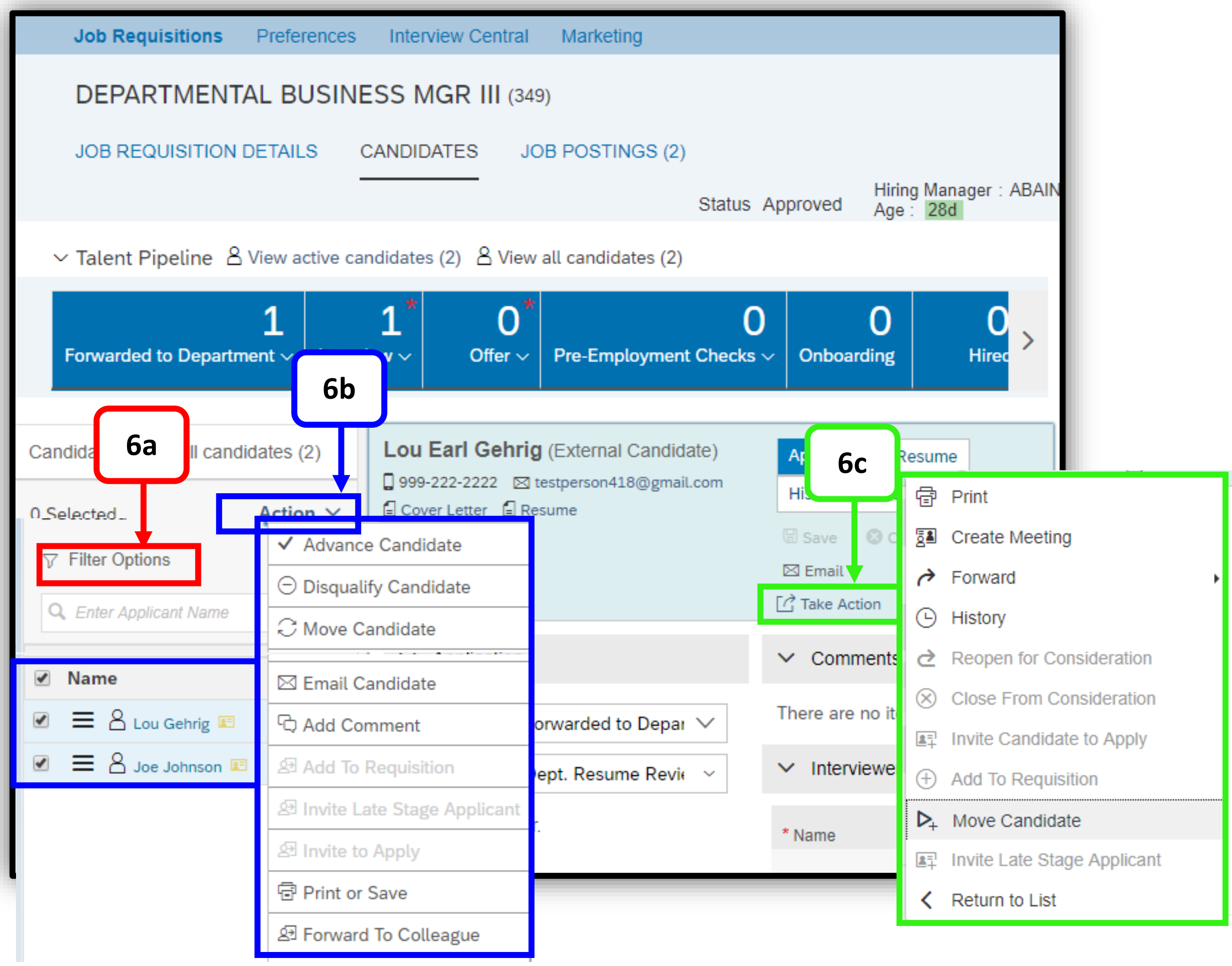


6. Click the hyperlinked text that displays the **Candidate's Name**; this will open a pop-up box that shows the candidate's information.

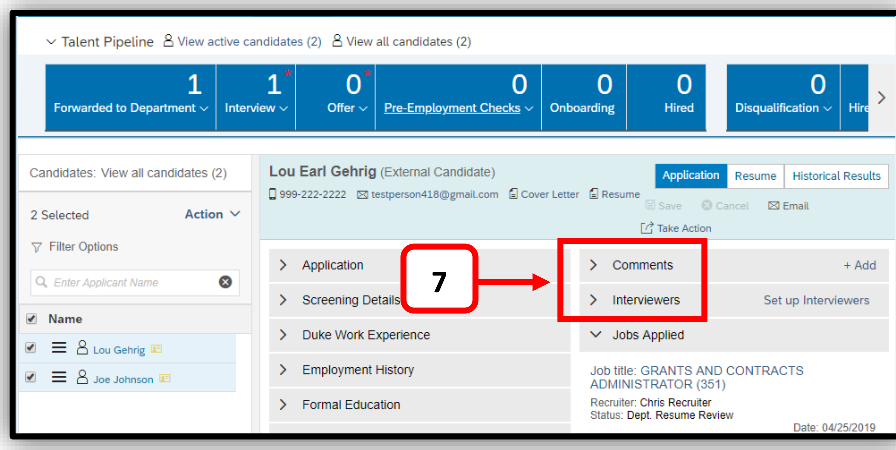
   a. **Filter** options are visible on the left side of the screen.

   b. **Action drop-down menus** are available throughout the page and actions are active, based upon the candidate's status in the selection. The **Action drop-down** on the left side of the screen allows you to take action on **one or more candidates.**

   c. The **Action drop-down** on the right side of the screen allows you to take action on a **single candidate.**



7. Sections of the candidate's record can be opened by clicking on the **(>) arrows**. A **downward facing arrow (v)** indicates a section is open, while an **arrow pointing to the right (>)** indicates a section is closed.

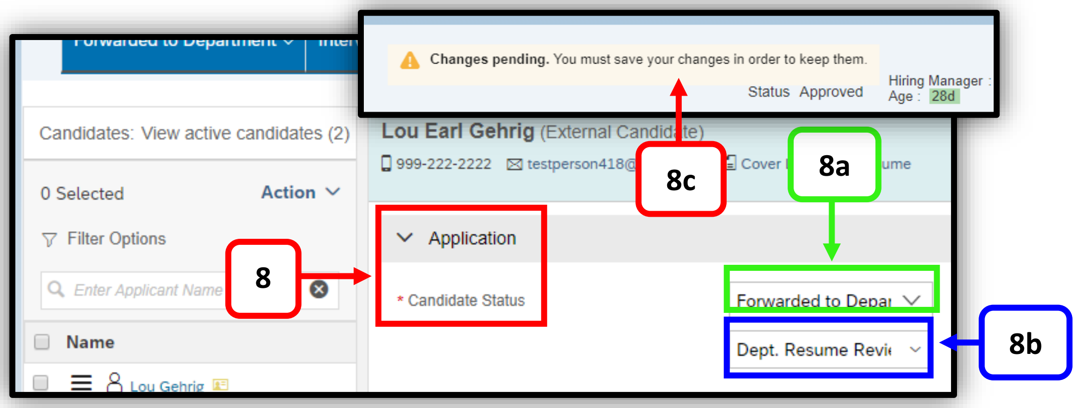


8. Users will frequently update the candidate's status as recruitment and onboarding progresses. **See below**.

   a. The top status changes the **Talent Pipeline** step.

   b. The second drop-down changes the status within the pipeline step.

   c. If changes are made, a warning message appears at the top right of the candidate information dialog box, reminding users that it is necessary to **Save** the changes. Once changes are saved, the candidate will move to another step in the **Talent Pipeline** and/or the status in that talent pipeline step will be updated.



9. To return to the homepage, at the top left of the SuccessFactors screen, click **Recruiting**, then click **Home.**