SuccessFactors:
Position Manager Guide
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Overview:

The Position Manager in SuccessFactors refers to the direct supervisor for the position. As a Position Manager, you have the ability to:

- View your own public and private profiles
- View the private profiles of your direct reports
- View and screen applicants for open positions reporting to you

NOTE: If you have not already done so, click here to access the e-Learning module, “Setting the Foundation”, which will provide information needed to navigate SuccessFactors and understand public and private profiles.
Logging in to SuccessFactors

1. Navigate to the SuccessFactors website and click on the SuccessFactors portal button.

2. The SuccessFactors Log In screen will appear. Enter your Username (6+2) and Password (same as you use for email and UCFlex), and click [LOG IN].

3. The default page upon login is the Home screen.

   a. The “Navigation Menu” is a drop-down menu that displays tools to which you have access.

   b. The “Name” menu is used to access additional system functions.

   c. Use the “People” box to quickly locate information about a colleague.

   d. The Home page is made up of mini-application “tiles” that you can add, remove, and rearrange to display information most important to you. These also provide quick links to your most-needed information.

NOTE: Mozilla Firefox is the recommended browser for optimal performance in SuccessFactors. If utilizing Internet Explorer, please add *.successfactors.com as a trusted site in the browser. For assistance with this, please contact your local IT support or the Help Desk at 556-HELP or helpdesk@uc.edu.
Viewing Direct Reports’ Profiles

An Employee Profile stores information about an individual (i.e., name, title, department, contact information, work experience, education, etc.).

There are two profiles in the system:

- **Public Profile** - Your Public Profile is like a business card, providing the UC community with basic contact information. All staff and faculty have an Employee Profile (with the exception of Term Adjuncts, Student employees, and affiliates).
- **Private Profile** - Your Private Profile contains the same business card style information viewable under a Public Profile. The difference is that your private profile also allows you to share information regarding your skills, background, and experiences with Human Resources and your manager.

For information on how to edit and view your own profiles, please see the “Editing Your Employee Profile” Quick Reference Guide.

1. Locate the “My Team” tile on your homepage.

2. To access an employee, click on the employee’s profile picture or name. The employee’s information will open within the tile.

3. Click on [ACTIONS] to quickly access the employee’s public or private profile.
   - The “Public Profile” is the profile anyone within UC can view.
   - The “Profile” is the private profile only you as his/her manager and Human Resources can view.

**NOTE:** This section is not currently being utilized, as it connects with another SuccessFactors module that we are not currently utilizing.
a. When you choose “Profile”, the employees private profile appears, which includes:

- Personal Information – which appears on the “Public Profile” as well
- Work History
- Education History
- Certificates
- License
- Languages Skills

4. From the “Profile”, there are a few other actions you may take:

a. Click the employee’s name to see the employee’s manager, peers, and direct reports.

b. Click [TAKE ACTION] to print this screen or save as a PDF.

c. Click [PROFILE] to jump to the “Public Profile” or “Org Chart”.

Badges

1. You can send a badge to the employee by clicking [BADGE]. Badges are a great way that users can provide peer-to-peer recognition.

   a. Choose which badge to give to the employee, write a short note in the window that will appear, and then click [GIVE A BADGE].
Accessing Candidates

Prior to accessing candidates in the system, please ensure the following:

- The Hiring Coordinator has added you as the Position Manager in the requisition.
- You have discussed the process for reviewing and choosing candidates with the Hiring Coordinator and Search Committee Members (if applicable).
- You have reviewed the e-Learning module, “Setting the Foundation” (click here to access).

NOTE: This guide is designed to navigate the Position Manager through the process of screening and selecting candidates. If you are working with a Search Committee, please confer with your Hiring Coordinator and Search Committee Chair to decide on a process for screening and selecting candidates.

There are two ways to access candidates:

- Through the home screen tile
- Through the Job Requisition screen

Accessing Candidates through the Home screen tile:

1. The default page upon login in is the Home screen. On the Home screen, find the tile called “My Team”.
   a. Current team members and their profile pictures, if applicable, will appear in this tile.
   b. Open positions will appear in this tile with the Job Title.
2. To access the candidates for the open position, click the [POSITION TITLE] in the tile. A snapshot of the number of new and total candidates will slide into the tile.
   a. Click the [REQ ID: #] to open the Job Requisition.
   b. To access new candidates only, click the on the number of [NEW] candidates.
   c. To view all candidates, click on the number of [TOTAL CANDIDATES].
   d. To scroll through all open positions, click the [ ] arrows at the upper right of the tile.
Accessing Candidates through the Job Requisition screen:

1. The default page upon login is the Home screen. On the Home screen, click [HOME] and select Recruiting.

2. The Job Requisition page will display. It allows you to quickly view information about positions for which you are a Position Manager.
   a. Ensure that “Open Job Requisitions” is displayed in the drop-down menu on the left above the job title.

3. To access candidates for a particular position, look under the Candidates column on the Requisitions page.
   a. Click the hyperlinked blue number under the Candidates column to open the Candidate Summary for the corresponding position.

   **NOTE:** The number in blue represents the total number of Candidates who have applied for the position. A number in parentheses and orange (1 New) displays the number of new candidates whose application has not been viewed by anyone. If anyone – including yourself, the Hiring Coordinator, or a Search Committee Chair/Member (if applicable) – views that candidate’s application, it will no longer show with (1 New).
4. The **Candidate Summary** provides a snapshot of candidates for the position, including:

- **Talent Pipeline**: The Talent Pipeline shows an overview of the recruitment process for candidates, as well as providing a snapshot of how many candidates are at each status within the process.
- **Name**: Displays the first and last name of each candidate.
- **Status**: Candidate’s current status in the Talent Pipeline.
- **Source**: Displays the source type from which the candidate applied. For example: Job Board, Corporate: Default Site (UC external website), internal site (SuccessFactors website), Forwarded (from another pool of applicants), etc.
- **Candidate Source**: If the candidate applied through a job board advertising source (in #6d), the specific source (i.e., Careerbuilder, Ohio Means Jobs, etc.) will be listed here.
Screening Candidates

There are two ways candidates may be screened. The method used is determined by the unit. Please discuss your unit’s preferred method with your Hiring Coordinator.

1. The Hiring Coordinator completes the initial screening of the applications, placing those who meet minimum qualifications into the “Application Review” status in the talent pipeline for your further review (instructions begin below).

2. As the Position Manager, you screen ALL candidates and let the Hiring Coordinator know which candidates you wish to move forward in the process (instructions beginning on page 5).

NOTE: If the position is a Classified position, the Recruiter will screen all new candidates and conduct the required assessments. Neither you nor the Hiring Coordinator will be able to see the candidate until the Recruiter places those who pass these requirements in “Application Review” for you to view.

Hiring Coordinator moves to “Application Review” for additional screening

1. After they have completed the initial screening, the Hiring Coordinator will change the status of candidates who meet minimum qualifications to “Application Review”. The Hiring Coordinator will inform you when candidates are available to review.
   a. If the position is Classified, the recruiter will conduct the initial screening, and the Hiring Coordinator and Position Manager will be unable to view the candidate until the Recruiter places them in “Application Review” status.

2. Upon opening the Candidate Summary, click on [APPLICATION REVIEW] to view only those candidates that have met initial screening criteria.

3. You may review multiple candidates using the Resume Viewer or choose to view individual candidates:

   **To review multiple candidates:**
   a. Click the checkboxes by the candidates you wish to review. To select all, check the top box to the left of “Name”.

   ![Image of Resume Viewer with checkboxes and selection options]
b. Click the down arrow next to “Action” ( ) and choose “View Resume”.

c. The Resume Viewer will open. Scroll through the resumes of all candidates using the arrows as indicated.

d. While reviewing resumes, make note of which candidates you wish to consider further, phone screen, or bring in for a 1st interview. Email your Hiring Coordinator with your input so they can update the status of those candidates.

To review individual candidates:

a. Click the candidate’s name from the Candidate Summary page (#6 on page 3).

b. The candidate’s application appears within a smaller window.

c. To view the resume within the window, click the Resume button at the top right of the application window.

d. To view the resume and cover letter in a pop-up Resume Viewer, click the hyperlinks for each located under the candidate’s name.
Position Manager screens all candidates

The following outlines the process if you as the Position Manager wish to conduct the initial screening for ALL new candidates.

1. When new candidates apply, you will have immediate access to review them, *unless it is a Classified position*. This can be done at any point following the job being approved and posted to the careersite. Log into SuccessFactors following the instructions on page 1.
   - If the position is Classified, the recruiter will conduct the initial screening, and you will be unable to view the candidate until the Recruiter places them in “Application Review” status.

2. Upon opening the Candidate Summary, click on [NEW] in the Talent Pipeline to view new candidates.

3. You may review multiple candidates using the Resume Viewer or choose to view individual candidates.

   **To review multiple candidates:**
   a. Click the checkboxes by the candidates you wish to review. To select all, check the top box to the left of “Name”.
   b. Click the down arrow next to “Action” (▼) and choose “View Resume”.
   c. The Resume Viewer will open. Scroll through the resumes of all candidates using the arrows as indicated.
   d. While reviewing resumes, make note of which candidates you wish to consider further, phone screen, or bring in for a 1st interview. Email your Hiring Coordinator with your input so they can update the status of those candidates.
To review individual candidates:

a. Click the candidate’s name from the Candidate Summary page (#6 on page 3).

b. The candidate’s application appears within a smaller window.

c. To view the resume within the window, click the Resume button at the top right of the application window.

d. To view the resume and cover letter in a pop-up Resume Viewer, click the hyperlinks for each located under the candidate’s name.

Selecting Candidates for Interviews

Once you have screened candidates, contact your Hiring Coordinator with feedback and suggestions. The Hiring Coordinator will keep the system updated and work with you and other interviewers to set up interview dates and times for potential candidates.

For more information on your role as an Interviewer within SuccessFactors, refer to the Interviewer Quick Reference Guide.