SUCCESSFACTORS USER GUIDE

This Guide is For: Field HR Staff

Document Number: F501

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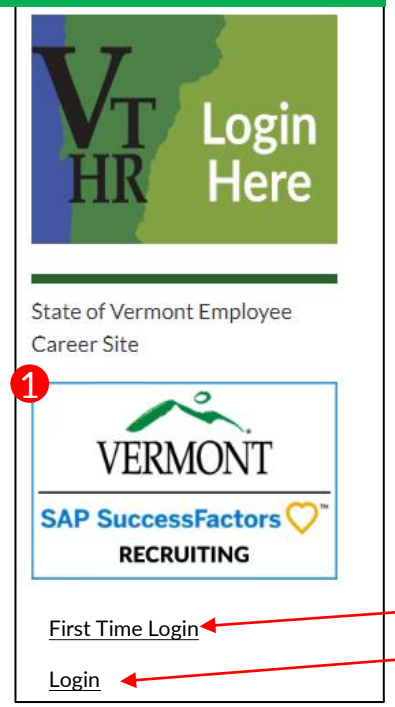
FIRST TIME LOG ON/ RESETTING PASSWORD

FIRST TIME LOG ON

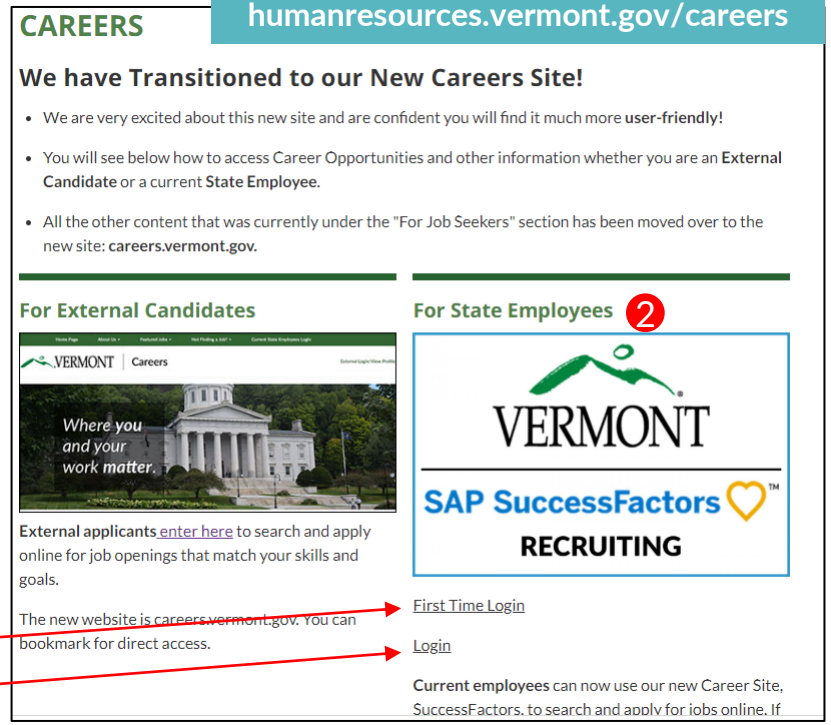
First Time Log On – State of Vermont Employees

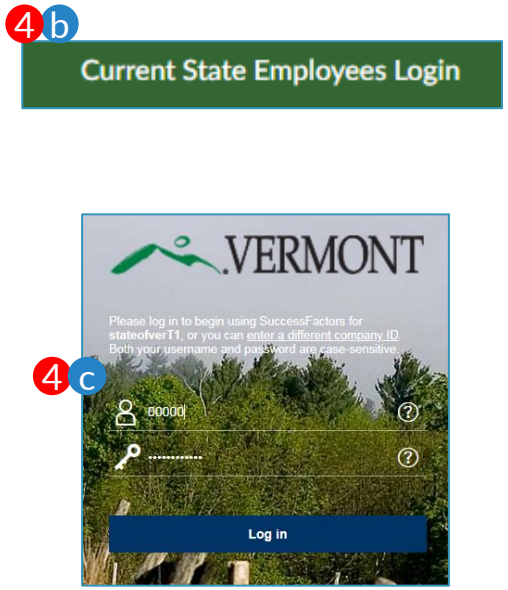
This section will provide information on your access as a State of Vermont Employee.

humanresources.vermont.gov



humanresources.vermont.gov/careers





1) As state employees, you will be able to access the new SuccessFactors Recruiting and Careers Site from the DHR website, (humanresources.vermont.gov) either by going to the login widget on the right hand column of the Home page (adjacent to the VTHR Login) or
2) Going to the "For Job Seekers" Page (humanresources.vermont.gov/careers)
3) You must select 'First Time Login' the very first time you attempt to access the system. This will take you to a page (not shown here) that will:
   - I. Review the new site's terms of use.
   - II. Take you through the first time login instructions explained on the next 3 pages.
   - III. Link you to help/user guides.
4) **Only after you have set your password** you may access the site in the future by:
   - a) Using the login link on the DHR Website widgets.
   - b) Using "For Current State Employees Login" Link on the external careers site.
   - c) Bookmarking the SuccessFactors Login Page.

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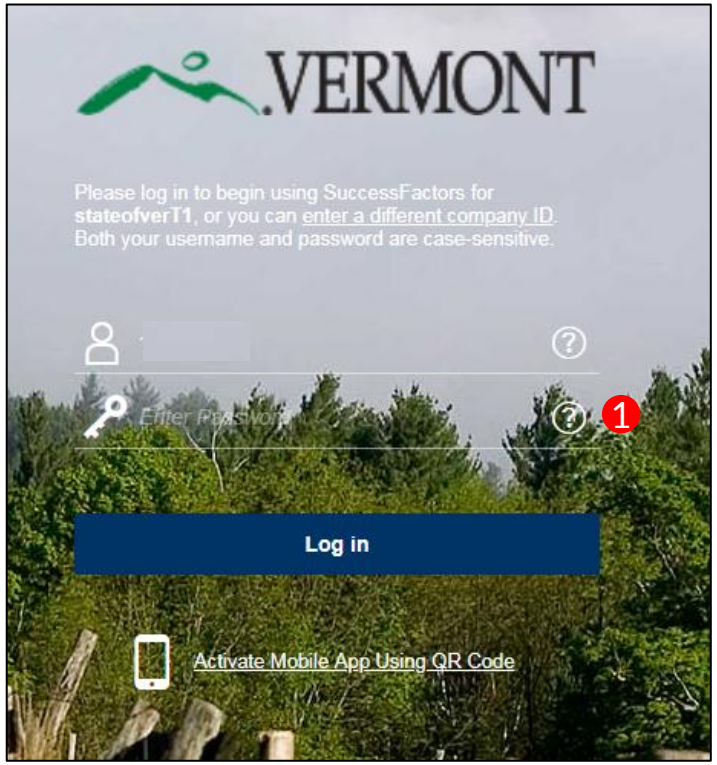
FIRST TIME LOG ON

Logging In/Setting Password– State of Vermont Employees



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No State of Vermont Email?

If you don't have a State of Vermont email, you won't be able to set your password in this way.

Please contact Recruitment Services at:
802-828-6700 or toll free at 855-828-6700
Select Option 1, then Option 4

Email: DHR.Recruitment@Vermont.gov

1. For the initial log in, you are required to change your password. Passwords can be changed/reset by the user with the "?" link beside the password login box.

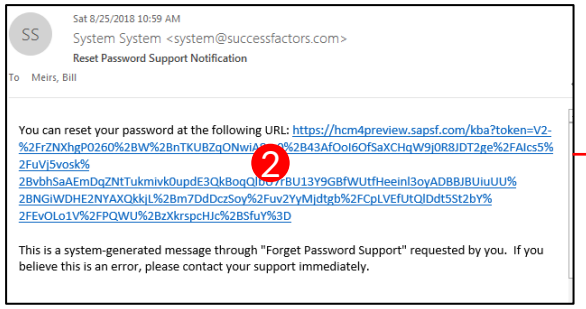
2. You will be sent to the Forgot Password Screen. Enter your **User ID (Your State of Vermont Employee ID)** and click "Reset"

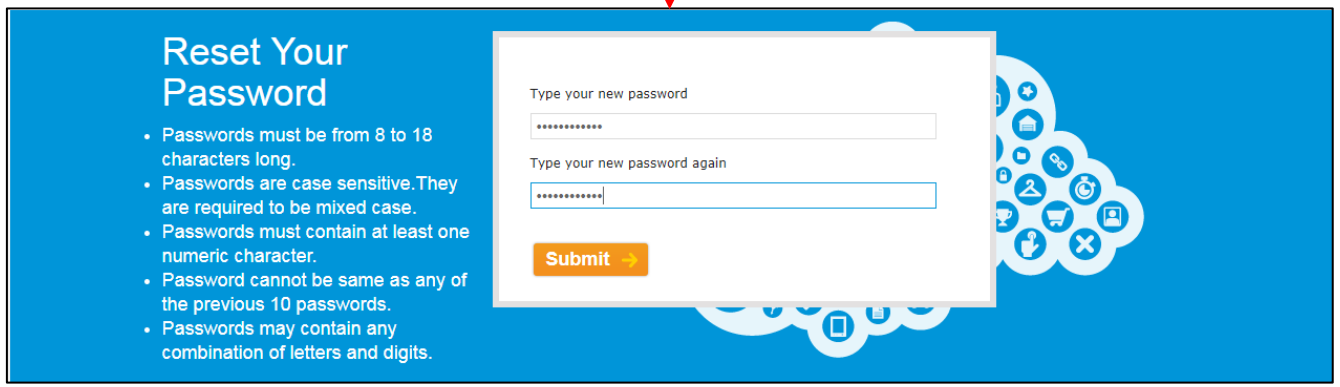
RESETTING PASSWORD

Logging In/Changing/Resetting Password– State of Vermont Employees

1. An email notification will be sent to your **State** email with a hyperlink to reset your password. See password requirements on Reset screen. Please close out of the browser completely.

2. **Click** the hyperlink that was emailed to you or **Copy** and paste into your browser. Complete the fields as required then select the 'submit' button.





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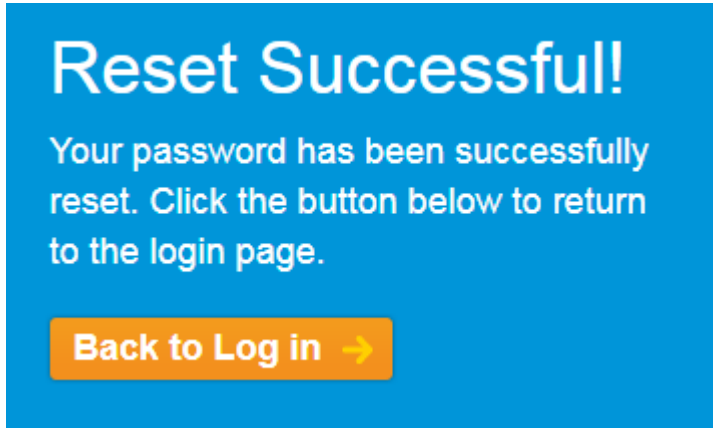
RESETTING PASSWORD

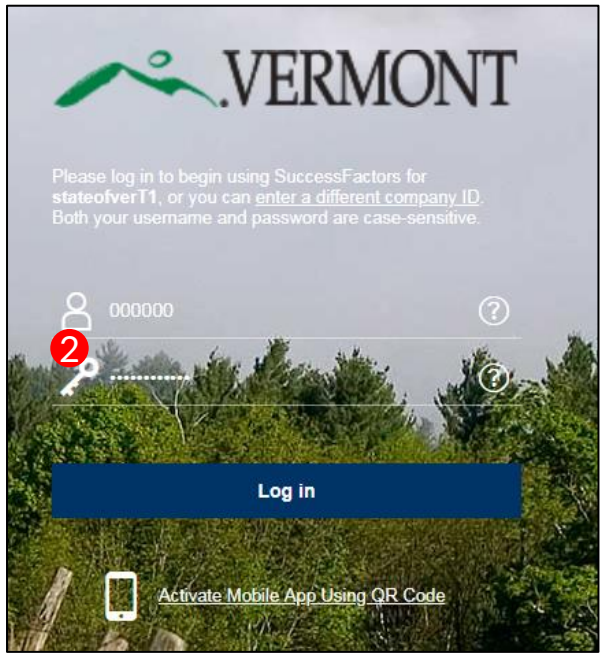
Logging In/Changing/Resetting Password– State of Vermont Employees

1. You will get a "Reset Successful" Screen if you have successfully chosen a password and they match. You can then proceed to login by clicking **Back to Log In** button.

2. You will now be directed back to the login screen. You can proceed with your new password to log in to the SuccessFactors Recruiting system. If your computer is **not used by anybody else or a public computer**, you can store your login information in your browser.

1





VS.

WHAT'S THE DIFFERENCE?

The **New SuccessFactors Recruiting** system is only for:

- **Searching and applying for positions** at the state.
- Creating and Managing Job Requisitions.

All other functions you currently do in **VTHR** (timesheets, etc.) **will remain the same.**

HOME PAGE NAVIGATION

9. Home Page Navigation Tour

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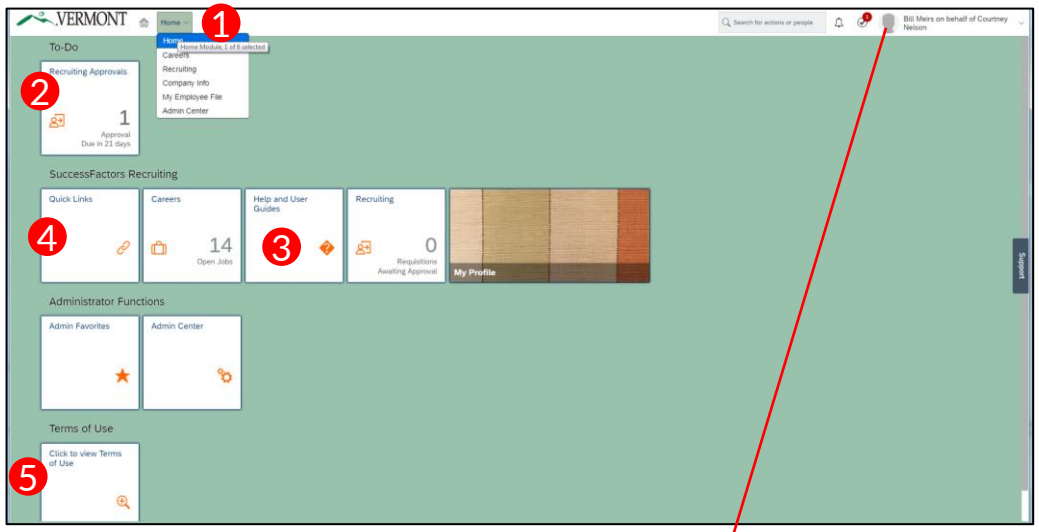
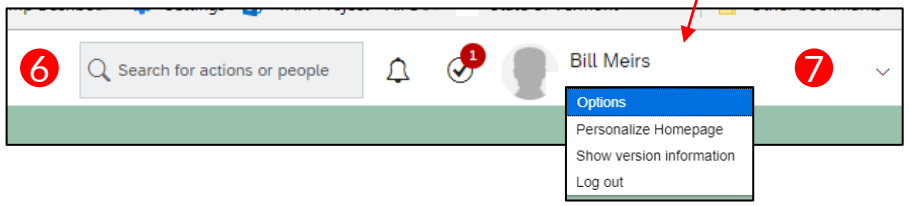
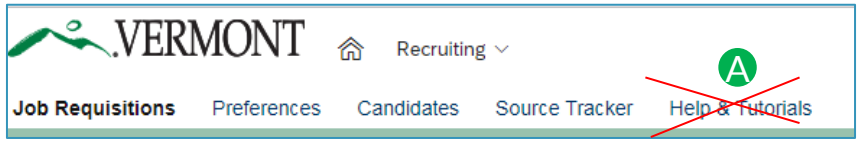
HOME PAGE NAVIGATION

Tour of the HR Field Home Page







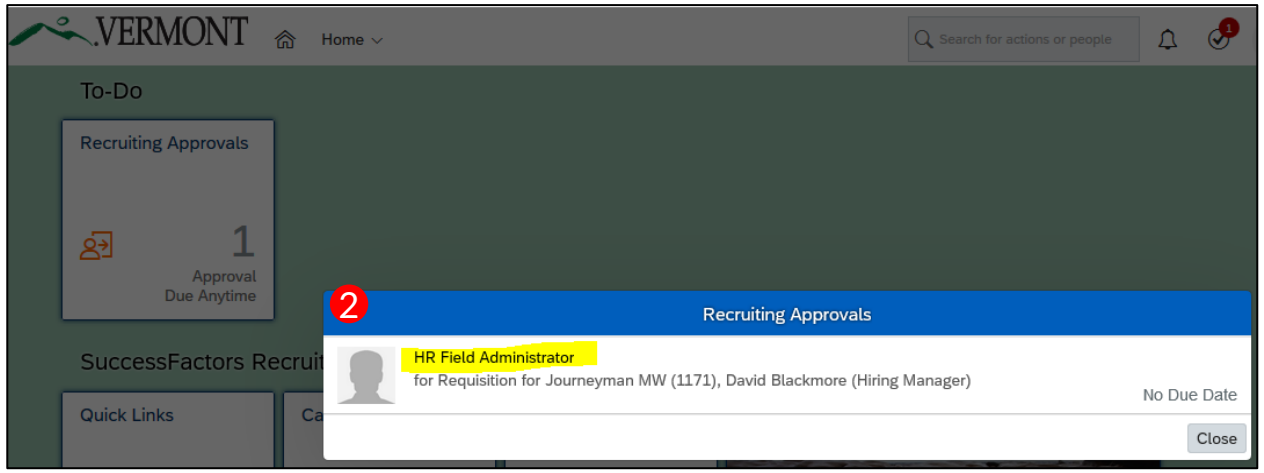
Upon logging into the Success Factors Recruiting portal, you will be directed to your **home page**. The Home Page is a **Tile Catalog**, with blocks of tiles. Each tile created is accessible to users based on specific role created in the portal.

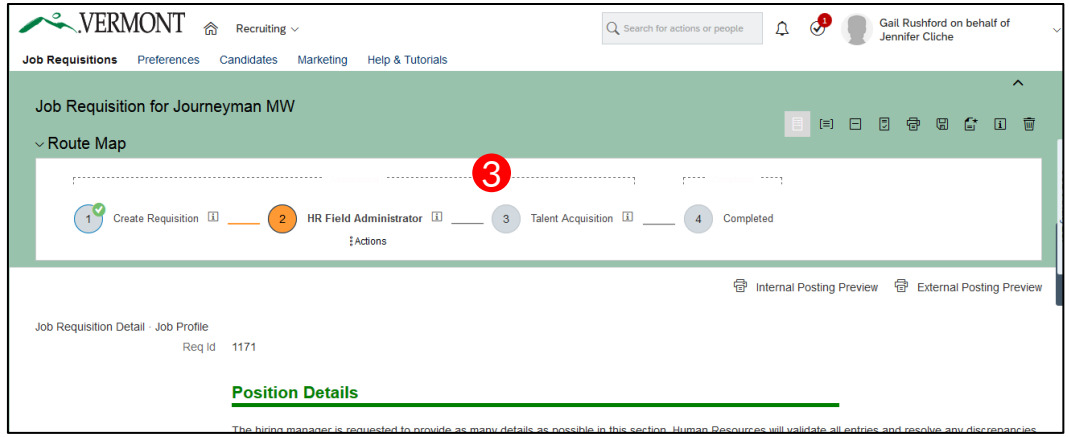
1) **Home Tab** – All users have at least 3 dropdown options. All users will have "Home", "Careers" and "My Employee File". Click on "home" to show the dropdown options, then hover over each drop-down menu and click to select. Based on your role, you may have others options.
   - **Home.** Is your home page for accessing any "To Do's", easily accessible job aid documents, and Quick Links.
   - **"Careers"** brings users to any current jobs posted within the State of Vermont for internal or external applicants. Searching and applying for jobs is detailed further in this document.
   - **"My Employee File"** brings users to their personal information in relation to work experience, previous employment, education and courses/continuing education.
2) **To Do Tile:** Tasks that are specific activities that an employee needs to take action on. For example "complete your profile" or "approve a requisition."
3) **Help and User Guides:** This tile will display useful help resources. For example, you may see a Job Aid for navigating through the SF Recruiting Portal. **Note: In the recruiting module, you will see a help link in the Recruiting Main menu** (see fig A.) **Please disregard this link. You will be able to find all the help resources on this Help and User Guide Tile.**
4) **Quick Links Tile:** This tile brings user to other areas of the portals through links available to them.
5) **Terms of Use** for logging into SuccessFactors System. You should review upon your first login.
6) **Search Bar:** The search bar allows users to search by category on the job they are seeking. After typing in the search bar, a list of possible items will drop down where users can choose what they are looking for.
7) **Account Navigation** – "Employee Profile" (the picture icon) has a drop down to select one of the following: "Options", "Personalize Homepage", and "Log Out".
   - **Options** allows users to reset their passwords, enable mobile, and receive notifications.
   - **Personalize Homepage** is a feature to move your tiles around on your home page.
   - **Log Out** allows users to logout of the system.

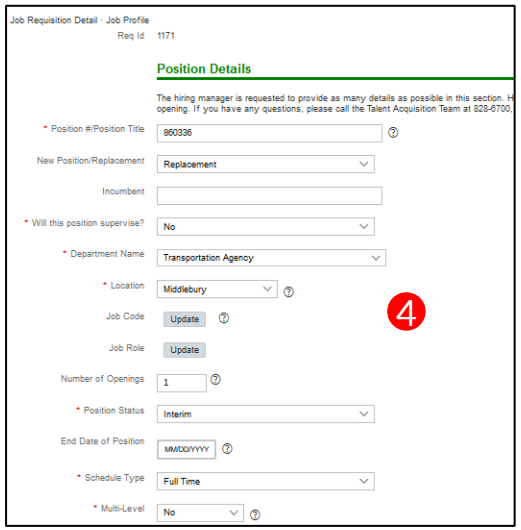
APPROVING A REQUISITION

APPROVING A REQUISITION

Navigating to Position Details







1. After you have logged into your SuccessFactors, click on the To-Do tile on you home page.
2. Select the Requisition that is pending approval by placing your cursor over the HR Field Administrator link and clicking.
3. You will now be on the Job Requisition Screen. This page includes the “Route Map” and the details to be completed before the requisition is advanced to the Talent Acquisition team.
4. Validate the position details and enter corrections as required. The following pages will take you through what you are required to complete.

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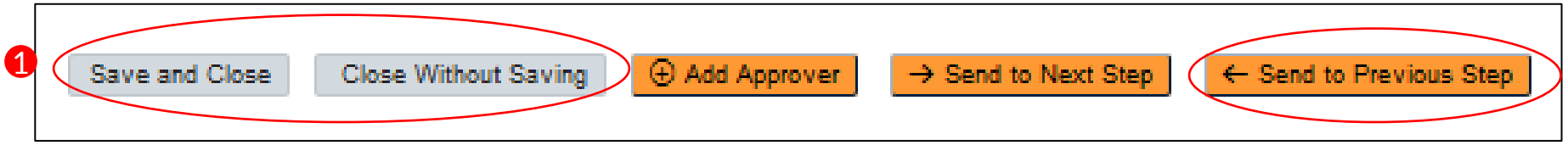
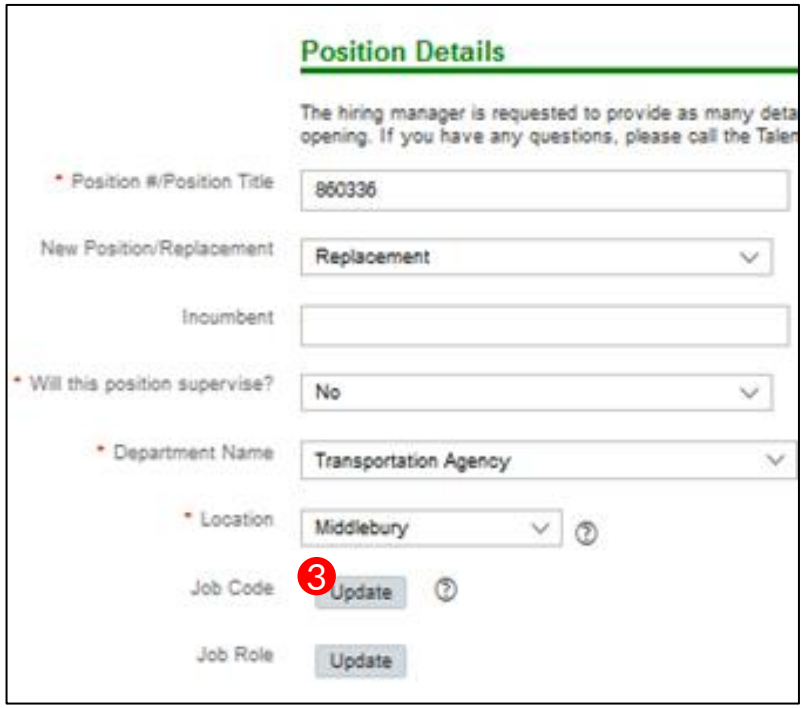
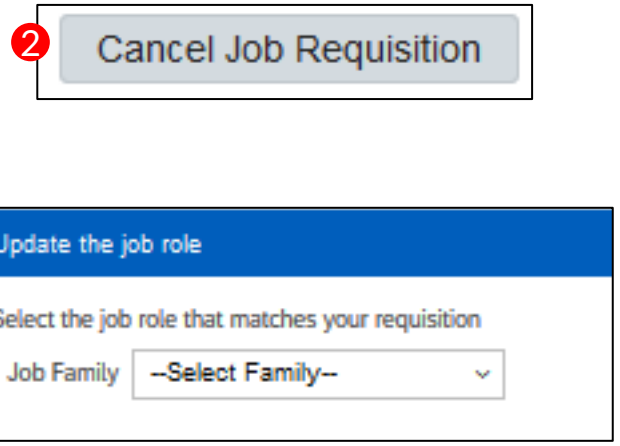
APPROVING A REQUISITION

Validating Position Details







1 If there are errors that cannot be corrected at this time, or if the position is not ready for recruitment, scroll to the bottom of the page and close the pending requisition or send it back to the hiring manager until the issues are resolved.

2 If this requisition will NOT be approved for recruitment, enter a note in the comments that the Hiring Manager needs to cancel the requisition, using the button in the bottom right corner of their screen.

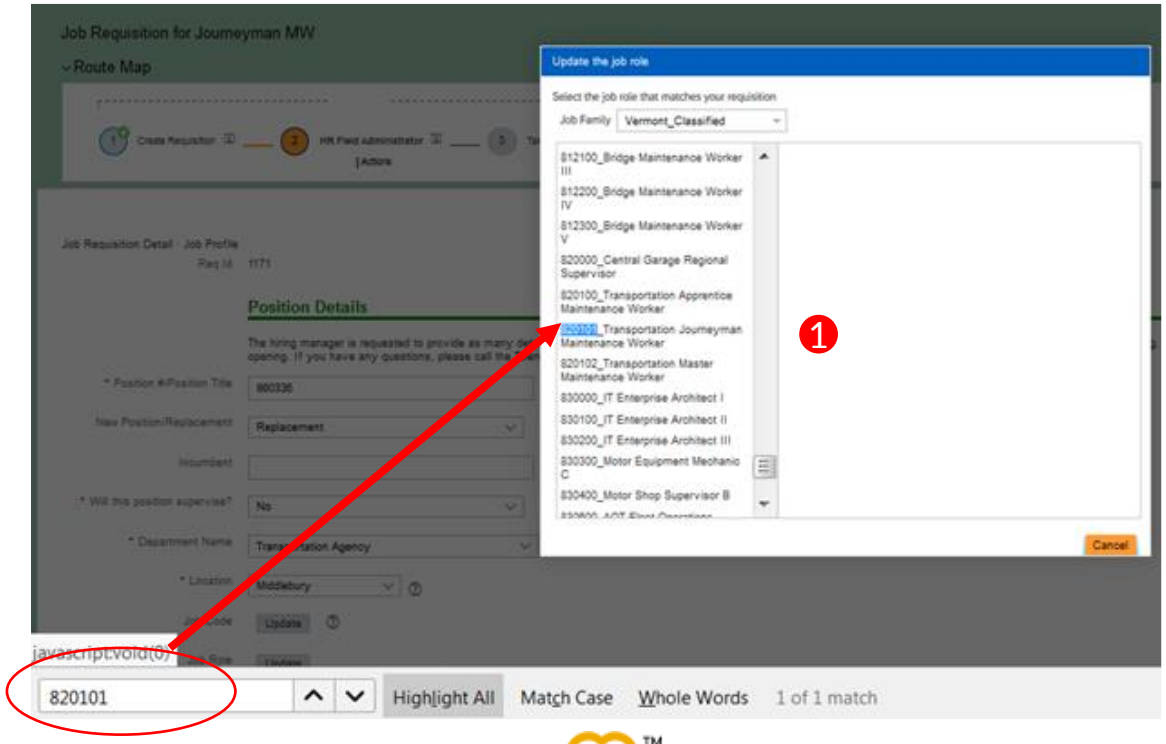
3 The hiring manager created the job opening with an internal job title. At this stage, the job code needs to be populated to pull in relevant data from VTHR and to later send data to VTHR at the time of hire. Enter the job code of the position by clicking on the Update button.

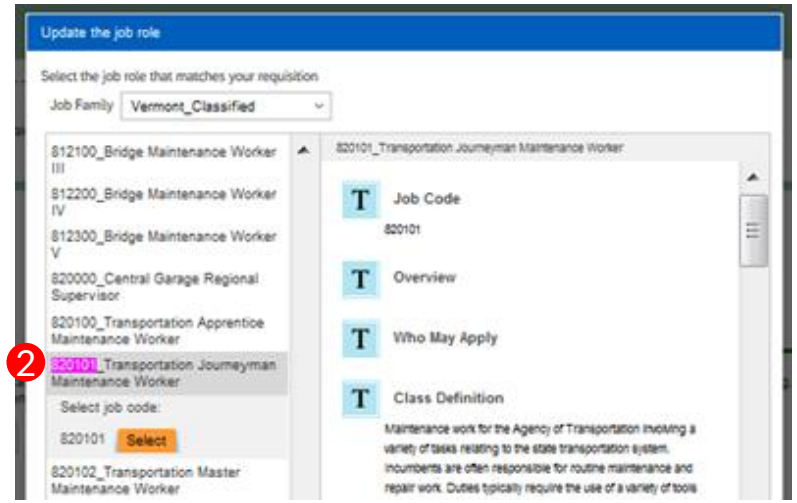
4 A box will open. Click on the drop down to select the Job Family
- Vermont_Classified provides a list of all classified job codes for which we have class specifications in the system.
- Vermont_Non Classified is for all other job codes (temporary and exempt).

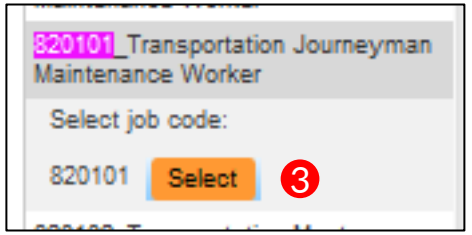
APPROVING A REQUISITION

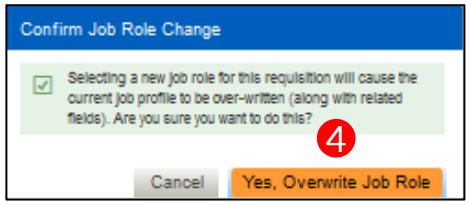
Validating Position Details

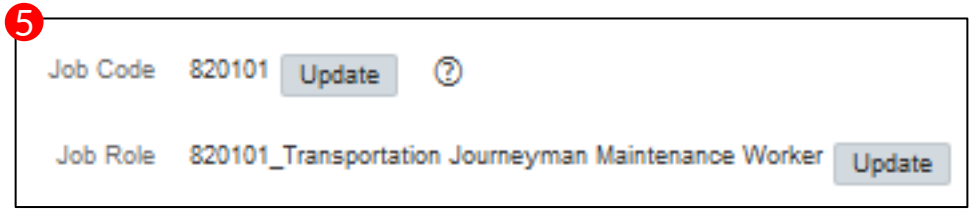
1. After you click on the family, a list of job codes and titles will appear. Use Control F on your keyboard to create a search box. Enter the job code (or a keyword from the title) to find the correct item in the list.
2. Click on the correct job code/title and the job profile will appear.
3. Click on "Select"
4. Click on Yes, Overwrite Job Role.
5. The correct Job Code and Title are now populated in the requisition.











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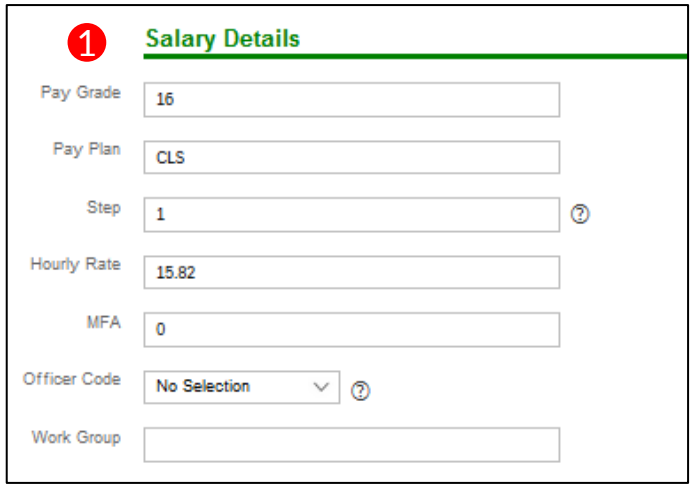
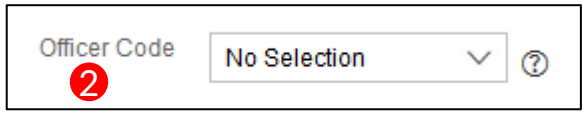
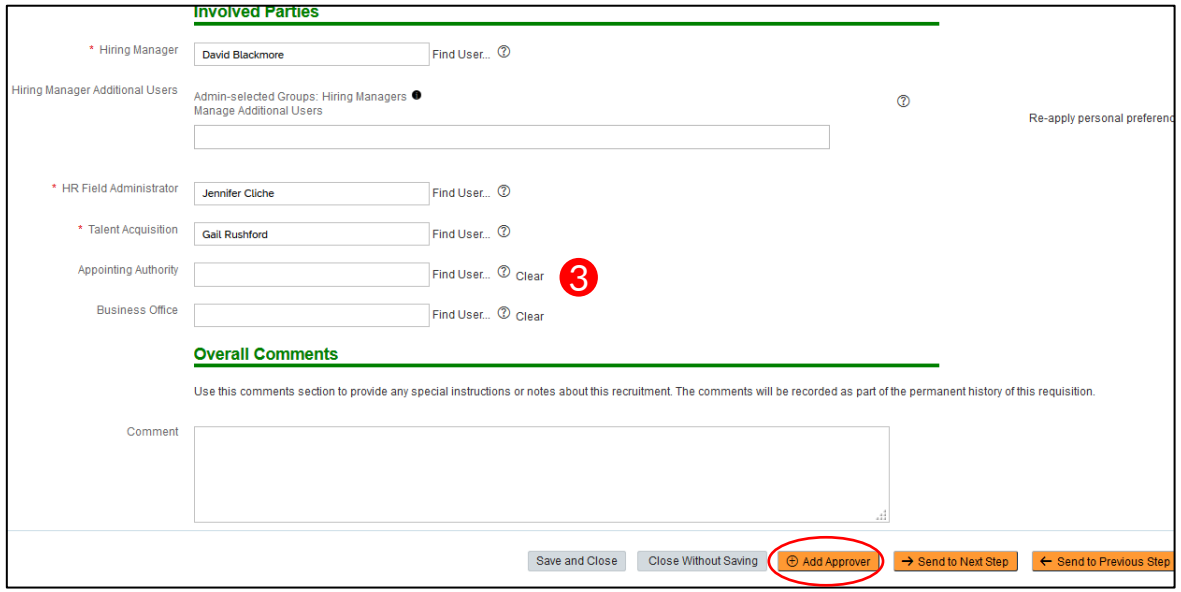
APPROVING A REQUISITION

Validating Position Details







1. The Salary Details are now populated from the Job Code. Validate that these are correct and as expected.

2. Enter the Officer Code of the position from the drop down list. If bargaining unit information should be added to the posting description, please make a note in the comments box at the bottom of the requisition page.

3. Validate that the correct parties are entered in the requisition. In this example, the hiring manager submitted the requisition without adding the Appointing Authority (or designee). Entering the Appointing Authority in the "Involved Parties" creates an email notifying that person that a requisition has been submitted. No action will need to be taken by the Appointing Authority. To obtain approval by the Appointing Authority or designee via the system, use the Add Approver button at the bottom of the requisition screen. (See Next Page – "Add Approver")

APPROVING A REQUISITION

Adding an Approver - Optional

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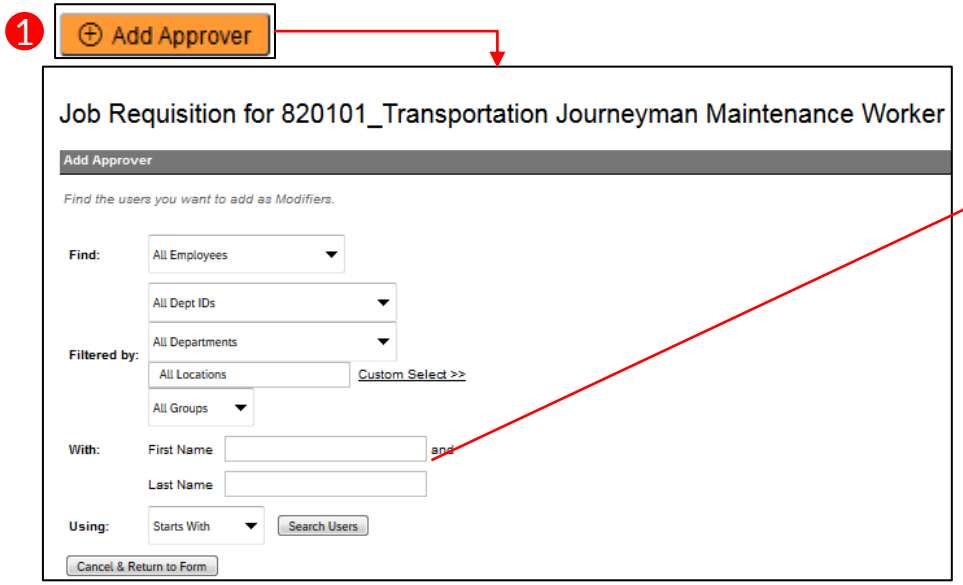

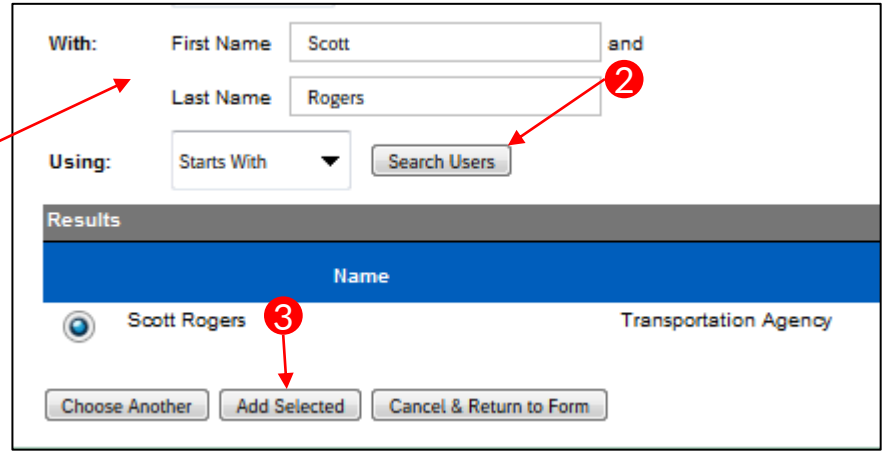

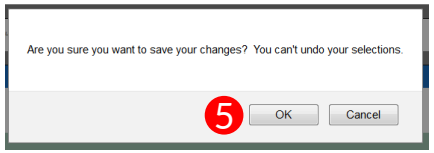

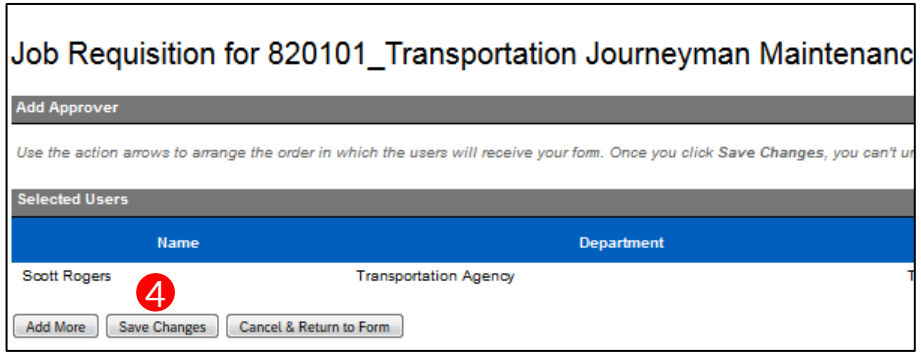

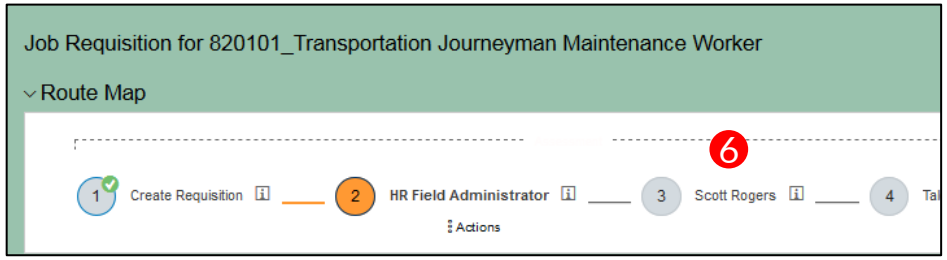

1. Click on the Add Approver button and a new screen will open.
2. Enter the First and Last Names of the Approver and click on Search Users
3. Select the correct user from the list of search results, then click on the Add Selected button.
4. Click on Save Changes
5. Click OK
6. The Approver is now added to the Route Map

NOTE:

This step will add the Approver as a "hard stop" in the Route Map. Use of this step is **optional** based on the **Department's business process.**

APPROVING A REQUISITION

Requesting Time and Labor Data

1 a

Business Office | Renea Bordeau | Find User... | Clear

1 b

Search for actions or people | Gail Rushford on behalf of Jennifer Cliche

2

Renea Bordeau
Financial Director IV
DHR.TestWF@vermont.gov
Take Action

3

Overall Comments

Use this comments section to provide any special instructions or notes about this recruitment. The comments will be recorded as part of the permanent history o

Comment

4 → Send to Next Step

5 **Overall Comments**

Use this comments section to provide any special instructions or notes about this recruitment, such as time & labor codes, multi-level recruitment, posting durations greater part of the permanent history of this requisition.

T&L Info

Taskgroup: TAXPROPVAL
TRG: 08TAX05
Workgroup: P11EX840P

Job Requisition Detail · Job Profile

Req Id 1171

Position Details

The hiring manager is requested to provide as many details as the comments section to provide any special instructions regar dhr.recruitment@vermont.gov.

* Position #/Position Title	860336
New Position/Replacement	Replacement
Incumbent	
* Will this position supervise?	No
* Department Name	Transportation Agency
* Location	Middlebury
Job Code	820101
Job Role	820101_Transportation Journeyman Maintenance Worker

TIP Take a snip of the relevant Position Details (through Job Role) to paste into your email

1 There **are 2 options** within the system for requesting Time and Labor data from the department's Business Office:

a) Add a Business Office representative to the Involved Parties. When you send the requisition to the next step, the system will trigger an email to that employee. The email includes details from the requisition and requests that the Time and Labor date be provided to you in 5 business days.

The system sends this email when Talent Acquisition approves the requisition.

b) If you don't want to trigger the system generated email, don't put anything into the Business Office box. You can still use the system to select the staff member and send your own email.

Click in the Search box at the top of the page and enter the name of the person that you want to send your data request to.

2 Hover over the name that appears, and a box will pop up with the person's name, title, and email address. Click on the email address and a blank email will open in a new window. Take a snip of the position details and paste into your email.

3 Add any comments as needed.

4 Click on the Send to Next Step button.

5 Add Time and Labor Data to the "Overall Comments" found toward the bottom of the Job Requisition Details **prior to hiring** a candidate to that requisition.

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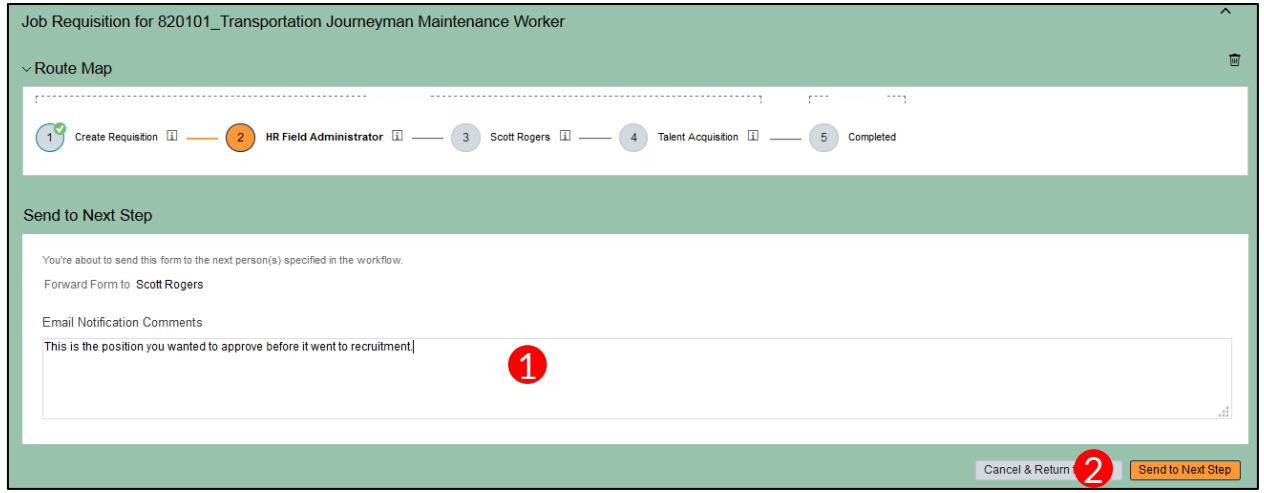
APPROVING A REQUISITION

Sending to Next Step in Approval Path



1. Optional: Enter any comments that you want to include in the notification email that will go to the Approver at the next step (whether the Appointing Authority/Delegate or Talent Acquisition).
2. Then Click on the Send to Next Step Button.
3. The requisition is now pending approval at the next step in the Route Map

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PRE-OFFER PROCESS

PRE-OFFER PROCESS

"Pre-Offer to Hired"

Business Process Steps

Hiring Manager Selects Finalist

Pre-Offer – Tax Compliance and Criminal History Declaration

a) Hiring Manager moves candidate to Pre-Offer status

b) Candidate receives notification and updates application

c) Field HR receives notification that the application is updated

i. Complete Tax Compliance verification

ii. Review Criminal History

iii. Review STIP responses

d) If candidate fails at this stage, notify Hiring Manager off-line and move to Not Selected status

e) If candidate passes, go to next step

Ready to Hire

a) Field HR moves candidate to Ready to Hire status

b) Hiring Manager receives notification and contacts candidate off-line to provide verbal offer

c) After candidate accepts verbal offer, go to next step

Offer

a) Hiring Manager moves candidate to Offer status

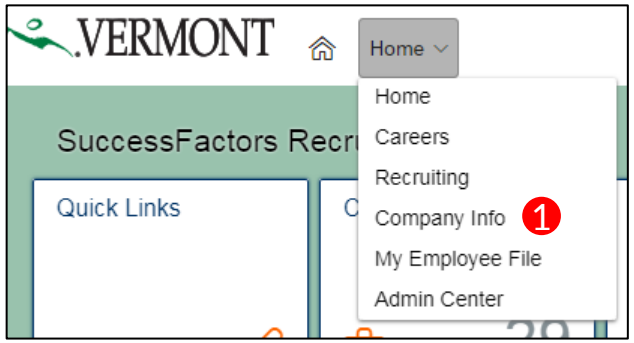
b) Field HR receives notification and completes written offer

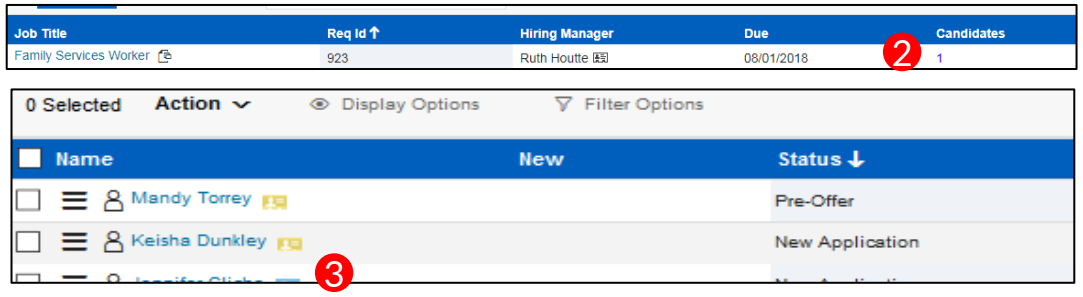
c) When candidate accepts offer, Field HR receives notification and moves candidate to Hired status

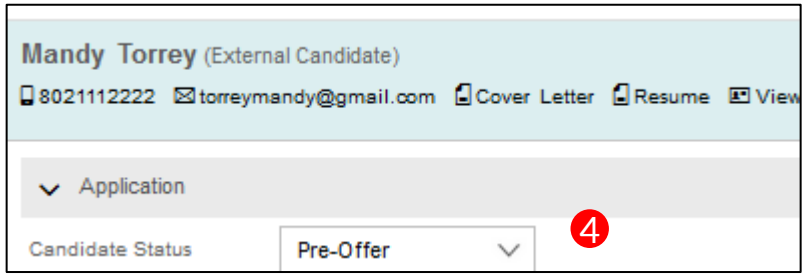
i. Candidates in Hired status are sent to HRIS (Manage Hire) through a data transfer

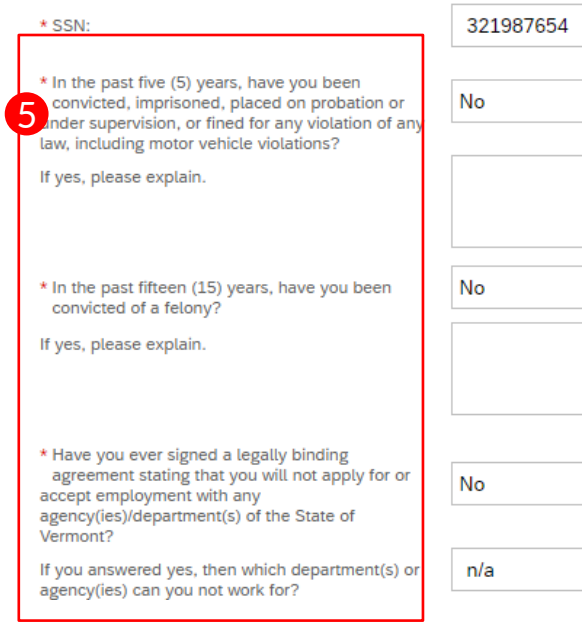
PRE-OFFER PROCESS

How to Manage Candidate Status in SuccessFactors







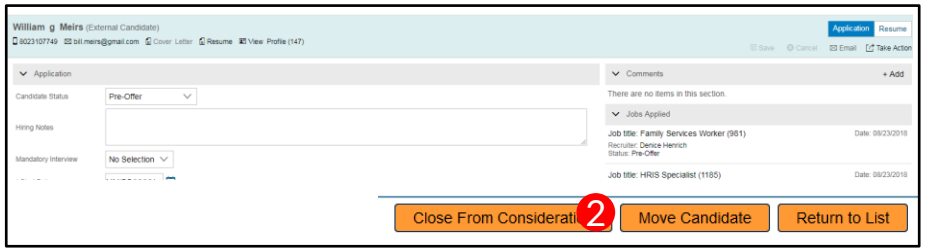


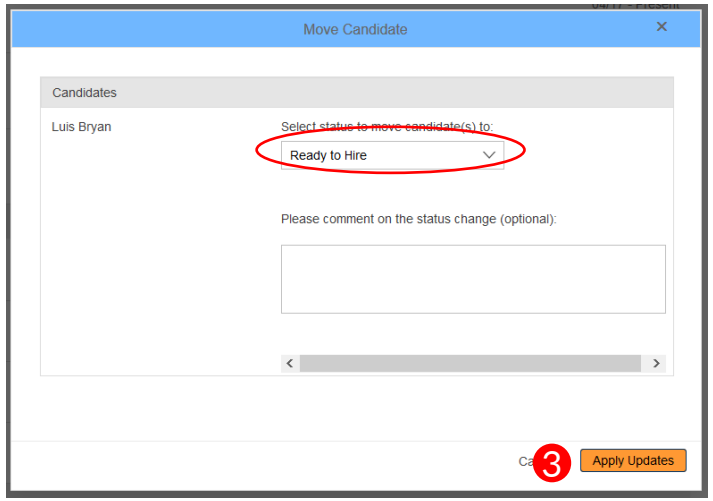
These steps begin once you have received notification that the candidate has updated their application.

1. Go to Home and click "Recruiting."
2. Select the requisition by clicking the candidates.
3. Select candidate that is in "Pre-Offer" status by viewing the list of active candidates and clicking on the candidate's name.
4. You are now viewing the candidate's application.
5. Review the candidate's responses to the Criminal History and STIP questions.
6. Review the candidate's Tax Compliance statement. Use the SSN entered by the candidate to send an email to the Tax Department (Tax.Compliancesupport@vermont.gov.) or complete the self-service Tax Compliance Validation process.

PRE-OFFER PROCESS

How to Manage Candidate Status in SuccessFactors





Once the candidate has been cleared with respect to Tax Compliance, Criminal History and any other background check requirements applicable at this phase, **move the candidate into the Ready to Hire status.** This status will trigger the hiring manager to proceed with the conditional verbal offer.

1. Drag and drop the candidate from the Pre-Offer status on the pipeline to the Ready to Hire status

   OR

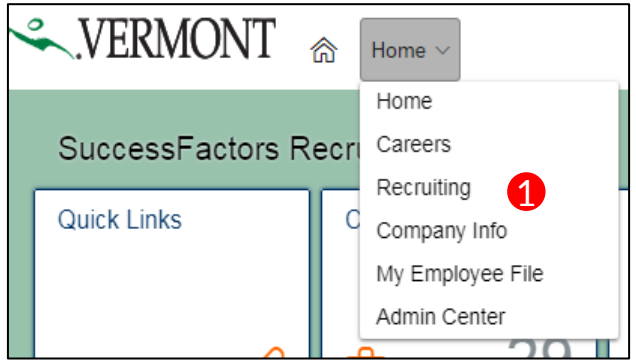
2. Click on the Move Candidate button (at the bottom of their application page)

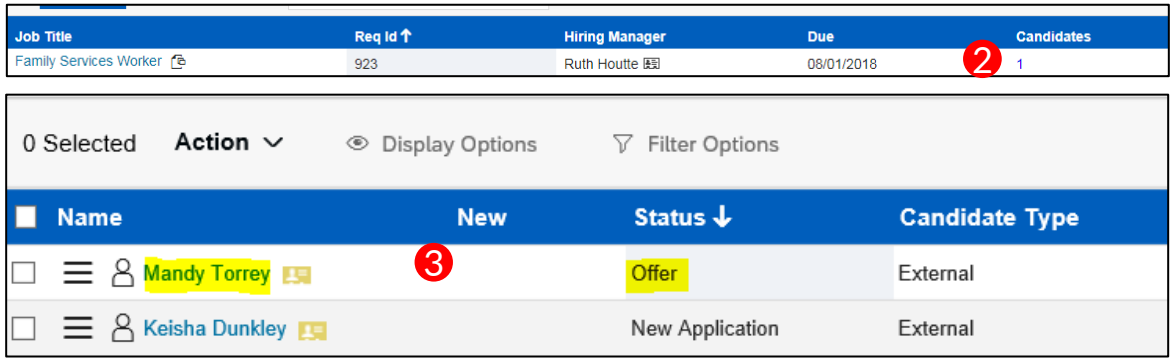
3. Choose the "Ready to Hire" status in the drop down and then click on Apply Updates

OFFER PROCESS

OFFER PROCESS

How to Manage Candidate Status in SuccessFactors





These steps begin once you have received notification that the candidate has been moved to Offer status.

1. Go to Home and click "Recruiting."
2. Select the requisition by clicking the number under candidates.
3. Select candidate that is in "Offer" status by viewing the list of active candidates and clicking on the candidate's name.
4. You are now viewing the candidate's application. Scroll down and note the hiring manager's comments on the right-hand side of the application.

Helpful Tips:

- ✓ Keep your email notification open in another window or print it for easy access to position details on the req.
- ✓ Also – open Position Management in VTHR in another window to cross-reference and validate position details
- ✓ Be careful about copy/paste. If a space is entered in a field, the data feed will fail.

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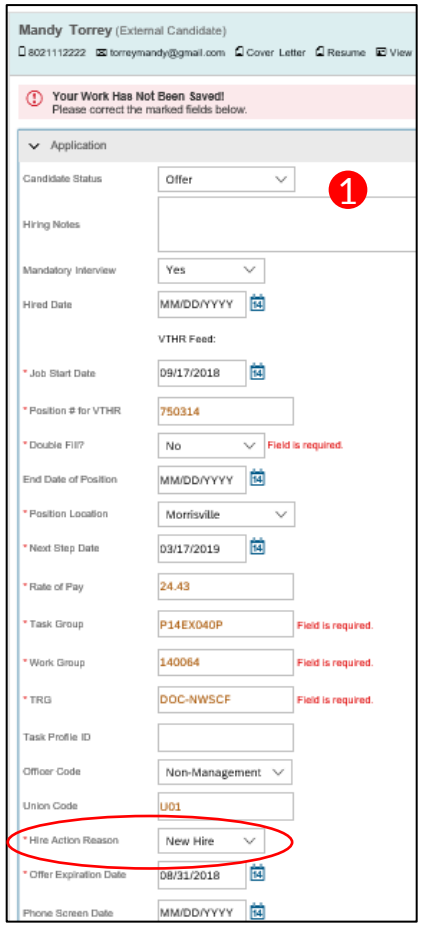
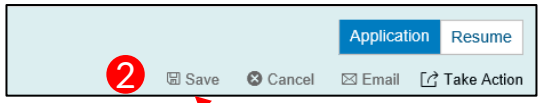
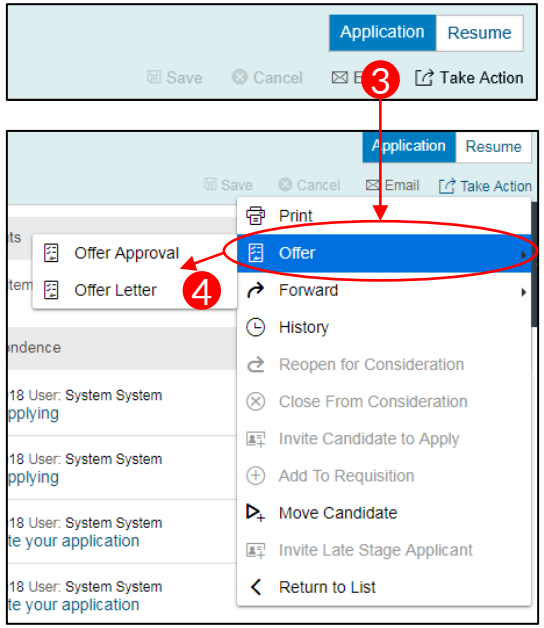
OFFER PROCESS

Offer Approval (Optional Step) and Offer Letter Creation





Make sure to save your changes or you will lose your work!



Tips and Notes:

- ✓ Search by Social Security Number in VTHR to validate whether the candidate is a New Hire, Rehire or Transfer before selecting the Hire Action Reason.
- ✓ The Next Step Date Field is a Required Field and should be filled in with new hire's next step date. For those who would not have a next step date (temps, etc.,) please use 1/1/1901.

Offer Approval is an optional step. If this step is required for your department's business process, **stop here and see the Offer Approval job aid.** Once you have the approval, return to these steps.

1. NOTE: The application includes a list of required fields. Some fields are required to populate the offer letter. Some are required for the data transfer to HRIS. This is not a multi-stage process, so all fields are required at the same time. Update and enter required fields, as applicable.
2. Once all required fields are entered, **click on the Save link** in the upper right corner. If you don't do this, you will lose your work!
3. Then, click "Take Action." Hover over the Offer item until the Offer Approval and Offer Letter options are visible.
4. Select the Offer Letter option.
5. Choose the correct letter type from the Templates dropdown: Internal, External or Temporary

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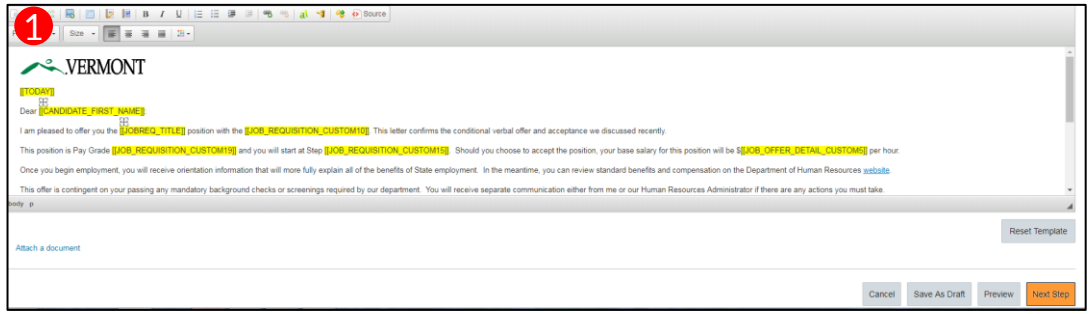
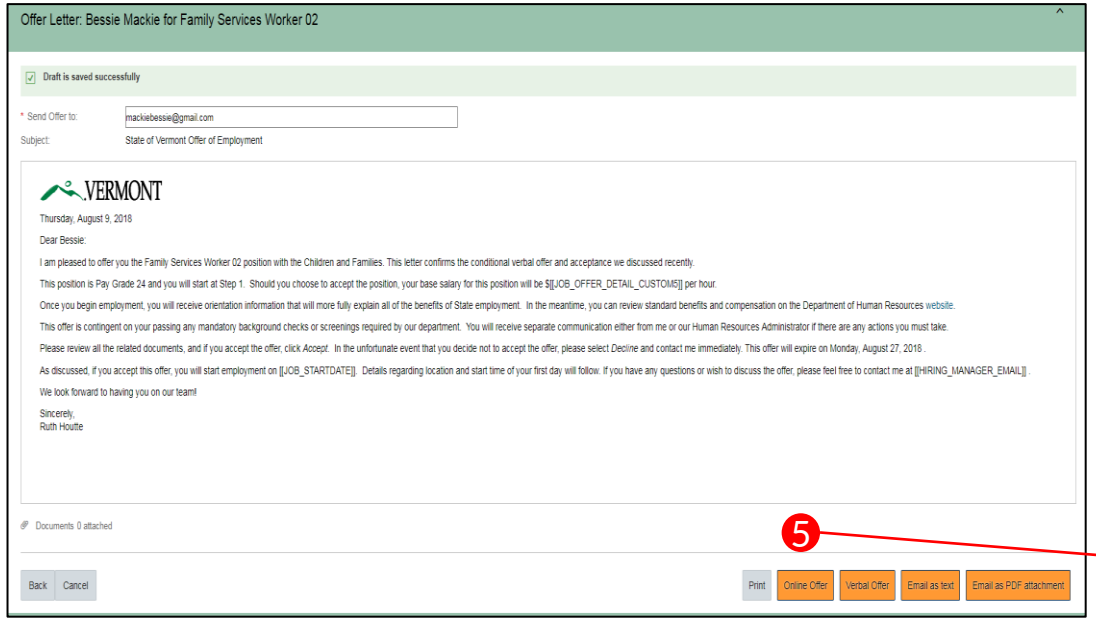
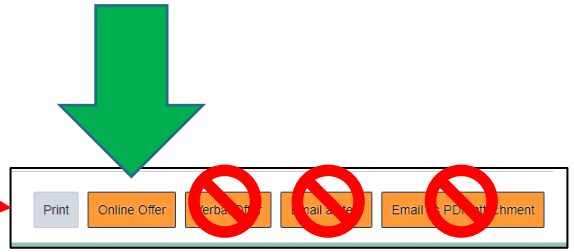
OFFER PROCESS

Reviewing the Offer Letter







1. After you select an offer letter template, it will bring up a copy of the offer letter. The information will autofill based on previous information that was entered. You can edit the letter if needed.
2. Click on the Preview button
3. If edits are required, click on the Back button in the bottom left corner of the preview screen to make the necessary changes. If no changes are needed, skip to **Step 5.**
4. If you made changes and now the document is ready to send to the candidate, click on "Next Step."
5. This will show the candidates email at the top of the screen with a subject line. In the body of the email will be the offer letter. Press "Online Offer" at the bottom of the screen. NOTE: no other options are to be used.

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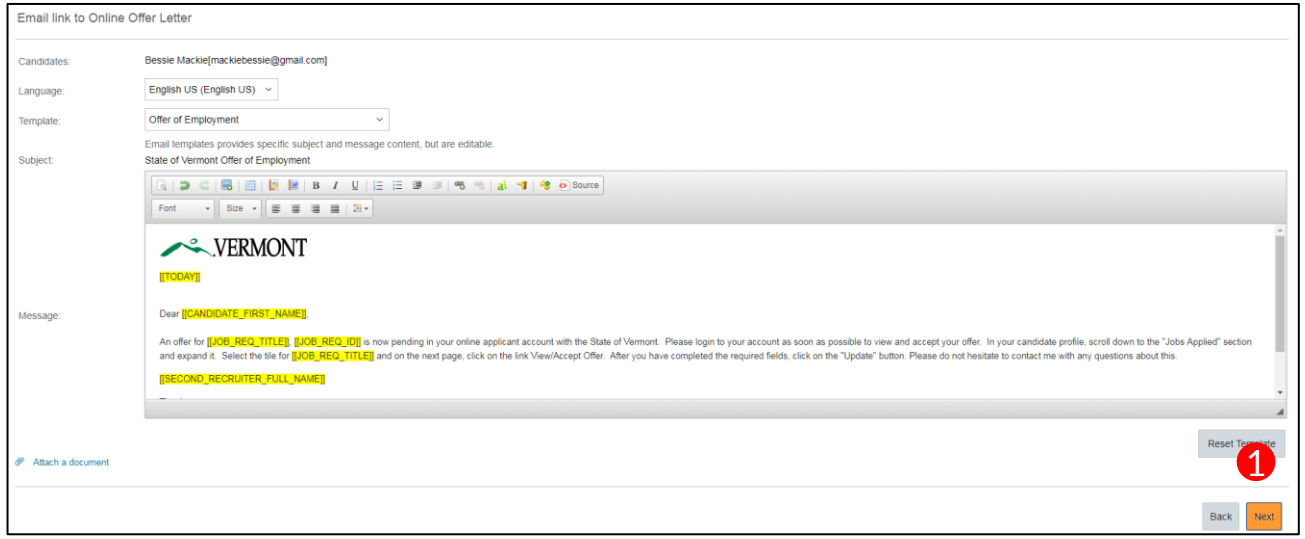
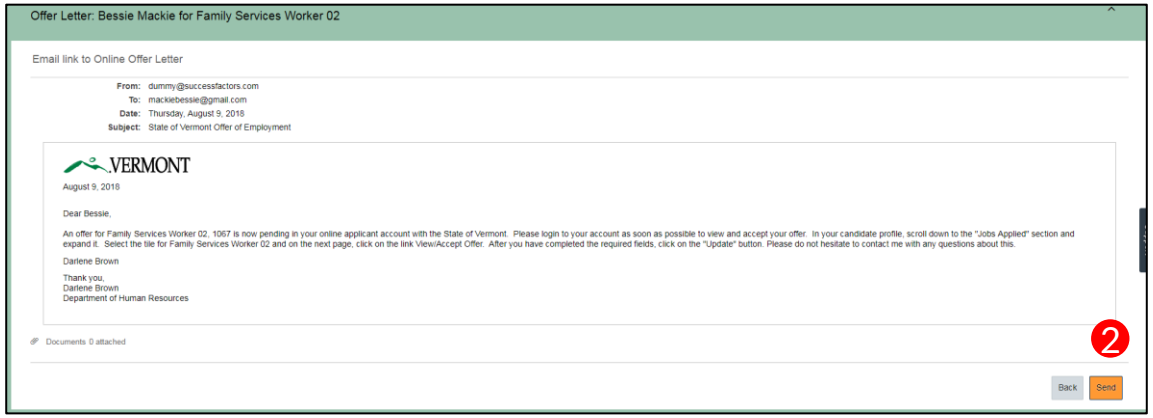
OFFER PROCESS

Sending the Offer Letter

1. The next screen will show you the email that the candidate will receive regarding the pending offer. Click 'Next" at the bottom of the screen.

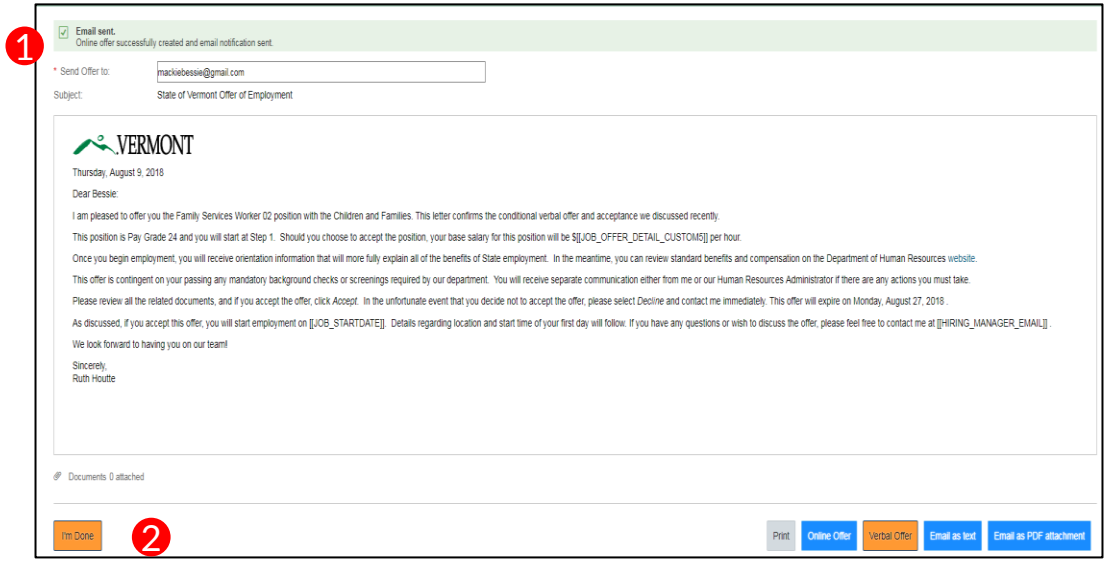
2. This screen will allow you to "Send" the letter to the candidate. Click "Send" at the bottom of the screen.

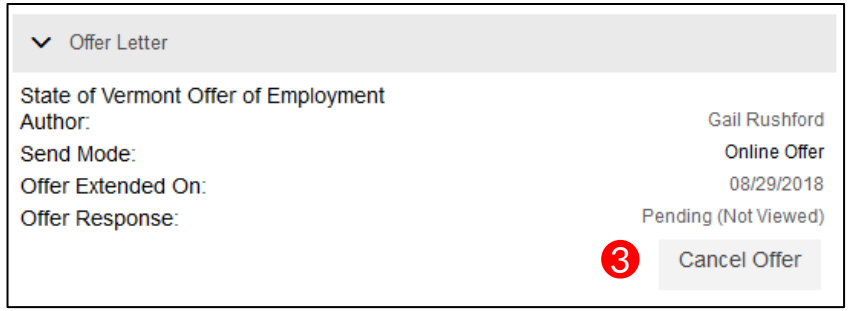




OFFER PROCESS

Cancelling Offer Letter/Acceptance Notification





1. The final screen will show you that the email has been sent.
2. Click "I'm Done" at the bottom LEFT of your screen.
3. To cancel an offer, return to the requisition and select the candidate's name in the active candidate list. On the application page, scroll down to find the Offer Letter on the right hand side of the screen.
   Click on Cancel Offer
4. Once the candidate accepts the offer you will receive an email confirmation.

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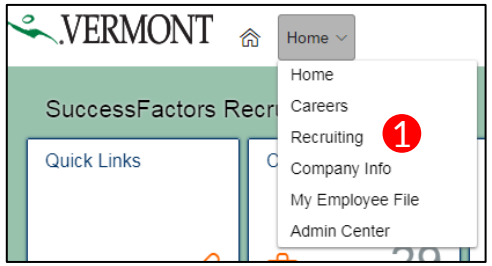
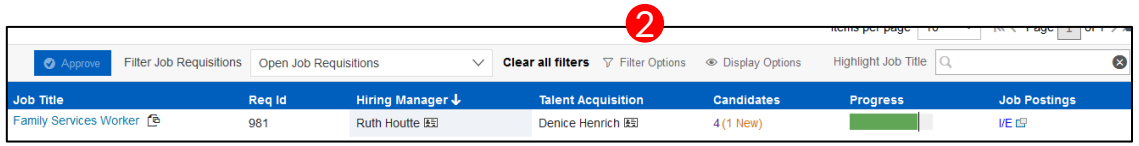
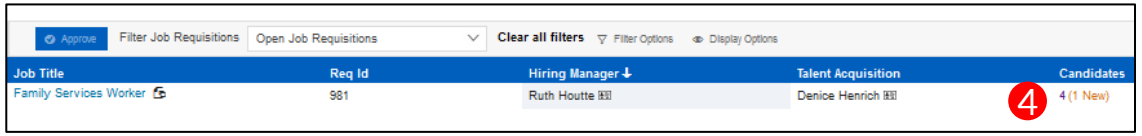
HIRE PROCESS

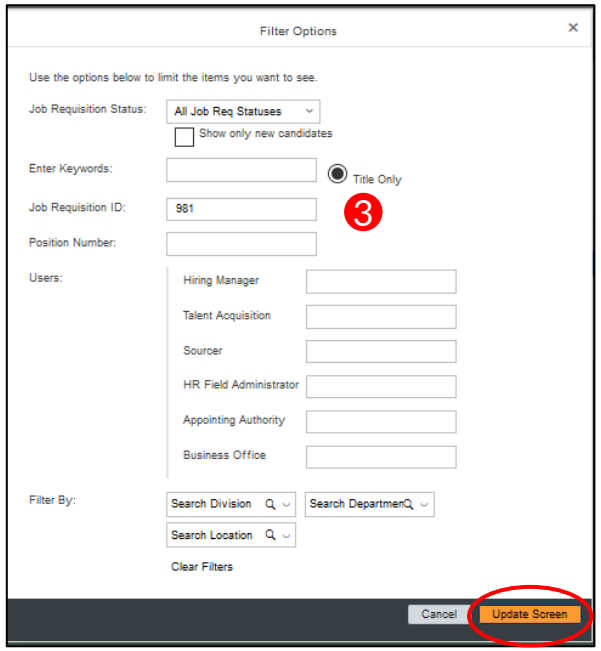
HIRE PROCESS

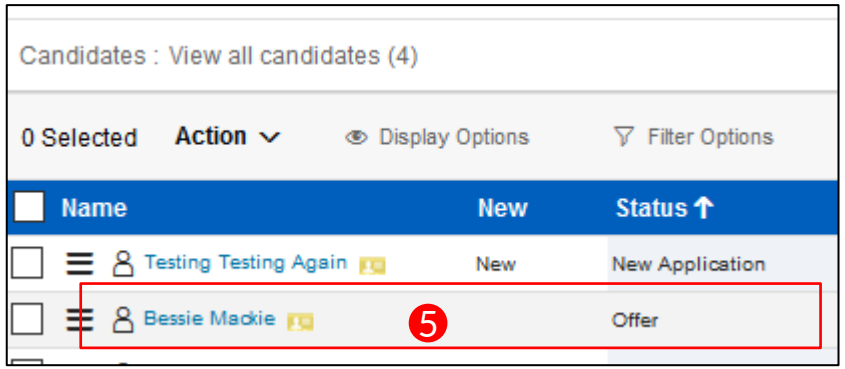
Initiating the Hire Process











Initiate the Hire Process upon receipt of system notification (email) that the candidate has accepted the offer.

1. From the Home menu drop down, click on the Recruiting link.
2. To quickly find the requisition, click on "Filter Options."
3. A dialogue box will open. Enter the Job Requisition ID and click on Update Screen.
4. On the requisition list, click on the number in the Candidates column.
5. Select the candidate in Offer Status, by clicking on the person's name.

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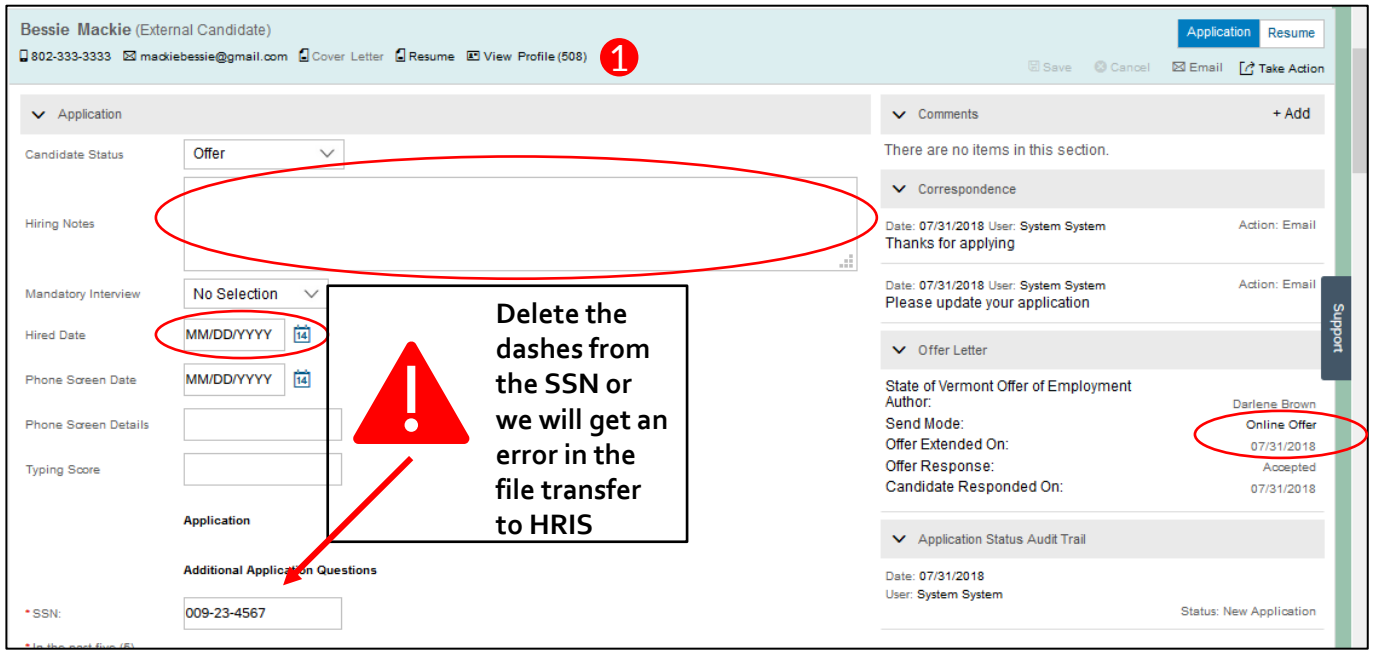
HIRE PROCESS

Initiating the Hire Process



1

You are now viewing the candidate's application. You may enter notes for HRIS in the Hiring Notes box. (for example: "Double fill approved xx/xx/xx by xx" OR "This is an internal xfr; actual start date is the beginning of the pp")
The details in the offer will be forwarded to HRIS by a data feed. You may review the offer letter by clicking on the link. It will open in a new window or download, depending on your web browser. To validate or overwrite the start date, enter the correct date in the "Hired Date" field.

Accuracy Alert
If you identify any errors (other than a change in start date) in the Offer, stop here. Once the discrepancies have been addressed, submit a new offer to the candidate and resume the hire process when the corrected offer has been accepted.
If your data is rejected in the data feed, you will receive a notification and be required to resubmit the Hire (after Talent Acquisition reopens the requisition). Errors that cannot be corrected this way will require a PAR.

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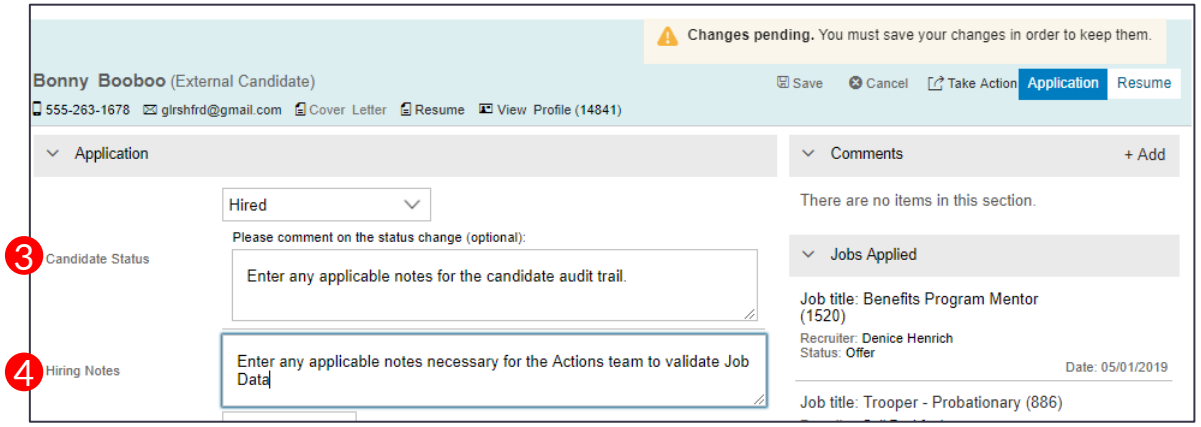
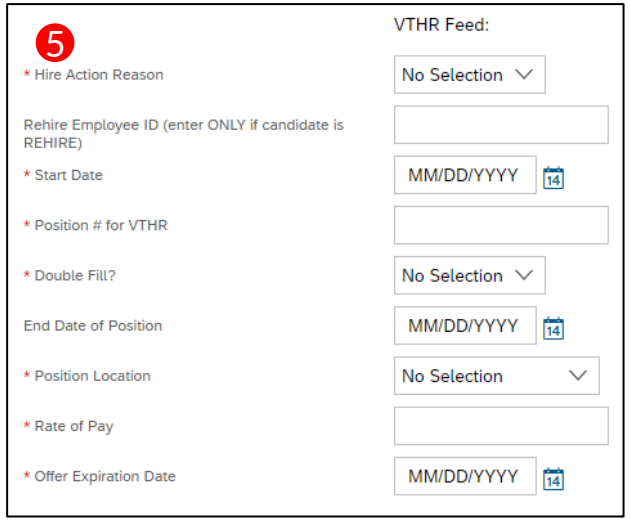
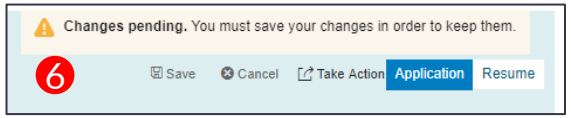
HIRE PROCESS

Moving to “Hired” Status and Closing out Requisition







NOTE:

If there was just one opening remaining on the requisition, the status of the requisition will change to filled and candidates who were not previously dispositioned to “Not Selected” will receive a system generated email.

1. When you are ready to move the candidate to Hired status, verify that the Candidate has accepted the Offer.
2. Expand the Candidate Status dropdown to select Hired.
3. Enter notes applicable to the change in candidate status.
4. Enter Hiring Notes for the Actions team.
5. Validate that all fields required for the VTHR Feed are complete and accurate. Hiring Notes for the Actions team.
6. Save
7. Complete and submit a PAR within 24 business hours of moving candidate into Hired status.

ADDENDUM:
GUIDANCE FOR EXEMPT POSITIONS - APPROVING REQUISITIONS AND HIRING

This Guide is For: Field HR Staff

Document Number: F501A

ADDITIONAL GUIDANCE FOR EXEMPT POSITIONS

Exempt Position Salary Details

Salary Details

Pay Grade	97
Pay Plan	OTH
Step	0
Hourly Rate	0
MFA	0
Officer Code	No Selection

1

2

1 Exempt positions are a little different from Classified positions in that all of the required information under Salary Details may not populate when Field HR chooses an exempt job code when approving the Job Requisition.

The Pay Grade field under Salary Details may not populate for all exempt positions. In these instances, **manually enter the numeric pay grade; do not write "Exempt."**

If pay grade cannot be determined at the time the requisition is created, Field HR will need to ask their TA Specialist to update this field with the appropriate numeric value prior to moving a candidate into "Hired" status. A blank field or inaccurate value will cause a feed rejection. If this happens, TA will need to re-open the requisition to update the field, and the new hire will need to be pushed through the feed a second time.

2 Pay Plan, Step, Hourly Rate, and MFA should self populate for exempt job codes. If they do not, you can enter "OTH," "0," "0" and "0" respectively to complete those fields.

If any fields aside from "Officer Code" are left blank, a feed rejection will occur when a candidate is hired. Ensure that these fields display the correct values prior to moving a candidate into "Hired" status. If any fields are blank, please notify your TA Specialist so they can enter the values.