

# SuccessFactors: Recruiting/Onboarding Quick Reference Guide

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**MANAGER AND HR ACTIVITIES**

*Last Revised: 06/25/2019*

**Duke** | HUMAN RESOURCES

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## 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.

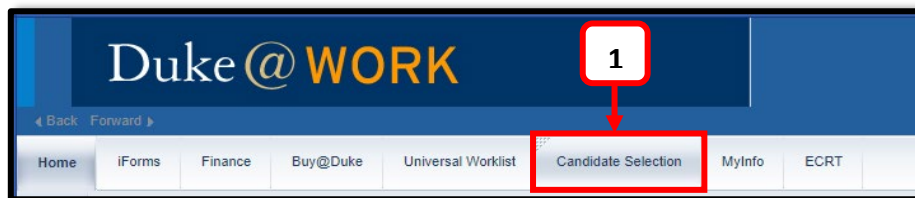
**PLEASE NOTE:** This task **must be completed** or nothing goes forward.

For additional details on working with SuccessFactors, online training videos are available and be can found on the Manager’s Section of the HR Website under Recruitment and Hiring via the following link:

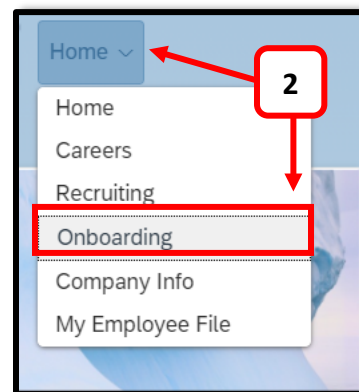
<https://hr.duke.edu/managers/recruitment/successfactors>.

## 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**.



## 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.

The screenshot displays 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 red arrow points to the 'Total Tasks' icon. Below the navigation bar, there are options to 'Create New Task', 'Refresh List', and 'Export'. The main content area shows a list of tasks under the 'Onboarding' category. A table lists tasks with columns for 'Tasks (1)', 'Assigned To', 'Start Date', and 'Location'. One task is highlighted with a red box: 'Derek Jeter Manager and HR Activities' assigned to 'Chris THOMAS' on 'Jul 6, 2019' at '1919 Yearby Ave'. Another red box highlights the 'Assigned To' column header.

Tasks (1)	Assigned To	Start Date	Location
<input type="checkbox"/> Derek Jeter Manager and HR Activities	Chris THOMAS	Jul 6, 2019	1919 Yearby Ave

**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.

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 type="checkbox"/> Internal Hires and Contractors 7</li> </ul>

Selecting Internal Hire and Contractors will expand the menu and collapse Onboarding as noted below.

Onboarding Steps	Internal Hires & Contractor Steps
<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Onboarding 1</li> </ul>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Internal Hires and Contractors 7</li> <li><input checked="" type="checkbox"/> Manager and HR Activities 5</li> <li><input checked="" type="checkbox"/> Employee Activities 2</li> <li><input type="checkbox"/> Notifications 0</li> </ul>

## 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.**

**Derek Jeter** | Manager and HR Activities | Chris THOMAS | Jul 6, 2019 | 1919 Yearby Ave

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New Hire Set-up Information (Derek Jeter)  
Manager and HR Activities

Name

First Name:  Middle Name:

Last Name:

Job Details

Hire Date:

Company:

Work Location:

Hire Information

Is the new hire a remote employee?  Yes  No

Please enter the new hire's email address:

Re-enter the new hire's email:

Personnel Number:

Duke NetID:

Position Number:

Position Title:

SF Requisition ID:

Duke Req ID:

Hiring Manager

Hiring Manager:

(Show Onboarding version information)

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.