SuccessFactors: Recruiting/Onboarding Quick Reference Guide

OVERVIEW & BASIC NAVIGATION

Last Revised: 06/17/2019
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 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.

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:

<table>
<thead>
<tr>
<th>Role</th>
<th>Definition/Responsibility</th>
</tr>
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<tbody>
<tr>
<td>Hiring Manager</td>
<td>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. <strong>NOTE:</strong> The Hiring Manager is still the responsible person even if candidates are processed by members of the Hiring Team.</td>
</tr>
<tr>
<td>Recruiting Team</td>
<td>This individual(s) can view information and take action on behalf of the Hiring Manager.</td>
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### 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 additional 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.
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.