TEXAS
Health and Human Services

Hiring Manager Guide

SuccessFactors Recruiting Platform

Table of contents

Abbreviation List

Job Posting – JP
Job Requisition – JR

1. How to use this guide?

The purpose of this guide is to support Hiring Managers during the recruiting process and through the testing phase.

This guide has been created to help in your daily business process as a Hiring Manager within the State of Texas. After the initial chapters focusing on general information and navigation around the SuccessFactors Recruiting Platform, the main focus of this document will be in the **Recruiting** section of the Platform, covering the following aspects:

- How to navigate through the system
- How to create and approve Job Requisitions
- How to update Job Requisition Forms
- Different types of candidates and candidate applications
- Explanation of various application statuses in the system
- How to move candidates through various application statuses
- Screening and Interview Planning (pending State of Texas approval, not up to date)
- How to prepare and extend offers

This guide is broken up into chapters. For better understanding, letters and numbers will be used in images to provide a structured step-by-step approach to cover the relevant topics.

2. Introduction SuccessFactors Recruiting Platform

The SuccessFactors Recruiting Platform is the new State of Texas' recruiting system. Using SAPs market leading solution, SuccessFactors provides a high quality, digital employee/candidate experience and access to *Best Practice* HR processes for recruiters and candidates. The system is accessed through the internet, therefore users are not location-dependent when using it.

3. Main Role of the Process

Hiring Manager – The Hiring Manager is the main process owner of the Job Requisitions/Postings function in the **Recruiting** process. Hiring Managers are involved in all stages of the application process, conducting administrative tasks and collaborating with other recruiting roles at certain stages.

4. Other Recruiting Roles

- **HR Professional** – HR Professionals have the **highest level of permissions** in the system. This role has extended permissions compared to Hiring Managers. They can **access all the JPs** and can update candidates in the *talent pipeline* after the JPs are fully approved and posted. HR Professionals function as high level operators for system support, if other users face errors or require assistance.
- **Non-HR Recruit** – Agency specific (HHSC, DSHS, DFPS) role with the same system permissions as a Hiring Manager. Supports Hiring Managers with Job Requisitions and can access **all** Job Requisitions of a specific agency.
- **Recruitment Partner** – Recruiting Partners support Hiring Managers with the **screening** and **interviewing** of candidates, with **view access** to Job Requisitions they are assigned to.

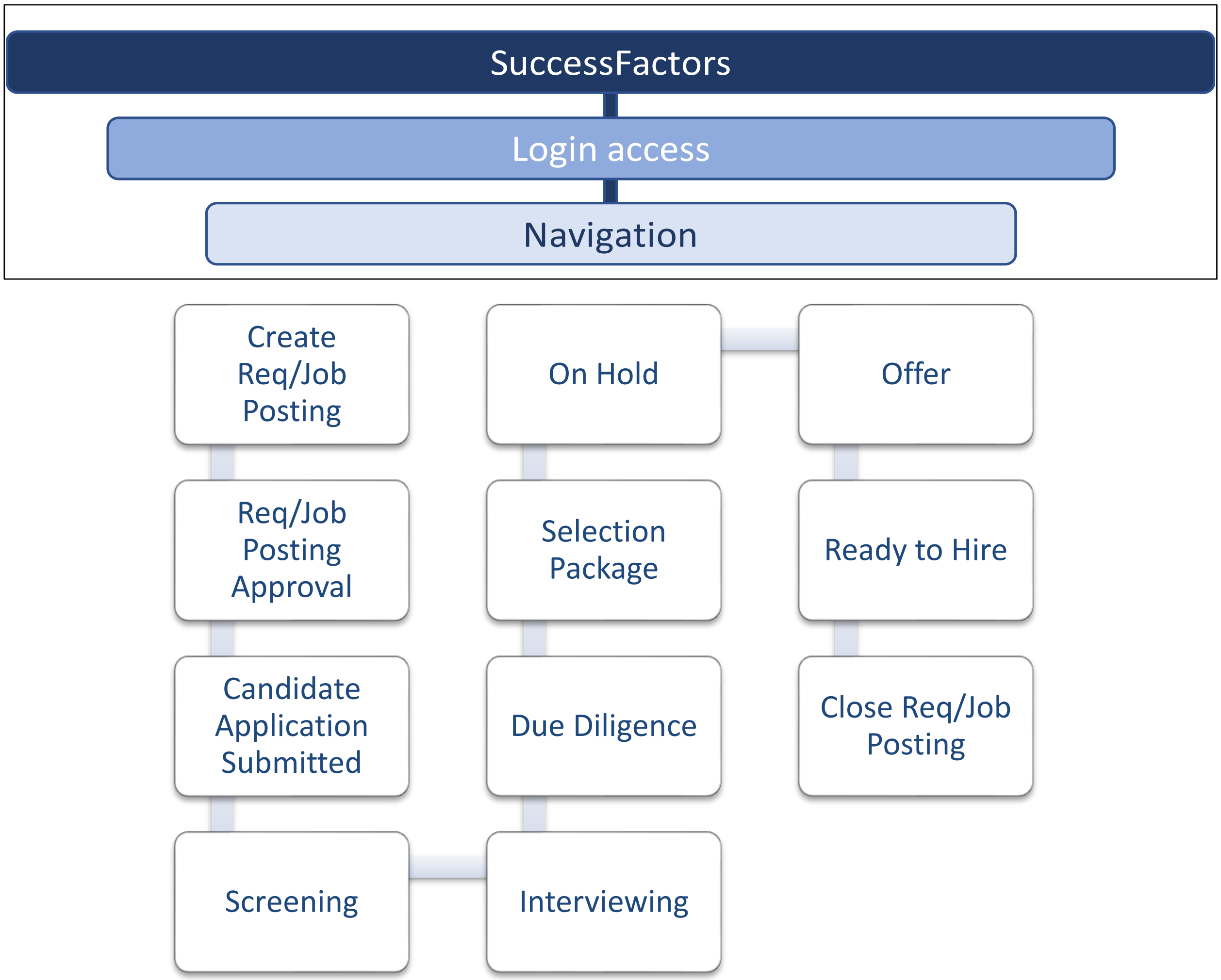
Background Information
The list below are people who serve a part in the recruiting process.

- **Staffing Coordinator** – Staffing Coordinators function as the final reviewer and approver of pending JPs. Their main focus is on recruiting related administrative tasks.
- **Delegate** – Designated by Hiring Managers and approved by the Recruiting team. The role is not transferred from the PeopleSoft file and must be set manually. A *Delegate* can use the *Proxy Now* button to act on behalf of the Hiring Manager (further information: SoT_Hiring Manager Guide).

Note: All employees have access to the new recruiting platform, including regular employees.

- **Regular Employee** – Employees with limited system features with only access to system sections *Careers*.

5. Process Flow



6. Log into SuccessFactors

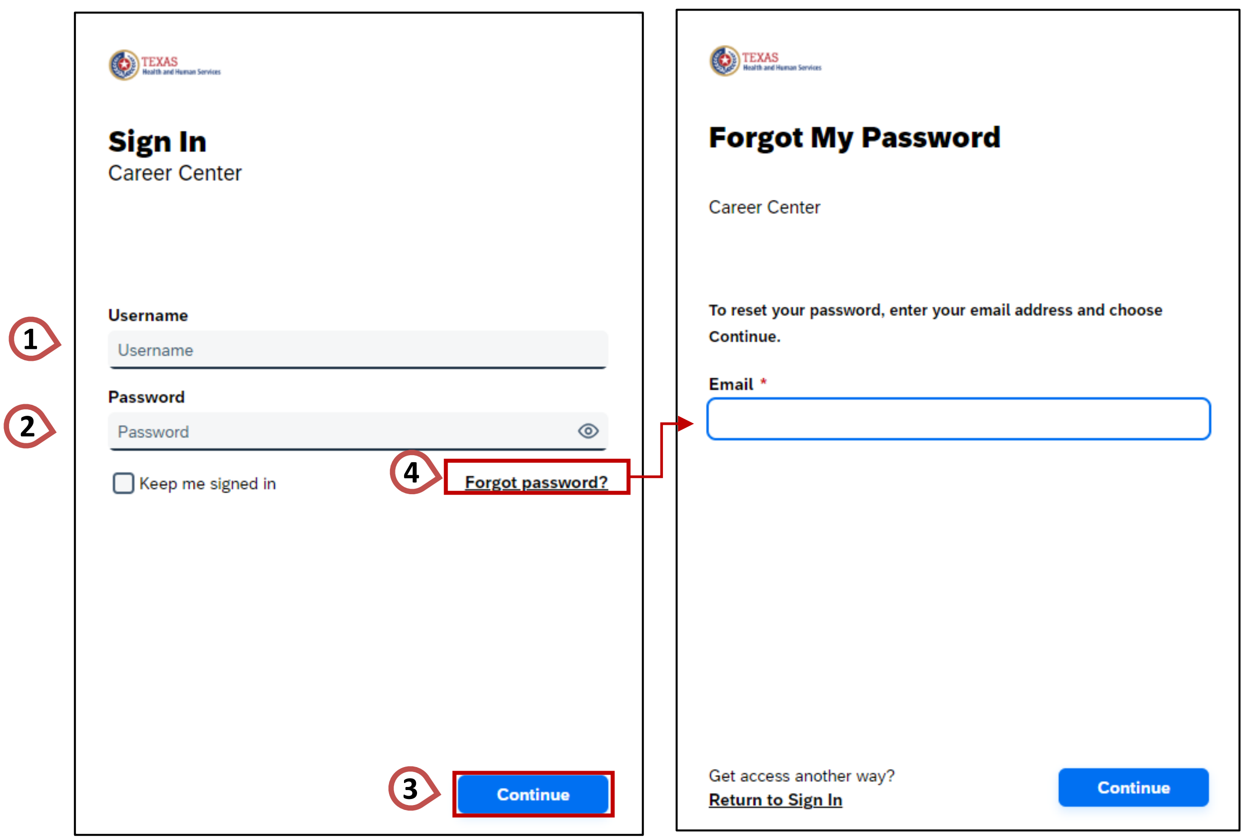
This section describes how to log into SuccessFactors.

Each SuccessFactors Recruiting Platform user is assigned a username and password. Additionally, State of Texas has an URL and Company ID assigned.

1. Open SuccessFactors URL. For quick access later, save the URL as a favorite by clicking on the *Star* icon on the right side of the URL bar.

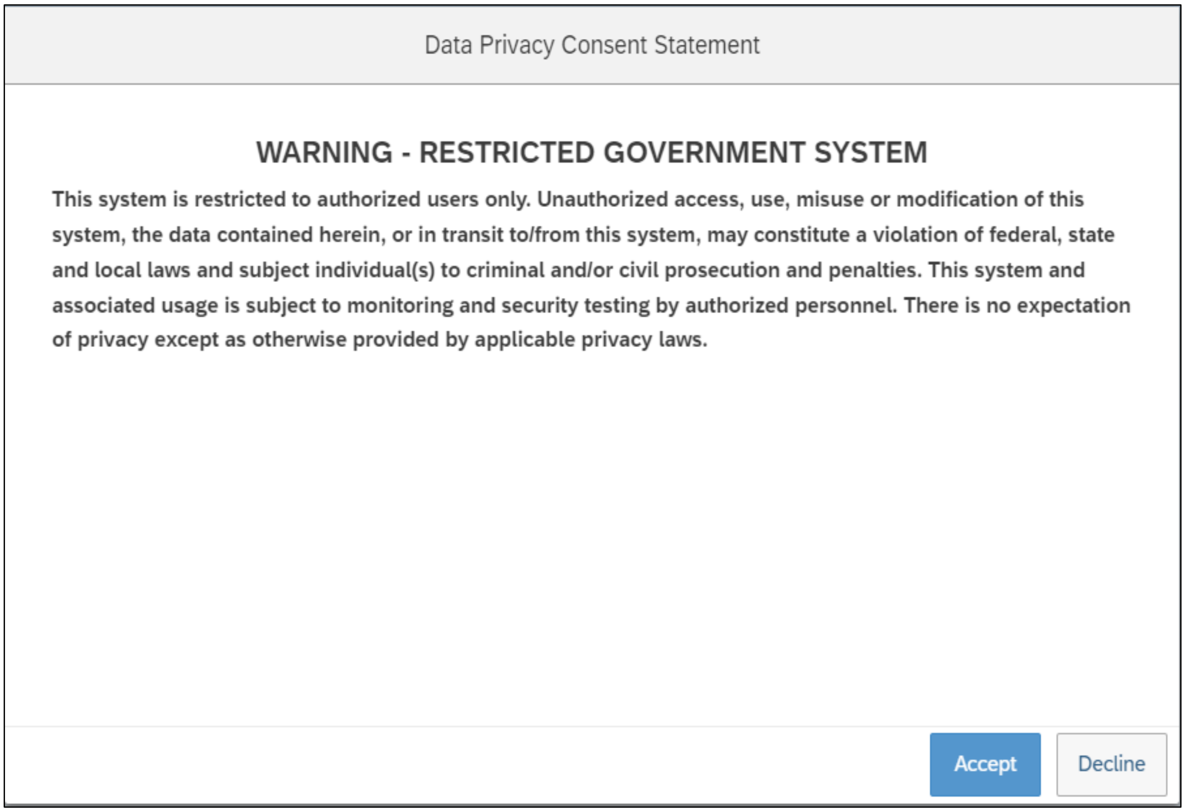
Once the Login page is opened, you are able to log into SuccessFactors:

1. Enter your username. You will use your CAPPS Employee ID#.
2. Enter your password.
3. Select *Continue*.
4. If you have forgotten your password, select the hyperlinked *Forgot password?* button below the password box to start resetting your password by entering your Email address on the next screen, click on *Continue* and receive a password reset email.



7. Navigation in the SuccessFactors Recruiting Platform

The first-time logging into SuccessFactors, the Hiring Manager will need to review and accept/decline the Data Privacy Consent Statement (DPCS).



Once accepted, the Hiring Manager will be redirected to the Home Page and will not need to accept the DPCS again when accessing the system the next time.

7.1. Home Page: Basic Navigation

The Home Page is the default start page of the SuccessFactors platform. For employees, the Home Page is the main entry point to the platform and generally the first page you see after logging in. It shows useful information like approval highlights, pending tasks to complete, recent.

A) Company Logo: State of Texas Logo. It will be always visible on the top left of the system screen, redirecting the logged in user back to the home page.

B) Navigation Menu: This is the main menu to access the sections of the system, mainly for *Careers* and *Recruiting*. It will be always visible on the top left of the system screen.

C) Actions/People Search: This is a search function, which is always accessible on the screen. Click on the search icon to find employees by their employee IDs or names. When you begin to enter text, you'll start to see applicable results. Additionally, users with extended system permissions can search for actions (e.g. to directly navigate to the recruiting section or parts of the recruiting section) or section specific commands. Can be collapsed by using the *magnifying glass* icon. This feature remains constant as you navigate through the portal.

D) To-Do Alerts and Notifications: Quick access for open To-Do items and system Notifications. Same as for the Actions Search bar, these icons will be visible on all the pages when navigating through the system. They help you manage your day and prioritize what to focus on.

E) Profile Menu: Shows the name of the logged in user and options for system *Settings*, viewable system *version information* and the *Log Out* feature.

F) Banner: Appears with the Career Center logo.

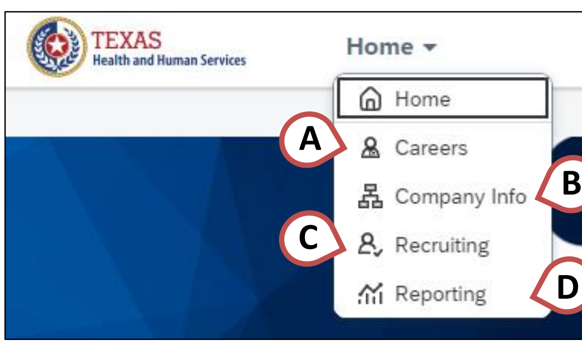
G) Quick Actions: Designed to promote efficient actions for the most common use cases.

H) Approvals: Requests around Job Requisitions appear here to be reviewed, approved or declined by the manager. Pending Approvals appear as To-Do tasks.

I) Resources: Shows five tiles (HHSC & DSHS Due Diligence Workbook, Posting Templates, DFPS Due Diligence Workbook, User Guides, and Assistive Technology User Guides) that store additional resources that can be downloaded.

7.1.1. Navigation Menu

The *Navigation Menu* will help to navigate through different sections of the recruiting platform.



A) Careers: Internal candidates will use the *Careers* section to search for and apply to positions after being redirected to the *Internal Career Center*.

B) Company Info: Redirects to the company *Org Chart*.

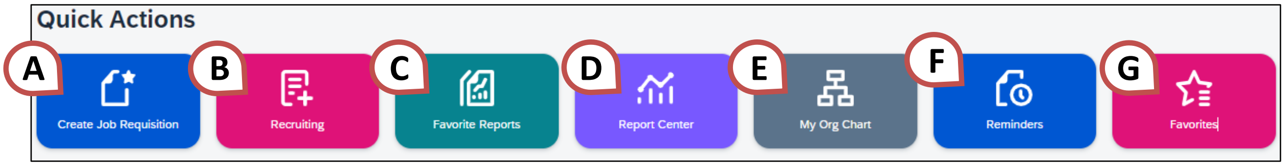
C) Recruiting: Hiring Managers will use the *Recruiting* section which provides a central location to create and store Job Requisitions and manage recruiting processes.

D) Reporting: Redirects to the *Report Center*.

To return back to the home page, select the *Home* icon above *Careers* or the State of Texas logo.

7.1.2. Quick Actions

The Quick Actions section enables users to complete the most frequent or important actions. It's always visible at the top of the page and is designed to promote efficient, focused action for the most common use cases.



Quick Actions are visible on the home page and the following quick actions are available:

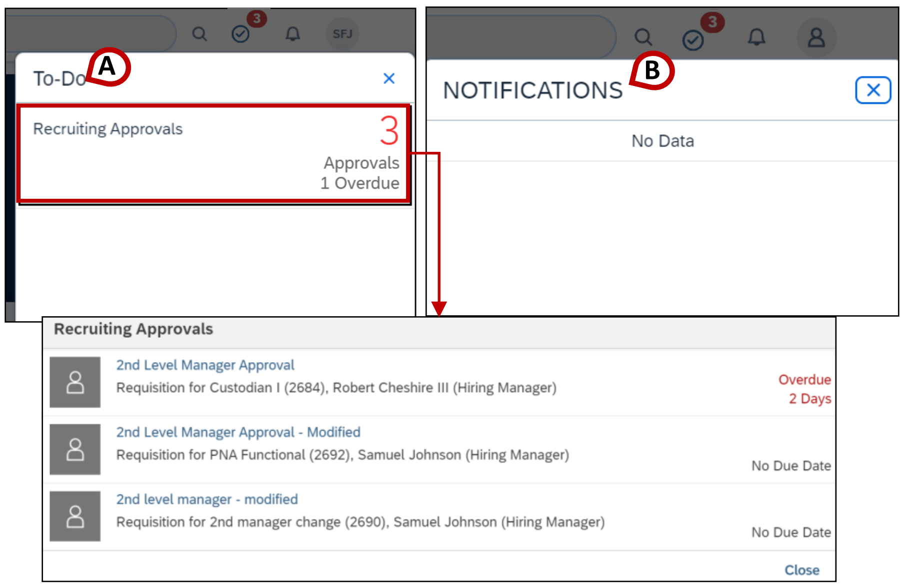
A) Create Job Requisition: Redirects to the *Create Job Requisition* tab of *Company Info*
B) Recruiting: Redirects to the *Recruiting* section (further information: 8. Recruiting Management).
C) Favorite reports: Enables users to build favorite reports that are automatically populated with the most up-to-date information with each login.
D) Report Center: Redirects to the *Report Center*.
E) My Org Chart: Redirects to the company *Org Chart*
F) Reminders: Home Page cards that were temporarily pushed to the next day. Reminders reappear on the Home Page 24 hours after their setup.
G) Favorites: Enables users to save quick links for frequently used parts/actions in the system. The system provides a default list of available links. Users can choose which ones to mark as their personal favorites for quick-access.

7.1.3. To-Do Items and Notifications

On the top right of the screen, the To-Do items check mark icon is visible. The icon shows the number of pending To-Do's. Next to it, there is an icon to view new, user-specific notifications.

A) To-Do Items: Example with three pending *Approvals* and one other *To-Do*.

B) Notifications: System notifications regarding the own profile or managed employees will be displayed here.



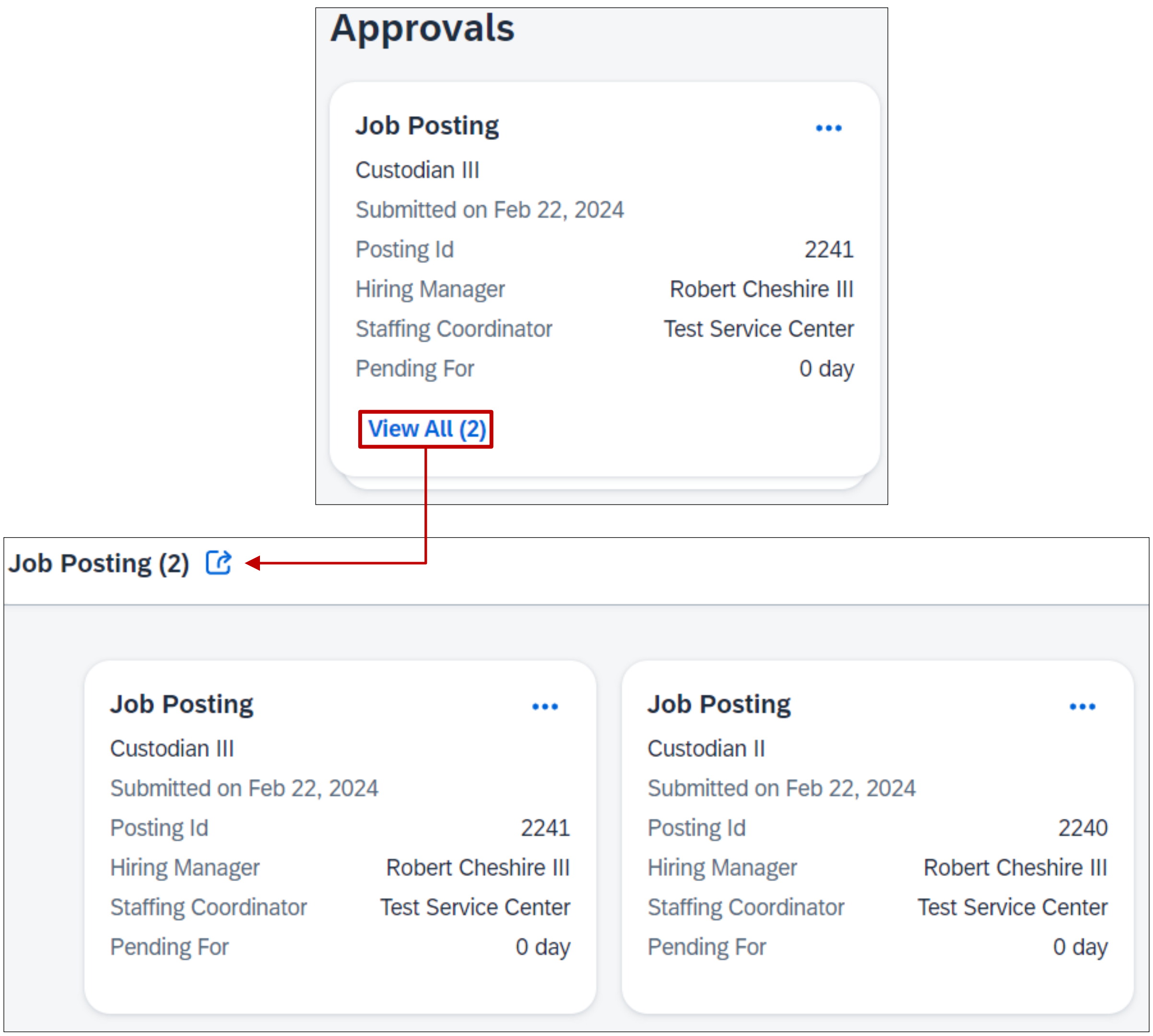
Note: These icons will be visible on any page in the system as the upper frame is locked and always available throughout the system.

7.1.4. Approvals

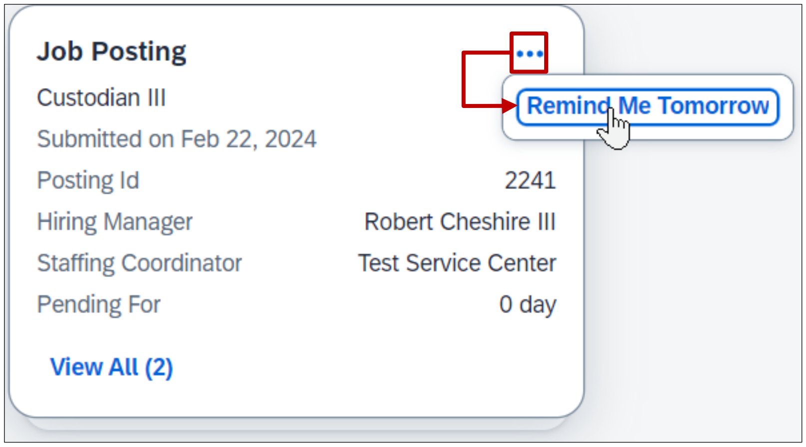
<u>Note</u>: If the logged in user is a **Hiring Manager** or has any other role (refer job aid document SoT_HR_Professional+Other_Roles_Guide) that is involved in the recruiting process, the *Approvals* section on the home page shows changes or requests that require the user to review, approve or decline.

Approvals are *To-Do tasks* and also appear on the [To-Do panel](). These show up as individual cards. When a task gets completed, it disappears from both places.

Single approval cards can be accepted or declined by selecting the card itself. The system will then redirect to the respective page of content to approve or decline (further information: [8.3. Approving a Job Posting]()). Multiple pending approvals require the Hiring Manager to access another page by selecting *View All* and review all pending items. Most approval processes will optionally allow or require approvers to add comments before approving/declining.



There is the option *Remind Me Tomorrow* to dismiss a card for 24 hours by selecting the three dots on the top right of an approval card.

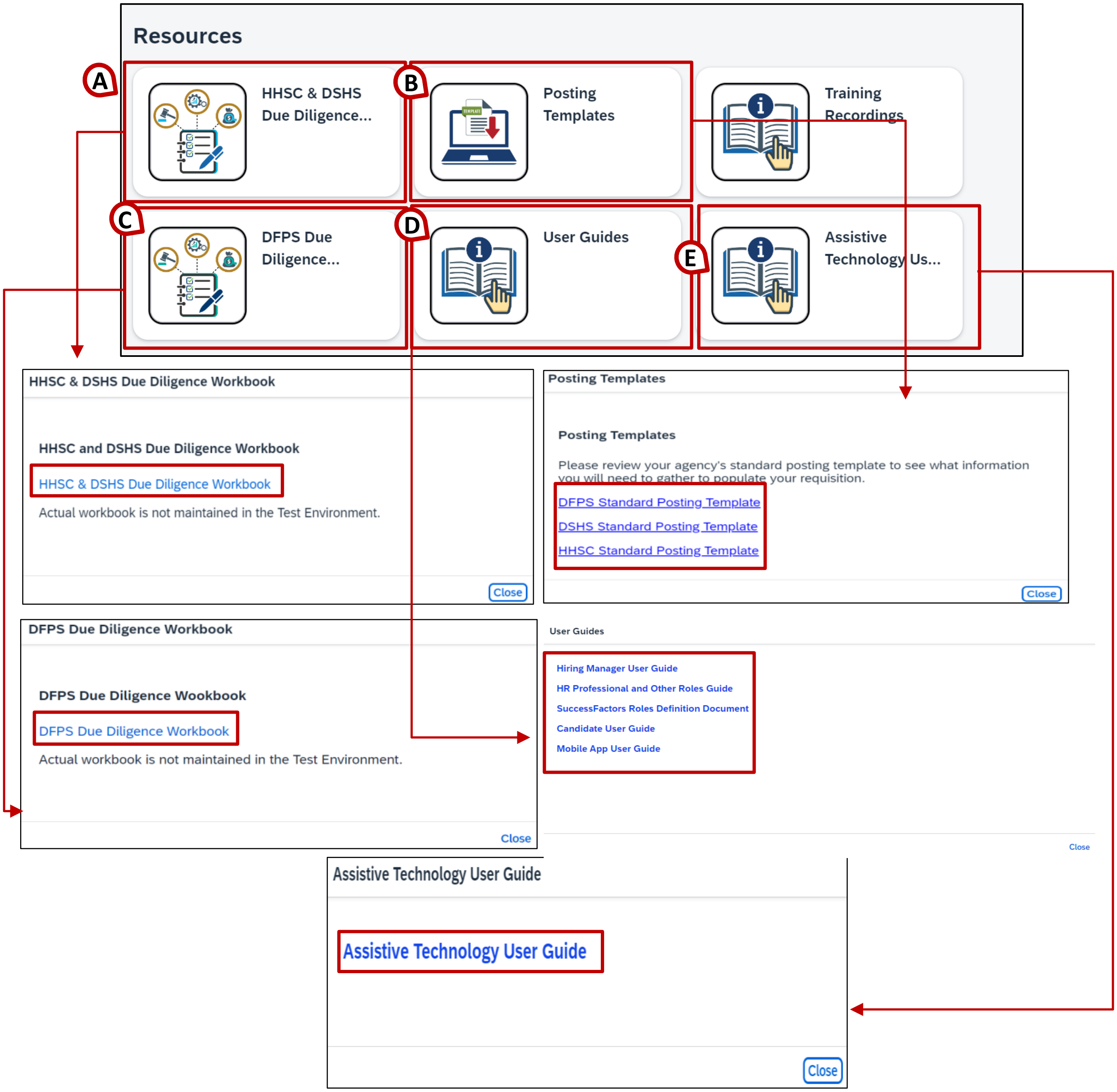


Two examples for pending Approvals:

- Job Offer: Prompts the Hiring Manager to review and approve a pending *Job Offer*. Links the Manager to the details of the offer to review and decide whether to approve/decline it.
  - Appears when there is a pending *Job Offer* that the Hiring Manager needs to approve.
  - Disappears after the offer was approved or declined. If no action is taken, it disappears 180 days or after the due date (if set) or the Last Modified date (if there's no due date).
- Job Posting: Prompts you to review and approve a pending JP. Links you to details so that you can review the requisition and then decide whether to approve or decline it.
  - Appears when you have a JP to approve-- that is, when you've been added as an approver and it's sent for approval.
  - Disappears when you accept or decline the requisition. This step moves it to a different step in the workflow. If no action is taken, it disappears 180 days or after the *due date* (if set) or the *Last Modified date* (if there's no due date).

7.1.5. Resources

Resources is a new section on the home page, providing guideline documents for due diligence, posting templates and job aids.



A) <u>HHSC & DSHS Due Diligence Workbook</u>: Stores additional resources regarding Due Diligence. Clicking on the link (HHSC & DSHS Due Diligence Workbook) will automatically download the *Excel* workbook.

B) <u>Posting Templates</u>: In this section you will find three different templates, one for each agency of State of Texas. Review your agency's standard posting template to see what information you need to gather to fill your requisition. Clicking on the link will automatically download the Word document.

C) <u>DFPS Due Diligence Workbook</u>: Stores additional resource regarding Due Diligence for DFPS agency. Clicking on the link will automatically download the *Excel* workbook.

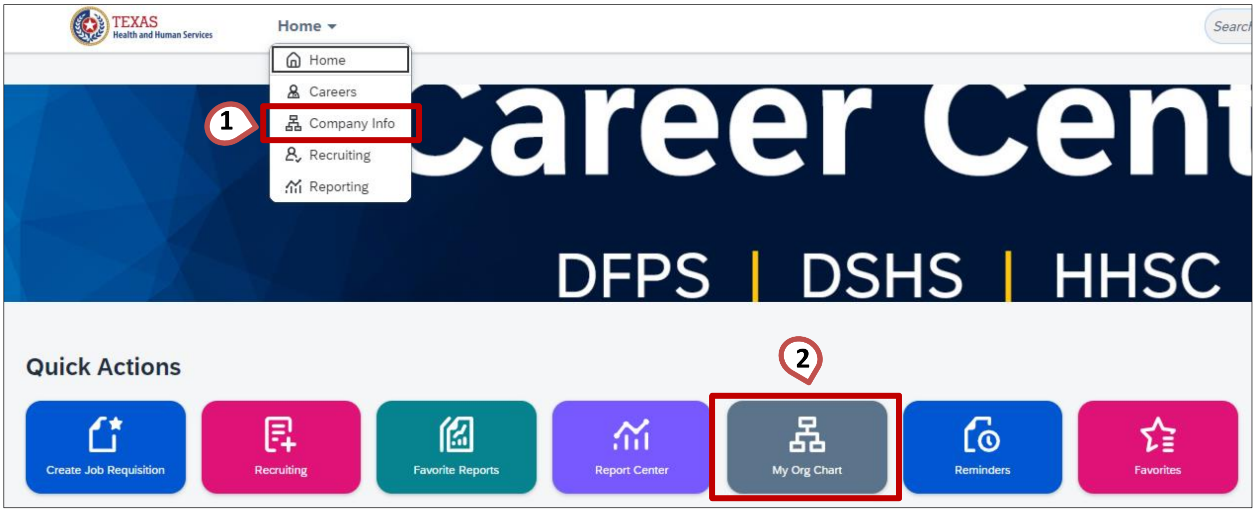
D) <u>User Guides</u>: This tile stores *Job Aid Documents* for further information about navigating through the system with different user roles like Hiring Manager, HR Professional, etc. Clicking on the link will automatically download the *Excel* workbook.

E) <u>Assistive Technology User Guide</u>: Stores the Assistive Technology User Guide.

7.2. Company Org Chart

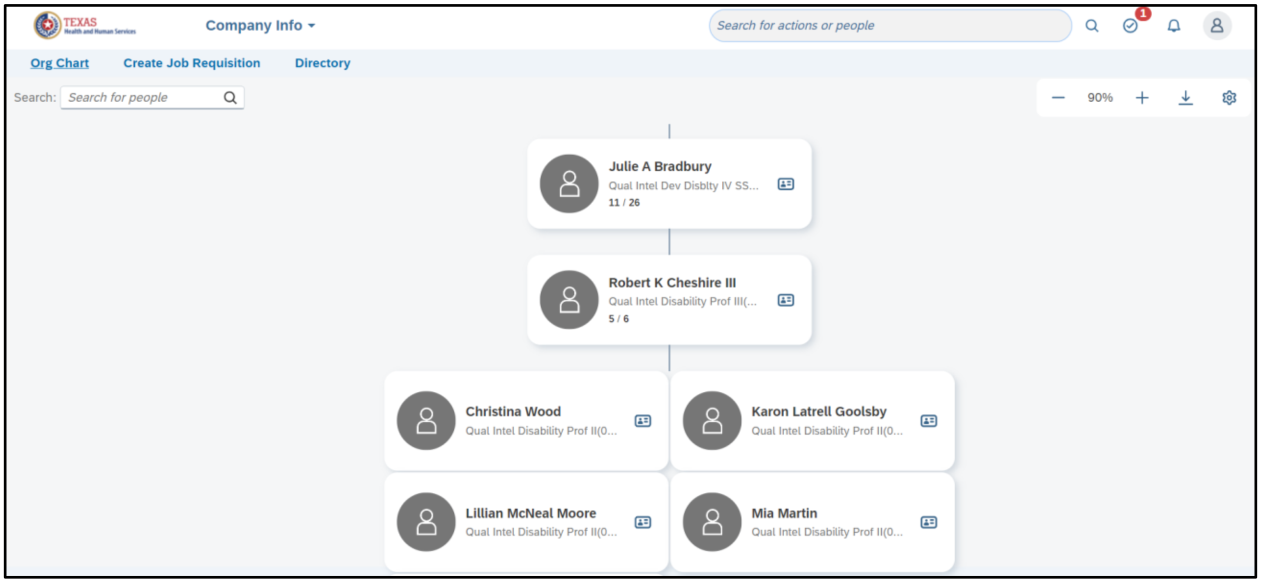
The State of Texas' *Org Chart* can be accessed from the home page in two ways:

1. Open the Navigation Menu and select *Company Info* or
2. Select the Quick Actions *My Org Chart*.



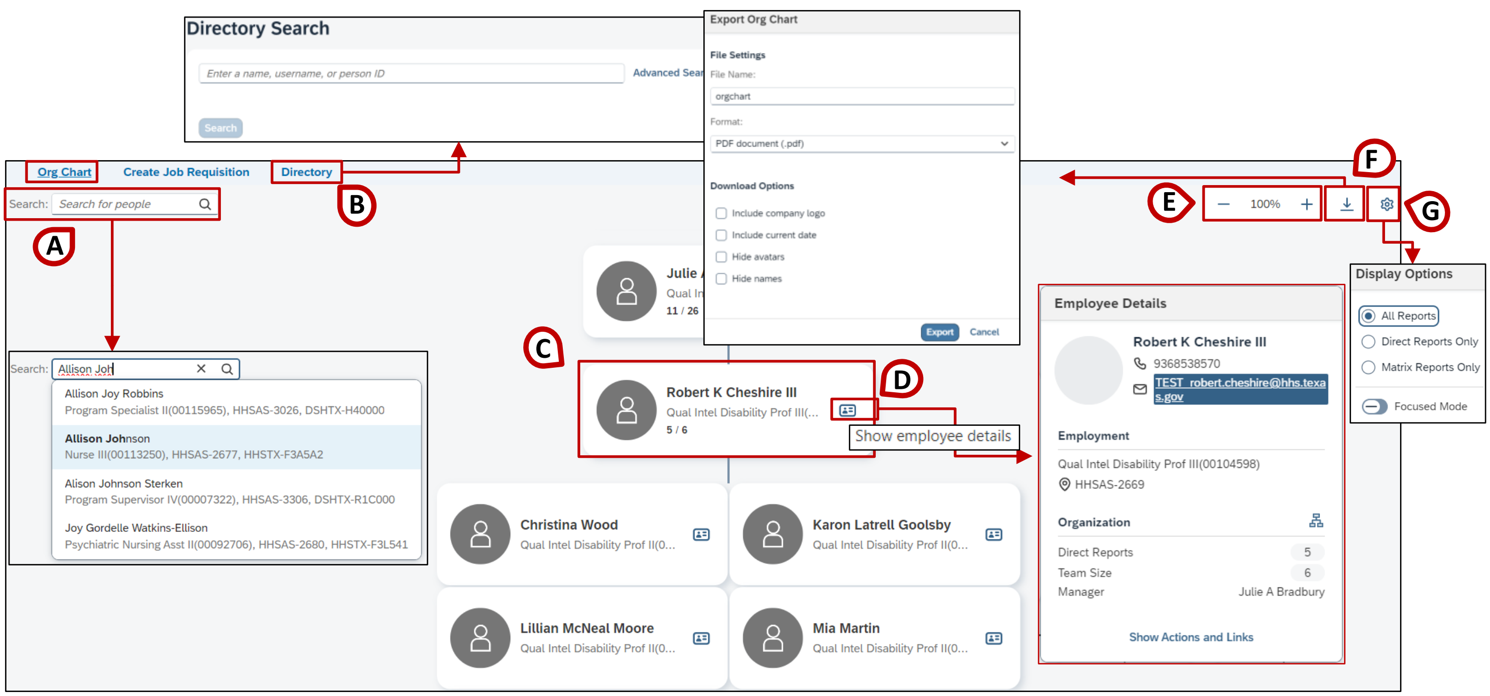
You can then browse the organizational hierarchy (*Org Chart*) to understand the department structure and reporting relationships. Find people in the organization and discover more about them using the *Employee Quick Card* or *Directory*. Hiring Managers can also view information about an employees' position, managers and other relationships in the organization, either direct or matrix.

7.2.1. Company Org Chart Navigation



Use the new *Org Chart* design to streamline your organization insight.

Note: The full reporting line of the searched employees will be shown right away. You can only navigate to the top and bottom of the chart by holding your left mouse key and dragging the mouse. Scrolling via the mouse wheel only zooms in and out of the org chart.



A) Search Org Chart: Allows to search and view an individual of the company on the chart.

B) Directory: General tool to search people of the organization by name, username, person ID or other advanced search criteria.

C) Employee Details: Displays the name and position name and ID. If an employee card shows numbers on the lower left, the respective employee is in a manager position and has direct reports. By clicking on the white card itself you can expand and collapse the display of the direct reports in the chart (the image shows the expanded chart).

D) Employee Details: Quick Card to open the Public Profile of an employee (further information: 7.1.5. Profile Menu: Public Profile).

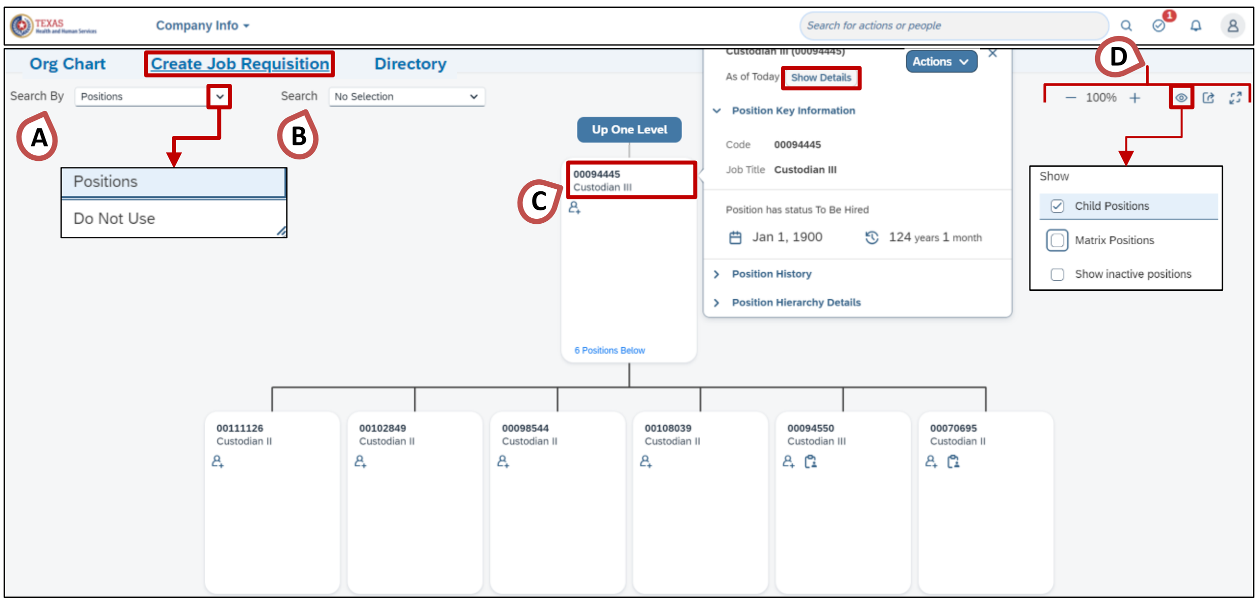
E) Zoom tool: Option to change the *Org Chart* size in percent by selecting the **–** or **+** icon.

F) Export Options: Option to export the chart in document or picture format with additional download options to include or hide certain aspects like names, avatars, the company logo and the current date in the export.

G) Display Options: Option to display all reports, direct reports only or matrix reports only in the *Org Chart*.

7.2.2. Create Job Requisition Navigation

The Position Org Chart allows Hiring Managers to view a graphical representation of positions in the organization, who occupies the positions and how they relate to other positions, whether those are higher-level positions, lower-level positions or peer positions.



A) Search By: Option to find a position based on *position* names or codes. The second option labelled as *Do Not Use* is searching for a position by employee name. Please only use the *Positions* option when trying to create a job requisition.

B) Search: Based on the previous selection for *Search By*, users can search by positions or employee name.

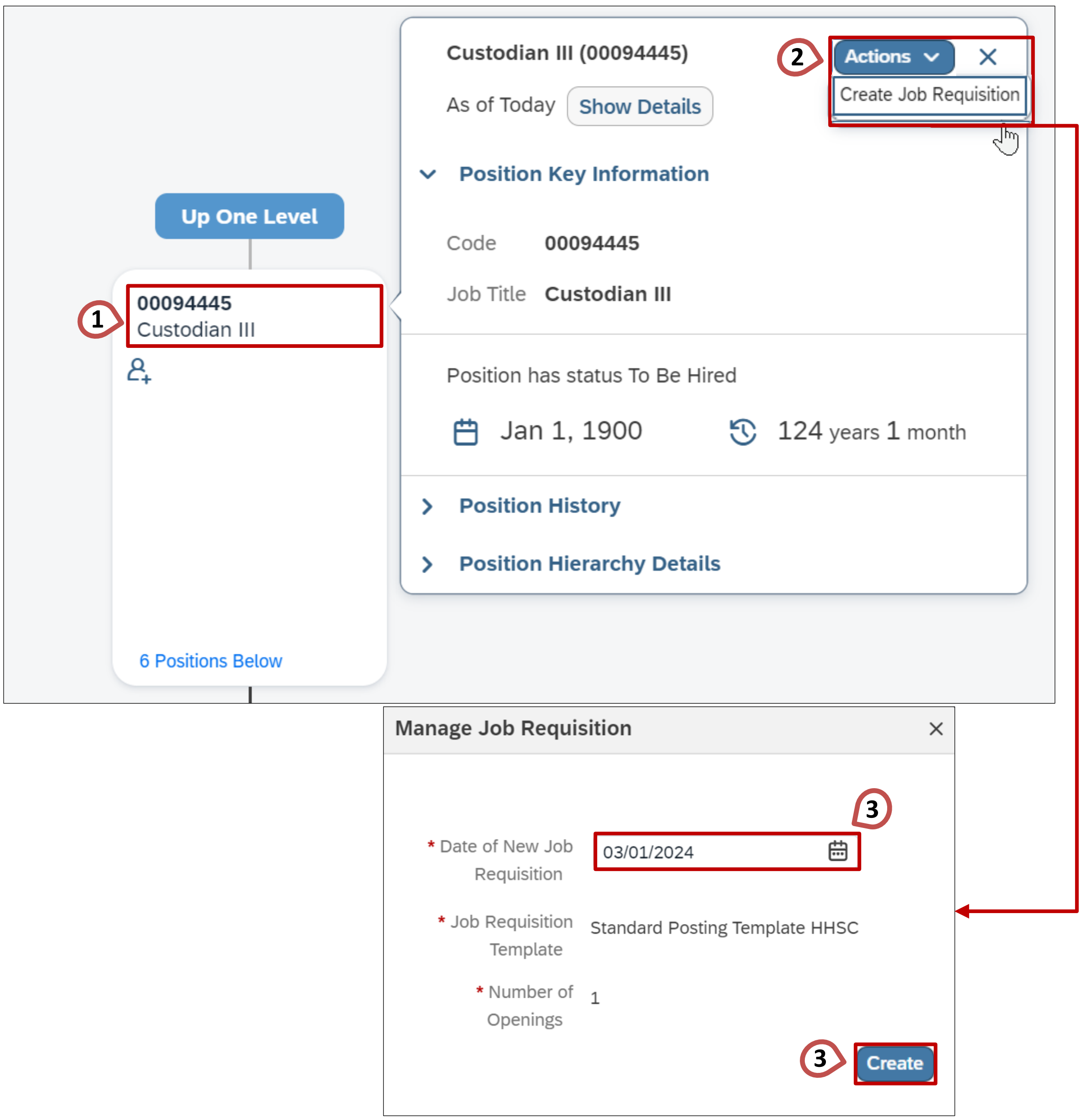
C) Position Card: Position information will be displayed when selecting the position code/name. Details like position *Code* or *Job Title* will then be shown. For all details about the position, use the *Show Details* button.

D) Display Options: Options to change the *Org Chart* size by selecting the **–** or **+** icon. Select *Display Options* icon to filter the chart by the position type (*Child Positions, Matrix Positions, Show inactive positions*). The *Export* icon can be used to save a copy of the chart, either as a PDF or an image file. *Hide top navigation* will collapse the navigation bar, only displaying the Org Chart on the page.

7.3. Creating a Job Requisition

To create a JR, navigate to the *Create Job Requisition* tab of the *Company Info* section. Then,

1. select the respective *Position card* where you want to create a requisition.
2. On the top right corner, select *Actions* and then on *Create Job Requisition*.
3. Choose an effective start date for the requisition and select *Create*.



Back to: 8.2.2. Create Job Requisitions

8. Recruiting Management

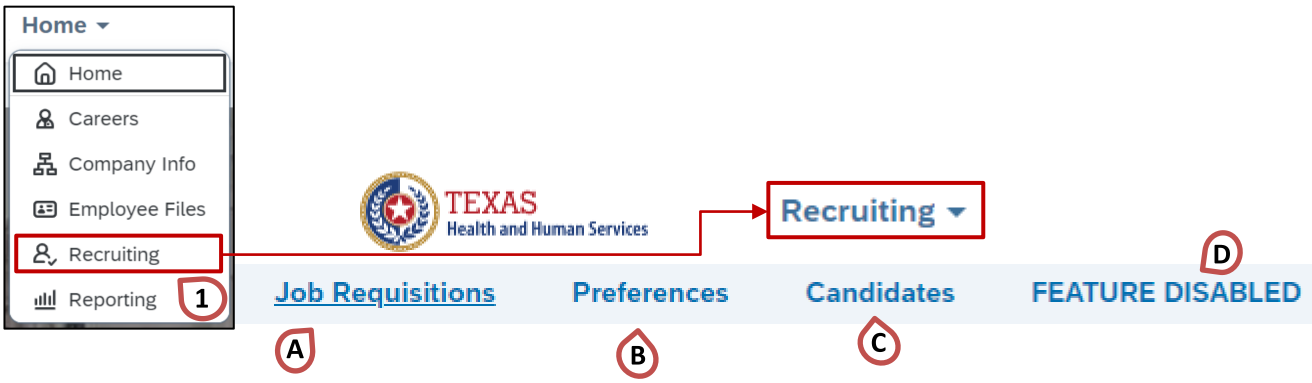
This section will walk you through the ***Recruiting*** section of the platform.

SuccessFactors *Recruiting* will:

A) Provide a multi-channel approach that gets jobs in front of the right candidates.
B) Initiate relationships and maintain contact with candidates.
C) Facilitate a strategic recruiting process for your business's needs.

8.1. Recruiting module Navigation

1. Select *Recruiting* in the navigation menu on the top left of the page.



The Recruiting page lands on one of the tabs (**A** – **C**).

A) Job Requisitions: Overview of *Job Requisitions* the respective Manager has access to.
B) Preferences: Storage for *saved* pre-screening *questions* for candidates, *saved rating scales* and *display preferences*.
C) Candidates: Tab to search for internal and external candidates by key words, background information and other criteria.
D) FEATURE DISABLED: No longer supported/utilized feature which cannot be made invisible in the system, therefore the tab was relabelled.

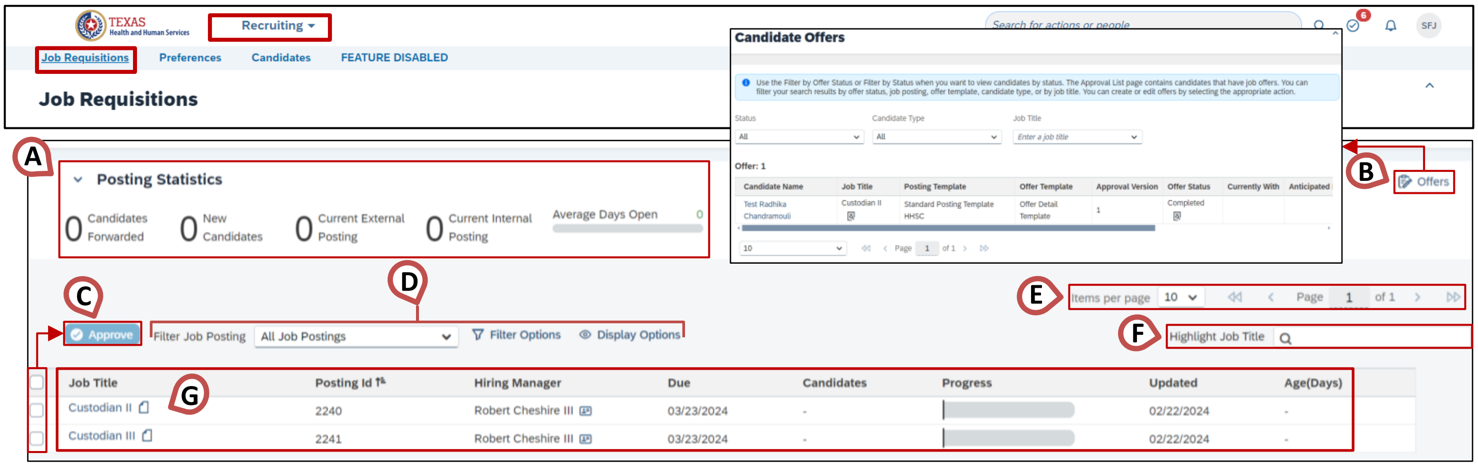
All tabs except *FEATURE DISABLED* will be explained further in the next chapters.

8.1.1. Job Requisitions

By default, and if not changed in the personal settings, the *Job Requisitions* tab will be shown when accessing *Recruiting*.

All JRs that the logged-in Hiring Manager has ownership of will display on this page (requisitions with pending approvals as well as already approved/open postings).

Note: Job Requisitions (JRs) are called Job Postings (JPs) as soon as they were fully approved and published/posted. *Job Requisition* is used to internally label the pre-published forms.



A) Posting Statistics: Information about JPs: number of candidates forwarded, number of new candidates, the number of current external and internal postings. Average Days Open shows the average days a job posting is in Open status.

B) Offers icon: Option to search for existing *Offers* that were offered to *Candidates*.

C) Approve button: Postings which are in pending approval state can be approved by selecting the *check box* on the left side of the job titles in the table and use the *Approve* button. This way, multiple pending Job Requisition approvals can be finalized at once.

D) Filter/Display Options: Select and set different filter and personal display options as preferred to facilitate a better overview of the JRs.

E) Items per page: Option to adjust how many JRs are shown on the overview page at once.

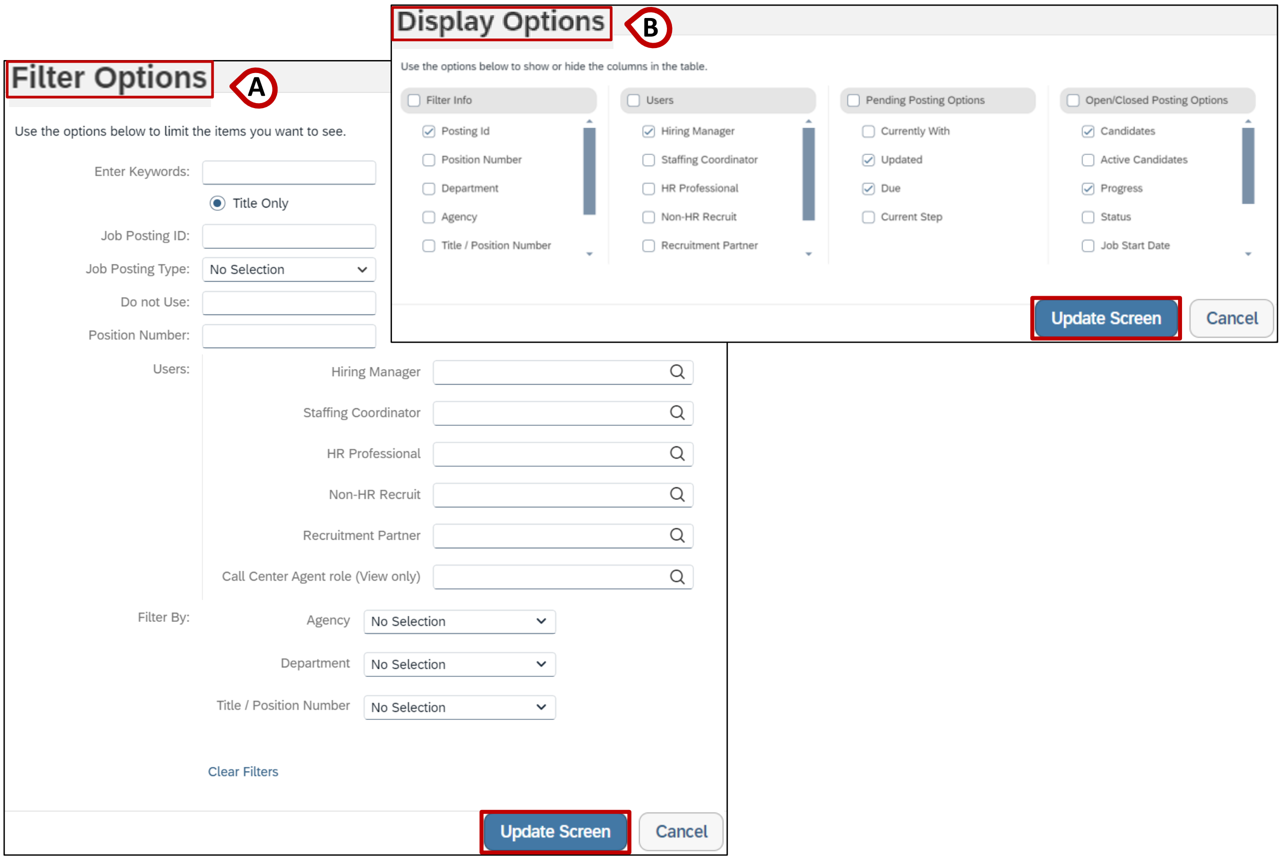
F) Highlight Job Title: Listed job titles can be highlighted in yellow by entering the title in this search bar and find them easier on the page. This is a time-saving feature if there is a high amount of listed JRs.

G) Job Postings: *JPs* are listed with the internal *Job Title* along with the system assigned *Posting ID*. The table columns show details for postings such as *Hiring Manager*, *Due* date, number of *Candidates* that applied, *Progress* in the recruiting process etc.

Filter and Display Options (D)

A) *Filter Options* contain criteria which can be utilized to show only specific postings. Select *Update Screen* after selecting or entering filter options to apply the filter.

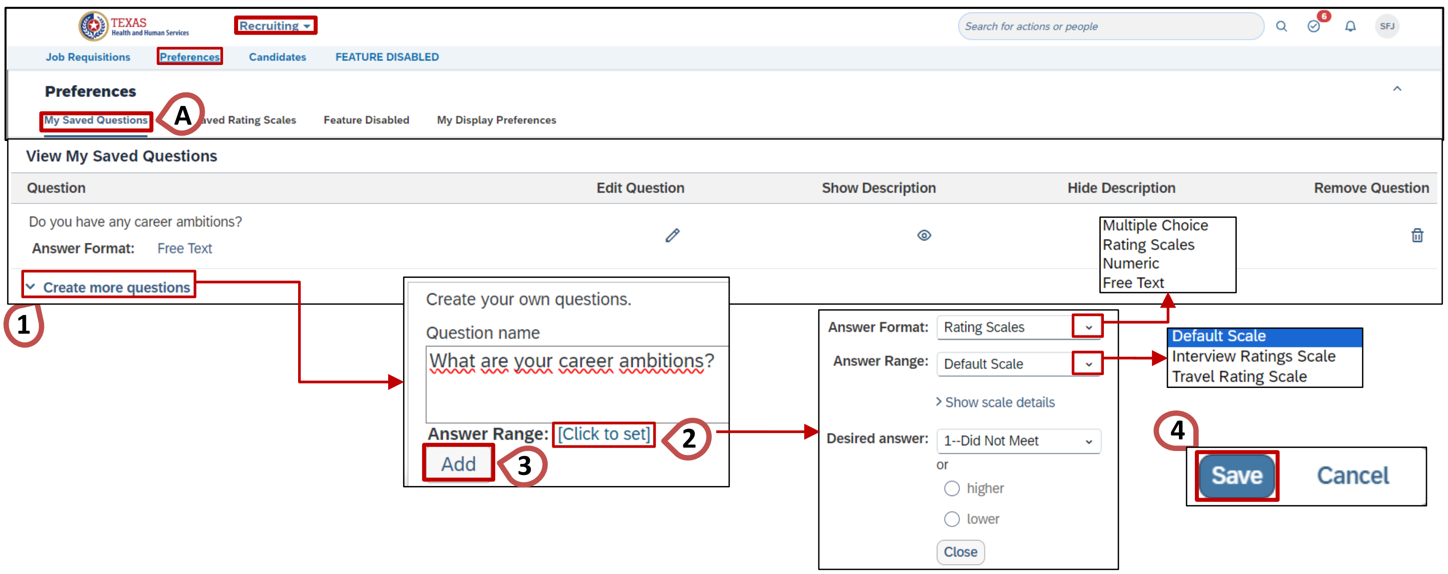
B) *Display Options* allows you to make only individually preferred columns of the table visible. Select *Update Screen* after selecting to apply the display preferences.



8.1.2. Preferences

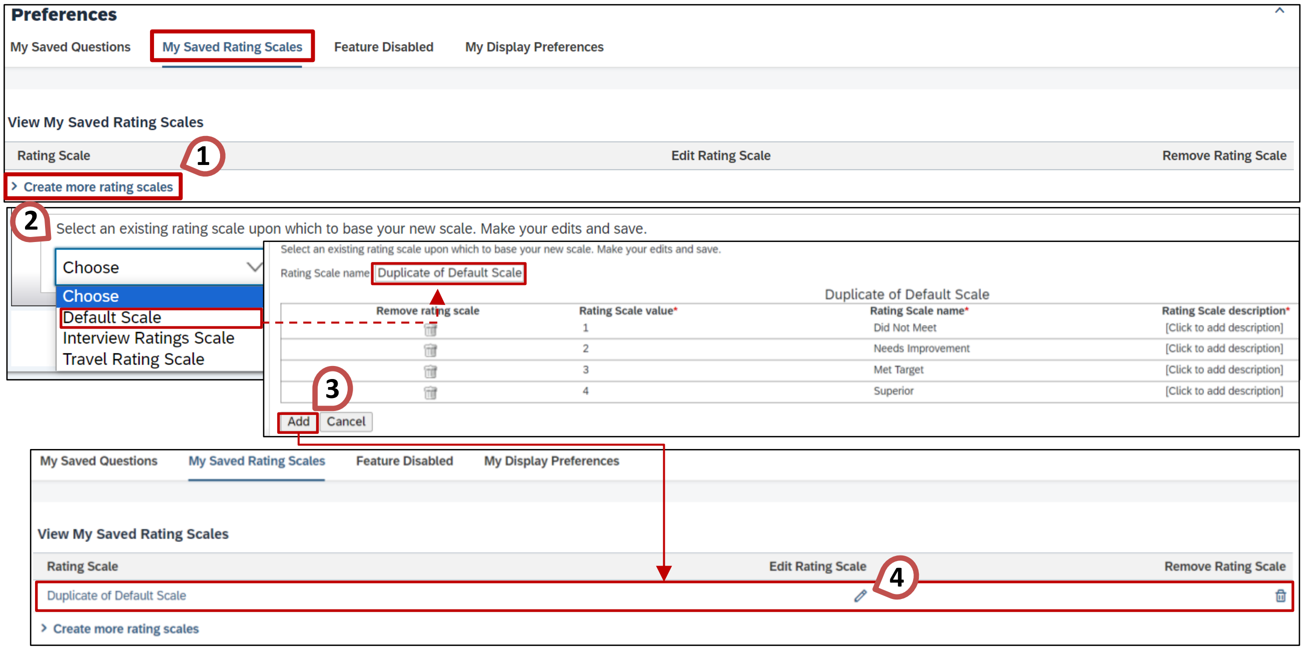
Within the section *Preferences* of the *Recruiting* section, Hiring Managers can navigate through different sub-sections: *My Saved Questions, My Saved Rating Scales*, *FEATURE DISABLED* and *My Display Preferences*.

A) My Saved Questions: *Assessment Questions* which are **not** part of the default global *Question Library* can be created (**1**), *Answer Ranges* defined (**2**) and both be added (**3**) here. The answer ranges can be formatted as multiple choice, free text, rating scales or numeric format. These questions are only visible/editable for the **owner who created** and **saved** them (**4**).

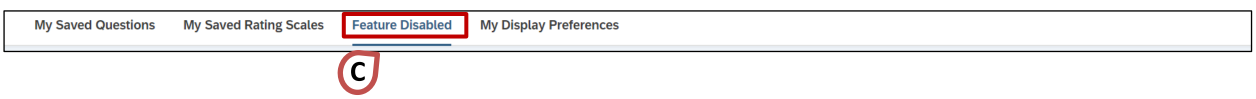


Note: The free text entry in the *Create your own questions* part will default to 200 characters if not edited.

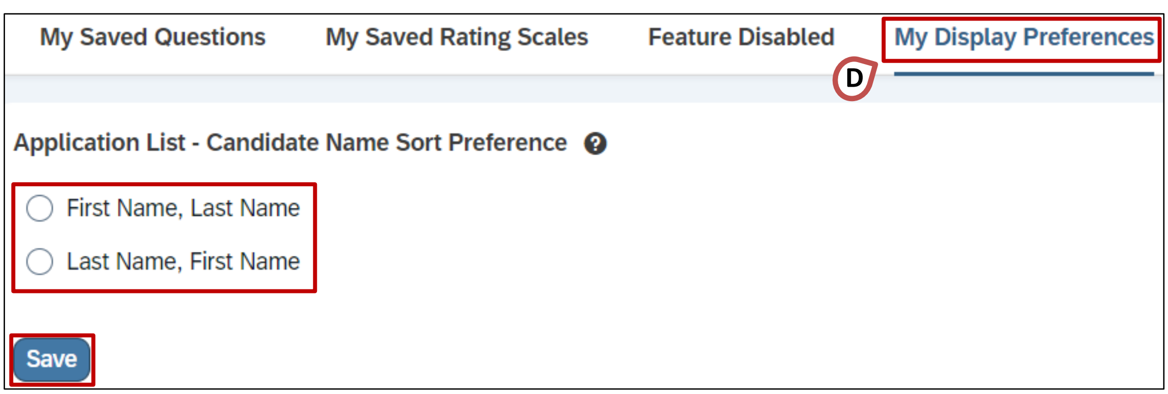
B) My Saved Rating Scales: Hiring Managers can create (**1**) personal rating scales to use in job applications and evaluate candidates during and/or after an interview.



C) Feature Disabled: No longer supported/utilized feature which can't be turned off completely in the system. This sub-section was relabelled to indicate the inactivity.



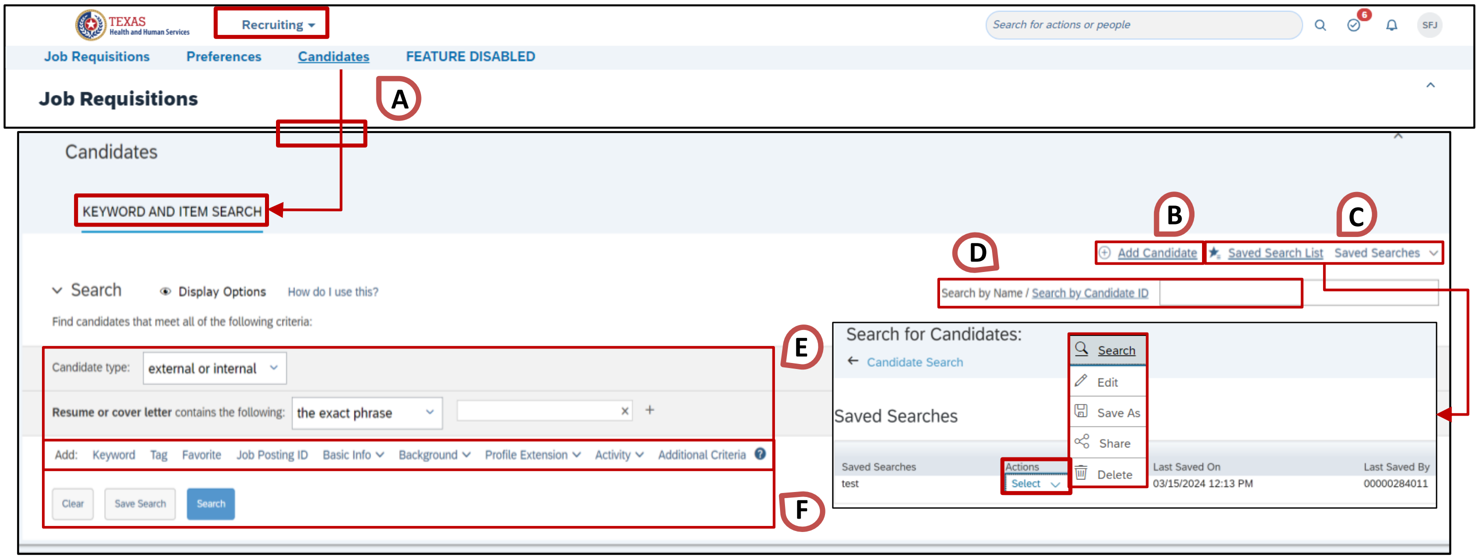
D) My Display Preferences: Option to *save* a type of sorting for the list of users for *JR forms* where a Hiring Manager is listed as an owner/originator.



8.1.3. Candidates

This section shows Hiring Managers (and other operator roles of the system) how to access and utilize the *Candidates* tab under **Recruiting**.

To search for candidates:



A) Access the *Candidates* tab in *Recruiting***.** The *Keyboard and Item Search* will show up.

B) Add Candidate: **Not used by Hiring Managers.** This feature is mainly used by the **Service Center** team to create basic profile candidate users. These candidates will **not** be linked to the State of Texas PeopleSoft application and can be used for testing purposes or ad hoc applications.

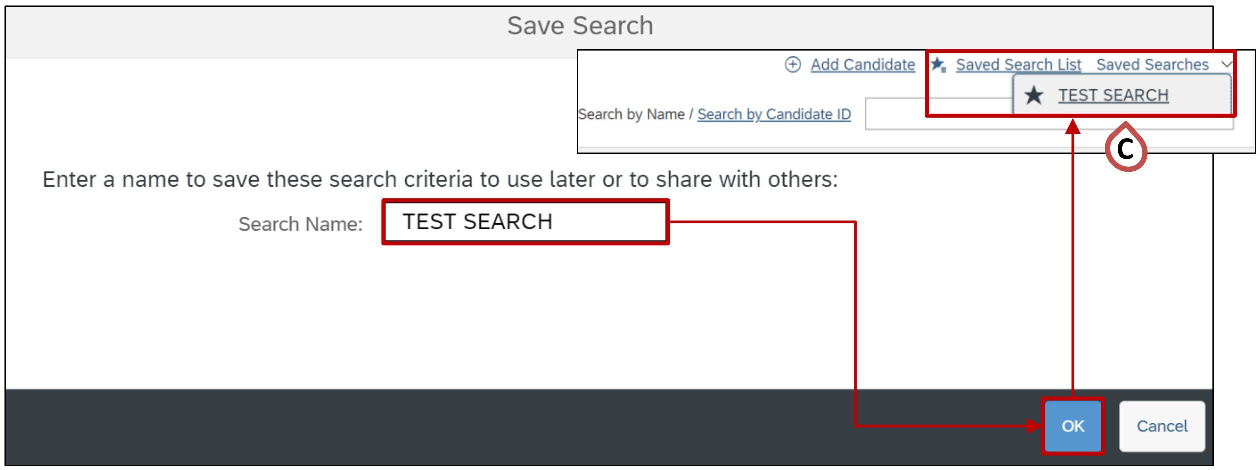
C) Saved Searches: Hiring Managers can create a *Saved Search List* or *Saved Search* (quick access) for candidates that are searched frequently. It's possible to initiate and edit the saved search by adding or deleting candidates from the list or editing/deleting the search criteria to narrow the search down. The saved searches can also be shared with other colleagues.

D) Candidate Search: Search by *Name* or *Candidate ID*. When selecting a candidate from the search list, the user will be directed to the profile. It's possible to save a personal search list with multiple, frequently searched candidates stored.

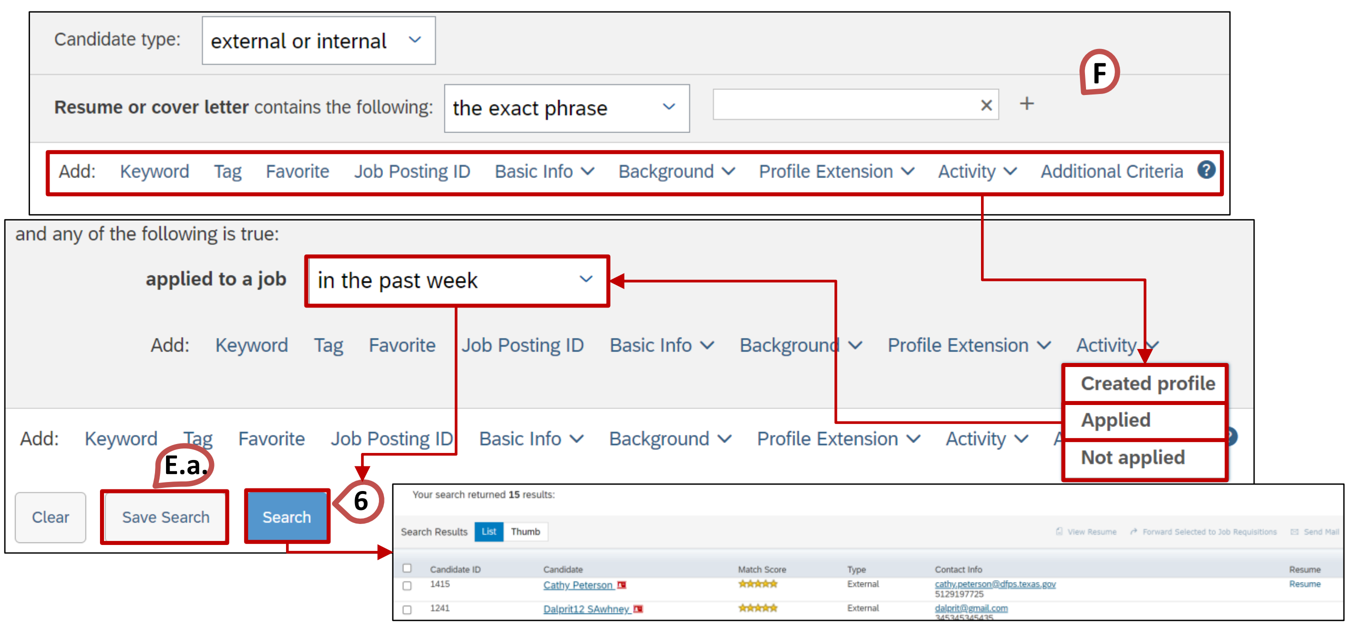
   a. If searching by Name or Candidate ID and picking a candidate from the upcoming list, the Hiring Manager will be redirected to the **basic information profile** of the candidate.

E) Keyword and Item Search: Search for candidates based on certain criteria (**F**).

a. Select *Save Search* after setting up all criteria (see screenshot of next step). Set up a *Search Name* and save it by selecting *OK*. The newly saved Search will appear in *Saved Searches,* accessed on the upper right (**C**) of the page.



F) When trying to search based on certain criteria, select *Search* **after using at least one of the criteria shown below** (e.g. Activity -> Applied).



<u>Note</u>: The Hiring Manager can only search for candidates that applied to their own JPs and see their details. For other candidates, the Hiring Manager can only see the basic profiles.

8.2. Managing Vacancies

> **<u>Note</u>**: Before creating a JR, the Hiring Manager should check if vacant positions are already available in the *Position Org Chart* or if a new position needs to be created first.

8.2.1. Position types

There are two different position types at the State of Texas:

1) **Single Tap positions**: Individual Positions with same salary grade.
2) **Career Track positions**: Positions based on multiple levels. So, you can find different positions with the same position title but with different levels. For example:
    - Director I (blue)
    - Director II (green)
    - Director III (red)

Career Track position titles can have any of the these prefixes: APS, CPI, CPS, FGC. They will always include a roman numeral at the end (I, II, III, IV…) according to the position level and salary grade.

See the below table which describes the internal *Career Track* process and how to manage candidates throughout the different *Career Track* positions and opened JPs:

Position	[JP creation]()	[Posting Advertisement Type]()	Candidate Application
Pharmacist I	Yes	Internal/ Internal and External	The candidate applies to the JP manually via Careers section (internally) or Career Center (externally).
Pharmacist II	No	N/A	Hiring Manager will create an Offer letter for the **Pharmacist II** position and its respective salary grade based on experience/skills of the candidate.
Pharmacist III	No	N/A	Hiring Manager will create an Offer letter for the **Pharmacist III** position and its respective salary grade based on experience/skills of the candidate.

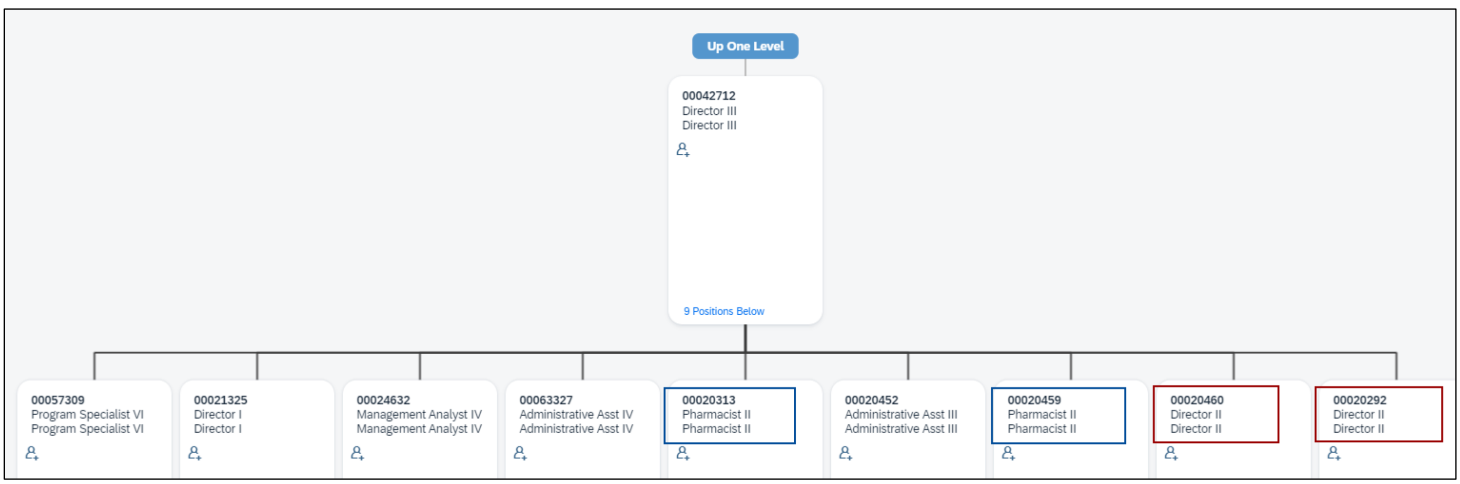
Additionally, for **Career Track positions** we can find the same position title with different position codes. that in the Position Org Chart for the same position we could have plenty of openings. This will be defined by the Hiring Manager when creating the JR.

Example:

- Pharmacist II (00020313) (blue)
- Pharmacist II (00020459) (blue)

or

- Director II (00020460) (red)
- Director II (00020292) (red)



Note: Only the lower-level positions (level 1) get posted internally and externally as open for applications and will be extended by the Hiring Manager based on the assessment and interview results of the respective candidate.

8.3. Create and Update Job Requisitions

After a position is visible in the Position Org Chart (*Create Job Requisition* tab of the *Company Info* section), it's ready for the hire of a new employee for it, the Hiring Manager can create a *Job Requisition* based on the position.

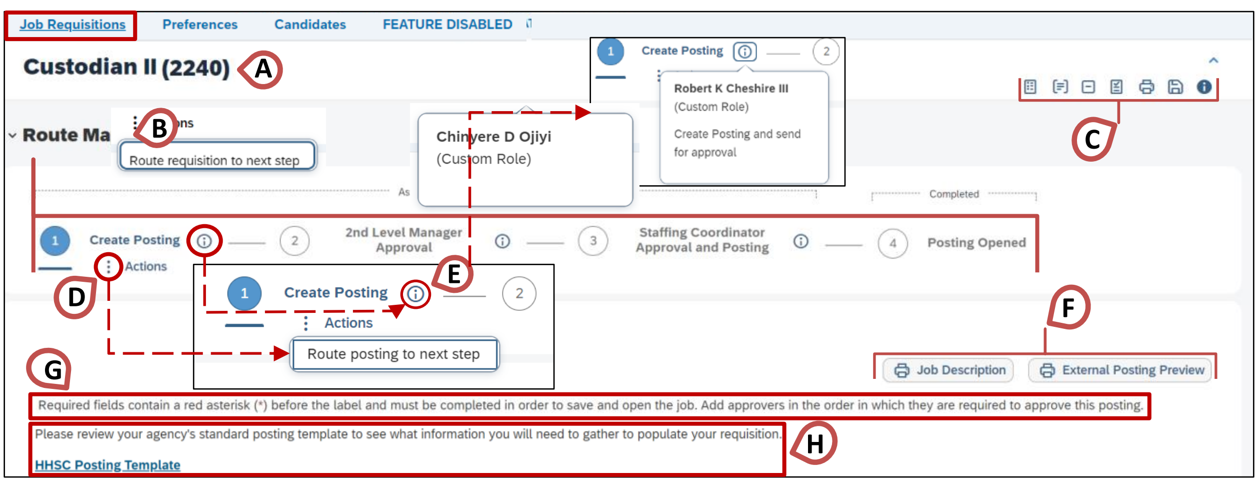
> **<u>Note</u>**: The process is used to create *JRs* based on *Single tag* or *Career Track* positions. For further information, refer the [Position types](#) chapter.

Please review the [chapters 7.2.2. and 7.3.](#) to understand this process.

8.3.1. Update Job Requisition Forms

After selecting a pre-approved JR, Hiring Managers need to review the *JR Form* and update it according to the required information.

> **<u>Note</u>**: Fields marked with a red asterisk (*) are mandatory to fill and be able to save the updated posting. A lot of fields are not editable here, as they get filled with data from the PeopleSoft records directly or prepopulated/carried over based on the details of the position used to create the JP.



A) <u>JR Title and ID</u>: header of the page, shows title and ID of the posting.
B) <u>Route Map</u>: Displays the JR approval process. The current step is highlighted in blue, next upcoming steps are shown greyed out.
C) <u>Additional options</u>: Display and download options at the top right of the page. The options include: *View Full Form, View Form by Section, View Form by Item, Print Preview, Print to HTML or PDF, Save the entire Form, Info about this Form*. **<u>Note</u>**: The first three options do **not** have utilized functions in the system, the other options are explained by their labels.
D) <u>Step action</u>: With this option, postings can be routed directly to the next approver step.

E) <u>Step information</u>: Hiring Managers can see the roles and responsible persons involved in the approval steps by selecting the info icon next to the step titles.

F) <u>Posting Preview</u>: The Job Description button links the Hiring Manager information entered during the further JR creation. The *External Posting Preview* button does not show anything for Hiring Managers, another role (Staffing Coordinator) that manages the *External Career Center* postings will be able to see external descriptions.

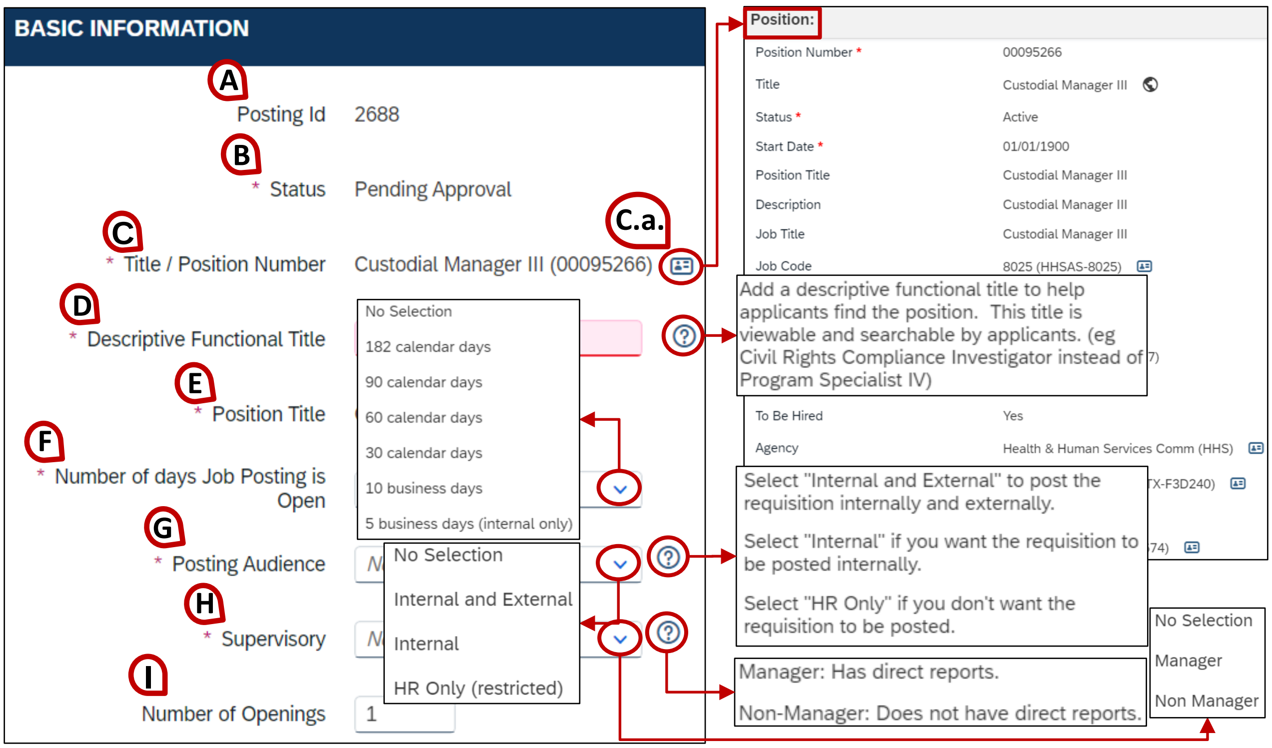
G) <u>Instruction box:</u> Shows instructions regarding the creation of *JR Forms*. Same instruction as in the note-box at the beginning of this chapter.

H) <u>Standard Posting Template</u>: A quick-link to the standard posting template of the agency assigned in the *JR form*. Use the template as a guide to fill the sections of the *JR form* (further information: **B** in 7.1.10. Resources).

<u>Note</u>: Content which was filled into the template should be pasted into the *Job Description* field of the *JR Form* in the recruiting system.

8.3.2. Basic Information

The first section Hiring Managers will review and update accordingly in the **JR Form** below the Introduction section is the **Basic Information**.



A) Posting ID: Identification number that gets generated and assigned by the system when a JR gets created.

B) Status: Reflects the current *Status* of the JR, either *Pending Approval*, *Open* or *Closed*.

C) Title / Position Number: Title and number of the position chosen to create the JR.

   a) By selecting the *card icon* next to the picklist, the *position details* can be viewed.

D) Descriptive Functional Title: Title of the position which can be **modified** by Hiring Managers to clarify position specifications. The *Descriptive Functional Title* is used to help finding JRs.

E) Position Title: Title of the position used to create the JR. Gets automatically populated to reflect the same title as in the respective position details. It is **non-editable** in the form.

F) Number of days Job Posting is Open: Refers to the number of calendar days that the JP will stay opened/posted. The value *5 business days (internal only)* will determine the JP only showing for internal applicants, other values will show for chosen *Posting Audience*.

> **Note**: The picked value of this field will define the Posting Start and End Date.

G) Posting Audience: Three options to choose for the publishing of the posting:

- Internal and External: Job is posted internally (within the *Internal Career Center*) and externally (outside of SuccessFactors in the *External Career Center*).
- Internal: Job posted only internally (within SuccessFactors for internal applicants).
- HR Only (restricted): Only HR admins and Recruiters will be able to see the posting in the system.
  a) **Help Text**: Select the question mark icon next to the field to see additional information/explanations about the field.

Note: This field will define the Posting Type of the

H) Supervisory: Reflects the hierarchy level of the position. These are the picklist options:

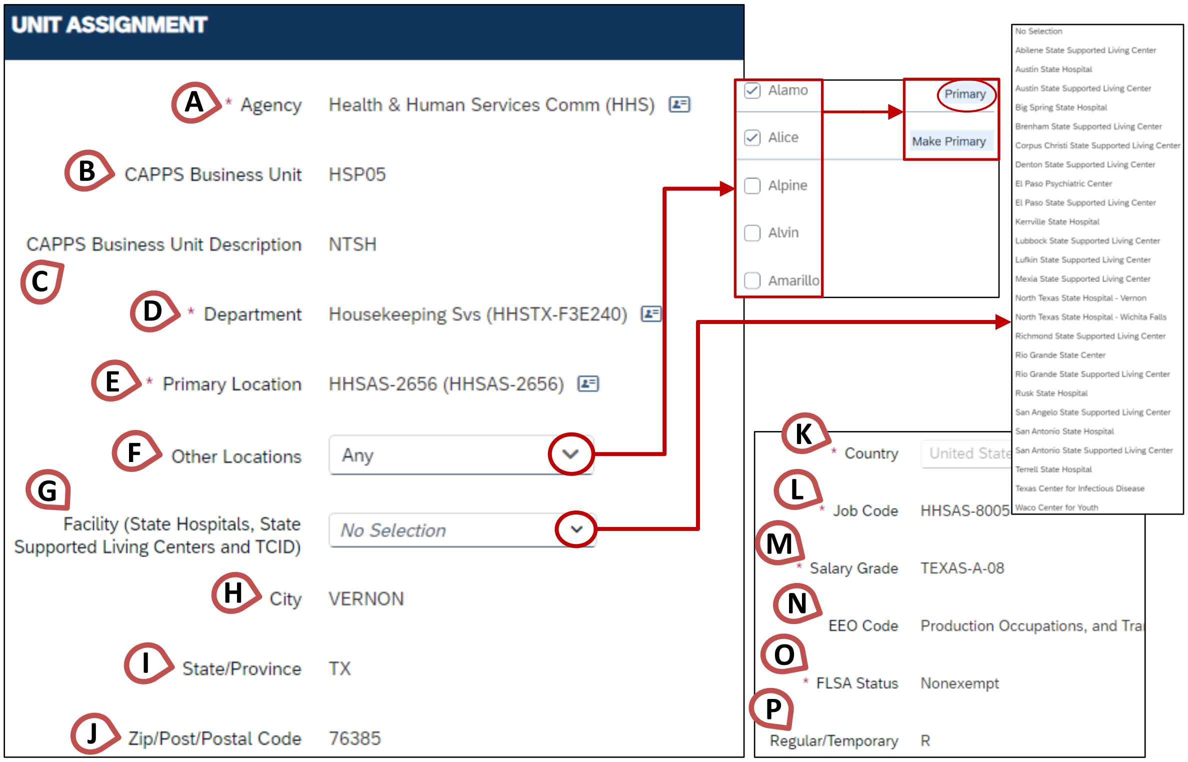
- Manager: The new position will have direct reports to manage.
- Non-Manager: The new position will **not** have direct reports and will function as a regular employee position.
  a) **Help Text**: Select the question mark icon next to the field to see additional information/explanations about the field

I) Number of Openings: By default, only 1 position will be opened, but Hiring Managers can modify the value based on the required number of positions they need to fill.

Note: If more than one opening is set, the Hiring Manager should provide a different position code in the Offer phase of the applications.

8.3.3. Unit Assignment

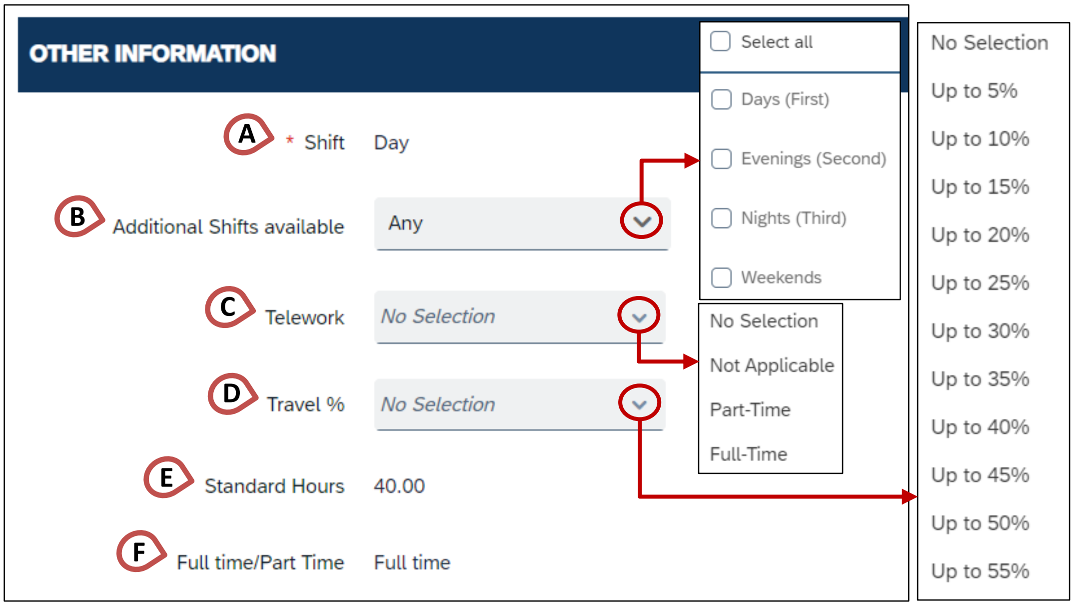
The *Unit Assignment* section will have most of its fields prepopulated or their values carried over based on the **position details** and the respective **PeopleSoft profile (if existing)**.



A) <u>Agency</u>: Prepopulated from the file (**PeopleSoft profile**).
B) <u>CAPPS Business Unit</u>: Prepopulated from the file.
C) <u>CAPPS Business Unit Description</u>: Prepopulated from the file.
D) <u>Department</u>: Prepopulated from the file.
E) <u>Primary Location</u>: Prepopulated from the file.
F) <u>Other Locations</u>: Optionally, locations regarding the job can be multi-selected from the drop-down menu. Set one primary location if multiple locations were selected.
G) <u>Facility (HHSC/DSHS only)</u>: Optional field with Facility locations shown in the picklist, only referring to the HHSC and DSHS agencies.
H) <u>City</u>: Prepopulated from the file.
I) <u>State/Province</u>: Prepopulated from the file.
J) <u>Zip/Post/Postal Code</u>: Prepopulated from the file.
K) <u>Country</u>: Prepopulated from the file.
L) <u>Job Code</u>: Prepopulated from the file.
M) <u>Salary Grade</u>: Prepopulated from the file.
N) <u>EEO Code</u>: Prepopulated from the file.
O) <u>FLSA Status</u>: Prepopulated from the file.
P) <u>Regular/Temporary</u>: Prepopulated from the file.

8.3.4. Other Information

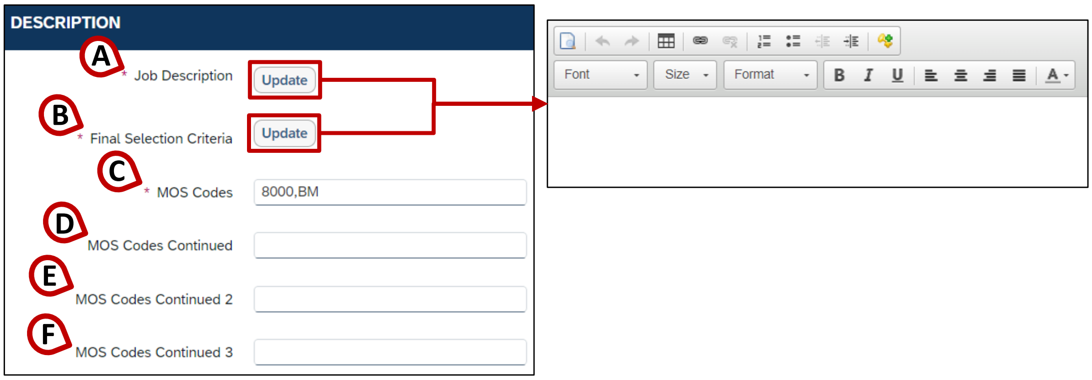
Additional information fields will be prepopulated according to the PeopleSoft profile (if existing) in this section.



A) <u>Shift:</u> Prepopulated from the file (**PeopleSoft profile**).
B) <u>Additional Shifts available</u>: For positions such as Directors that are **not** shift workers, Hiring Managers need to choose the suitable options from the picklist (Days, Evenings, Nights, Rotating or Weekends). One value has to be selected as primary.
C) <u>Telework</u>: Choose from the picklist the suitable option depending on the position (Not Applicable, Part-Time or Full-Time).
D) <u>Travel %</u>: Refers to the percentage of travel availability. Select from the picklist the right percentage.
E) <u>Standard Hours</u>: Prepopulated from the file.
F) <u>Full time/Part Time</u>: Prepopulated from the file.

8.3.5. Descriptions

This section covers the Job Description which should be based on the Standard Posting Template. The other fields are explained below.



A) <u>Job Description</u>: Select the *Update* button to add a job description. Paste the details entered previously in the Job Description section from the **Standard Posting Template.**

> **<u>Note</u>**: Further information: Standard Posting Template.

> **<u>Note</u>**: For **Career Track positions**, Hiring Managers should include as many Job Descriptions as there are position levels. For **Single tap positions** only one Job Description needs to be included in the section.

B) <u>Final Selection Criteria</u>: Select the *Update* button to add a final selection criteria. Paste the details entered previously in the section Final Selection Criteria from the *Standard Posting Template*.

C) <u>MOS Code</u>: Prepopulated Military Occupational Specialty code. Review the prepopulated values. Pre-configured MOS Codes are **not** searchable in the current system, they have to be entered manually.

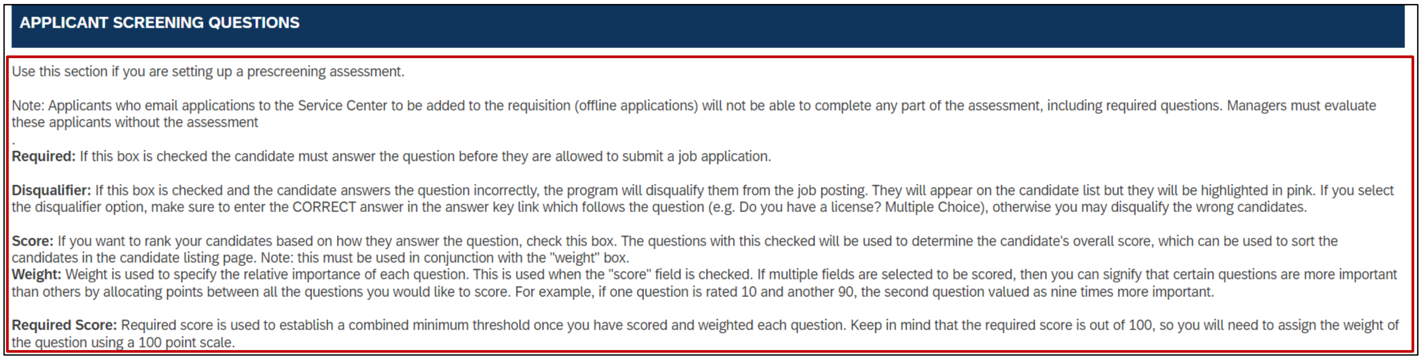
D) <u>MOS Codes Continued</u>: Additional MOS Code values can be entered here.

E) <u>MOS Codes Continued 2</u>: Additional MOS Code values can be entered here.

F) <u>MOS Codes Continued 3</u>: Additional MOS Code values can be entered here.

8.3.6. Applicant Screening Questions

This section gives Hiring Managers the possibility to define questions used for the candidate job application.



APPLICANT SCREENING QUESTIONS

Use this section if you are setting up a prescreening assessment.

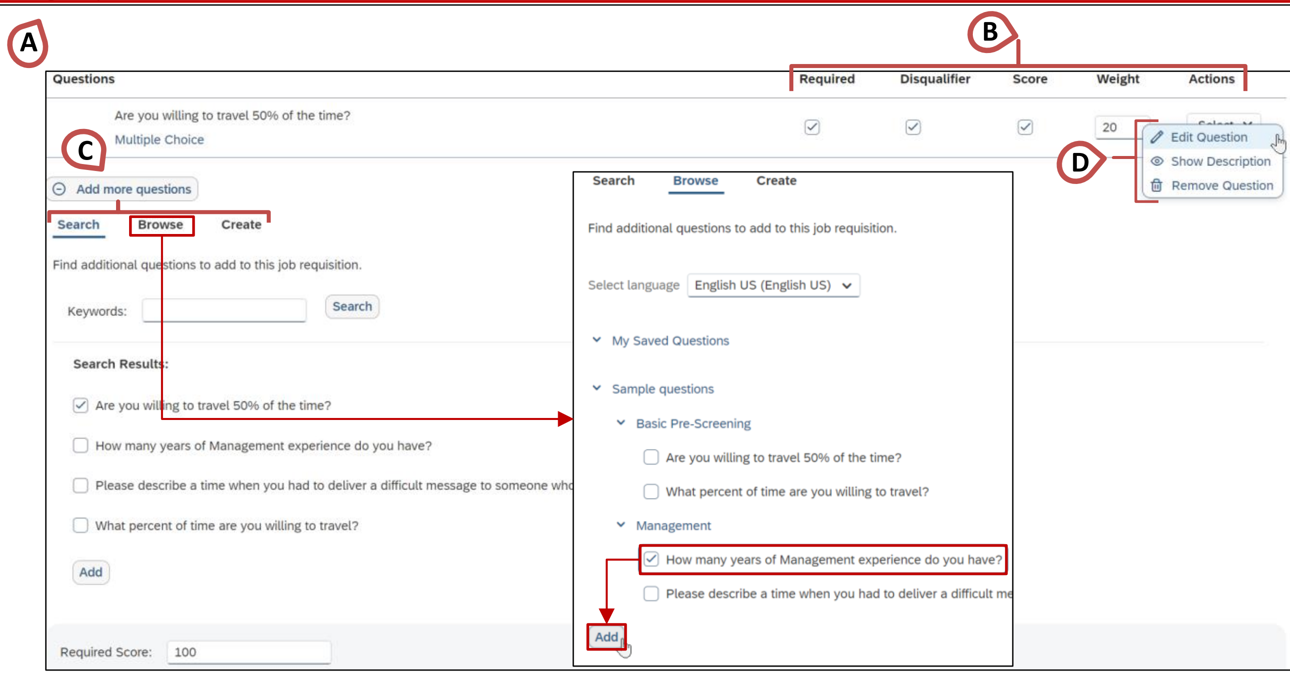
Note: Applicants who email applications to the Service Center to be added to the requisition (offline applications) will not be able to complete any part of the assessment, including required questions. Managers must evaluate these applicants without the assessment

Required: If this box is checked the candidate must answer the question before they are allowed to submit a job application.

Disqualifier: If this box is checked and the candidate answers the question incorrectly, the program will disqualify them from the job posting. They will appear on the candidate list but they will be highlighted in pink. If you select the disqualifier option, make sure to enter the CORRECT answer in the answer key link which follows the question (e.g. Do you have a license? Multiple Choice), otherwise you may disqualify the wrong candidates.

Score: If you want to rank your candidates based on how they answer the question, check this box. The questions with this checked will be used to determine the candidate's overall score, which can be used to sort the candidates in the candidate listing page. Note: this must be used in conjunction with the "weight" box.
Weight: Weight is used to specify the relative importance of each question. This is used when the "score" field is checked. If multiple fields are selected to be scored, then you can signify that certain questions are more important than others by allocating points between all the questions you would like to score. For example, if one question is rated 10 and another 90, the second question valued as nine times more important.

Required Score: Required score is used to establish a combined minimum threshold once you have scored and weighted each question. Keep in mind that the required score is out of 100, so you will need to assign the weight of the question using a 100 point scale.



A) Instructional information: Description of the different criteria that should be considered when adding new assessment questions.

B) Question Settings: Options to make a question *required* to be answered, a *disqualifier* based on a candidate's answers or *score relevant* if a question is used with a certain weight and required score to achieve by the candidate.

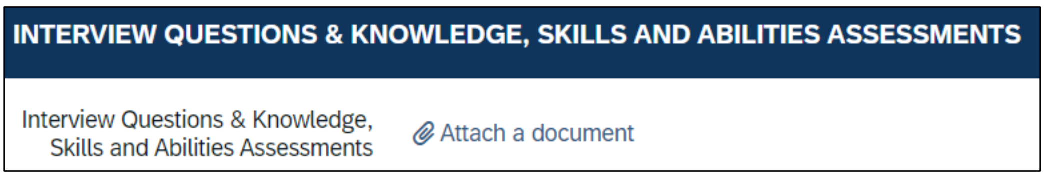
C) Add more questions button: Add a new question from the search catalogue by entering keywords, browse pre-saved catalogue questions saved under *My Saved Questions* or create new ones. These questions will only be available for the specific posting and will **not** be saved.

D) Actions: Menu to edit or remove questions. Additionally shows the job description below the question to edit.

Note: To add your own assessment questions, go to *Recruiting* **->** *Preferences* **->** *My Saved Questions* and create a list of frequently used assessment questions. Using this feature results in less manual work for the Hiring Managers during the JR form review and update process.

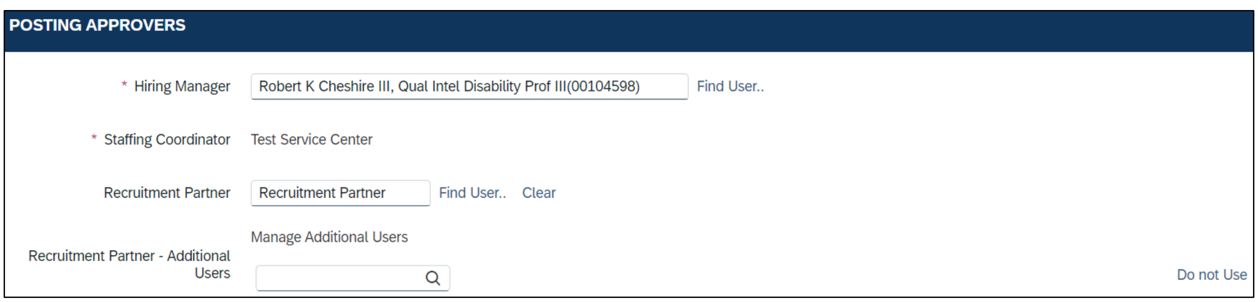
8.3.7. Interviewer Assessment Information

In this section Hiring Managers can optionally define the questions to be used during the interview by attaching a document with *Interview Questions* through *Attach a document*.



8.3.8. Posting Approvers

Hiring Managers can **edit** the assigned approval team or add additional team members that should be able to access the Job Requisition.



Note: The ***Recruitment Partner*** represents a new screening role. By selecting *Find User..* the Hiring Manager will see employees with the *Recruitment Partner* role assigned to their account (in **PeopleSoft**).

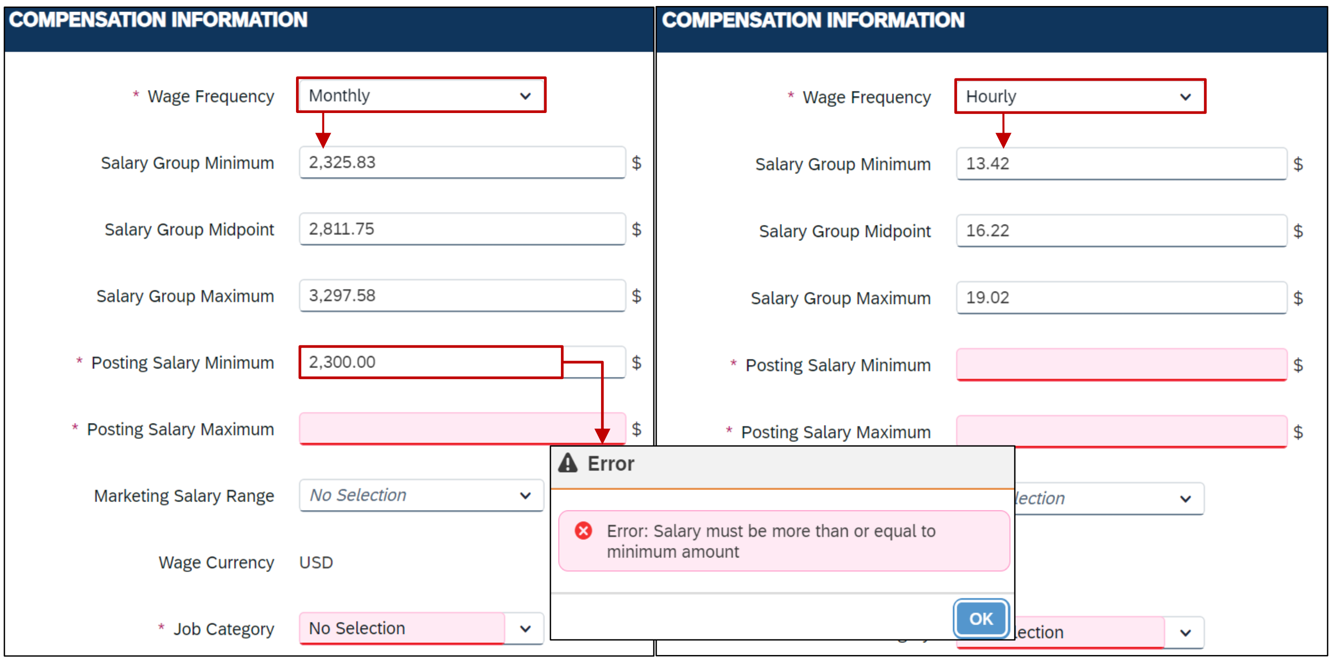
8.3.9. Posting Comments

Optional section for Hiring Managers to add comments for approvers of the next process steps.

8.3.10. Compensation Information

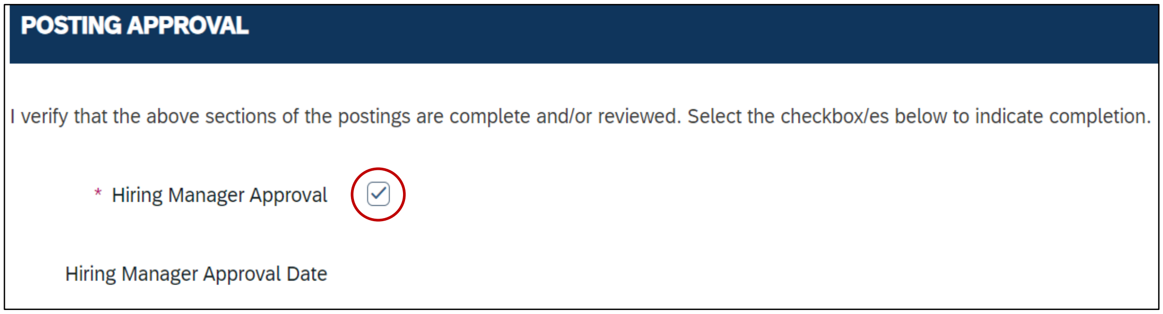
Hiring Managers will define minimum and maximum posting salary values and if they want to post them as a monthly or hourly rate values (*Wage Frequency*). The *Salary Group Minimum, Salary Group Midpoint* and *Salary Group Maximum* will be prepopulated based on information in the position details. The fields *Posting Salary Minimum*, *Posting Salary Maximum*, *Marketing Salary Range* and *Job Category* are to be maintained by the Hiring Manager.

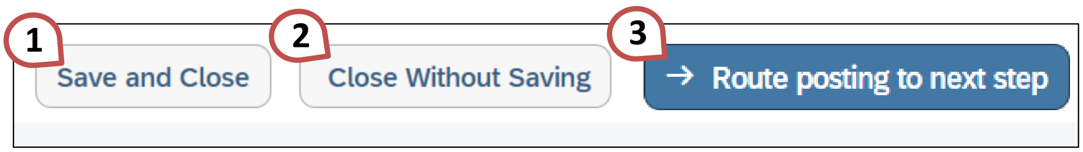
<u>Note</u>: The system will only allow *Posting Salary Minimum* and *Maximum* values in between the pre-set *Salary Groups*. It will **not allow** the Hiring Manager to manually change those group range values.



8.3.11. Posting Approval

The last section of the JR form is where Hiring Managers need to mark the check box to indicate their approval of the information in the form. Some forms require additional check boxes to be marked and confirmed by the Hiring Manager before the form can be send to next approver step.

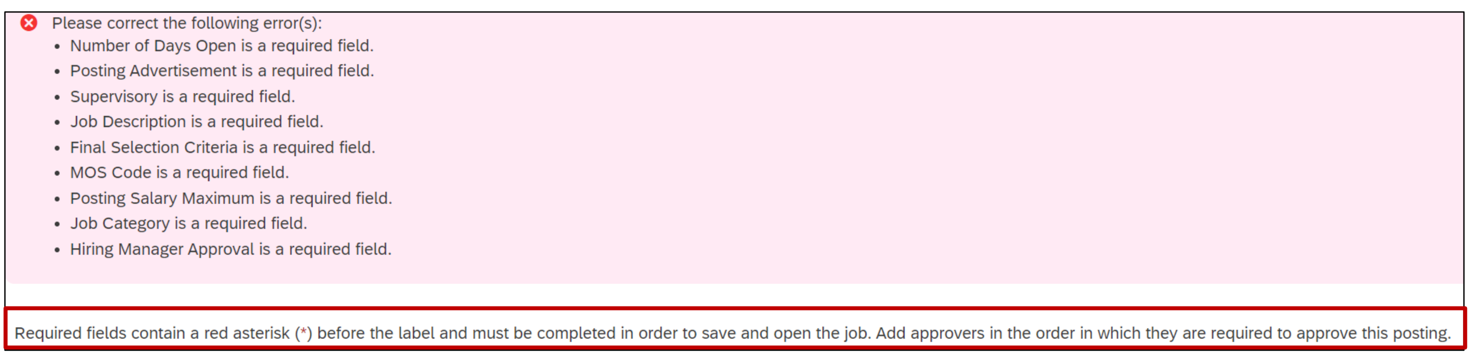




Afterwards, the Hiring Manager will have the options:

1) To save the requisition without routing it to the next approver step right away and continue at a later point in time.
2) Close the form without saving it.
3) Route the form to the next approver step.

> **<u>Note</u>**: The system will not save or route the posting to the next step if there are fields marked with a red asterisk (*) that are still open to be filled.



8.4. Approving Job Postings

8.4.1. Approval: Hiring Manager

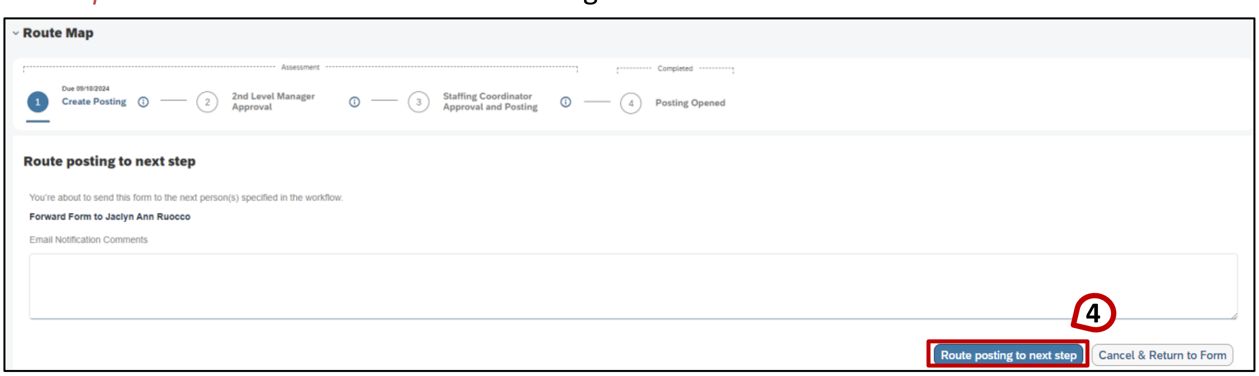
To approve the JP, the Hiring Manager should:

1. Select the relevant JP on the home page by selecting the *Approvals* card itself. If more than one Approval is pending, select *View All* to see and select different pending approvals.

2. Review the information and add all the additional information required. Further information: [8.3.1. Update Job Requisition Forms](#).

3. When finished reviewing, select *Route posting to next step*. Optionally, it can be *saved and closed* to be finalize later or *closed without saving*.

4. The next approver step in the route map will be the Second Level Manager. Hiring Managers can enter an email notification comment and click on *Route posting to next step* to send it to the Second Level Manager.



8.4.2. Approval: Second Level Manager

To approve the JP, the Second Level Manager should:

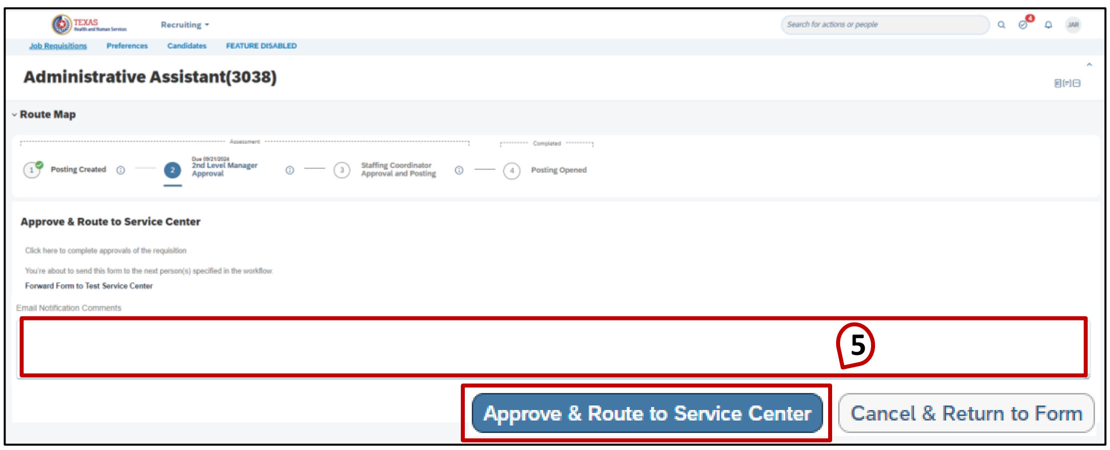
1. Go to the JP approval card on the home page and select the *Approval Card* itself. If more than one approval is pending, select *View All* and select the relevant card.

2. Review the data which was previously added by the Hiring Manager and add/modify/correct any information considered as relevant. The Second Level Manager has the same field permissions as the Hiring Manager, both can edit the same fields. Fields marked with a red asterisk (*) need to be filled to be able to proceed. Further information: 7.1.2. Update a Job Requisition Form – various sections.
3. **Posting Approval:** Second Level Managers need to approve the reviewed information based on the different sections in the posting form (**if** not already approved by the Hiring Manager). Clicking on Approve & Route to Service Center indicates completeness and approval.

Note: Second Level Managers are not permitted to modify the checked Hiring Manager Approval box.

4. When finished with reviewing, Second Level Managers can select *-> Approve & Route to Service Center*. This will initiate the next level approval process in the *Route Map* and the form will pass through to this final stage of the JR workflow. Second Level Managers can also send the form back to the Hiring Manager by selecting *<- Deny & Send to Previous Step* if there was missing data detected.

5. The JR will be sent to the next step, where the owner is the Staffing Coordinator from the Service Center. Second Level Managers have the option to enter an email notification comment and then select *Approve & Route to Service Center* to send it to the Service Center.



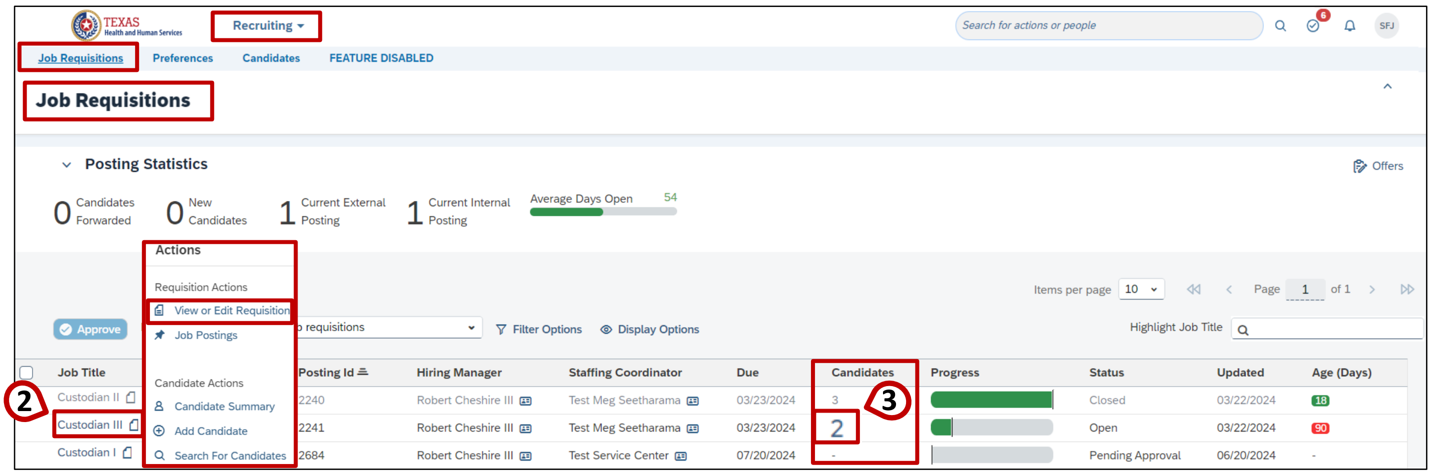
The *Service Center* will need to approve the last step of the process before the JP will be officially created and open for applications of internal and external applicants via the internal and external *Career Centers*.

8.5. Managing Job Applications

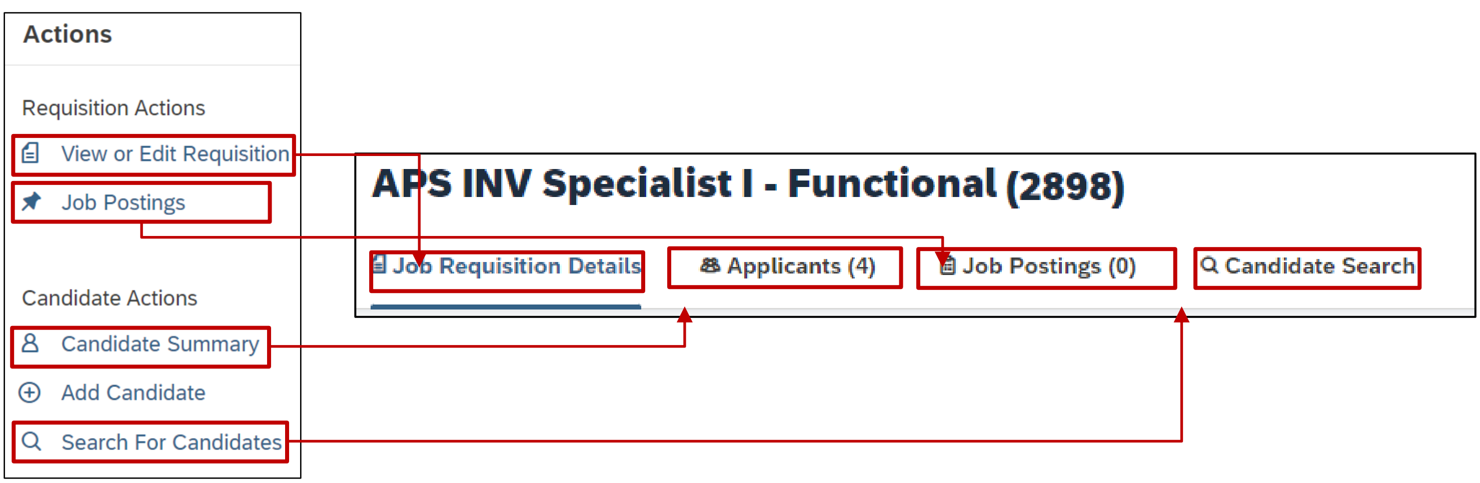
8.5.1. Job Posting Navigation

To navigate through a JP, Hiring Managers should:

1. Use a way to navigate to the **Recruiting** page (e.g. via the home menu). Further Information: [7.1.1. Navigation Menu]() and [7.1.2. Quick Actions]().
2. **Hover** over the relevant job posting. Select *View or Edit Job Requisition* in the ***Action*** menu or the click on the *Job Title* itself to jump to the Details of a JR.
3. If you want to navigate directly to the Candidate Workbench (Candidate sub-tab of a JR), click on the *number of candidates* of a specific JR in the table column *Candidates*.



The main JR page header will show the position title and code. You will see new sub-tabs appear as shown below, consisting of: *Job Requisition Details*, *Candidates*, *Job Postings*, *Candidate Search*. These sub-tabs are also directly reached via the Action menu that comes up by hovering over a job title and select as in step **2**.

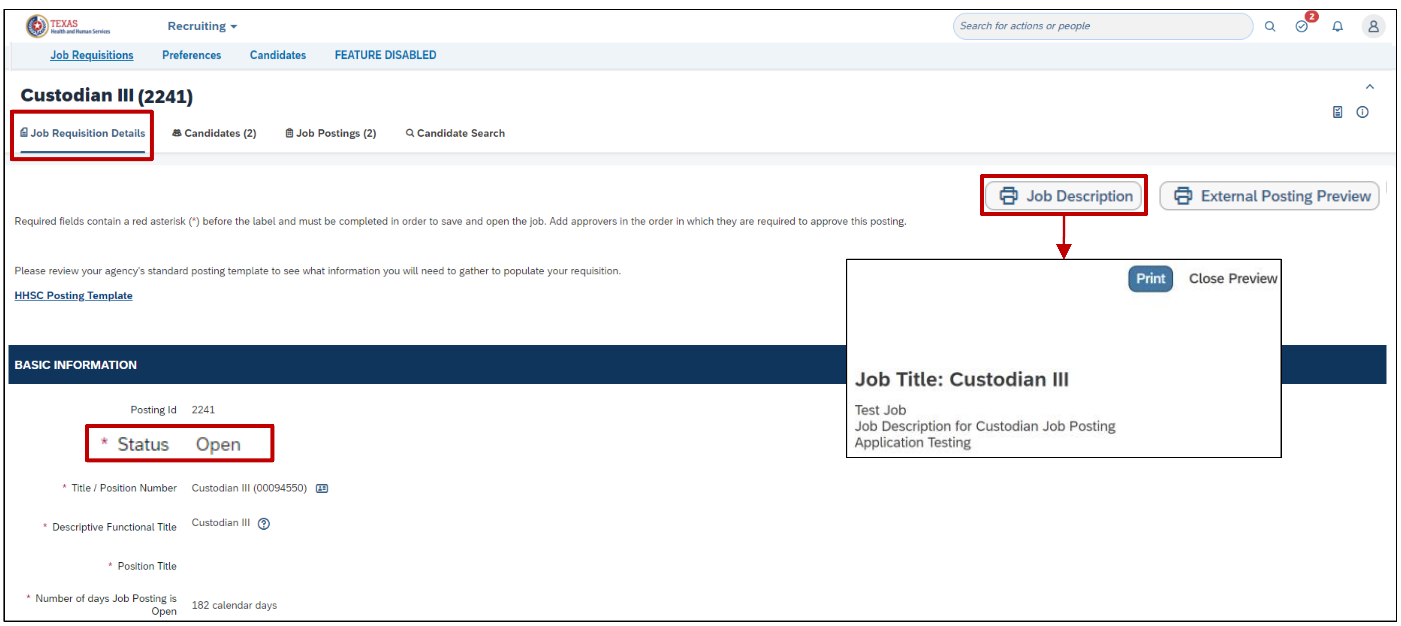


8.5.2. Job Requisition Details sub-tab

In this section Hiring Managers will review the JP information which was updated and approved previously (further Information: 8.3.1. Update Job Requisition Forms). They can view the **internal** job description through the *Job Description* button if desired. The *External Posting Preview* will **not** show any information for Hiring Managers, only for Staffing Coordinators (from the ***HR Recruiting*** team).

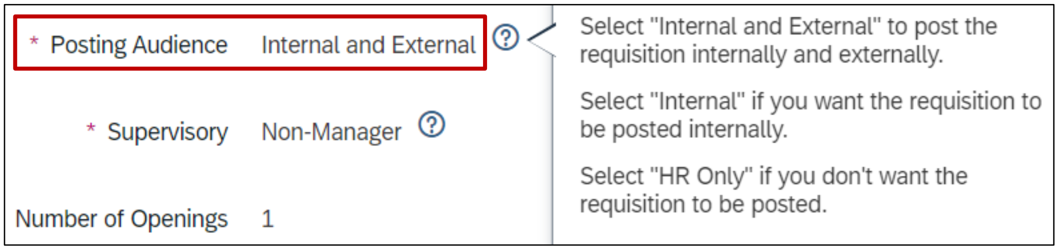
Note: The *Status* under the Basic Information section should now be set to *Open* (**A**) for the posted Job. It will remain in *Open* status until the last employee is hired as per the count in the *Number of Openings* field. To update the *Number of Openings* field value after a JP has been created, please contact a Staffing Coordinator or HR Professional user (admin with extended permissions in the system).

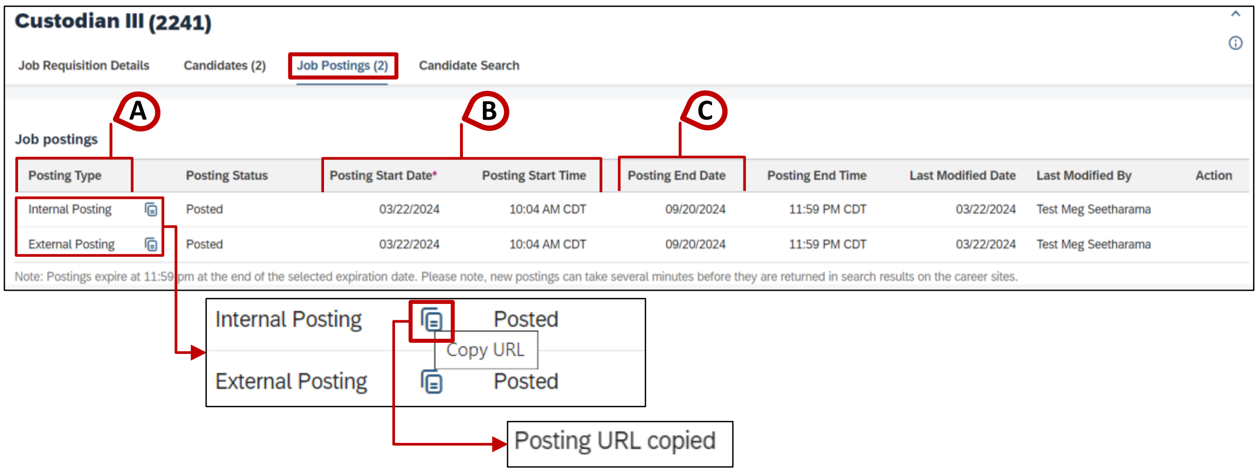
- If the JP stays in *Open* status without being utilized, it will automatically get changed to the status *Closed* after 60 days of inactivity.
- Optionally, the JP can be cancelled before 60 days pass. For early cancellations of JPs, Hiring Managers should contact a SC who has extended system permissions.
- A JP itself is created separately from the internal and external posting on the *Career Center*, its status will remain on *Open* even if the posting date for the internal and external posting might expire (**B** and **C** in next Job Postings sub-tab chapter) as the start and end dates of the JPs tab are independent of the JR form itself.



8.5.3. Job Postings sub-tab

To reach potential candidates, created JPs get published and can be found on the *Internal Career Center* search and on the *External Career Center* for the State of Texas. The *Job Postings* sub-tab





of the main *Job Requisitions* tab displays the links and durations of those postings.

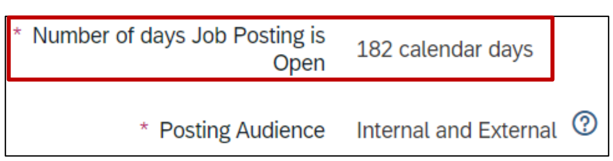
A) Posting Type: This information depends on the information entered in the *Posting Audience* field when the Hiring Manager filled out the JP Form.

By selecting the link icon next to the posting types, the URL for the JP site will be copied automatically, ready to be pasted. There are two posting types described above:

- Internal Posting: Published on the *Internal Career Center*, open for job searches.
- External Posting: Published in the *External Career Center* for the State of Texas.

B) Posting Start Date and Time: Refers to the internal JP approval date. Jobs get post automatically after the *JR Form* has been fully approved.

C) Posting End Date: This date is automatically filled depending on the option selected during the JR approval updates (refer 8.3.1.) in the field *Number of days Job Posting is Open*.

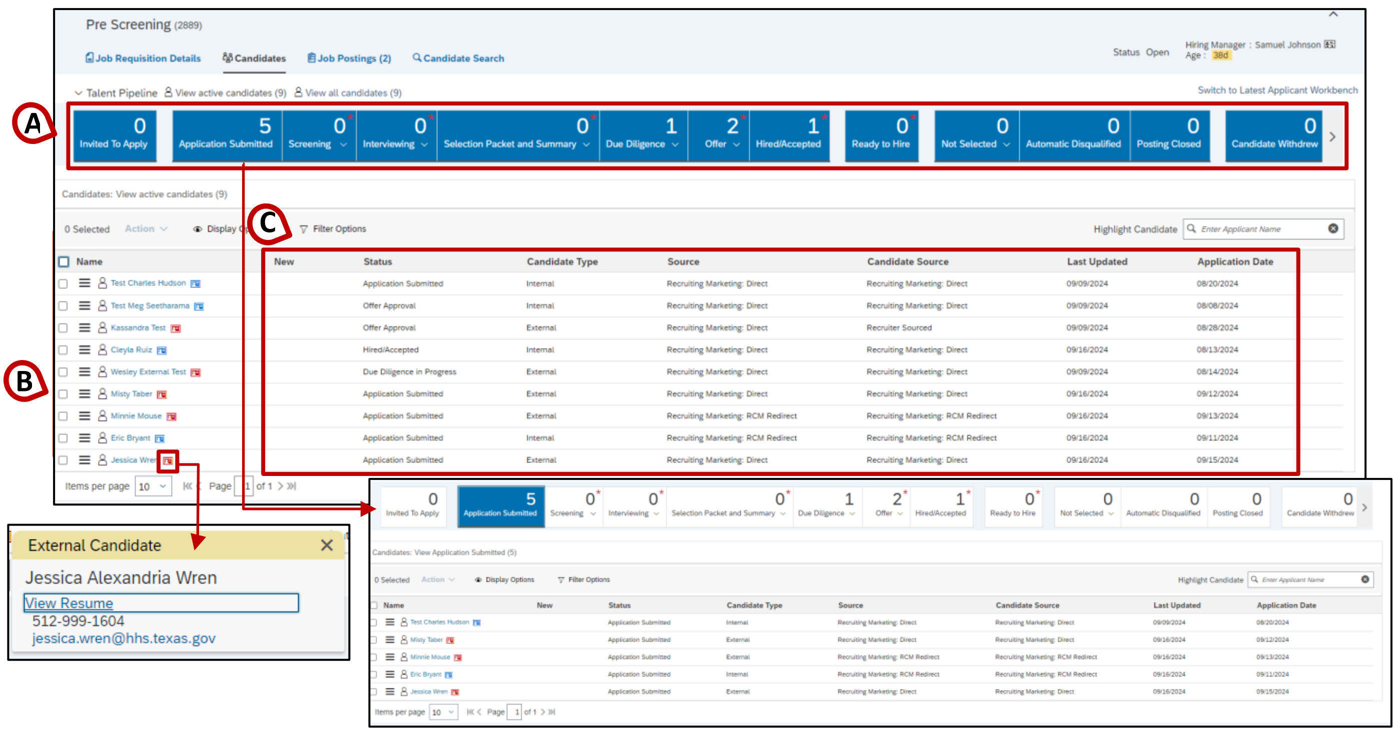


8.5.4. Candidates sub-tab (Legacy Candidate Workbench)

1. Click on an open requisition and select the *Candidates*.

2. Switch to the Legacy Candidate Workbench View link.

3. The Screen demonstrates the legacy Talent Pipeline layout.



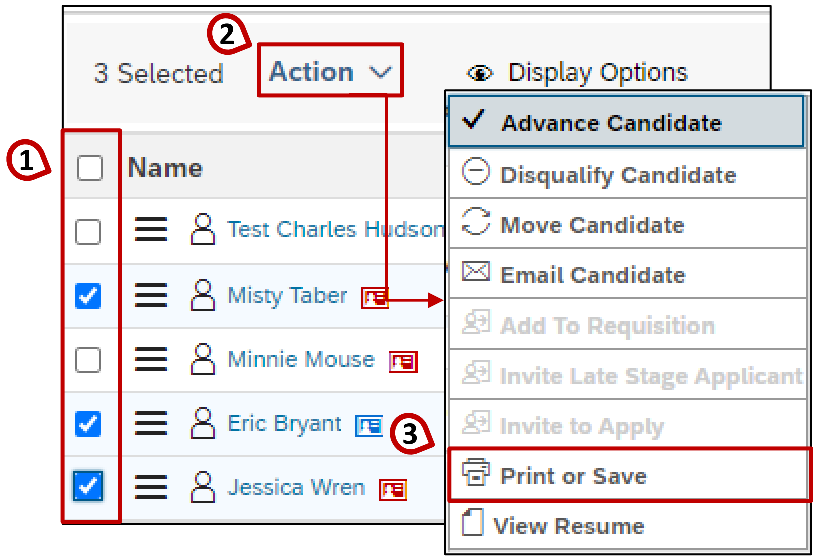
A) <u>Talent Pipeline</u>: In this pipeline you can see how many candidates are in which step of the requisition. By clicking on the step, you can see which candidates are in this stage.

B) <u>Candidates</u>: Here you can see the Candidates that have applied to this job requisition. By clicking on the profile icon, you will be able to open their resumes and view their contact details.

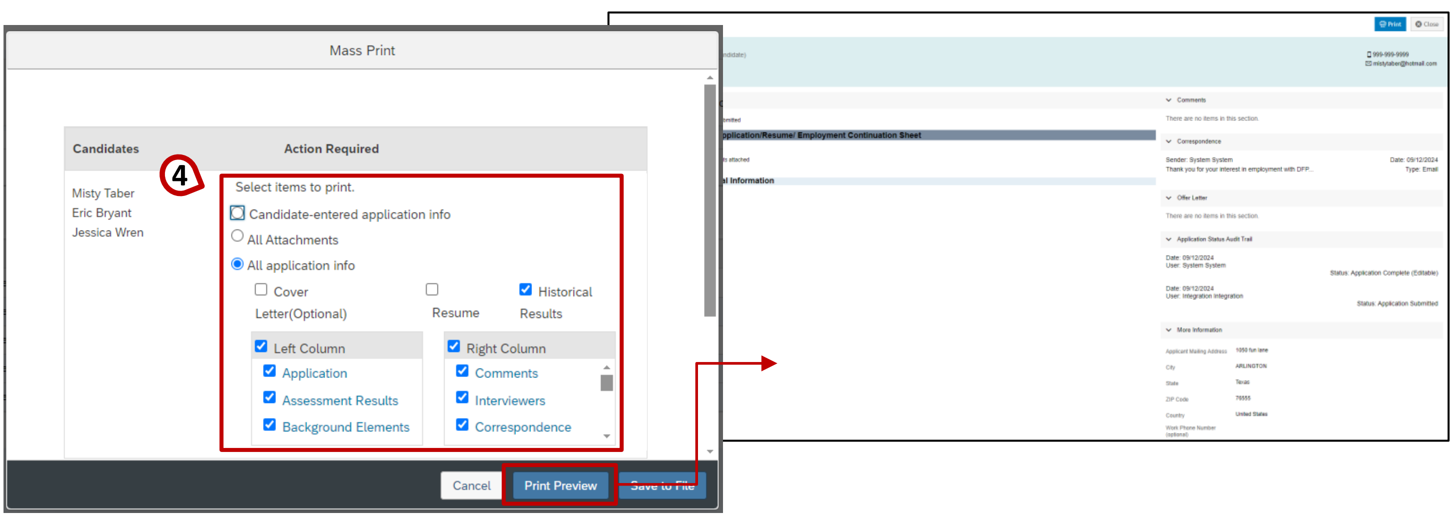
C) <u>Application status</u>: The next fields show the information about the candidate`s application status.

8.5.4.1. Print Resumes/ Application Documents

Note: This task can only be done in the Legacy View: printing resumes, cover letters and applications of applicants. The Legacy Workbench offers a more robust printing capability than the current system. This functionality has been submitted as an enhancement request with SAP, since many people still like to print documents instead of just viewing online.



1. Select the candidate/ candidates, or click on the button above to select all, you want to print the resume/ application documents.
2. Click on Actions menu, the selected action will affect all the selected candidates.
3. To mass print the resumes, click on the *Print or Save* action.



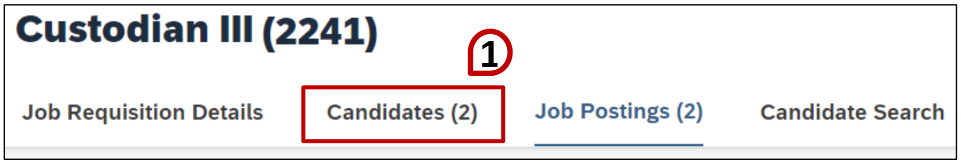
4. A dialog pop-up box will open, select the options you want to print:
   - Candidate-entered application info
   - All Attachments
   - All application info (and selected items you choose)

5. Once you have selected the files to be printed, click on *Print Preview* or *Save File*.

8.5.5. Candidates sub-tab (Applicant Workbench)

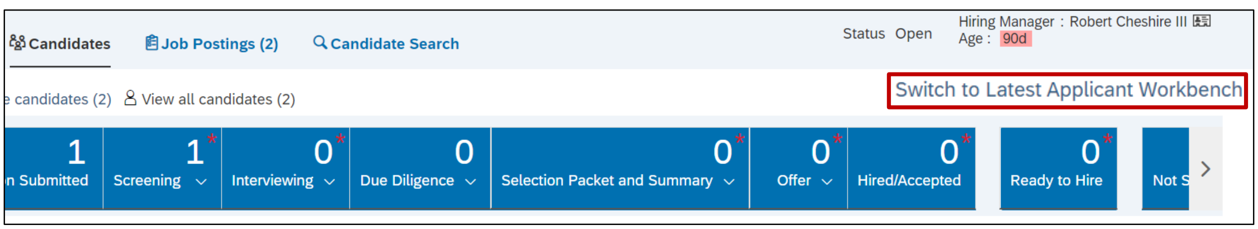
In this sub-tab, the Hiring Manager can manage applications by advancing, holding, tracking the progress, or disqualifying them.

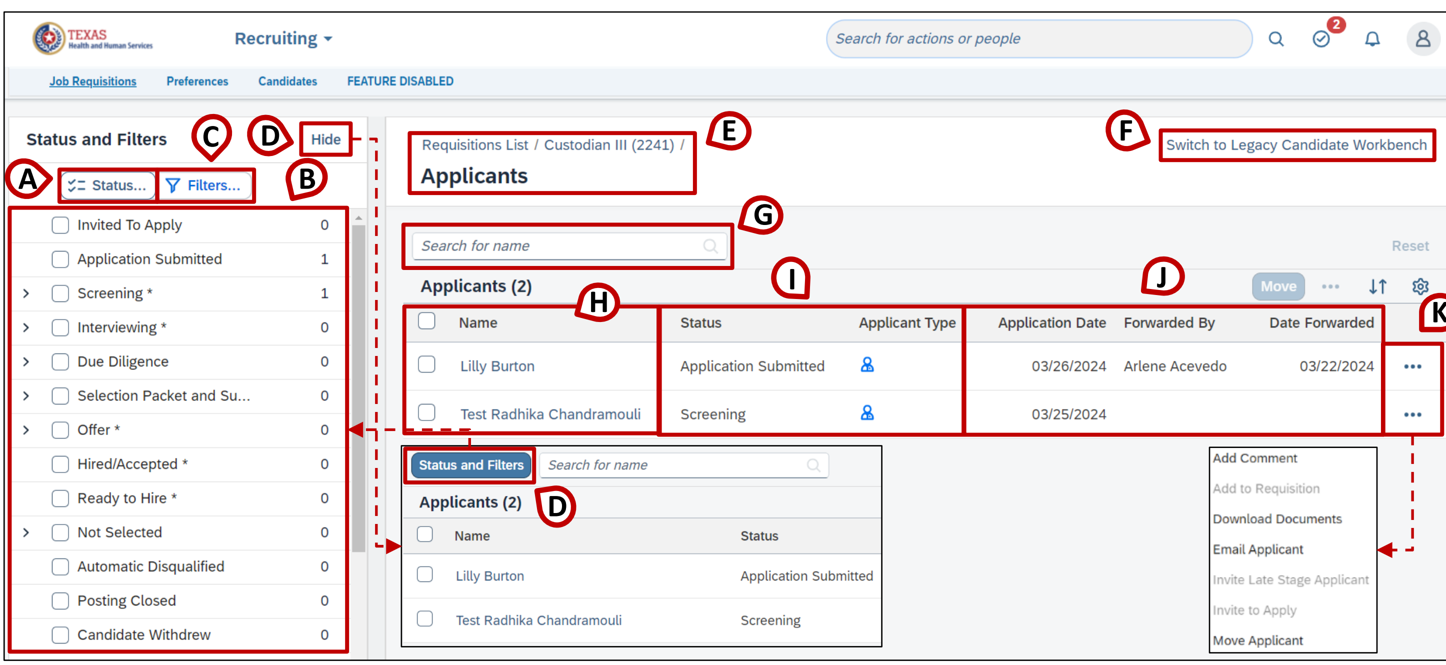
1) Switch from the *Job Postings* to the *Candidates* sub-tab



<u>Disclaimer</u>: The new *Applicant Workbench* design was implemented with the latest platform update and is used as the **standard design for system training purposes** for the State of Texas' user trainings. It is recommended to get familiar with the new design and incorporate it in the testing as it streamlines the application process and provides an improved user experience.

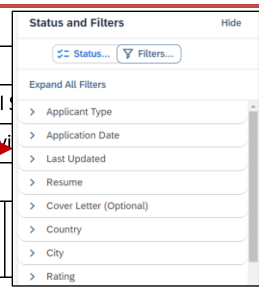
<u>Note</u>: System users that still see the default *Legacy Candidate Workbench* have the individual option to switch their page design to the *Latest Applicant Workbench*, as shown in the image, and vice versa. The system remembers the set display design for your next connection.





A) Applicant Workbench: The recruiting process flow is based on the below statuses and their sub-statuses of the (new) *Applicant Workbench*.

Invited to Apply					
Application Submitted					
Screening *	2.1 – Screening *	2.2 - Initial		2.3 - ISC/PF (Preferred Criteria)	
Interviewing *	3.1 - Request Interview	3.2 - Intervi		3.3 - Check References	
Due Diligence	4.1 - Due Diligence in Progress				
Selection Packet and Summary *	5.1 - Selection Packet *			m *	
On hold					
Offer *	Offer Approval *	Offer Approval Complete *	Create Offer Letter	Offer Accepted	Offer Declined
Hired/Accepted *					
Ready to Hire *					
Not Selected	Disqualified – No Show	Failed Due Diligence check	Failed Pre-Screening	Requisition Cancelled	Screened – Not Selected
Automatic Disqualified	**Posting Closed**		**Candidate Withdrew**		



A) Status (All) view: *Status and Filters* sidebar set to *Status (All)*. Provides the option to filter the list of displayed applicants based on the status that their application is in (compare with the *Status* column in the applicant table). The number on the right side of each status indicates the number of applicants that are currently in each status.

B) Statuses: List of all configured (collapsed) statuses displayed vertically inside the left sidebar of the screen. Provides the option to filter the list of displayed applicants based on the status that their application is in [compare with **I** (*Status* column in the table)]. The number on the right side of each status indicates the **number of applicants** in each status.

C) Filters: Shows status of JP, the Hiring Manager name and JP age (since its creation).

D) Hide – Status and Filters: Option to hide the *Status and Filters* sidebar with the *Hide* button and when hidden, use the *Status and Filters* button to open the sidebar again.

E) Quick Links and Header: Quick Links to the general *Job Requisitions* list in Recruiting and *Job Requisition Details* sub-tab of the JR. The Header refers to the *Applicants* list below.

F) Switch to Legacy Candidate Workbench: Link to toggle between the legacy design of the *Candidate Workbench* and the latest design called *Applicant Workbench* now.

G) Search for name: Possibility to search for names to filter them in the list. When you enter a name, the list automatically filters and displays only matching characters in the list.

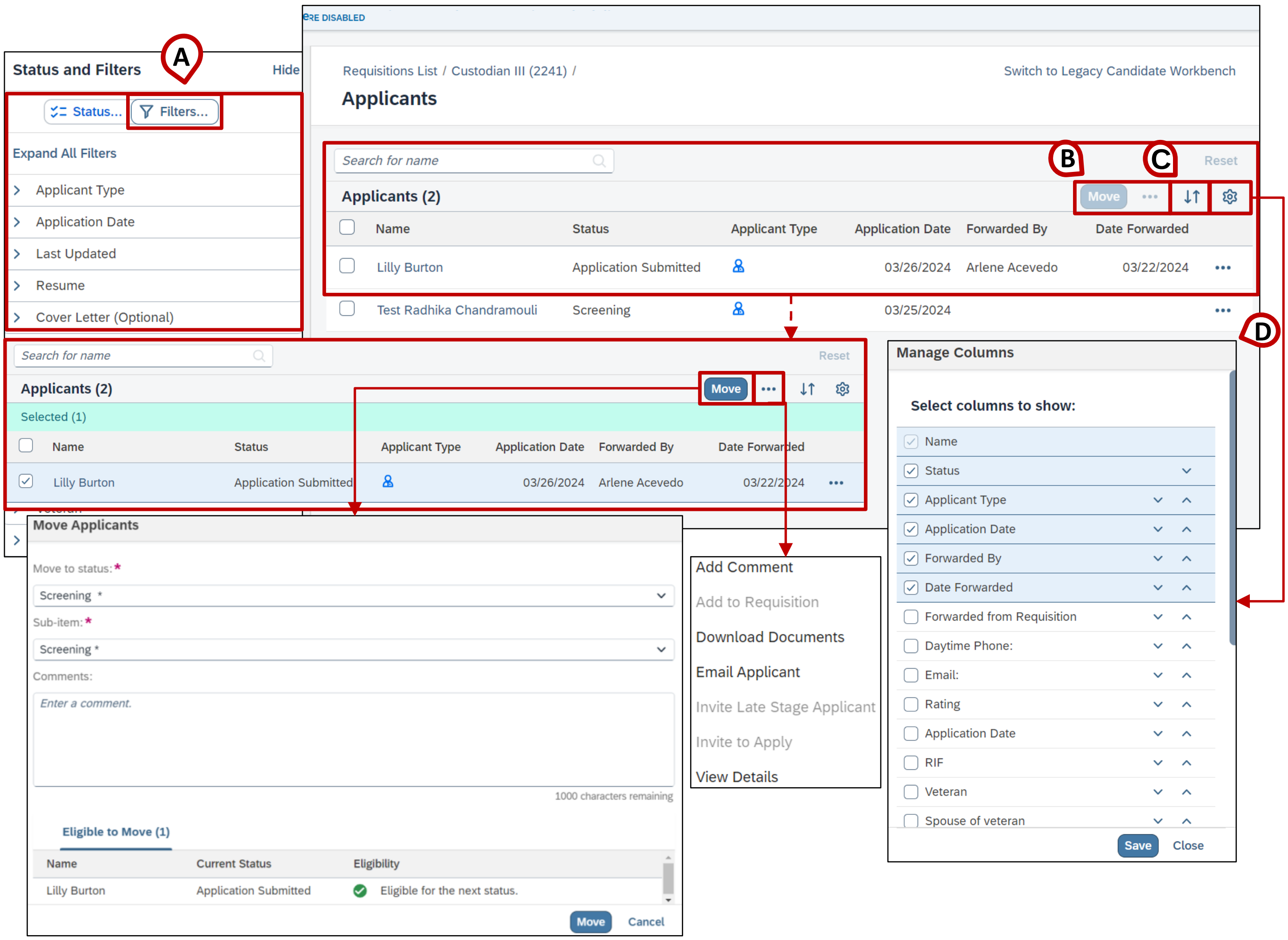
H) Applicant Names: Listing of applicant names, depending on the filtering and sorting.

I) Status and Applicant Type: The *Status* column portrays statuses of the applicants in the list. *Applicant Type* shows **internal** / **external** applicants by dint of colored icons.

J) Additional Information Columns: More columns to display details about applicants in the list. The displayed columns are managed via the *cogwheel icon* described on next page.

K) Applicant Management Options: With the three-dot *More* button you have application-specific options like adding a comment, email the applicant or move an applicant.

To utilize the options above the applicant list on the right side, *click* on the check box beside an applicant name. Then a message with turquoise background will state *Selected* with the number of selected applicants above the list. The previously greyed out *Move* and *Three-Dots* buttons can now be used to perform actions on selected candidates from the *Applicants* list.



A) Filters view: *Status and Filters* sidebar switched to *Filters* instead of *Status*. Provides the option to filter the list of displayed applicants based on available filter criteria from the applicant table columns (e.g. Applicant Type, Application Date etc.).

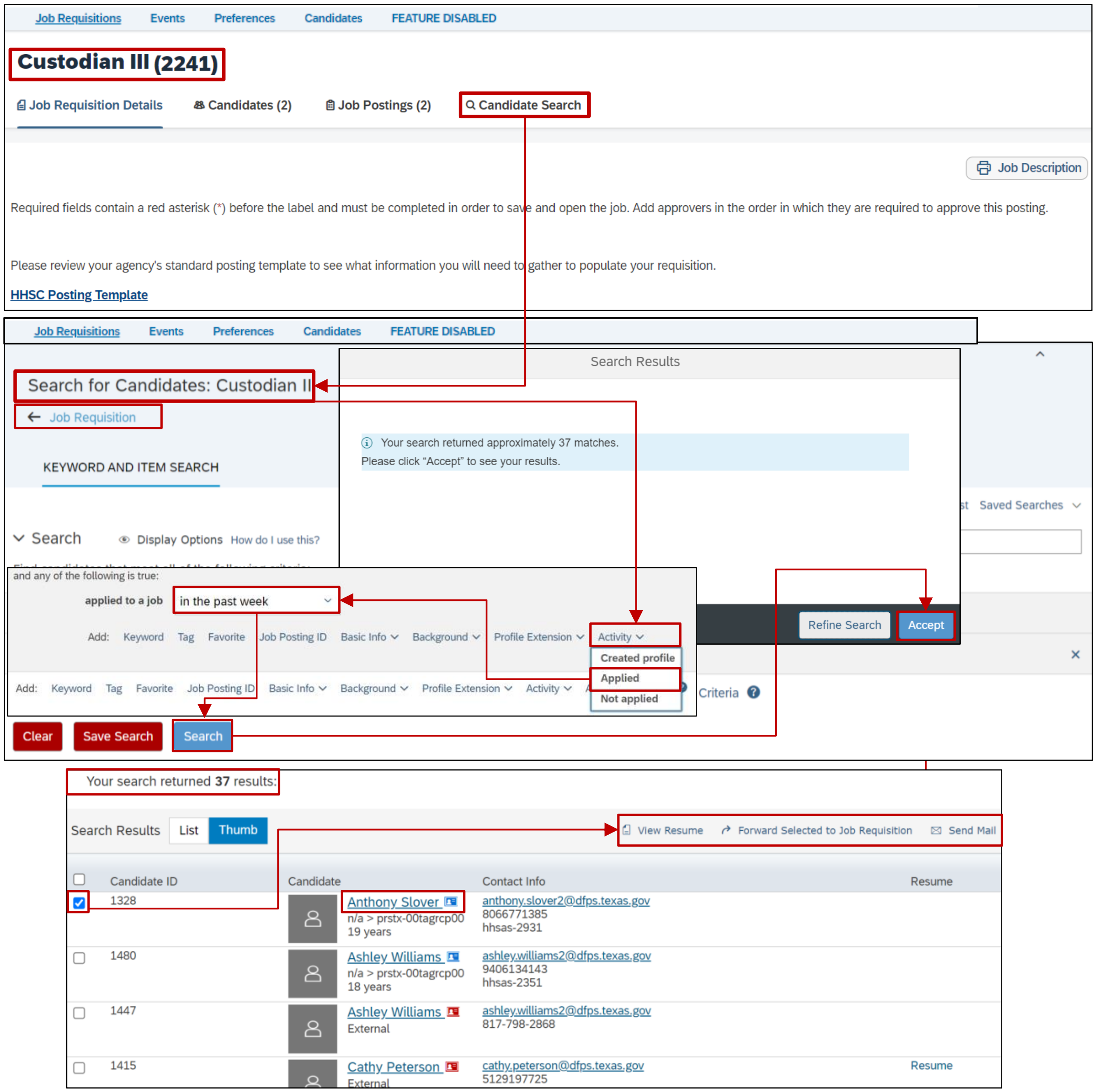
B) Move and More: Available buttons when at least one applicant from the list is selected. The *Move* button allows you to move applicants into other statuses of and sub-statuses of the Status pipeline. The three-dot *More* button opens application-specific options like *Adding* a *Comment*, *Email* the *Applicant* or *View* the *Details* about applications. The letter **K** on the previous page shows the *More* option to move applicants, **this is missing here**.

C) Sort: Option to sort the list of applicants based on various enabled columns (*Name*, *Status*, *Applicant Type* etc.) of the list/table in ascending or descending order.

D) Settings: Set the displayed columns of your applicant list via the *cogwheel icon*.

8.5.6. Candidate Search sub-tab

The Candidate Search feature can be accessed through the general Candidates tab or the Candidate Search sub-tab under the JRs tab to find candidates specifically for a certain posting [e.g. for Custodian II (2241) in the screenshot]. For further information about aspects of the candidate search functionality: 8.1.3 Candidates. After reviewing the *Candidates* chapter, you can test the functionality by following the path example shown with arrows in the screenshots below.



8.6. Application Navigation

8.6.1. Online Application

This section shows how to access, review and update data of candidate applications. The *Application Area* section of **online** applications is shown in this chapter.

Note: Main difference between **online** and **offline** applications is how candidates apply for JPs.

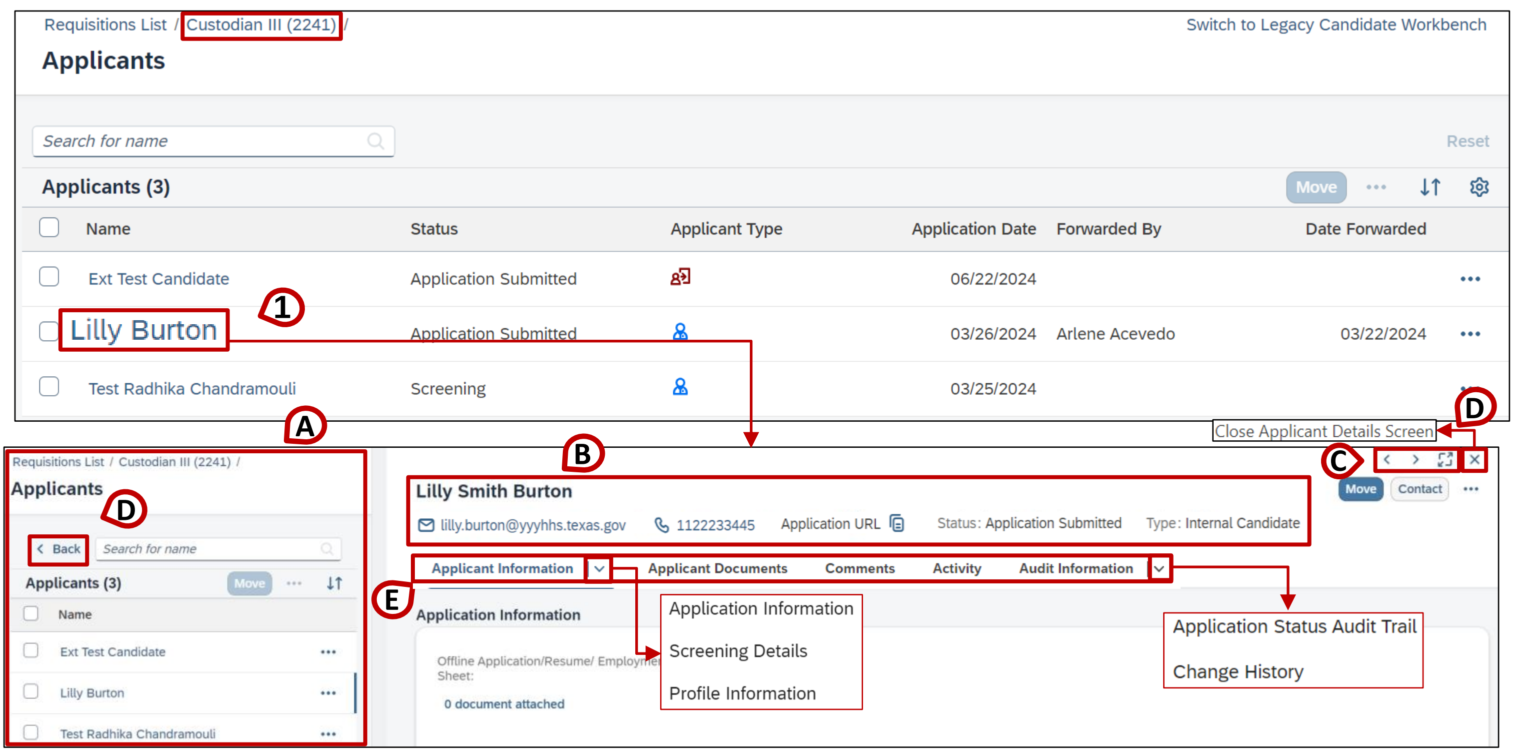
- **Offline applications** will be received as attached documents via email.
- **Online applications** will be filled and submitted by candidates either through the *Internal Careers Site* or the *External Career Center* of State of Texas.

Other than **online** applicants, **offline** applicants will **not** fill the additional fields and questions of the JP when applying. When applying, **offline** applicants will provide their candidate information via documents (e.g. Resume, Certifications etc.) by email. Further information about the difference between those application types: 8.6.1. Application, letter **C**.

Hiring Managers can access an application by following these steps:

1. Navigate to the *Applicant Workbench* [further information: 8.5.4. Candidates sub-tab (Applicant Workbench)] of an open JP with active candidates [e.g. "Custodian III (2241)"]. In the Applicants list, select an applicant name to open the respective *Application Area*.

2. The list of applicants will then be collapsed into a sidebar on the left side which still displays the quick links to the general *Requisition List* and the *JP name and code*. Here you can still manage applicants, select them via the *check boxes* and utilize the *Move* or the three-dot *More* button.



A) Collapsed Applicant Workbench sidebar: Provides information about the JP and has the function to navigate back to previous pages in the *Recruiting* section. It lets you manage applicants via the applicant list in the sidebar.

B) Basic Applicant Information: Header of the *Application Area*. Displays the full applicant name and other basic information (email address, phone number, URL copy field) as well as the *Status* of the application and the *Applicant Type* (internal or external).

C) Applicant Navigation and Screen Expand: The first two buttons allow you to switch back and forth between the *Application Areas* of applicants from the *Applicants* list on the left. The third button is used to expand the screen by hiding the main dashboard and sidebar, only showing the *Basic Applicant Information* and *Application Area*.

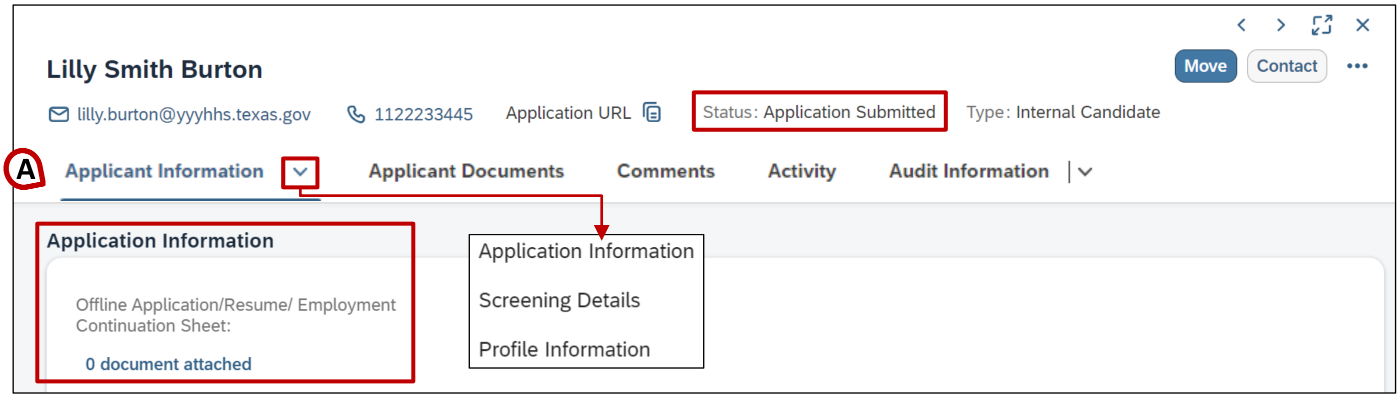
D) Close Application Details Screen/Back: Two buttons with the same function which allows you toggle back to the previous *Applicant Workbench* page [further information: 8.5.4. Candidates sub-tab (Applicant Workbench)] and *Status Pipeline*.

E) Application Area parts: Application Information, Resume and Documents, Comments, Activity, Audit Information and their displayed sub-parts in image. This area will be explained further in the next chapter.

8.7. Application Area

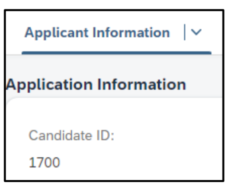
The **Hiring Manager** must document the attempt of obtaining a reference when they are unable to reach the reference.

8.7.1. Application Information



A) ***Applicant Information*** is the main section for all statuses. It will show and ask for more information around the application process when the applicant advances to the next statuses of the process.

In the **Application Submitted** status, the first is the *Application Information* sub-section which contains the Candidate ID number. This comes from the Candidate Application.

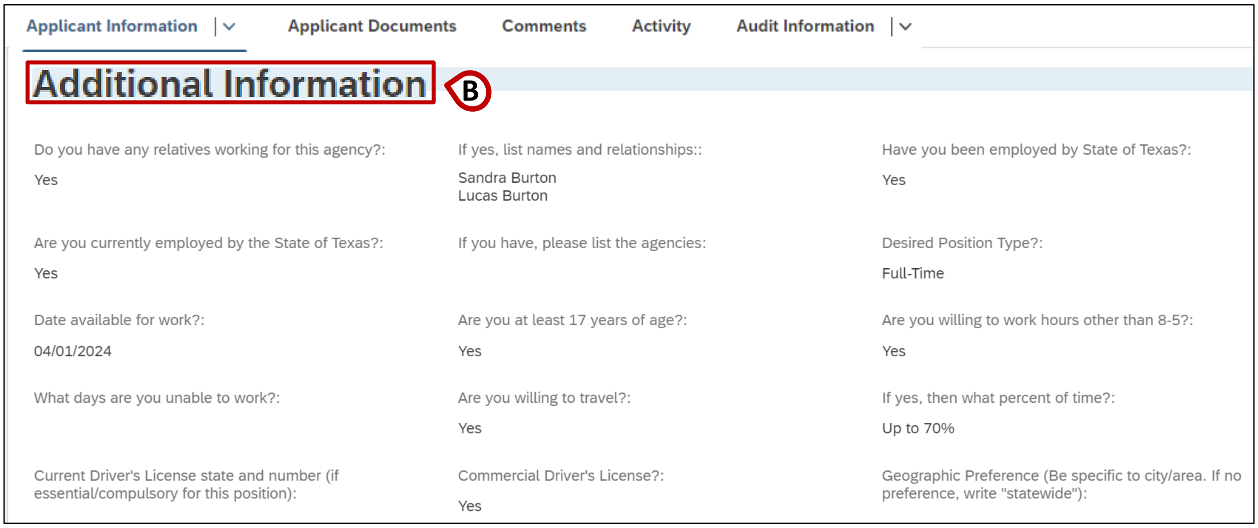


It also contains information regarding *Offline Application* documentation. It constitutes the main difference between **online** and **offline** applications. **If it inherits a document**, the candidate applied **offline** via email. As the process is shown for an **online** application, it shows "0 documents attached."

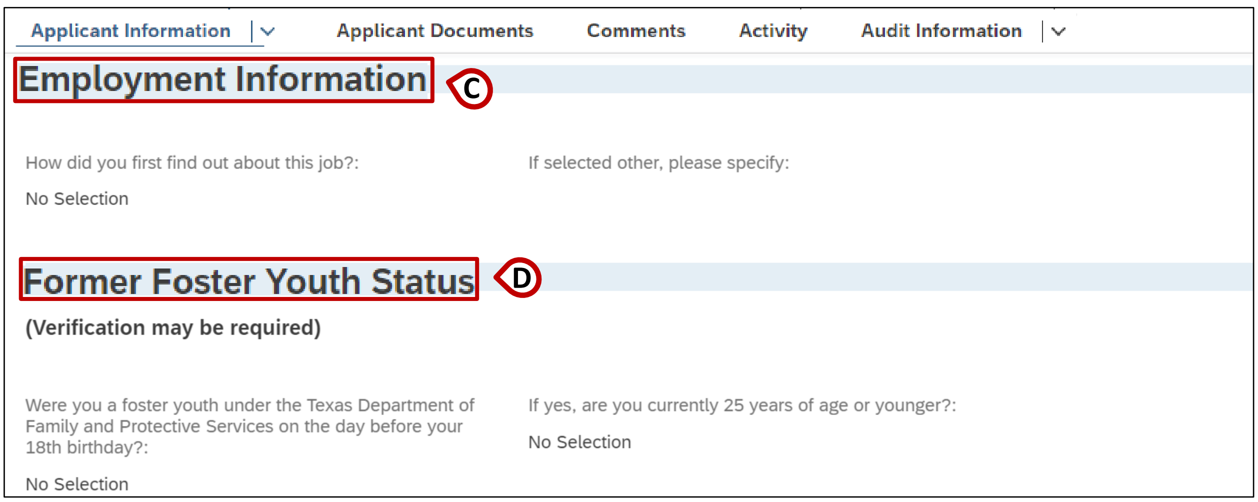
- **Offline applications** will **not** have further information provided in the information sections of the *Application Submitted* status.
- **Online applications** will have further information provided in the data fields of the *Applicant Information* section.

Note: Applicants who apply for postings offline via email will not be able to complete any part of the (required) assessment. Managers must evaluate these applicants without these preset HR system assessments.

The different sub-sections of the ***Application Area*** are called *Application Information*, *Screening Details* and *Profile Information*. Review the application data by scrolling down the sections.

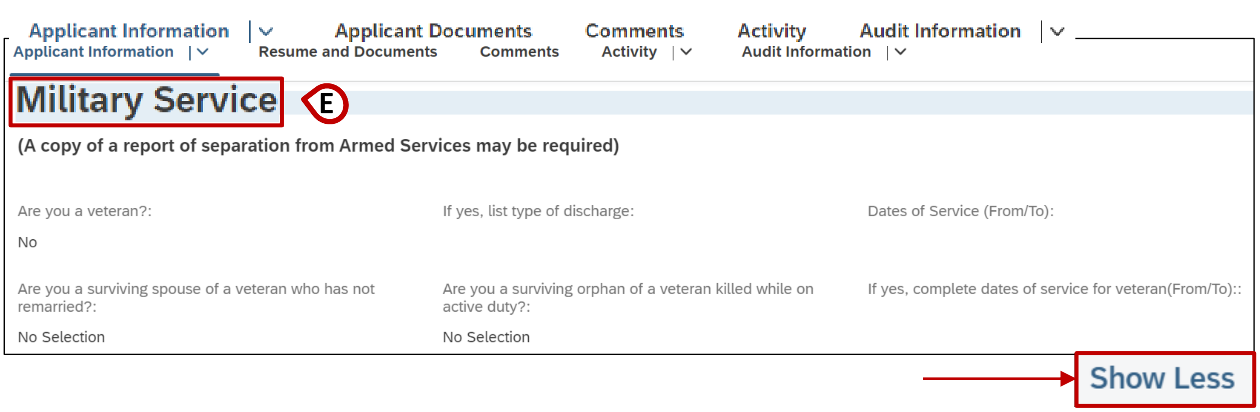


B) Additional Information: Header of the first sub-section of Application. The sub-section itself contains various types of questions that were already answered by the candidate.



C) Employment Information: Asks for the source of the candidate for finding the JP.

D) Former Foster Youth Status: Optionally, candidates provide further personal background information which can be reviewed here.

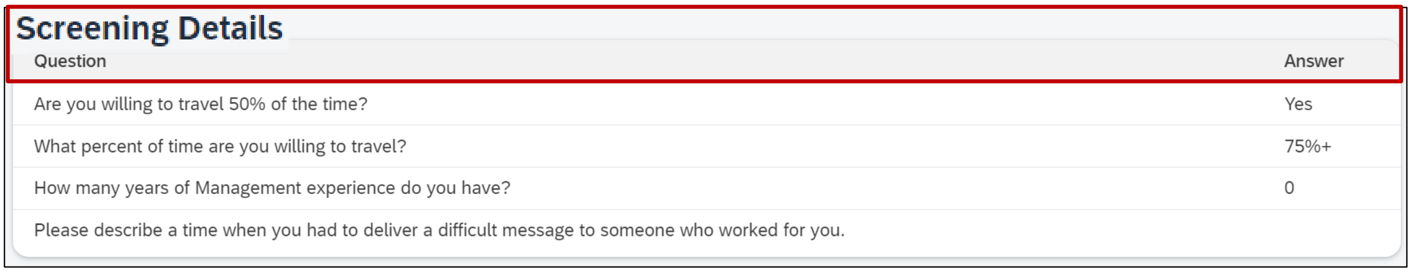


E) <u>Military Service</u>: If applicable, candidates provide important information about their veteran status details which can be reviewed here.

> **<u>Note</u>**: The *Show Less* button allows you to collapse the *Applicant Information* section to have a better overview of the sub-sections. It can be expanded back by using the *Show More* button which will be available then.

8.7.2. Screening Details

This sub-section displays the answers of the applicant regarding the screening questions that were set up during the JP update process (refer 8.3.6. Applicant Screening Questions).



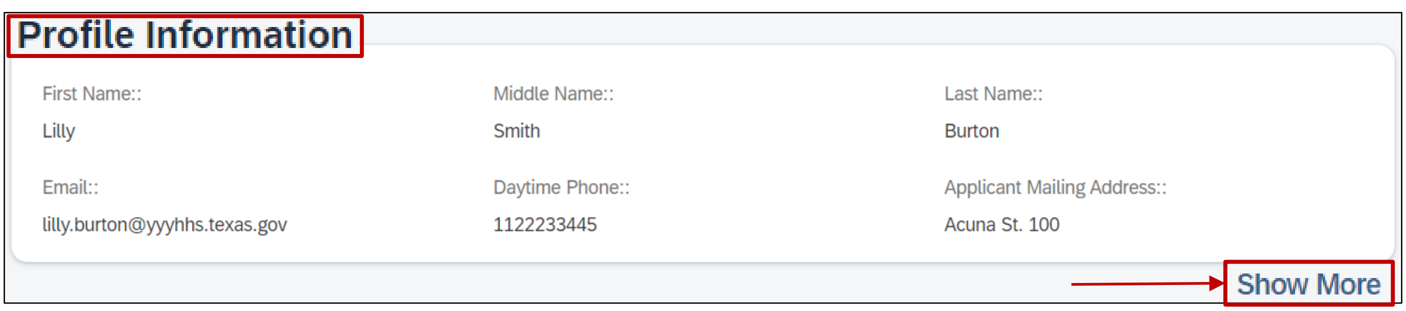
Screening Details

Question	Answer
Are you willing to travel 50% of the time?	Yes
What percent of time are you willing to travel?	75%+
How many years of Management experience do you have?	0
Please describe a time when you had to deliver a difficult message to someone who worked for you.	

8.7.3. Profile Information

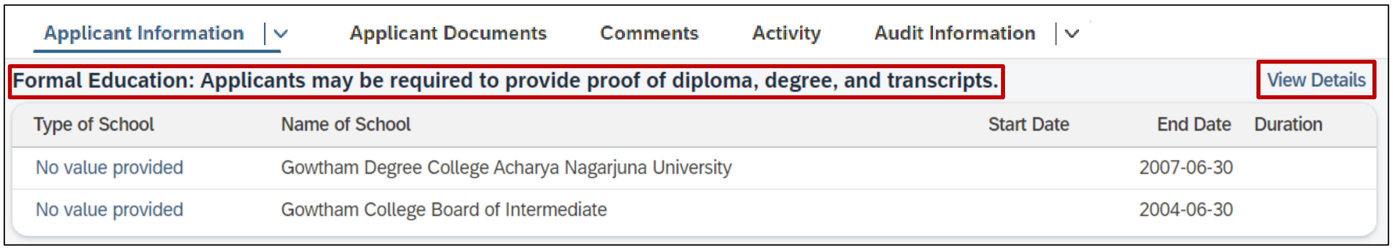
As you can see in the image, the sub-section captures the personal information around the applicant, provided by the applicant during the submission of the application. Contains the contact and address information, and also includes questions to be answered around the academic background, technical skills and language skills of the candidate

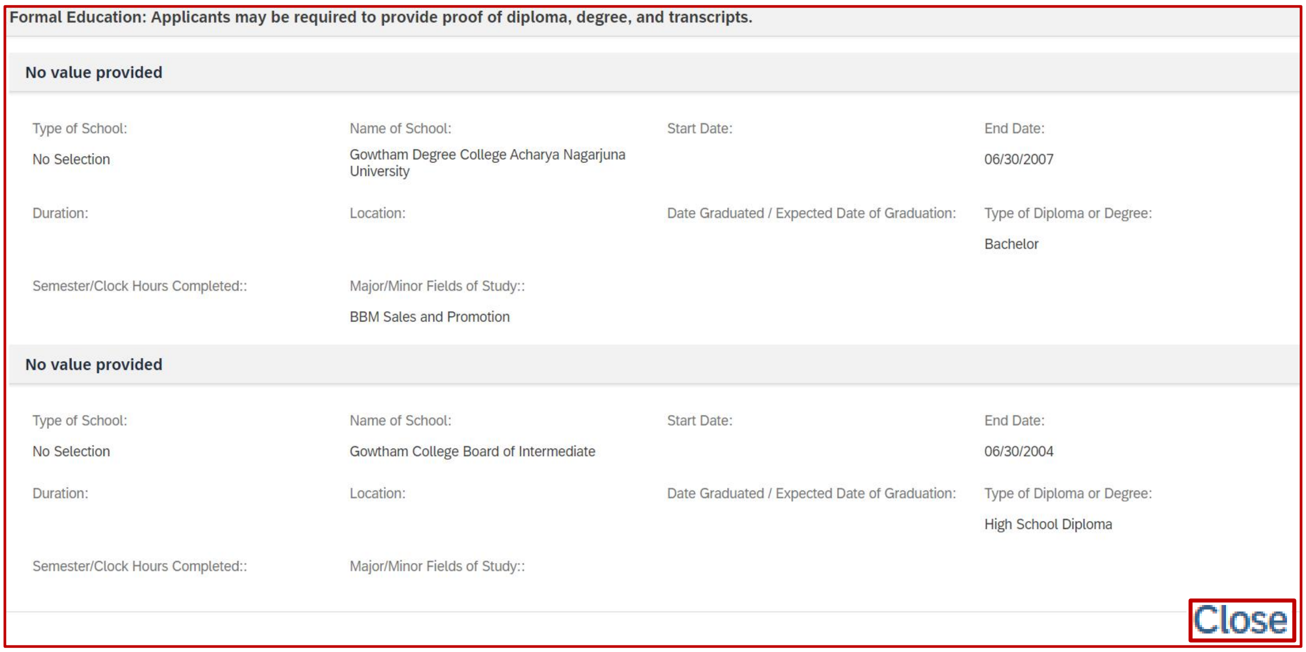
> **<u>Note</u>**: The *Show More* button allows you to collapse the *Profile Information* section to have a better overview of the sub-sections. It can be collapsed back by using the *Show Less* button which will be available then.



8.7.4. Formal Education

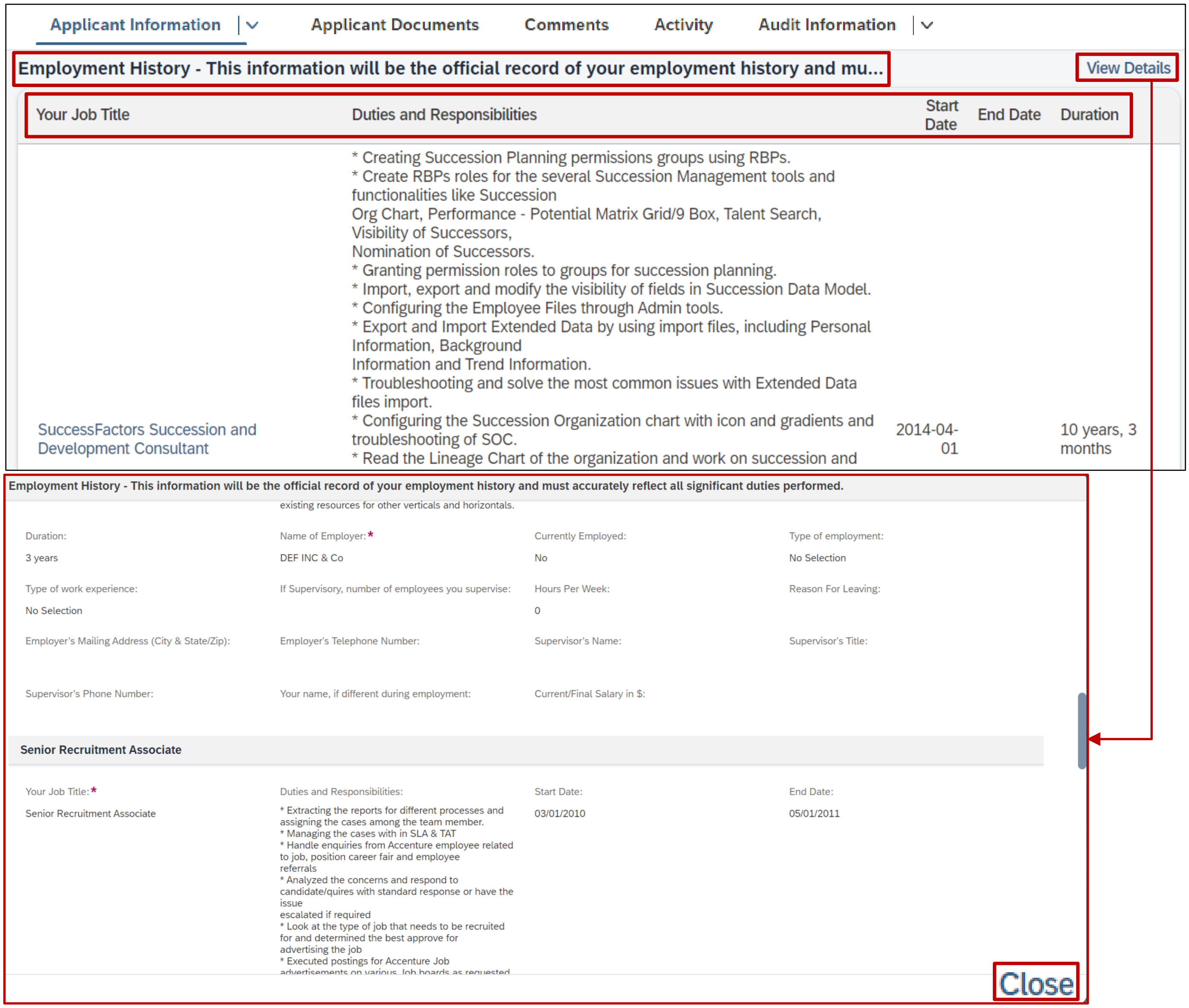
Adopted from the structure of CVs, Applicants may be required to provide the history of their *Formal Education* (proof of diploma, degree, and transcripts), this will be captured in this sub-section. Review the information by scrolling down or click on *View Details* to open a detailed overview.





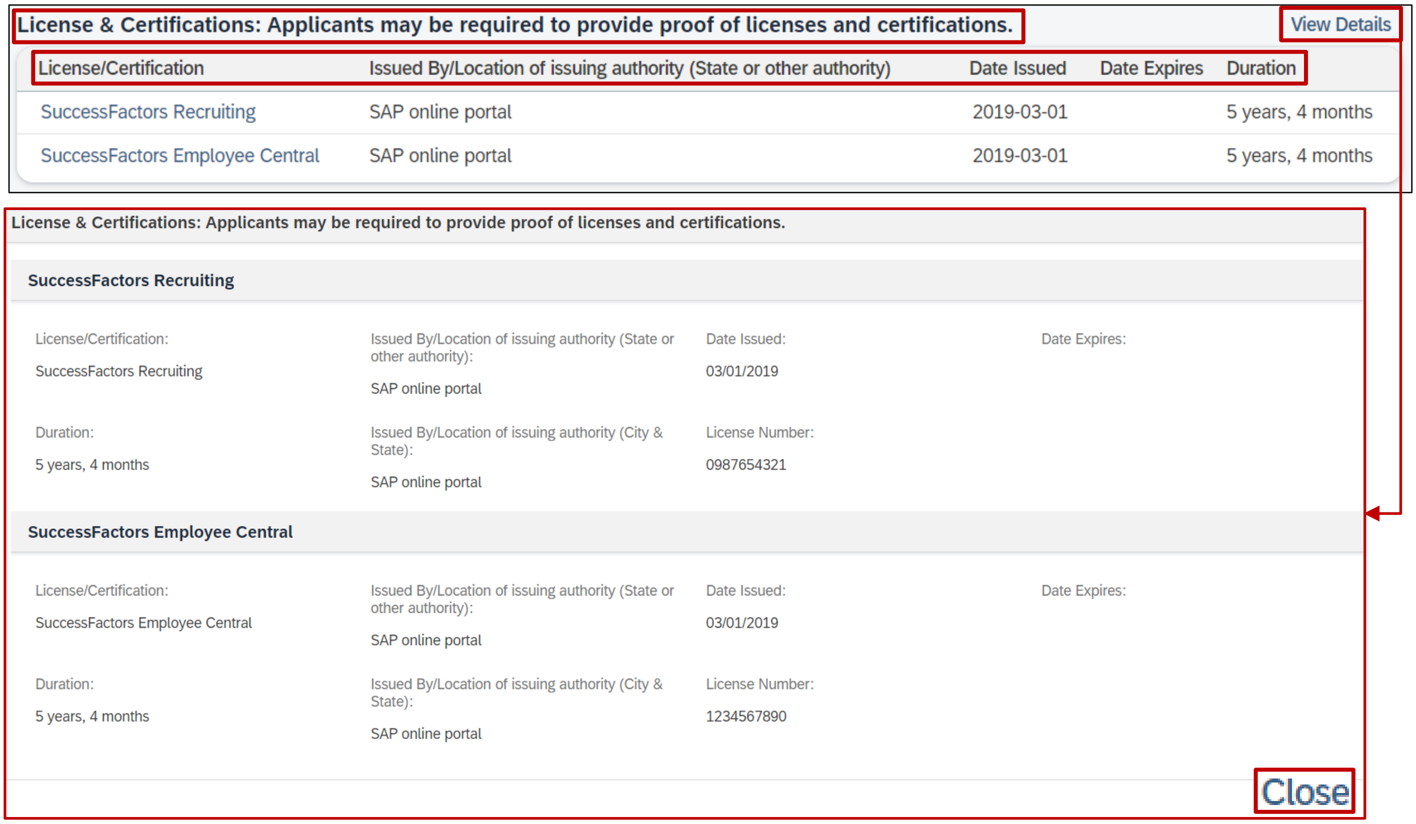
8.7.5. Employment History

Adopted from the structure of CVs, information of this sub-section reflects the official record of applicants' employment history and must accurately portray all significant duties performed. Review the information by scrolling down or click on *View Details* to open a detailed overview.



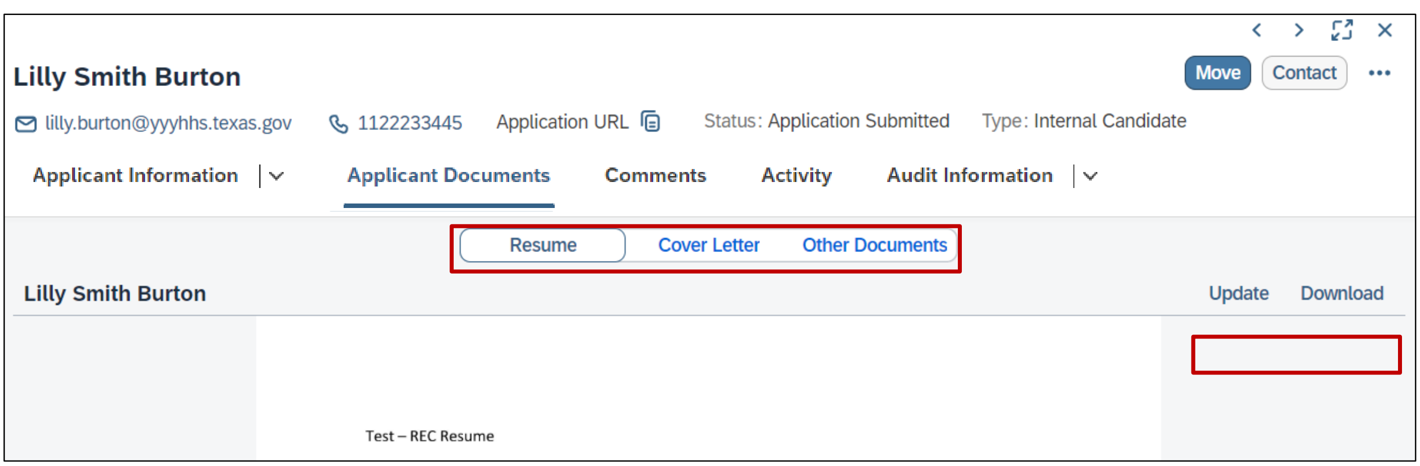
8.7.6. License & Certifications

In the last sub-section, applicants may provided proof of licenses and certifications which could be relevant for the job. Review the information by scrolling down or click on *View Details* to open a more detailed overview.



8.7.7. Applicant Documents

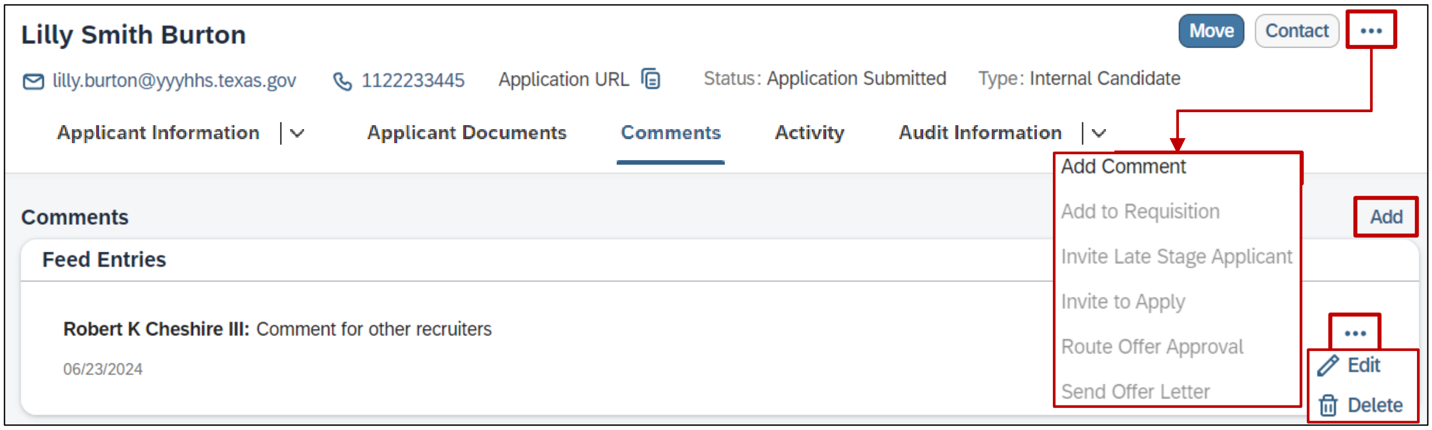
The next section of the *Application Area* contains the uploaded *Resume* which can be *updated* by replacing the resume and *downloaded* as indicated in the image. Two other parts of the



section are for storage of *Cover Letters* and *Other Documents* (like references, certifications, offline applications and resumes etc.).

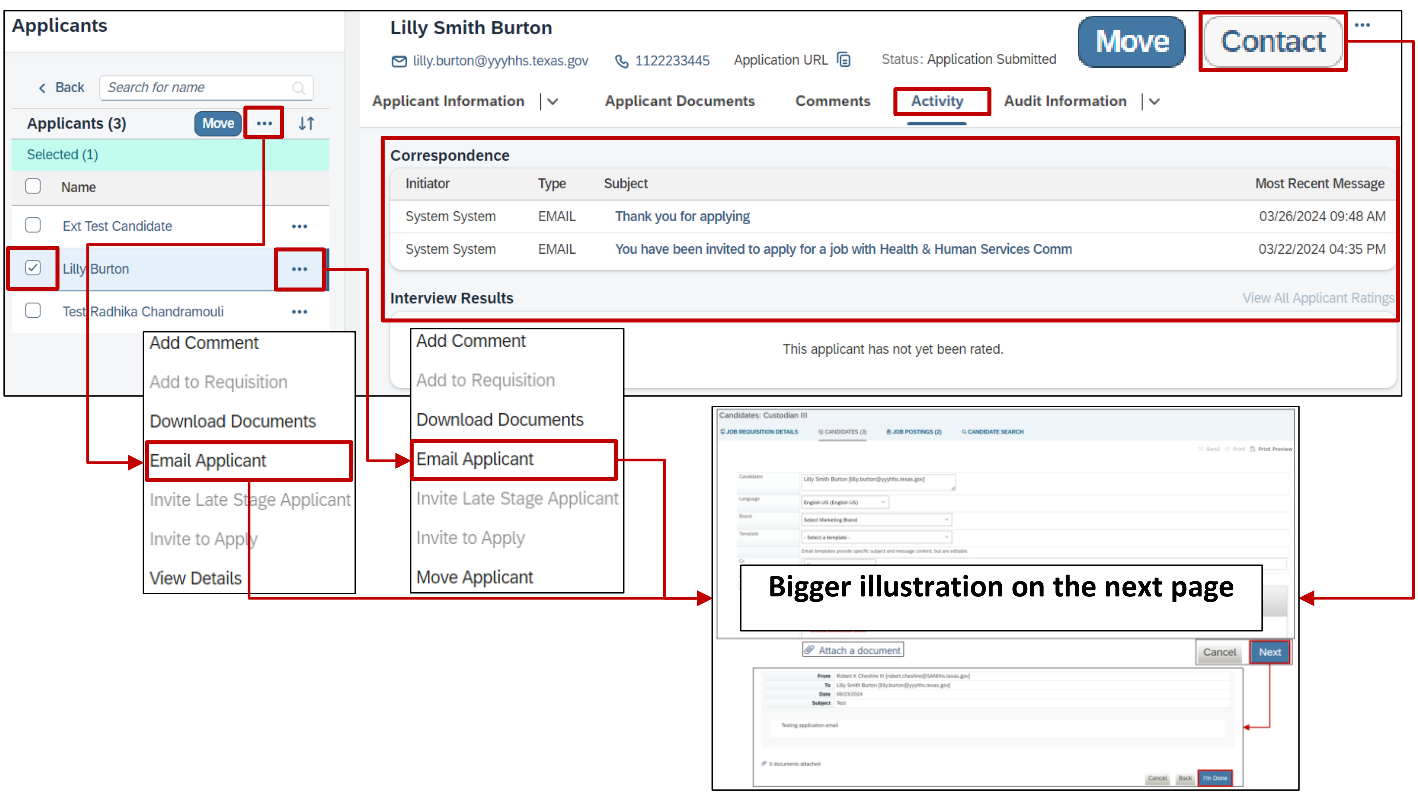
8.7.8. Comments

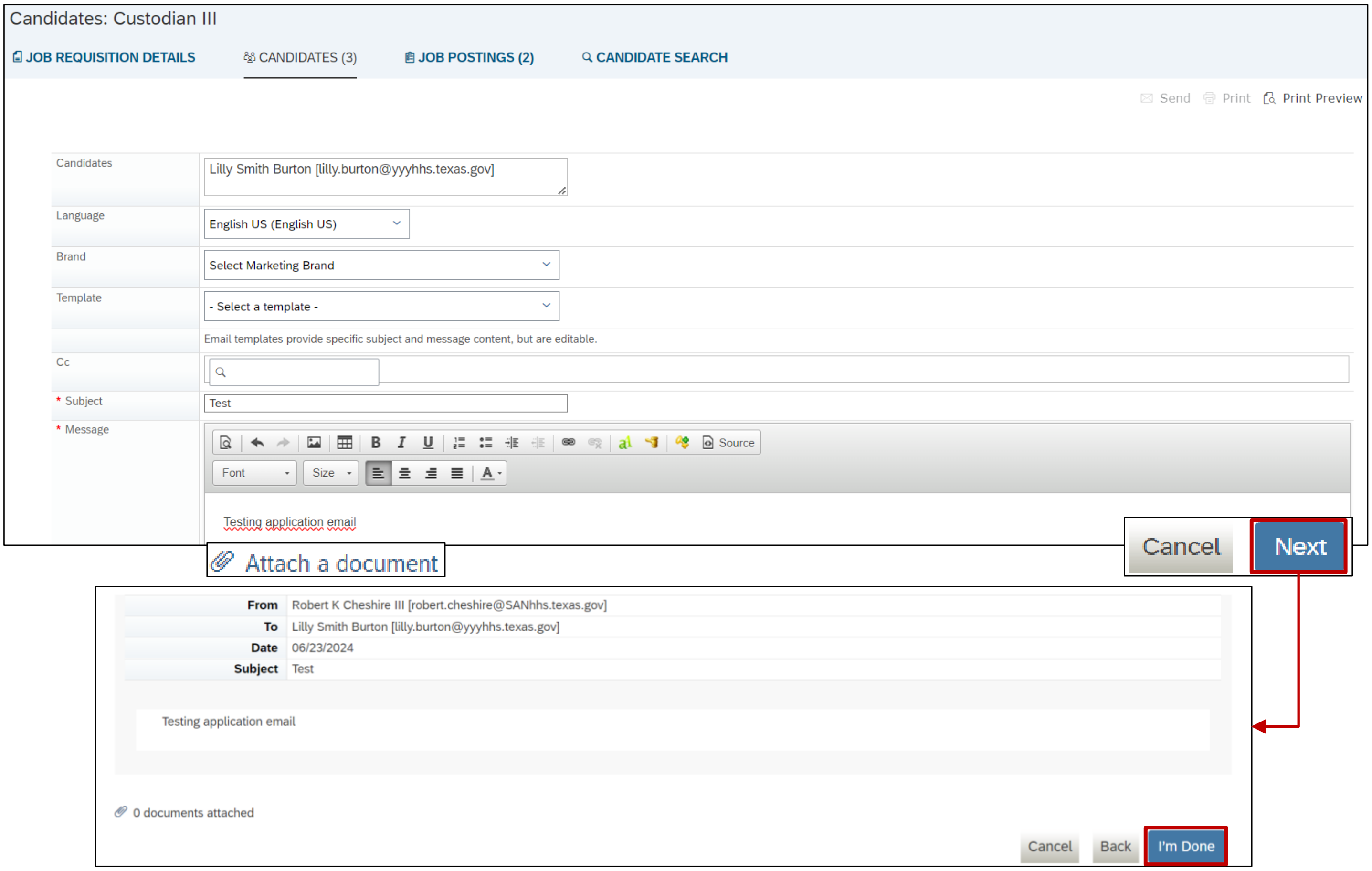
Hiring Managers can add/delete comments during the recruiting process if necessary. When adding or deleting a comment, the *Save* and *Cancel* buttons will be available to use.



8.7.9. Correspondence and Interview Results

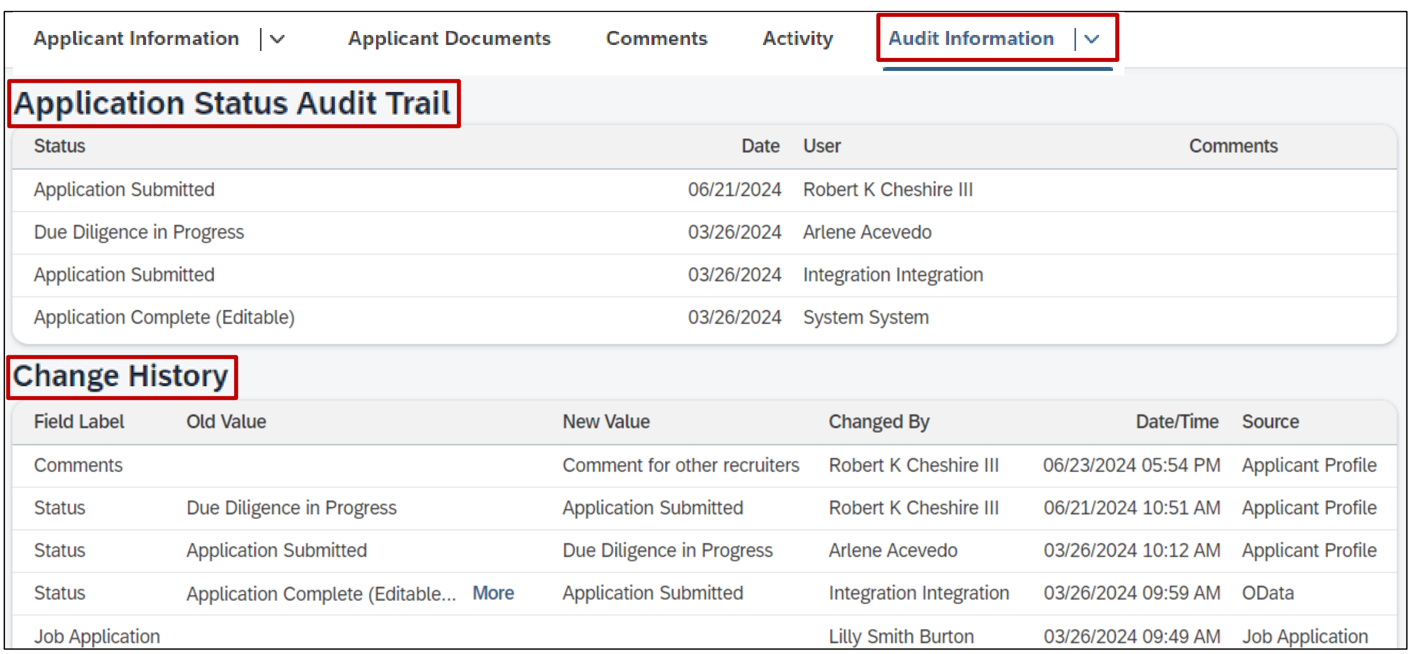
Under the section named *Activity*, managers have the option to review the saved *Correspondence* history. Here are three options available to prepare and send out emails to applicants. Use the *Contact* button on the right side of the *Application Area*. It has the same function as the *Email Applicant* option in the More menu of the left sidebar. You can set up ad hoc emails or utilize prepared email templates.





8.7.10. Application Status Audit Trail and Change History

The last section called *Audit Information* displays the *Change History* of all the activities and the *Application Status Audit Trail* that records status value updates performed on the application.

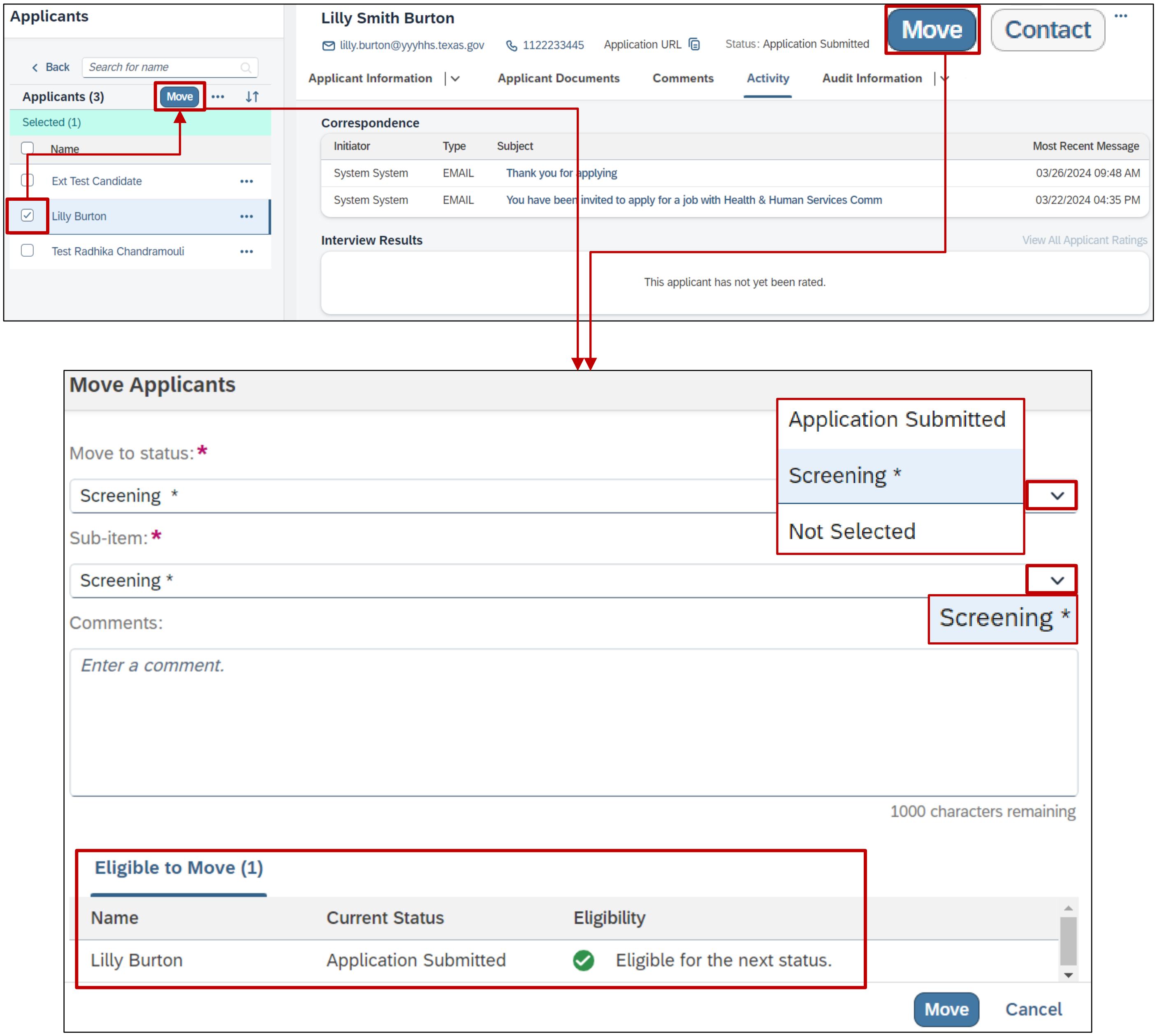


8.8. Move Applicants

The new Applicant Workbench offers two ways to move applicants from one status to another. Moving via the ***Move*** button or the ***Applicant List*** menu. Both will be described in the following.

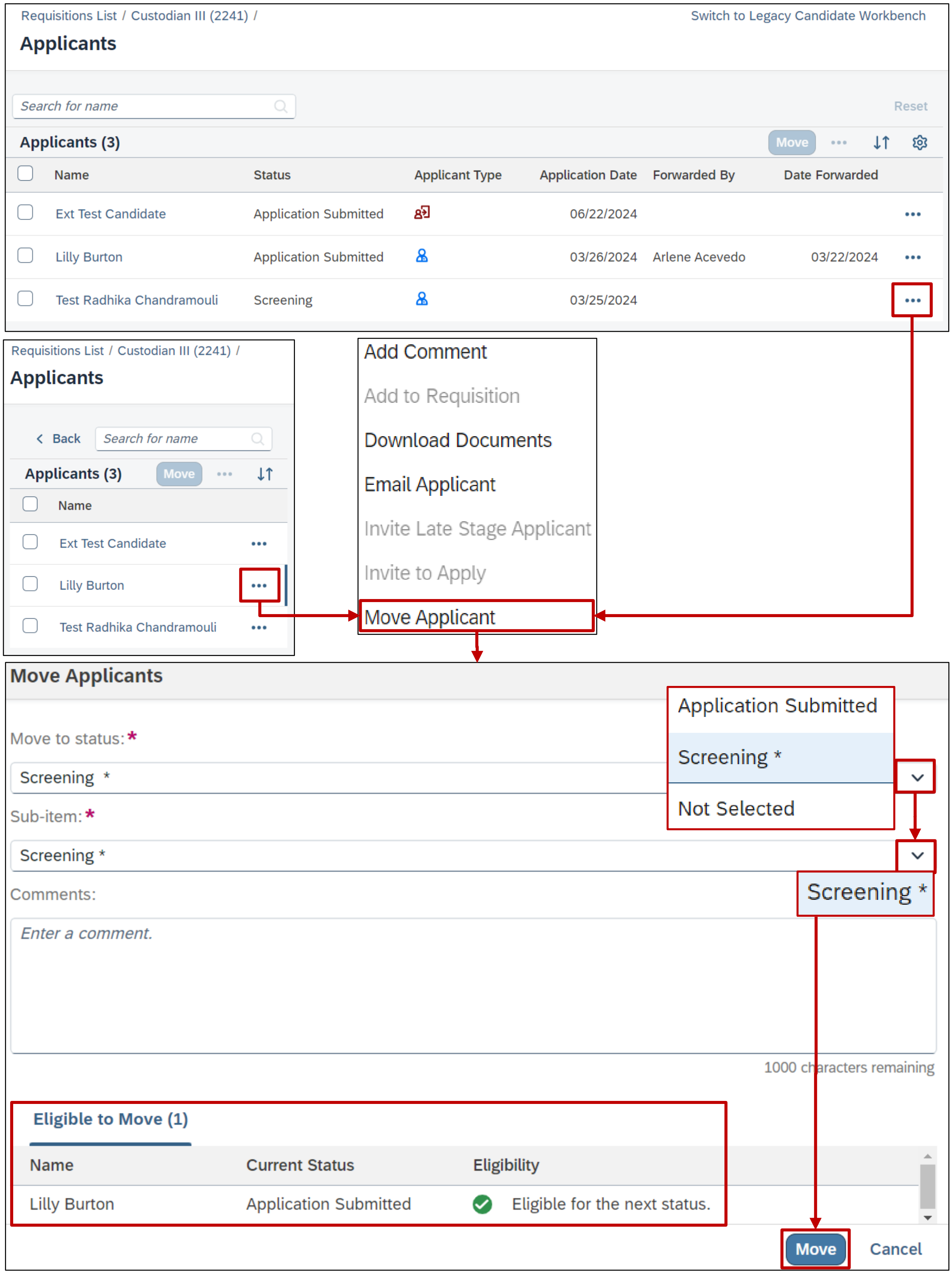
8.8.1. Move button

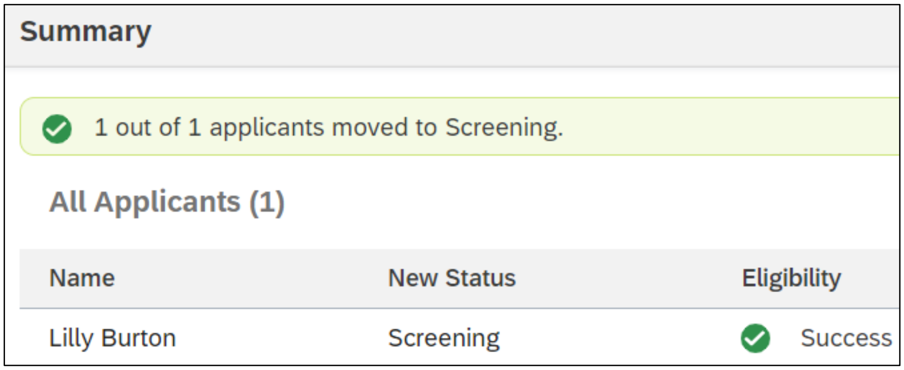
Utilize the *Move* button available in the general *Applicant Workbench* (refer **B** in 8.5.4.) and in the sidebar or on the top right when looking at candiate specific *Application Areas.*



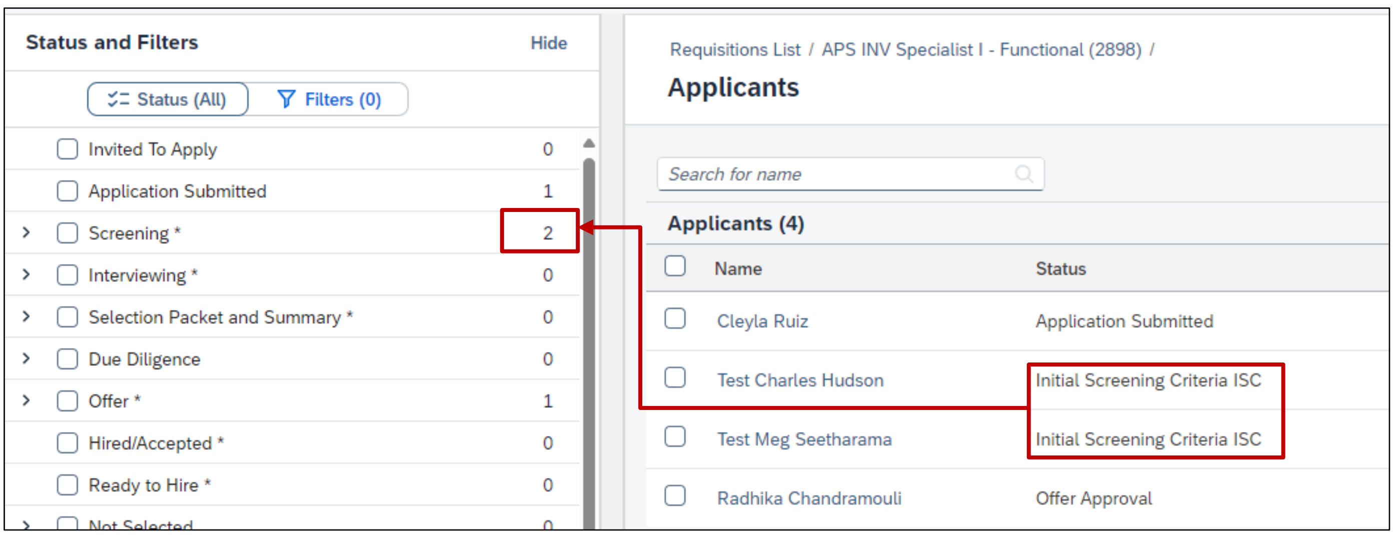
Note: The status drop-down list only shows statuses up until the next mandatory status. The image shows *Screening* as the next mandatory (active) status. *Not Selected* counts as a disqualification status and is always available to cancel the consideration of the candidate.

8.8.2. Applicant List Menu

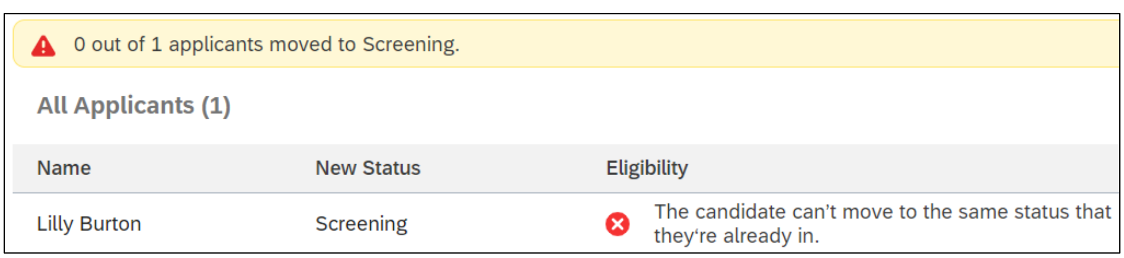




The *Status* in the *Basic Information* area of the application will automatically change to the new status value and will be displayed in the *Status* column of the Applicant Workbench (refer [8.5.4.](#)). Additionally, the Status Pipeline will show a bigger count for the number of applicants in the respective status.

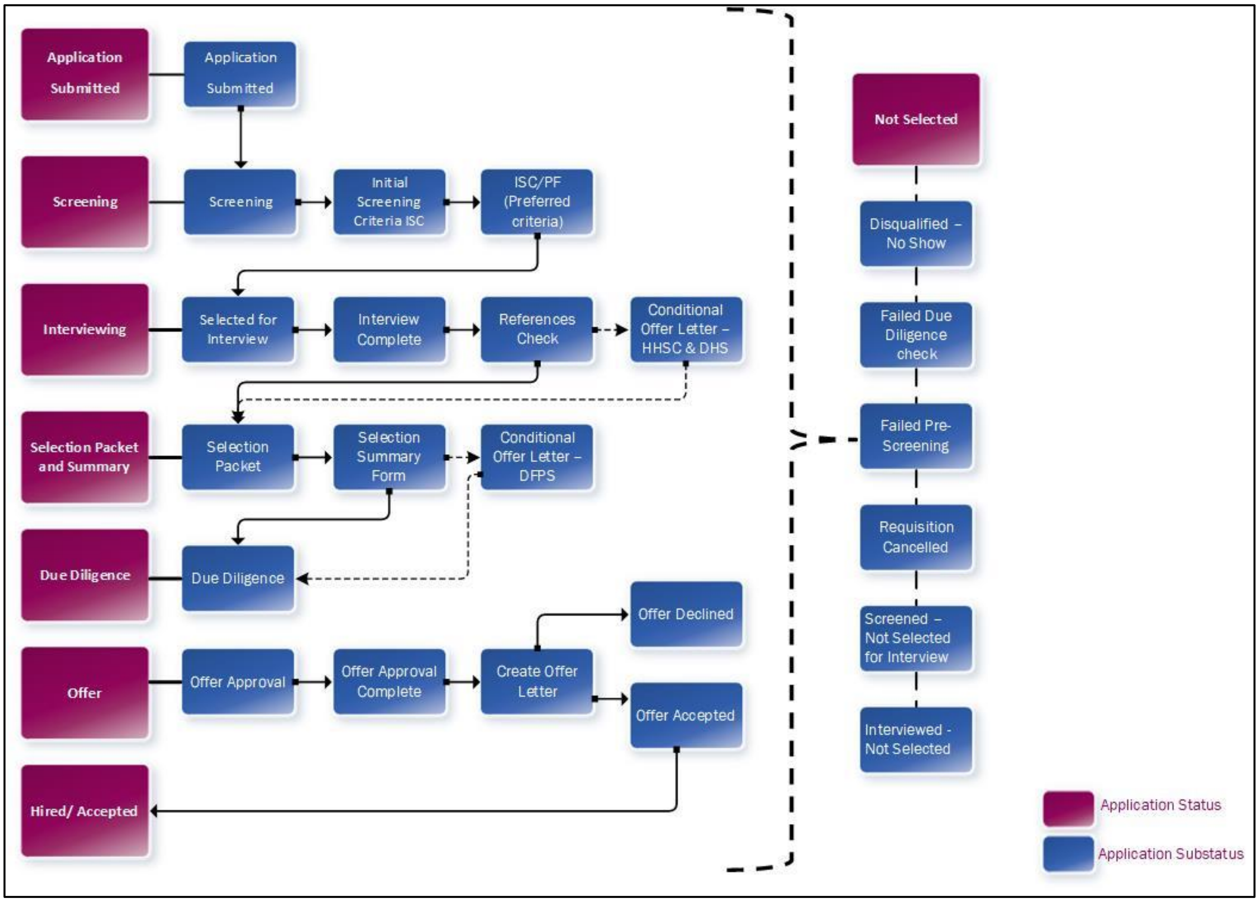


Note: Trying to move an applicant to current active status will result in an automated system error message as there will be no change to the specific application process in this case.



8.9. Applicant Status Pipeline

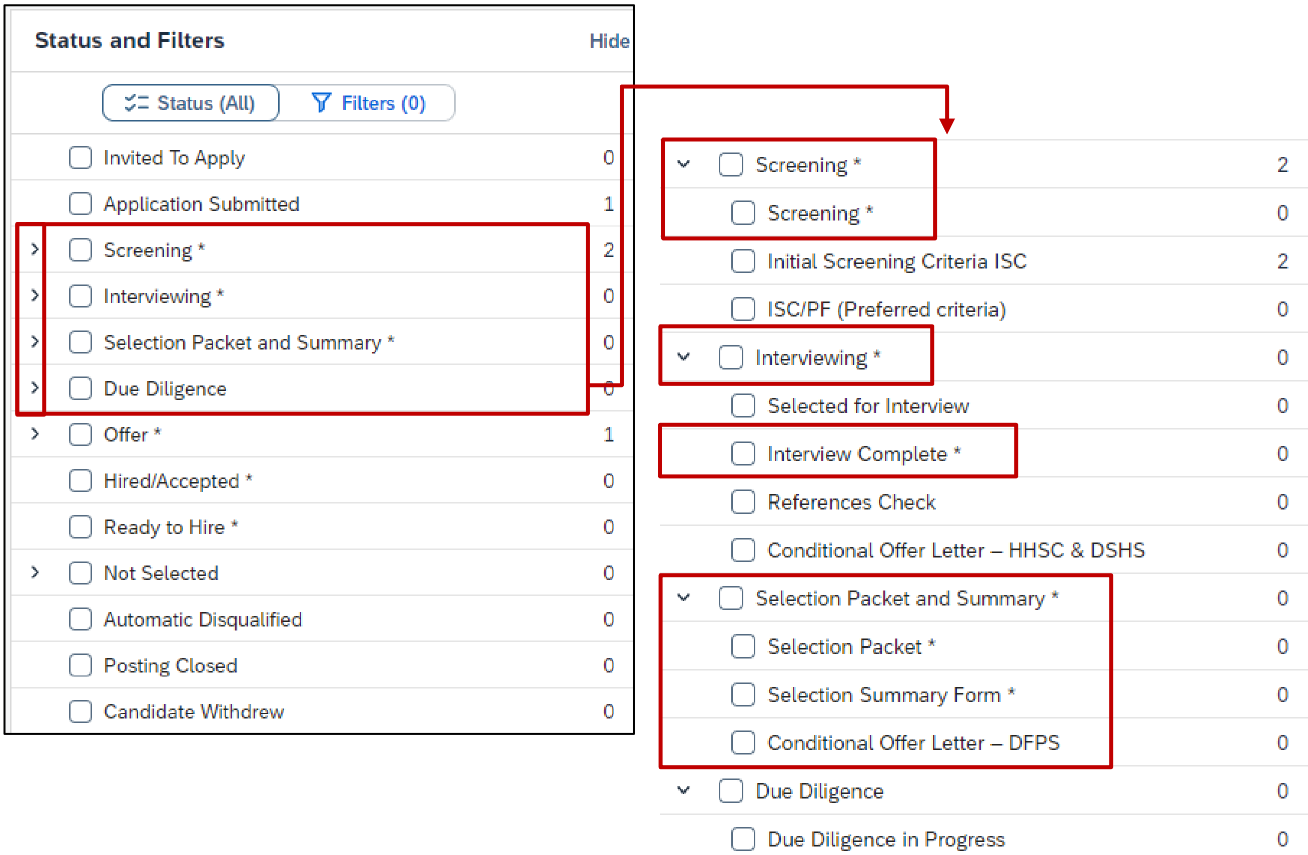
The *Applicant Status Pipeline* displays various optional and mandatory statuses a candidate can be moved to. The application process flows from vertically from top to bottom in the pipeline and upcoming mandatory (marked with an asterisk *) statuses cannot be skipped (e.g. if a candidate is in the *Screening* stage, the *Selection Interviewing* status **has to be** utilized before being allowed to move to the *Selection Package and Summary* status, which comes after *Interviewing* in the pipeline.)



This diagram shows the route map of the Application Status.

The candidate can be moved to the Not Selected status and the corresponding sub-status at any stage of the application.

Note: Please follow one of the methods in chapter 8.8. Move Applicants to bring applicants in the next mandatory status in their application process. An example of the consecutive mandatory statuses in the pipeline is shown below. It requires the **Hiring Manager** to consider utilizing the active non-mandatory statuses for each applicant and gather as much information as possible.



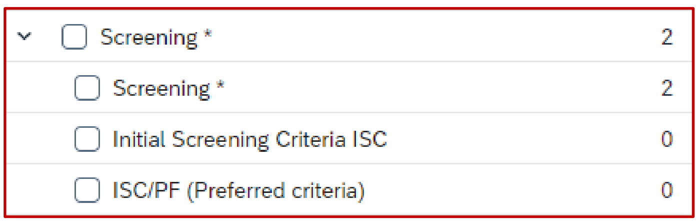
8.9.1. Application Submitted

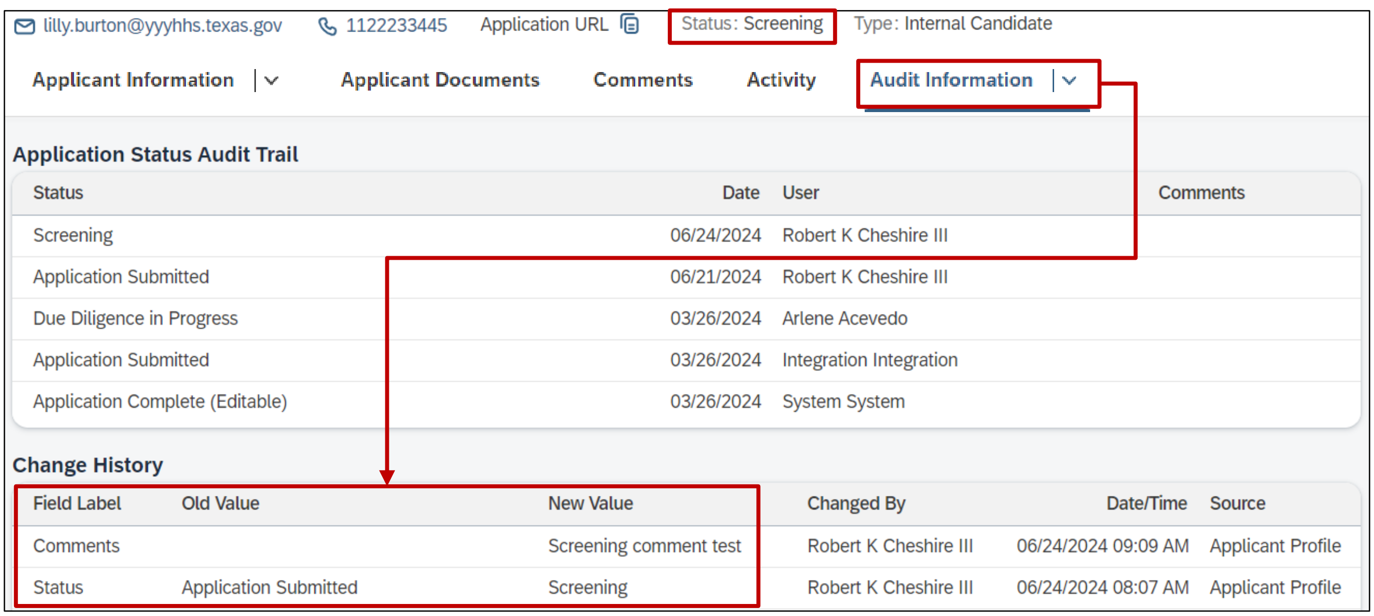
This status was covered as part of the introduction of the applicants' *Application Area* in chapter 8.7. Application Area.

8.9.2. Screening *

After first evaluations of the data, applicants are moved to the *Screening* status evaluated further and considered for an interview. The initial *Screening* sub-status is mandatory to go through and two other parts are optional: *Initial Screening Criteria ISC and ISC/PF (Preferred criteria*.

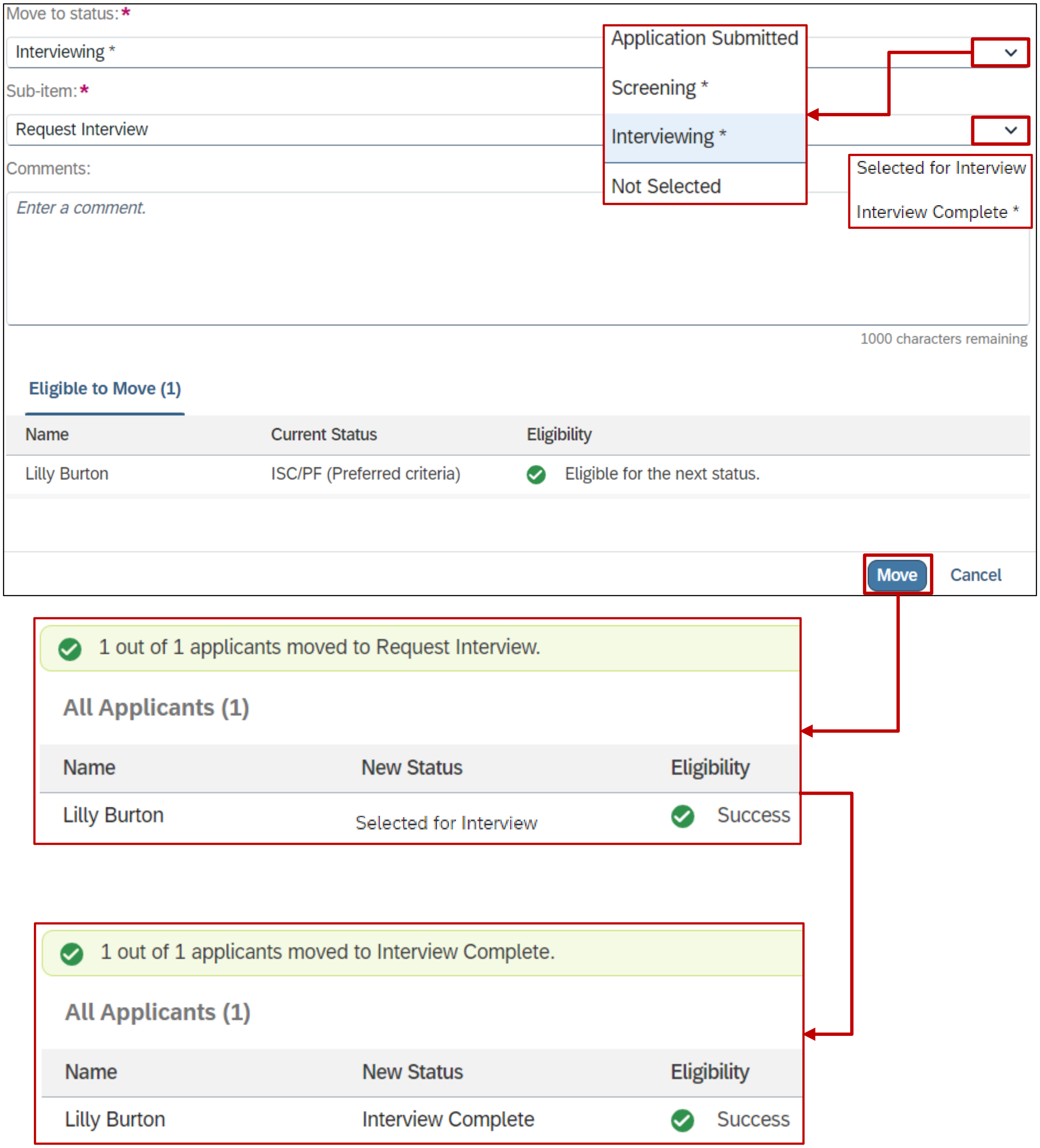
1. Go to the *Application Area* of a specific candidate (review: 8.6.1 Online Application).
2. If necessary, move the candidate to the new status by following the description in 8.8. Move Applicants. Select *Screening* as the main status and *Screening* as the sub-status.
3. Before saving, consider entering a comment to be reflected in the *Application Status Audit Trail* (further information: 8.7.10. Application Status Audit Trail and Change History).





The *Screening* sub-statuses do **not** include additional data fields to be populated in the *Application Area* by a Hiring Manager. The status functions as a reference step in the application process. Once screened by the Hiring Manager, it should be decided whether to advance, move or disqualify the applicant in the pipeline.

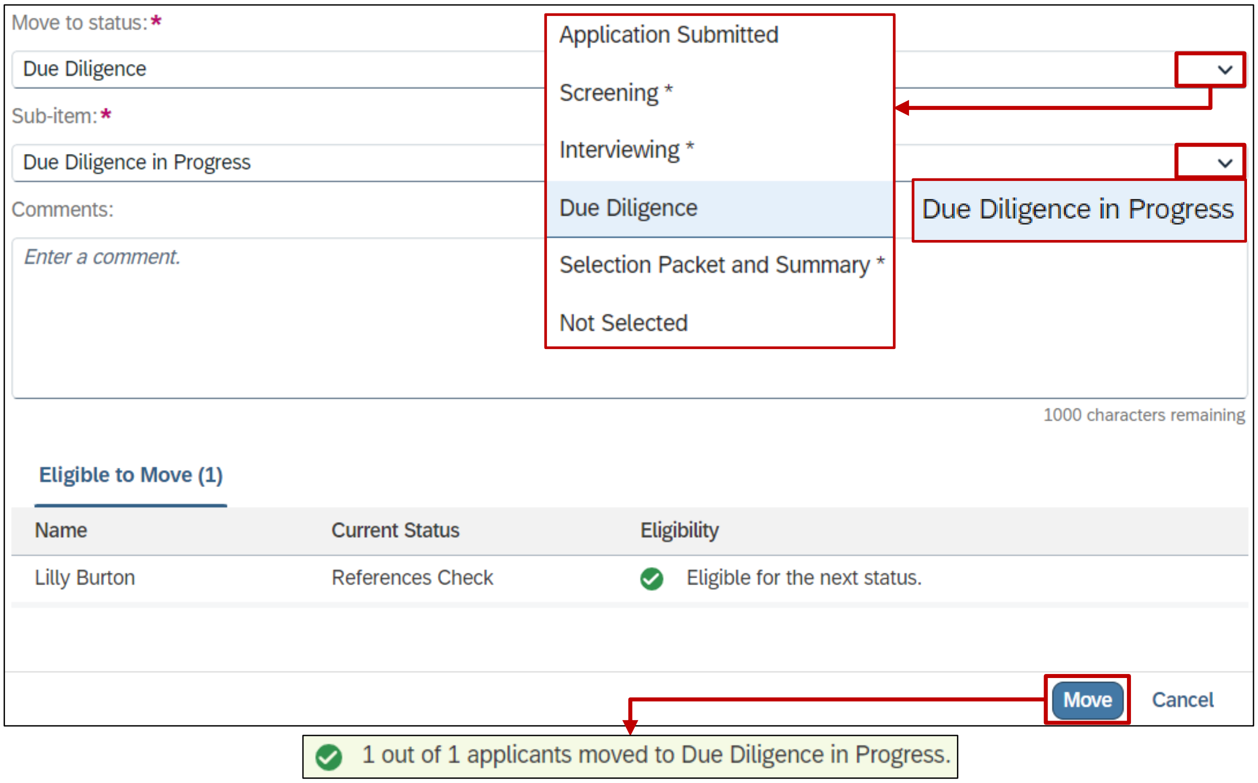
8.9.3. Interviewing *



Move the Candidate to the *Interviewing* status after the Screening was successfully completed. Move it to the Sub-status *Selected for Interview* to plan the interview and then to Interview completed once it is done.

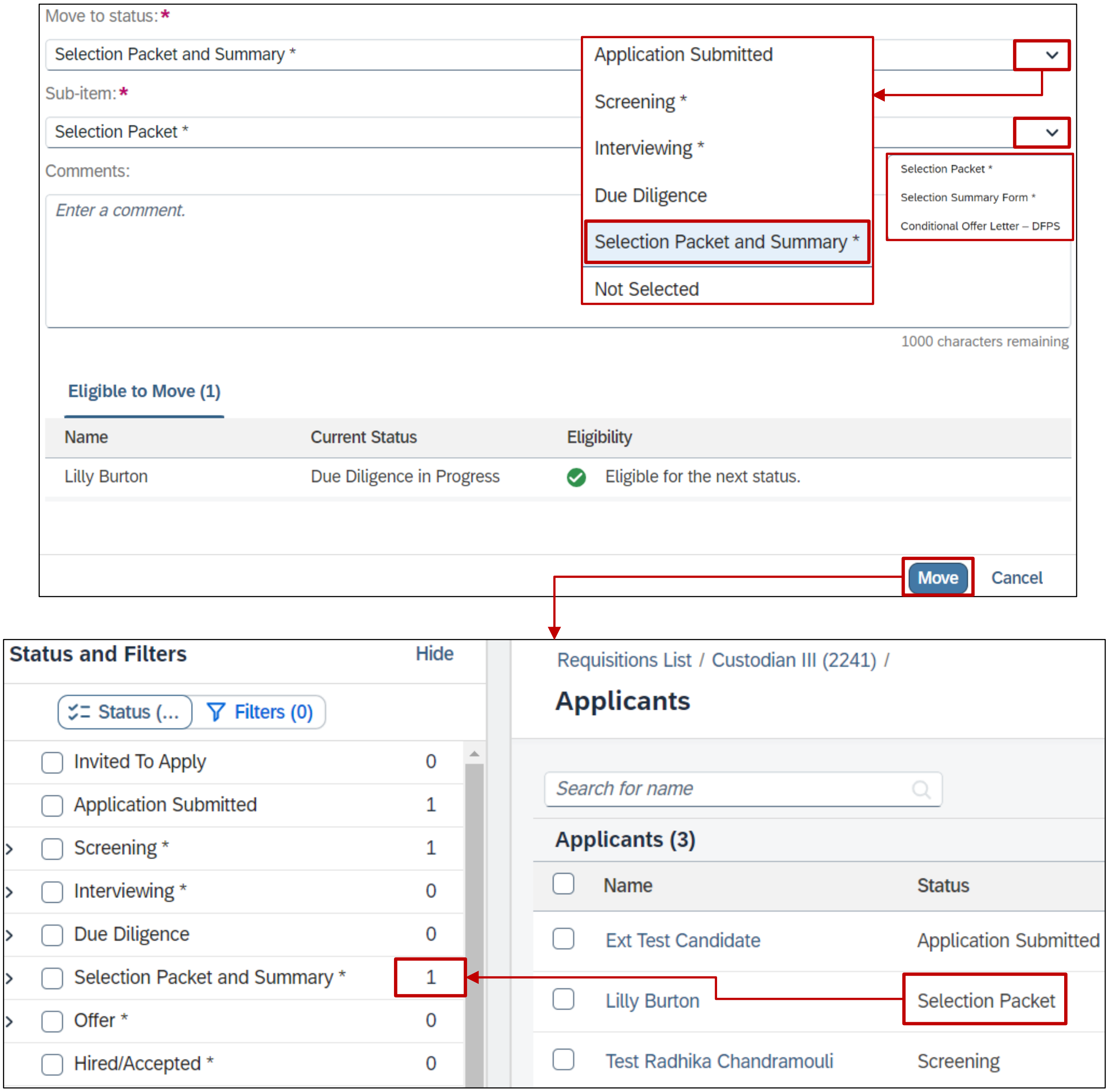
8.9.4. Due Diligence

<u>Note</u>: The Hiring Manager will only move the applicant to the *Due Diligence* status (if necessary) and will **<u>not see</u>** additional Due Diligence specific information fields in status. The background of the applicant will then get evaluated, diligence checks getting done by filling out questions around the legal and financial situation by the **HR Professional** (further information: SOT_HR_Professional+Other_Roles_Guide).



8.9.5. Selection Packet and Summary *

Move the applicant to the next **mandatory** status by using a method in chapter 8.8. Move Applicants. The pipeline status number will be updated automatically afterwards.

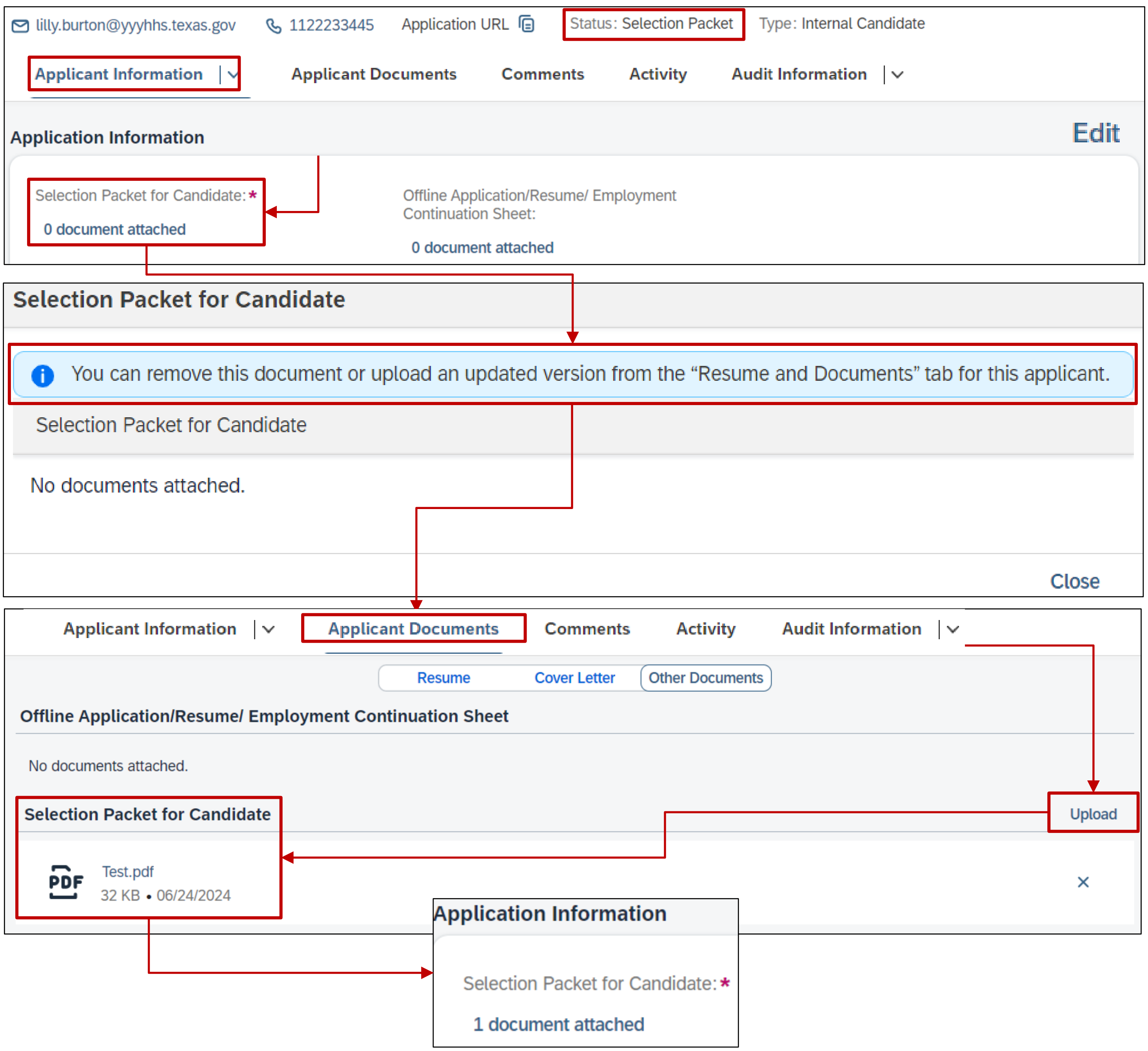


The status is based on two mandatory sub-statuses:

8.9.5.1. Selection Packet *

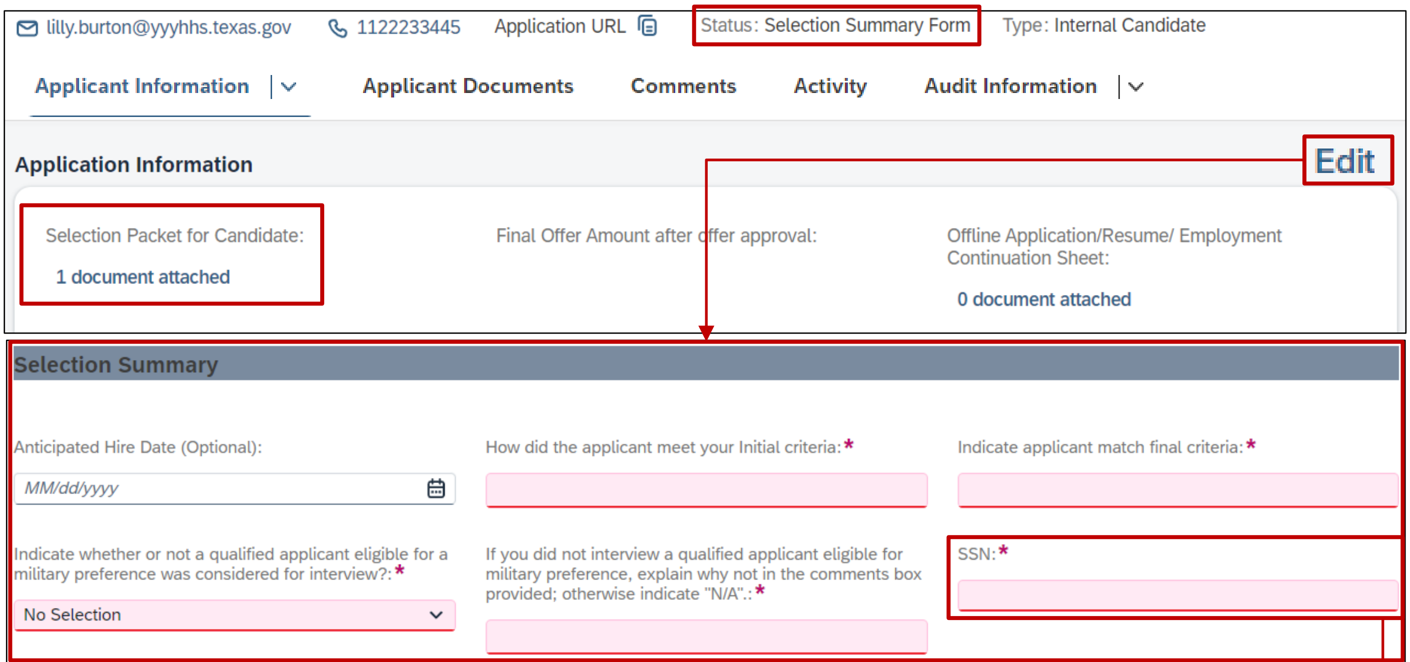
The mandatory (*) field *Selection Packet for Candidate* will be displayed in the *Application Information* area of the applicant. An Edit button will be available on the right side. Attach documents via the *Resume and Documents* section. After uploading documents, you can select the *x icon* on the right side to remove documents. If a selection packet document was uploaded, review the field under Applicant Information, it now shows one attached document.

Note: Attached documents can only be uploaded and removed in the *Selection Packet* status. Once this status was passed, those documents can not be updated anymore.

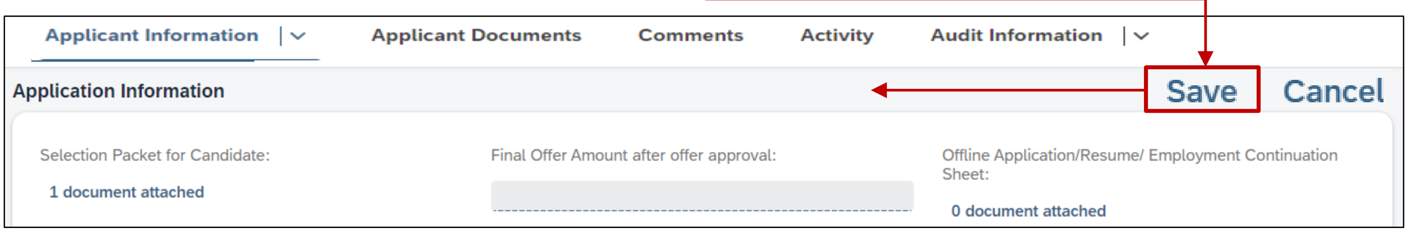


8.9.5.2. Selection Summary Form *

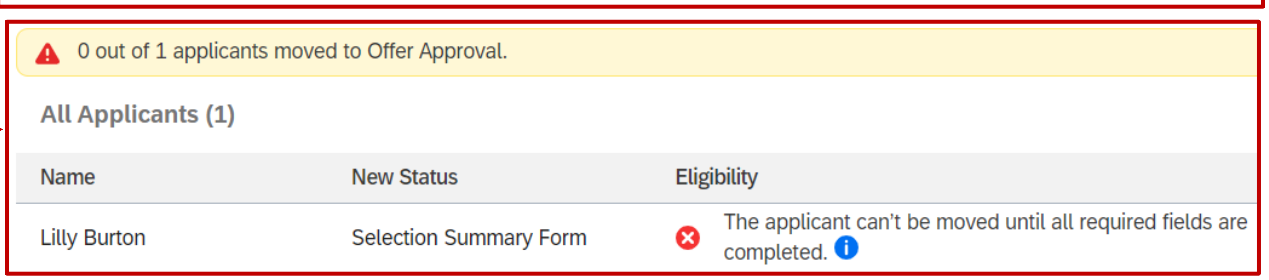
A new area inside the *Application Information* section will appear after moving the applicant to the *Selection Summary Form* status. Select the *Edit* button on the right side of the screen to insert information into the new fields highlighted in red. After entering the information, use the *Save* button to keep your data changes in the system.



Note: Do not enter dashes while entering the SS number.



Note: If you try to move a candidate before entering information into all required fields (*), you will receive an Error message in the *Move Applicants* window.

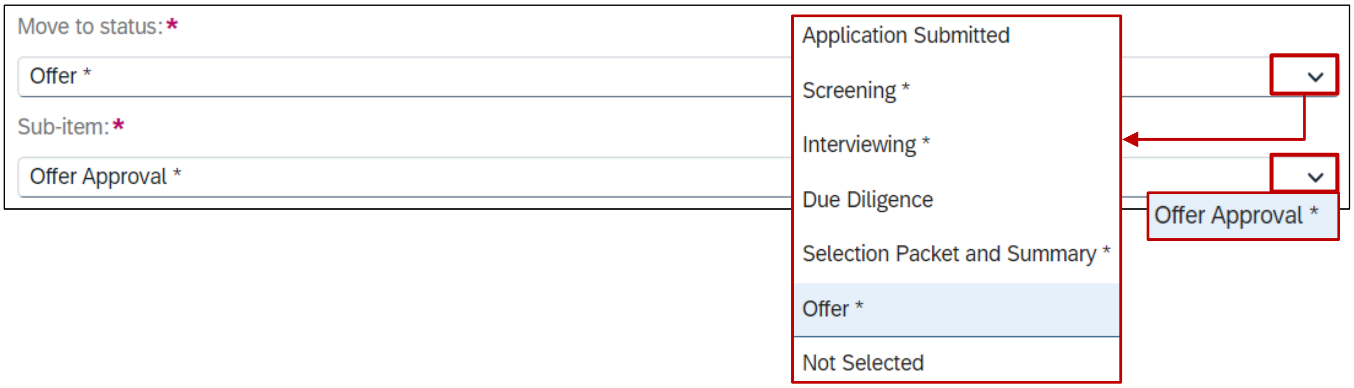


8.9.6. Offer *

When moving a candidate to the mandatory *Offer* stage, it is necessary to define job offer details and complete the internal approval process for the respective offer. There are two mandatory sub-statuses to update *Offer Approval* and *Offer Approval Complete*.

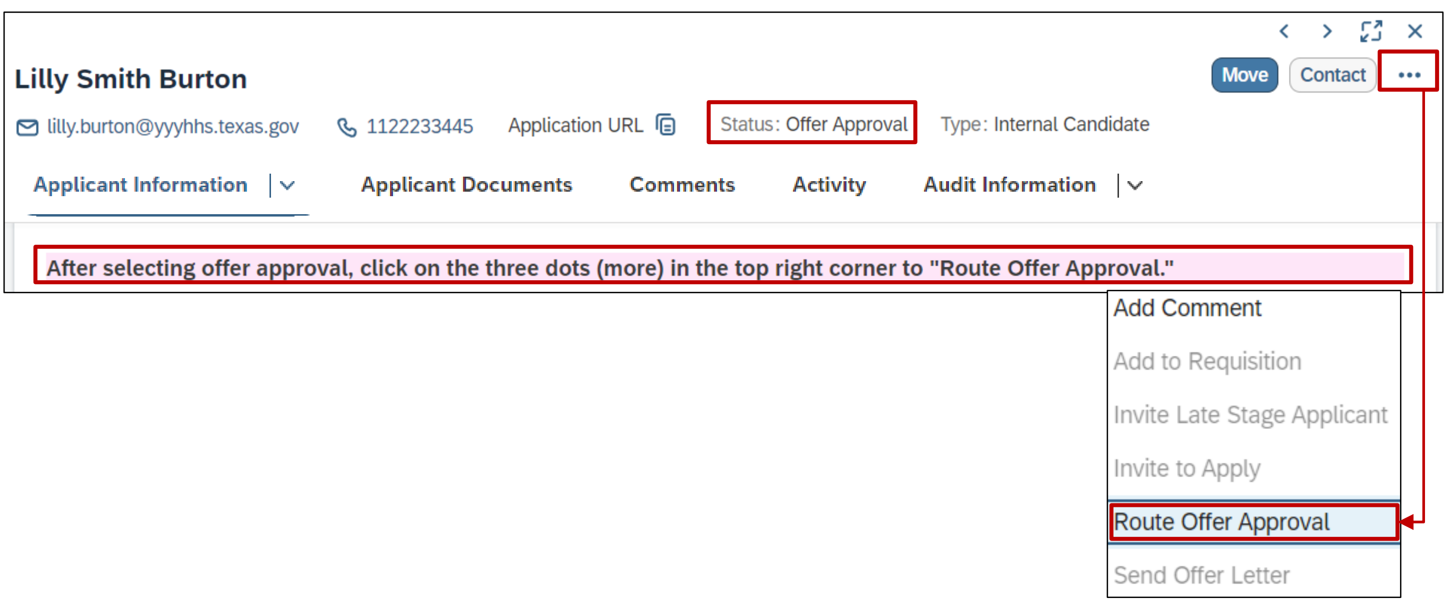
8.9.6.1. Offer Approval *

From the previous *Selection Summary Form* status, move the candidate to the *Offer Approval* sub-status to begin the *Offer* process for the candidate.



To continue the process after landing in the *Offer Approval* sub-status, follow these steps:

1. Select the three-dot *More* menu at the top right corner of the area. This instruction will also be displayed at the top of the *Applicant Information* section when the *Application Status* is ***Offer Approval***.
2. Select *Route Offer Approval*.



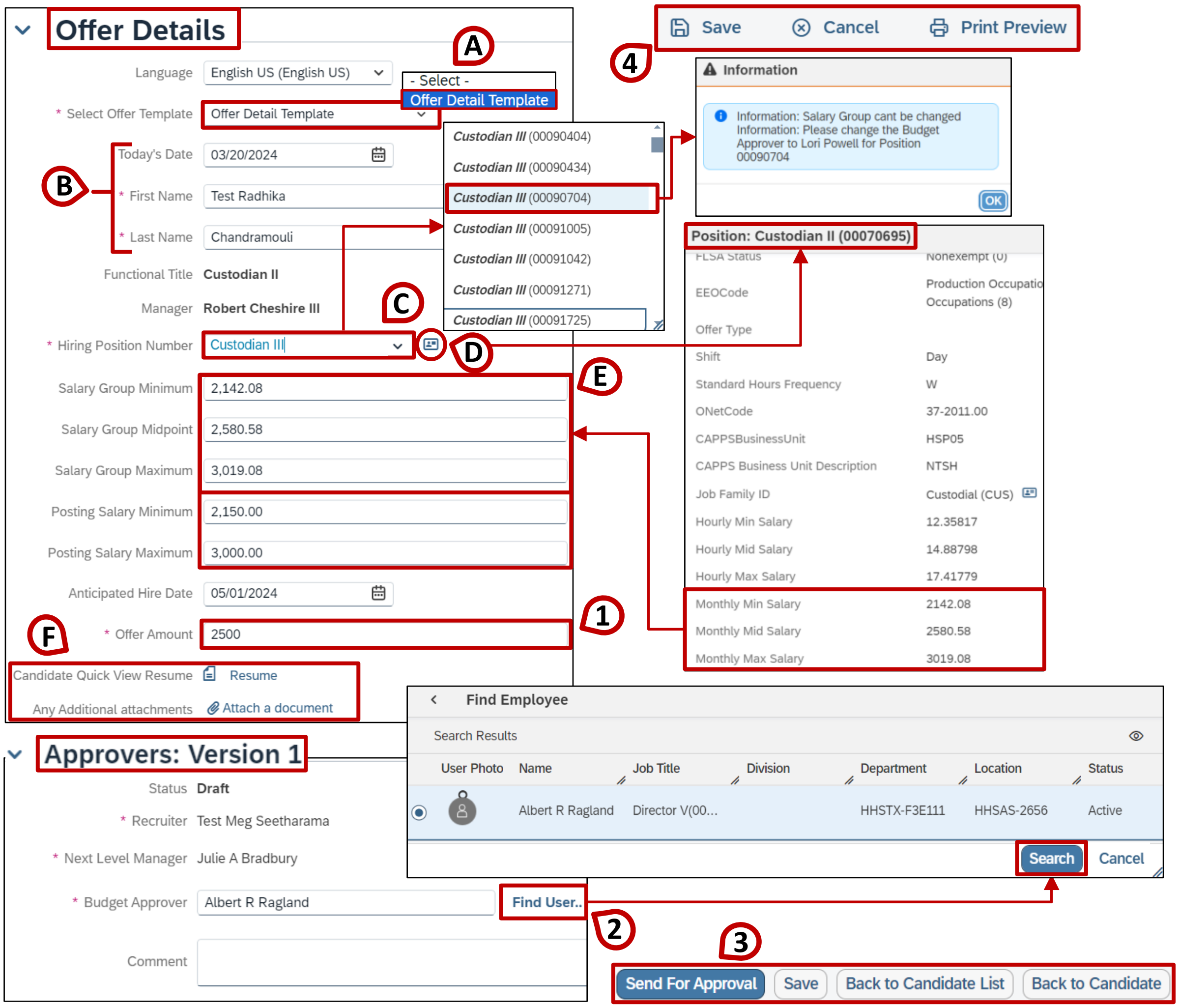
8.9.6.2. Offer Approval: Offer Details

1. After clicking on *Route Offer Approval*, you will be on the Offer Details page and Click on *Edit Offer Detail* to complete the missing information.

To set the offer details up for the approval process, follow these steps:

1. Fill out the *Offer Amount* field as it will appear empty. Take the position level and salary range defined as guidance. A value outside of the group range will result in an error message and the *Offer Amount* should be corrected.
2. In the ***Approvers: Version 1*** section, only the *Budget Approver* field will be editable and be prepopulated based on the position. Select/Confirm a *Budget Approver*. Select *Find User…* and search for a known user with the *Budget Approver* role. *Select* the user.
3. When all mandatory fields were filled, the offer can be *Send For Approval* or *Saved* for now. After you send out for approval, a *Confirmation* window will pop up to confirm and progress. By selecting *Back to Candidate List* or *Back to Candidate*, the entered offer details will **not** be saved and the system will redirect to the candidate application area.
4. Optionally, the *Save* and *Cancel* buttons on the top right can be utilized as well as the *Print Preview* option, which allows to print or save the offer details as a document.

Hiring Managers won't be able to move the candidate to next sub-stage until **all** approvers have approved the *Job Offer*.



A) Select Offer Template: A preconfigured *Offer Template* needs to be selected. Currently there is only one template available (*Offer Detail Template*) to select in the system.
B) Date, First and Last Name: Display of prefilled candidate name and current date (date of the offer). Update the date if needed. Updating the name will lead to error messages.
C) Hiring Position Number: The Hiring Manager can update the offered position here, e.g. if the candidate meets the criteria for a higher-level position. After updating it, a pop-up message will appear, saying that the *Salary Group* values can't be changed, but they will get updated automatically based on the new position details anyway. The message might also remind the Hiring Manager to update the *Budget Approver* (if applicable).

   Note: *Career Track* positions have multiple levels. Only lowest level positions get posted. Hiring Managers decide which higher-level position should be offered based on gathered information about a candidate (e.g. Project Manager **II** instead of Project Manager **I**).

   The **position number** used as a base for the JP needs to be updated if the *Number of Openings* defined during the initial updates of the JP requires additional candidates to hire. Hence, Hiring Managers can use **same position title and level** with a **different code**.

D) View Position: Review position details by selecting the card next to the *Hiring Position Number* field. Notice that the *Salary range* values get carried over to the offer details.
E) Salary range: The *Salary Group* values are determined by the position details and can't be modified. *Posting Salaries* will be displayed based on the defined values in the JP.
F) Resume and Attachments: Fields to review the resume and update attached documents.

Note: The *Approvers: Version 1* section will show *Version 1* the first time an Offer is sent for approval. If the Offer needs to be revised and sent again, the section will show as *Approvers: Version **2.*** The number of the version continues to increase based on the times an Offer gets redone.

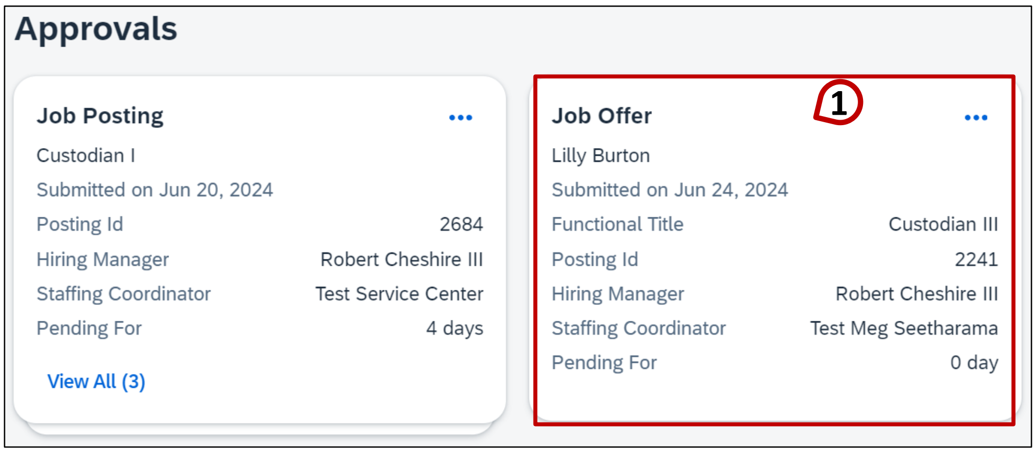
8.9.6.3. Offer Approval: Job Offer Approval

All assigned approvers in the *Approvers: Version 1* section will receive the pending approval, starting with the **Staffing Coordinator**, then the **Second Level Manager** and finally the **Budget Approver**.

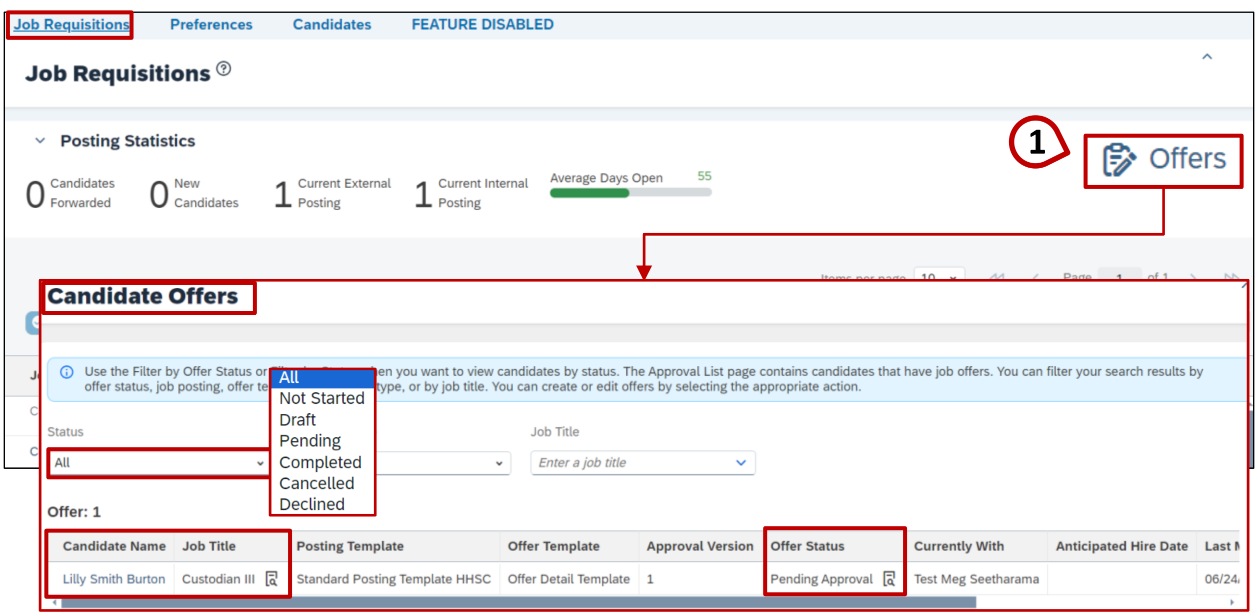
The process description refers to the approval process for *Job Offer Approvals*. It is applicable for **Second Level Managers** (second approver), but also for other approver roles (**Budget Approver**).

To approve the job offer, the approver should:

1. Select the pending *Job Offer approval card* on the *home page* **OR** review pending and completed offers by using the *Offers* icon (review **B** in [8.1.1. Job Requisitions]) in the general *Job Requisitions* tab of the *Recruiting* section.

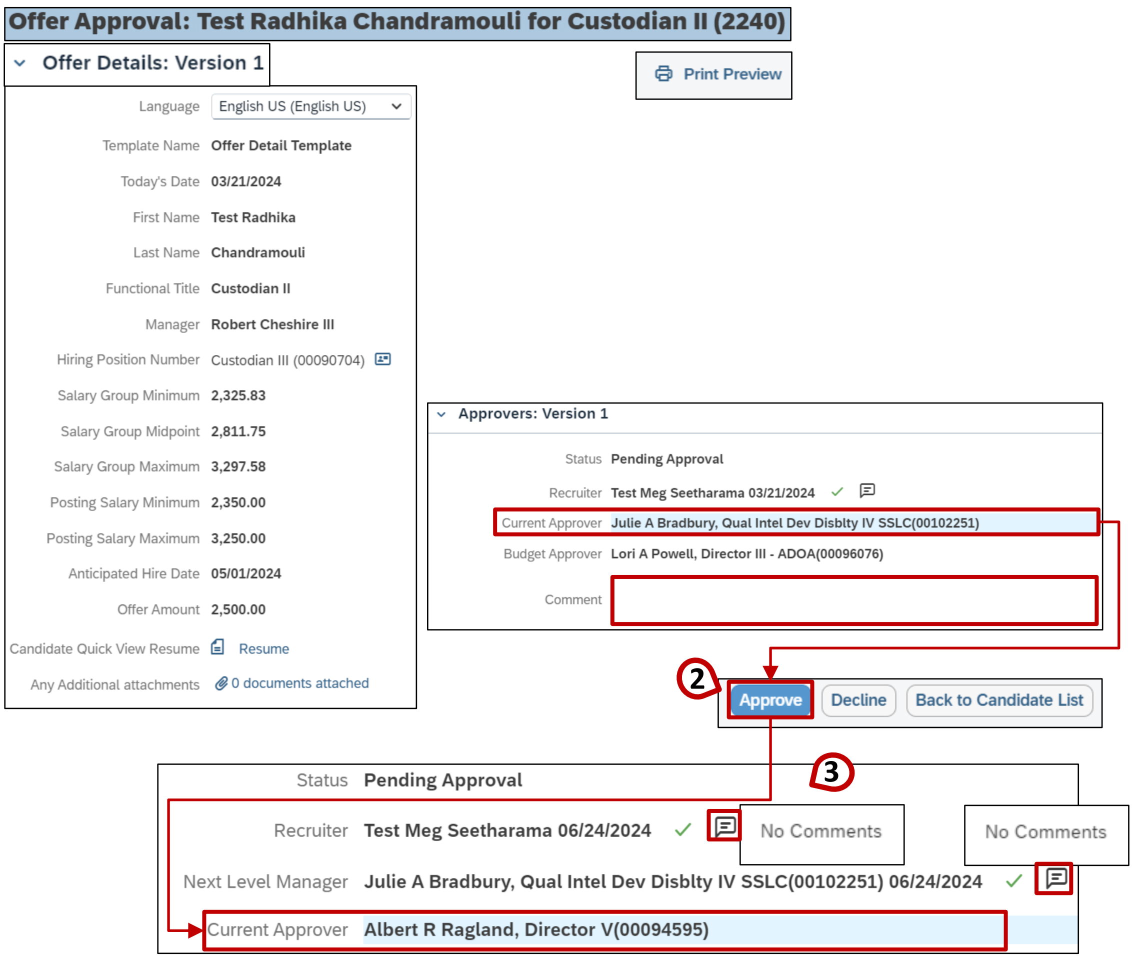


OR

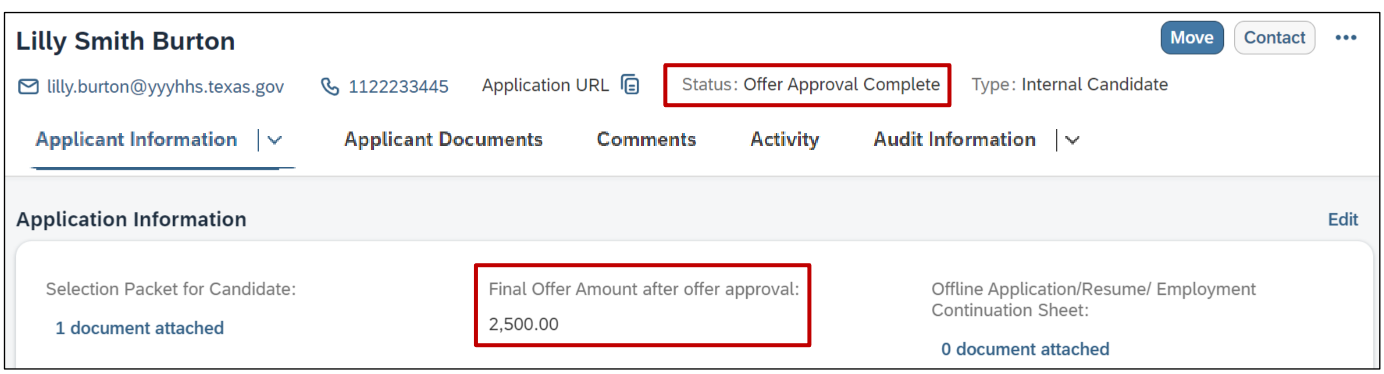


Note: If multiple *Offers* with different statuses are listed, filter them by using the *Status* picklist.

2. Before selecting *Approve* on the next screen, review the offer details and leave a comment for the other approvers if necessary. Optionally, the approval can be declined by selecting *Decline* and leaving a comment with an explanation (e.g. if identified that the *Offer Amount* was not calculated correctly by the Hiring Manager).
3. After approving, the upcoming approver will be highlighted as *Current Approver*. Comments from previous approvers can be viewed by selecting the *dialog icons*.



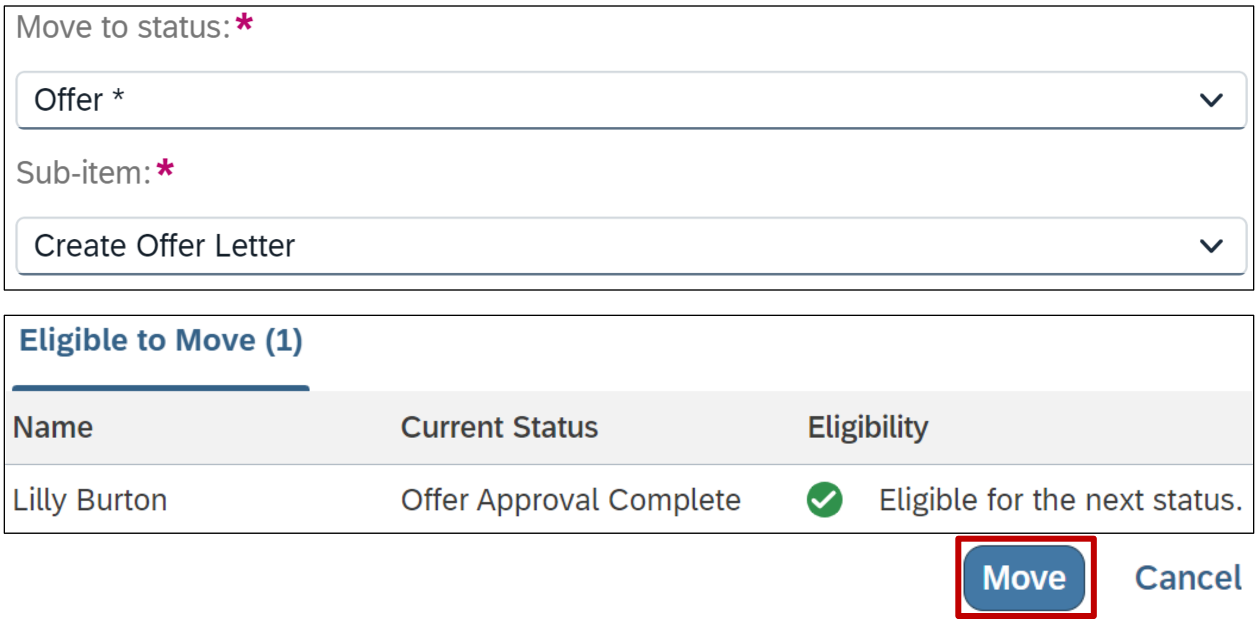
After the *Job Offer* is fully approved, the status of the respective candidate application will be automatically moved into the (mandatory) sub-stage *Offer Approval Complete* and the *Final Offer Amount after offer approval field* will show the approved value.



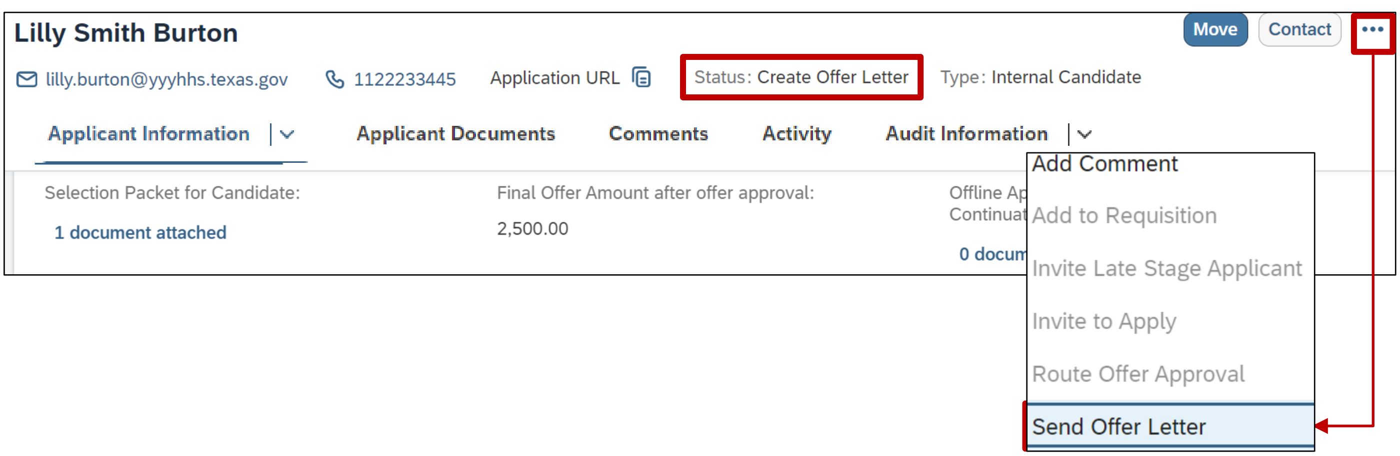
8.9.6.4. Create Offer Letter

This optional sub-status gives Hiring Managers the opportunity to send out *Offer Letters* that can be accepted by candidates. Single *Offer Letter Templates* in the system can be used for every agency of the State of Texas.

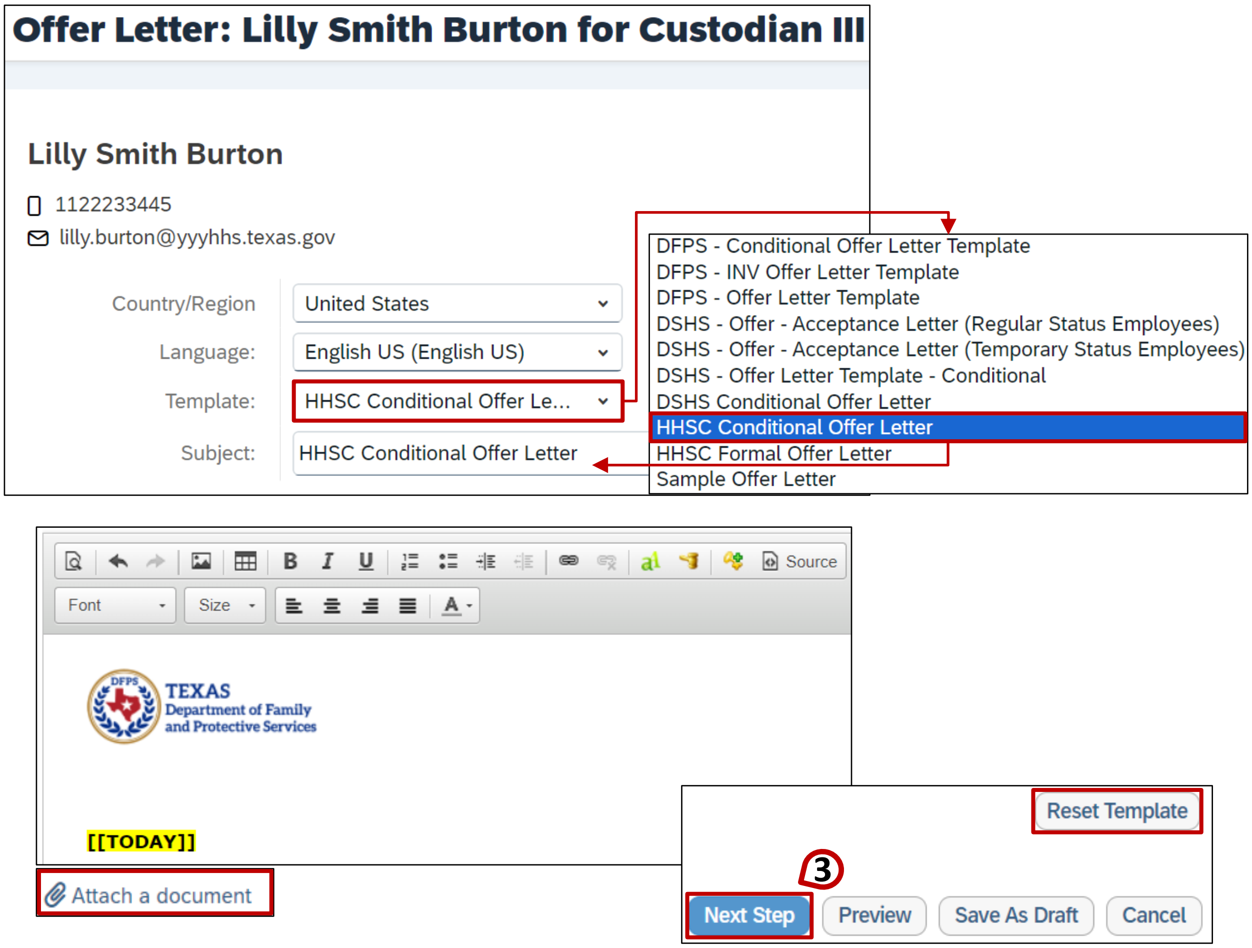
1. Go to the application area of the candidate. Move the applicant status to *Create Offer Letter*.



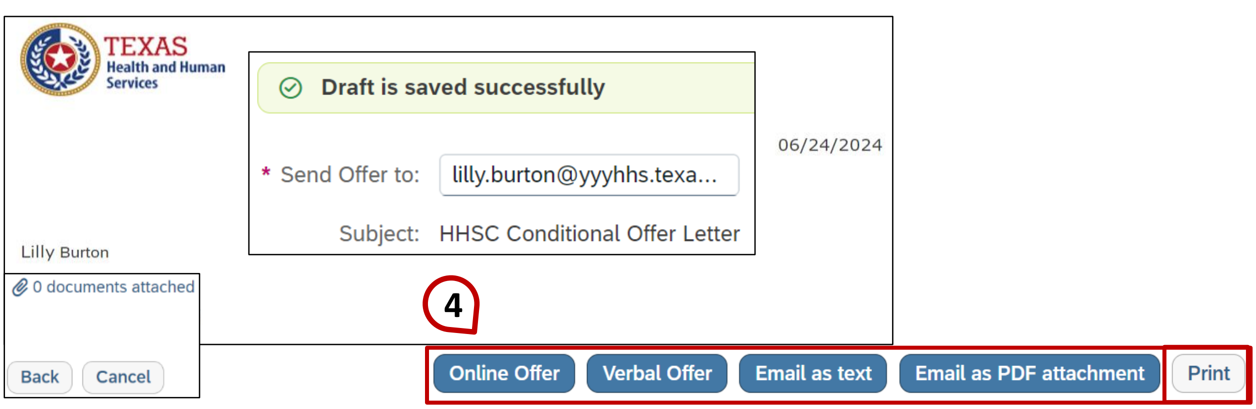
2. From this status, select the three-dot *More* menu and select *Send Offer Letter*.



3. On the next page, the offer letter can be prepared and sent to the candidate. Use the *Template* picklist to select a predefined template (e.g. *HHSC Conditional Offer Letter*) that will be automatically update the subject name to be same as the template name and update and prepopulate the letter body, but **can** also **be manually updated**. *Attach a document* can be used for additional relevant documents and if changes should be reverted, use the *Reset Template* button, otherwise select *Next Step* to proceed.

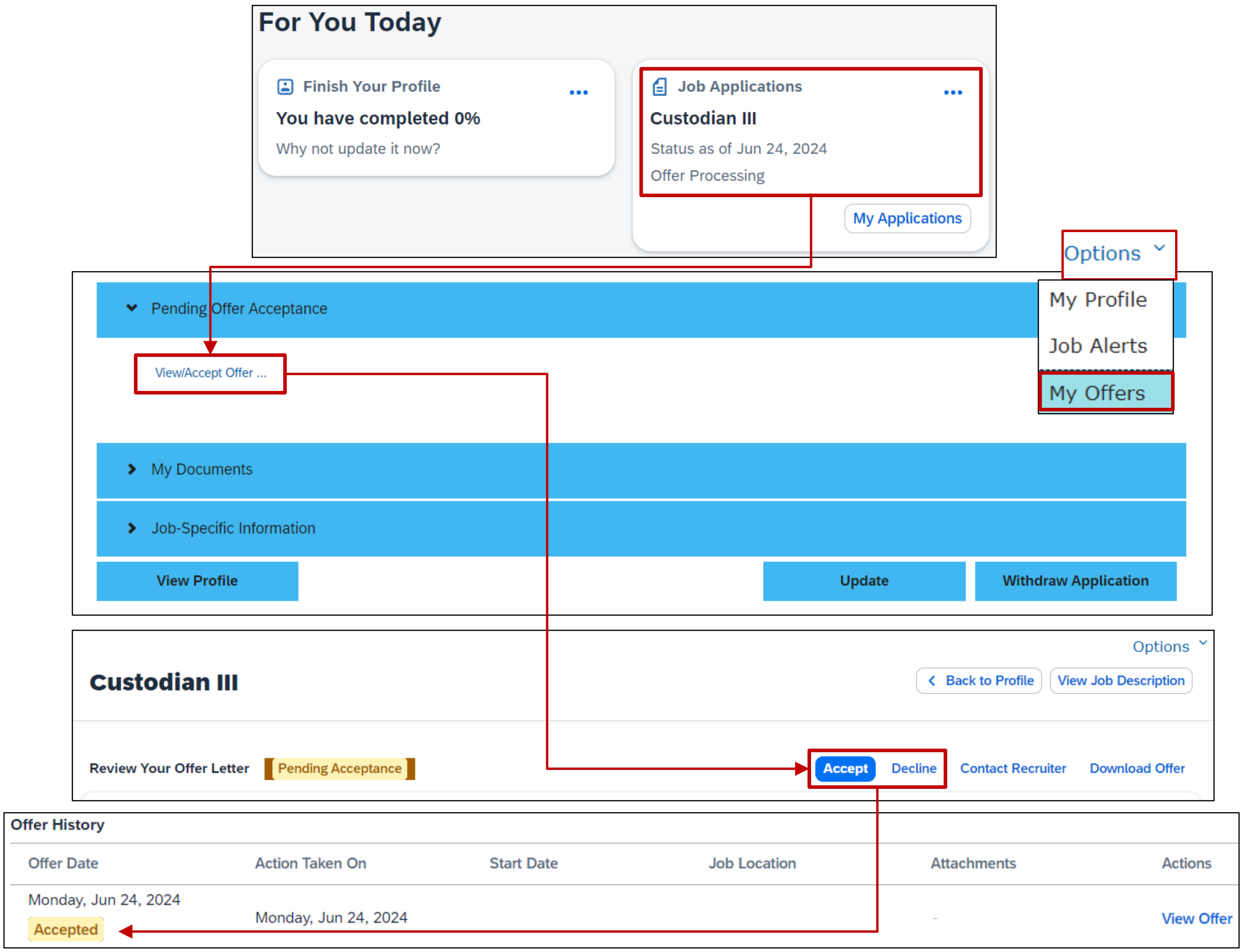


4. A message at the top left will show that the offer letter was automatically *saved successfully* as a *Draft*. The preview of the letter body will be displayed. Send the offer as an *Online Offer*, *Verbal Offer*, *Email as text* or *Email as PDF attachment*. The *Print* button will allow you to print or save the offer letter as a PDF file locally.



5. After selecting e.g. *Online Offer*, check the message content again on the next page. Select the *Next* button on the bottom right of the screen to proceed.
6. The last preview of the Online Offer Letter will be visible. To proceed the process, select the *Send* button on the bottom right of the screen.

The candidate then needs to log into SuccessFactors system and will see a new quick card under the *For You Today* part of the home page. By clicking on the card, the candidate will be redirected to the *Internal Career Center* and can review the pending offer request to *Accept* or *Decline* it.



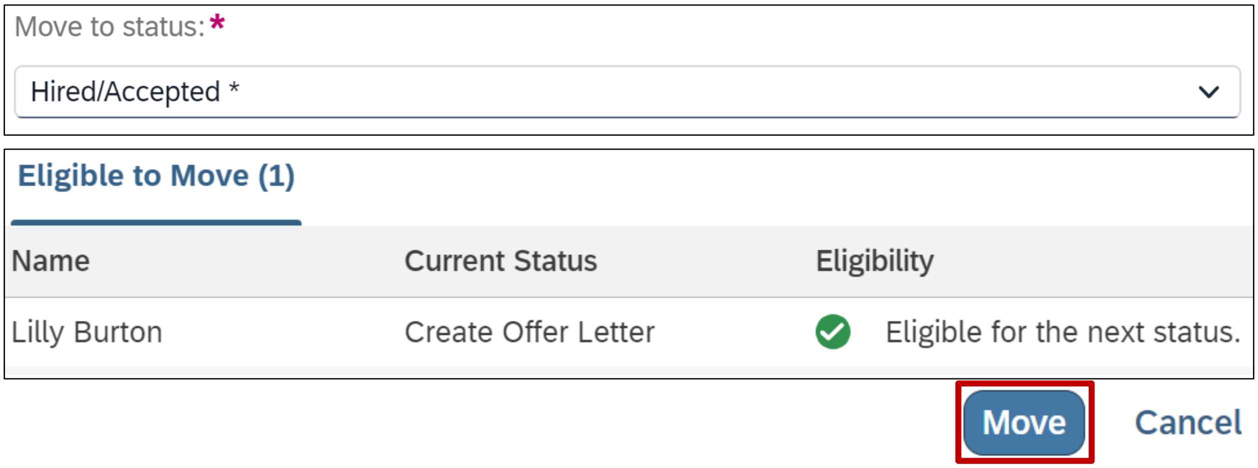
8.9.6.5. Offer Accepted and Offer Declined

Offer Accepted sub-stage: If the candidate **accepts** the offer online, the status of the candidate will be updated automatically to this status.

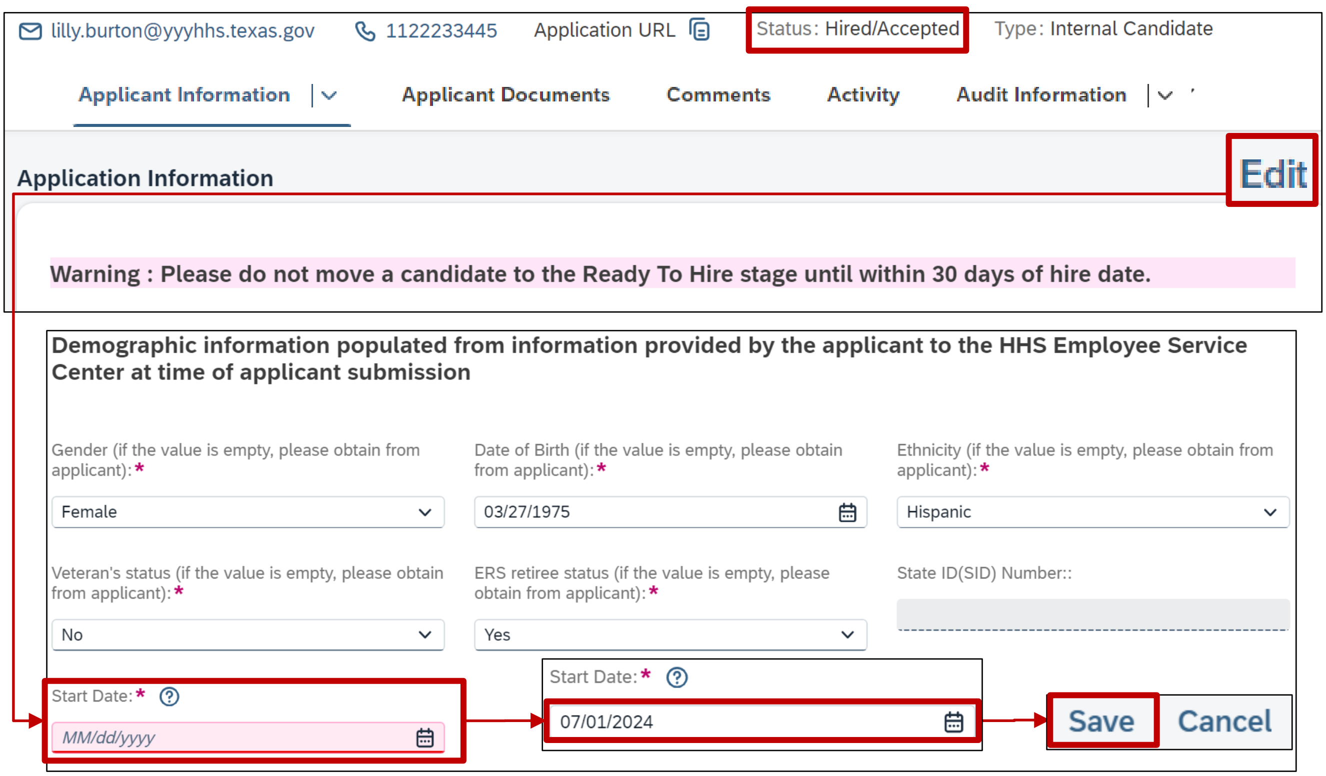
Offer Declined sub-stage: If the candidate **declines** the offer online, the status of the candidate will be updated automatically to this status. If this happens, further alignment or negotiations between candidate and Hiring Manager is required before disqualifying or cancelling the candidate application.

8.9.7. Hired/Accepted *

The next mandatory status is *Hired/Accepted*. Move the candidate from the application area of the saved *Create Offer Letter* sub-status.

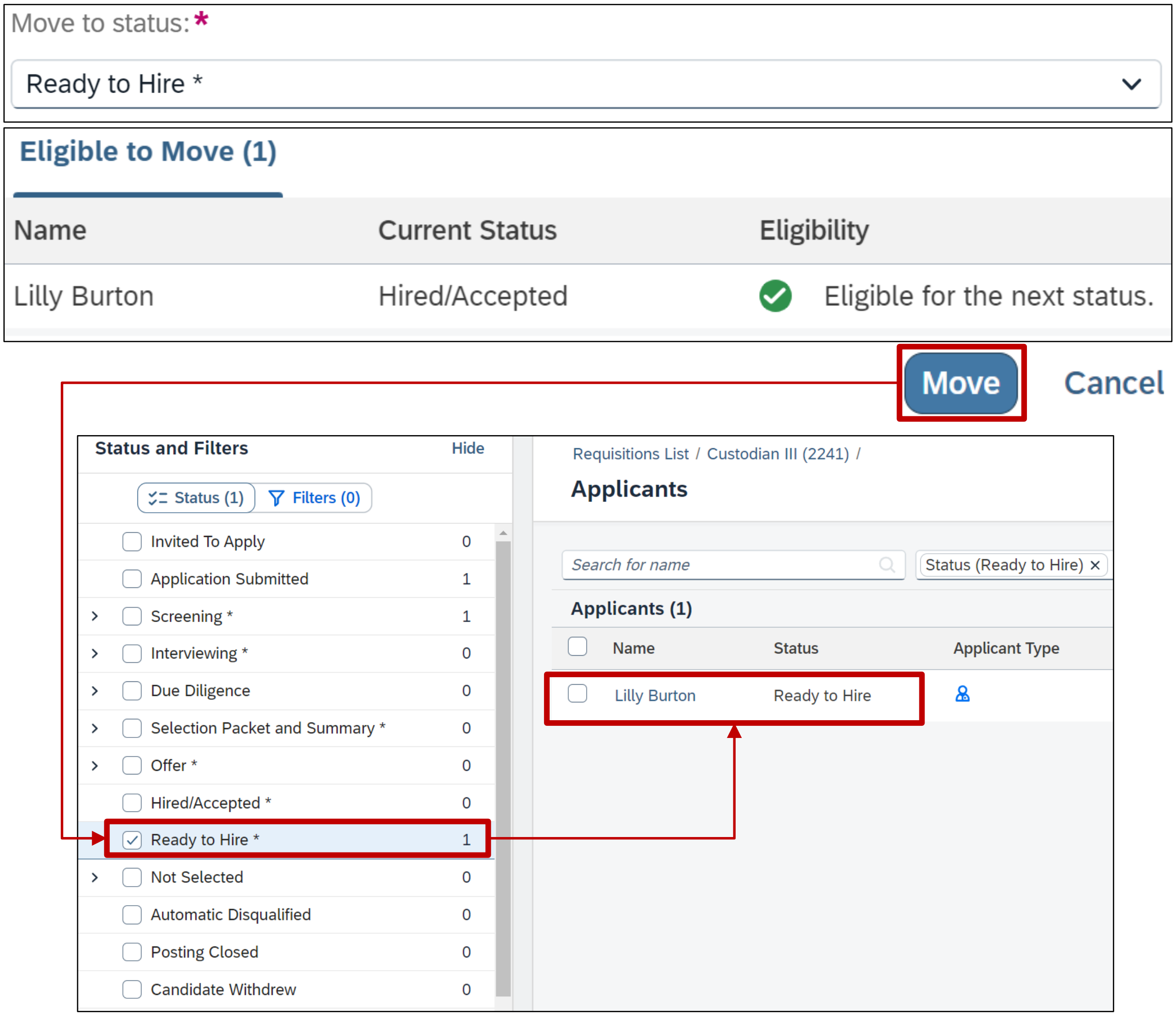


1) Back in the Application Area of the candidate, notice a *warning message* to keep the candidate in the Hired/Accepted status and align the move to the next status (*Ready to Hire*) **only if** the picked **Start Date** of the candidate will be **less than 30 days in the future**.
2) Review the new *Demographic Information* (**PII information**) fields visible under the *Applicant Information* section.
3) All fields should be already populated except the mandatory *Start Date* (Hire Date) field. Enter the desired date through the calendar icon and select *Save*.



8.9.8. Ready to Hire *

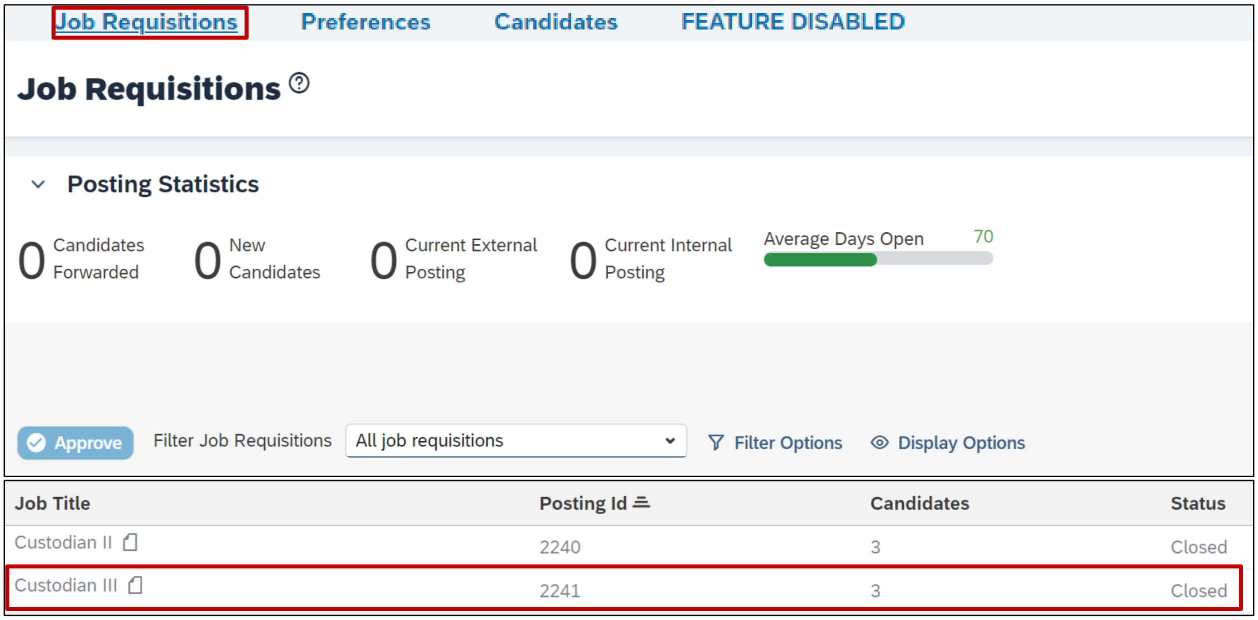
This is the last mandatory status of the recruiting process. At this stage, the candidate is ready to be hired as an employee of the State of Texas. Follow the steps below to complete the process. Move the candidate from the *Hired/Accepted* to the *Ready to Hire* status. The *Applicant Status Pipeline* will be automatically updated and the onboarding/hire process can be started.

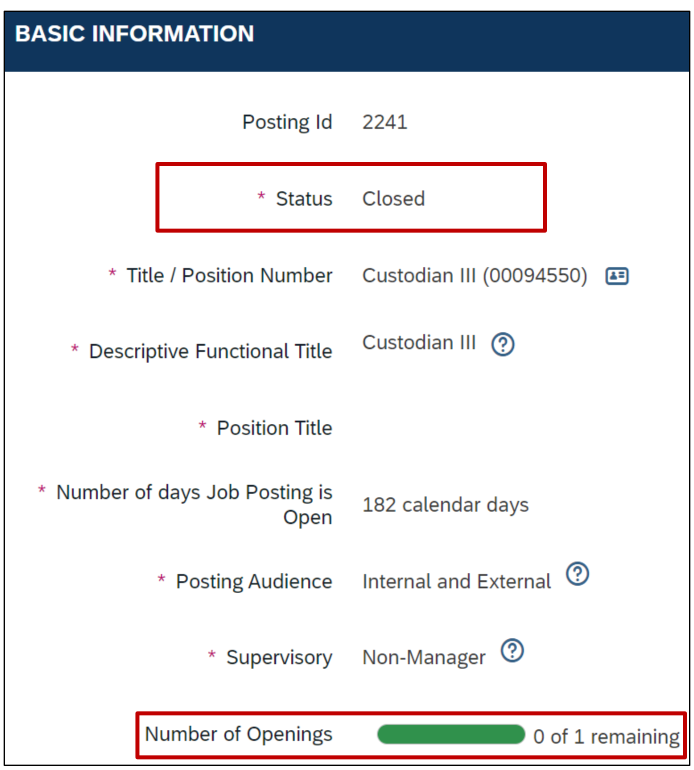


<u>Note</u>: If the candidate is moved and the *Hire Date* from the previous status (*Hired/Accepted*) is more than 30 days in the future, the system will show an *Alert* message when trying to move to the *Ready to Hire* stage. This will create a delay in Onboarding and will require additional steps. In such case, the Hiring Manager must contact the Staffing Coordinator of the Service Center for assistance or clarification.

If the candidate was the last one to fill the *Number of Openings* for this JP (review: letter **F** in 8.2.4. Basic Information), the system will show a pop-up message to inform the user about the last opening, which gets filled with the movement of the candidate to the *Ready to Hire* stage.

When checking the JP afterwards, the user will see that it will be greyed out in the list of JPs. The status will have the value *Closed* and the *Number of Openings* will show *0 remaining*.



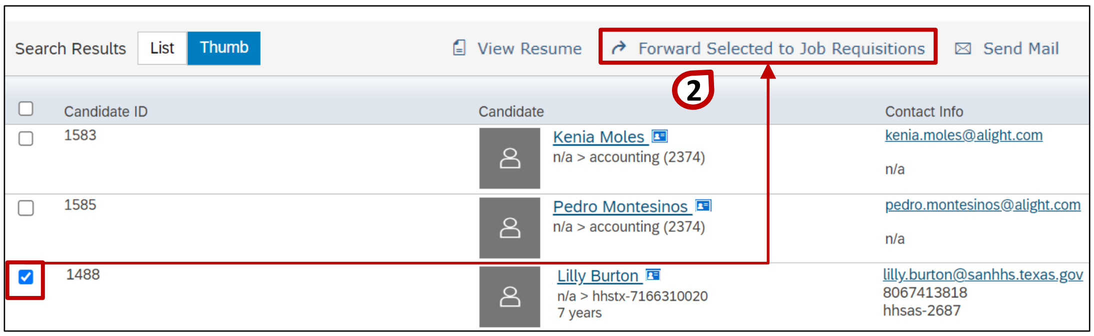


8.9.9. Invited to Apply

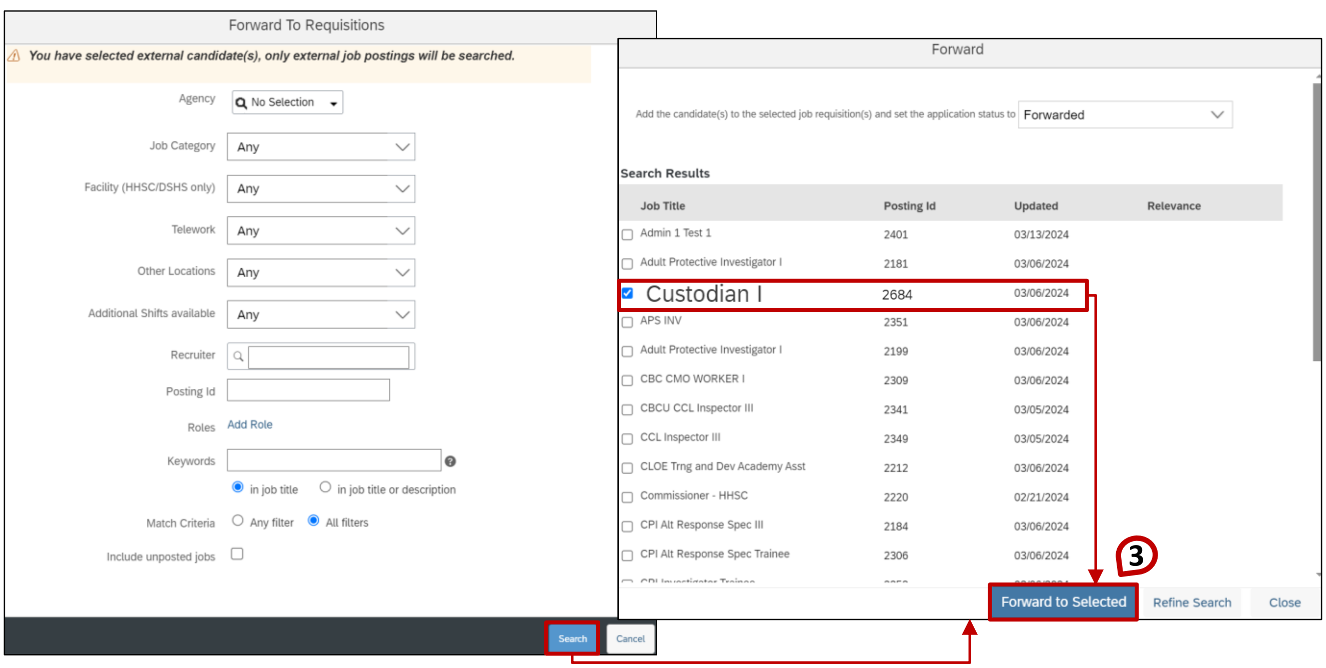
Candidates can be searched and forwarded to a Staffing Coordinator so he/she can invite the candidate to apply for a specific JP.

There are two ways to utilize the candidate search functionality, the first one looks like this:

1. Utilize the *Candidate Search* in the general *Candidates tab* of the *Recruiting* section (further information: 8.1.3. Candidates) and 8.5.5. Candidate Search sub-tab).
2. In the specific search results, select one candidate by selecting the *check box* on the left and select *Forward Selected to Job Requisitions*.

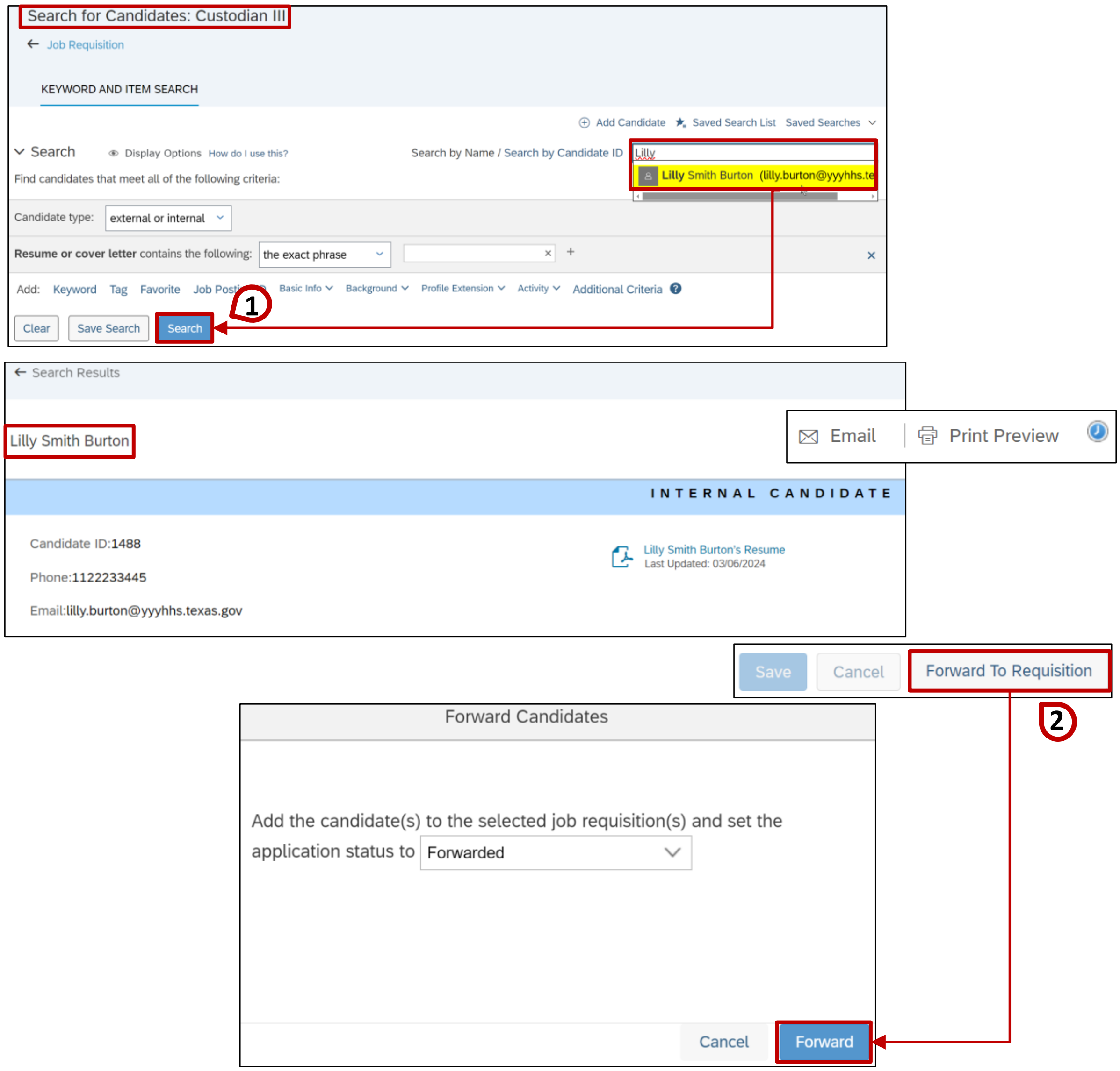


3. Refine the search by certain criteria shown below and select *Search*. From the *Search Results*, choose one or more JPs that the candidate should be forwarded/invited for and select *Forward to Selected*. (*Forwarded* = *Invited to Apply*; *Application Complete* = *Application Submitted*).

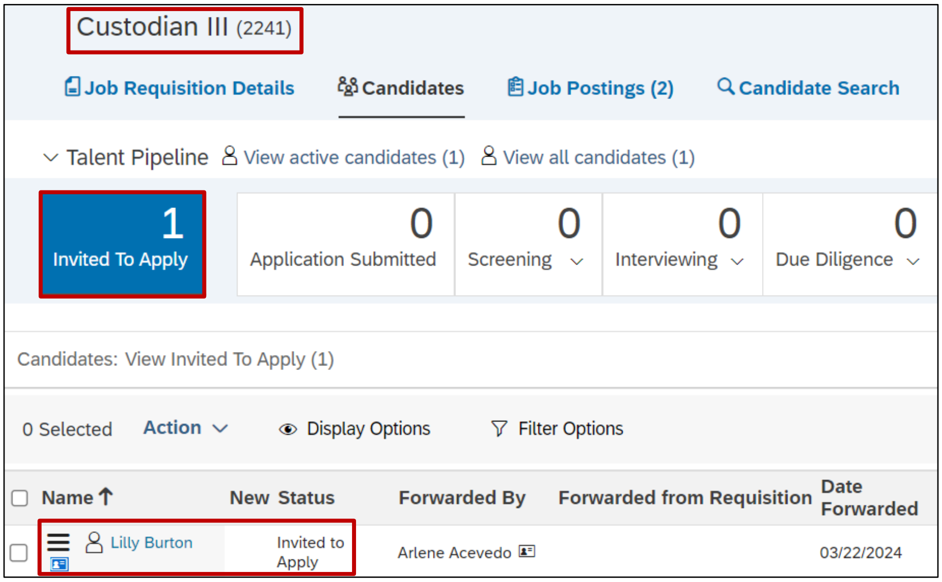


The second way to utilize the candidate search is within the **specific** JPs:

1. Go into a specific (active) JP and then to the *Candidate Search* sub-tab (review: 8.4.5. Candidate Search sub-tab) to *Search* for a candidate (e.g. search by candidate name).
2. The search should end at the candidate profile of a specific candidate. Select *Forward To Requisition* to complete the steps in the system as a Hiring Manager.



If the candidate gets forwarded for a JP and the **Staffing Coordinator** was contacted and moved the candidate into the *Invited to Apply* status of the respective JP, it will be reflected in the *Applicant Status Pipeline*.



If the candidate decides to apply for the JP, he/she needs to actively apply online or offline for the respective JP. Once the candidate has applied, he/she will be shown in the *Application Submitted* stage and the regular recruiting process will start (review: 8.9.1. Application Submitted).

8.10. Other Pipeline stages

Besides **active** Talent Pipeline stages, candidates can be moved manually or will be moved automatically to **passive** stages, e.g. because their application got rejected, disqualified, cancelled or withdrawn.

8.10.1. Not Selected

Here you will find the candidates who have been rejected from the selection process due to different reasons. As shown in the previous chapters for the status pipeline stages, candidates can always be moved to the *Not Selected* stage from any other stage they are currently in.

To move a candidate, utilize one of the methods described in chapter 8.8. Move Applicants.

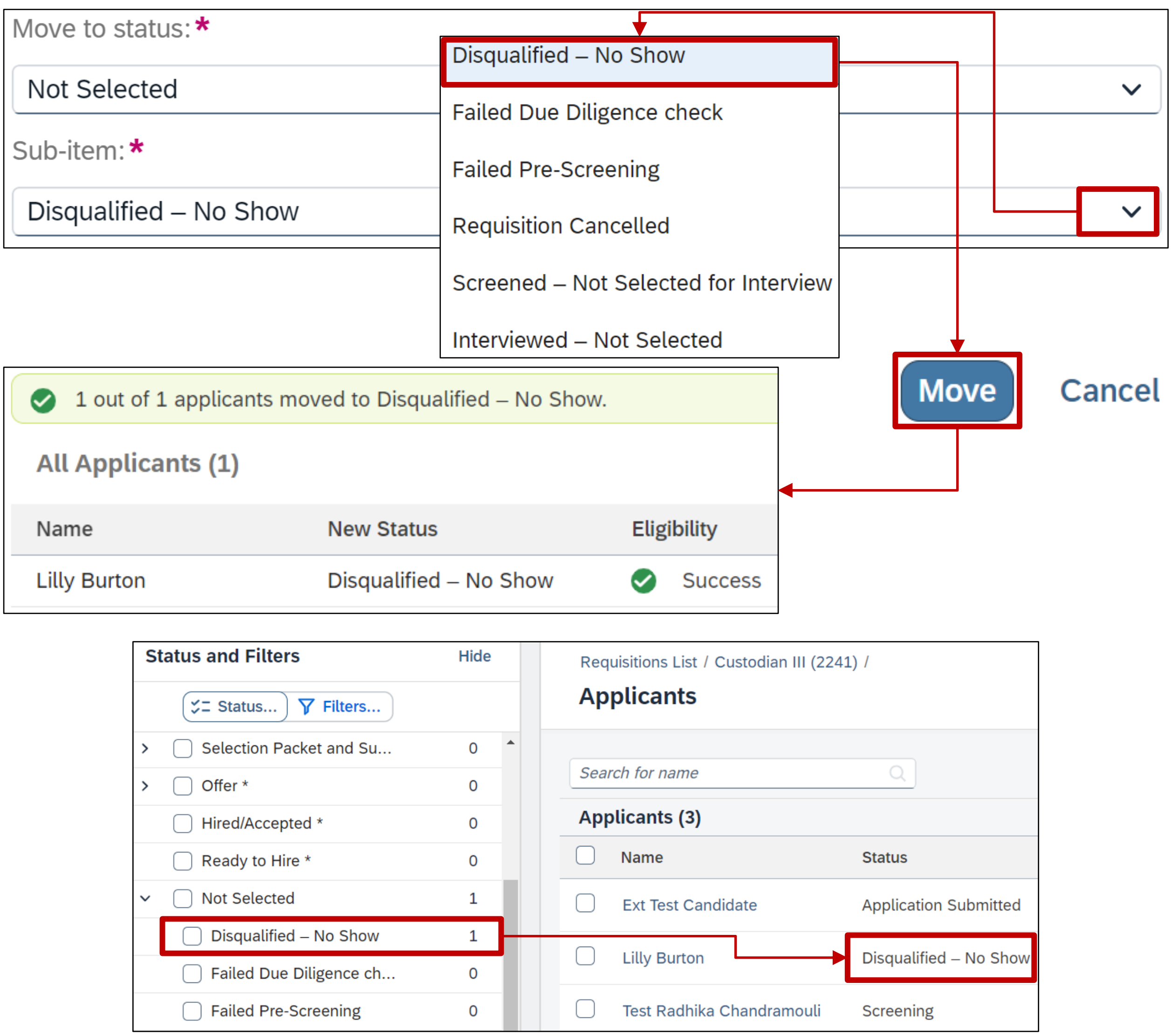
After the candidate is in the *Not Selected* stage, select one of the matching sub-statuses and move the candidate there.

8.10.2. Automatic Disqualified

This stage shows candidates who have been automatically disqualified from the application process if they have **failed** a required assessment during the process.

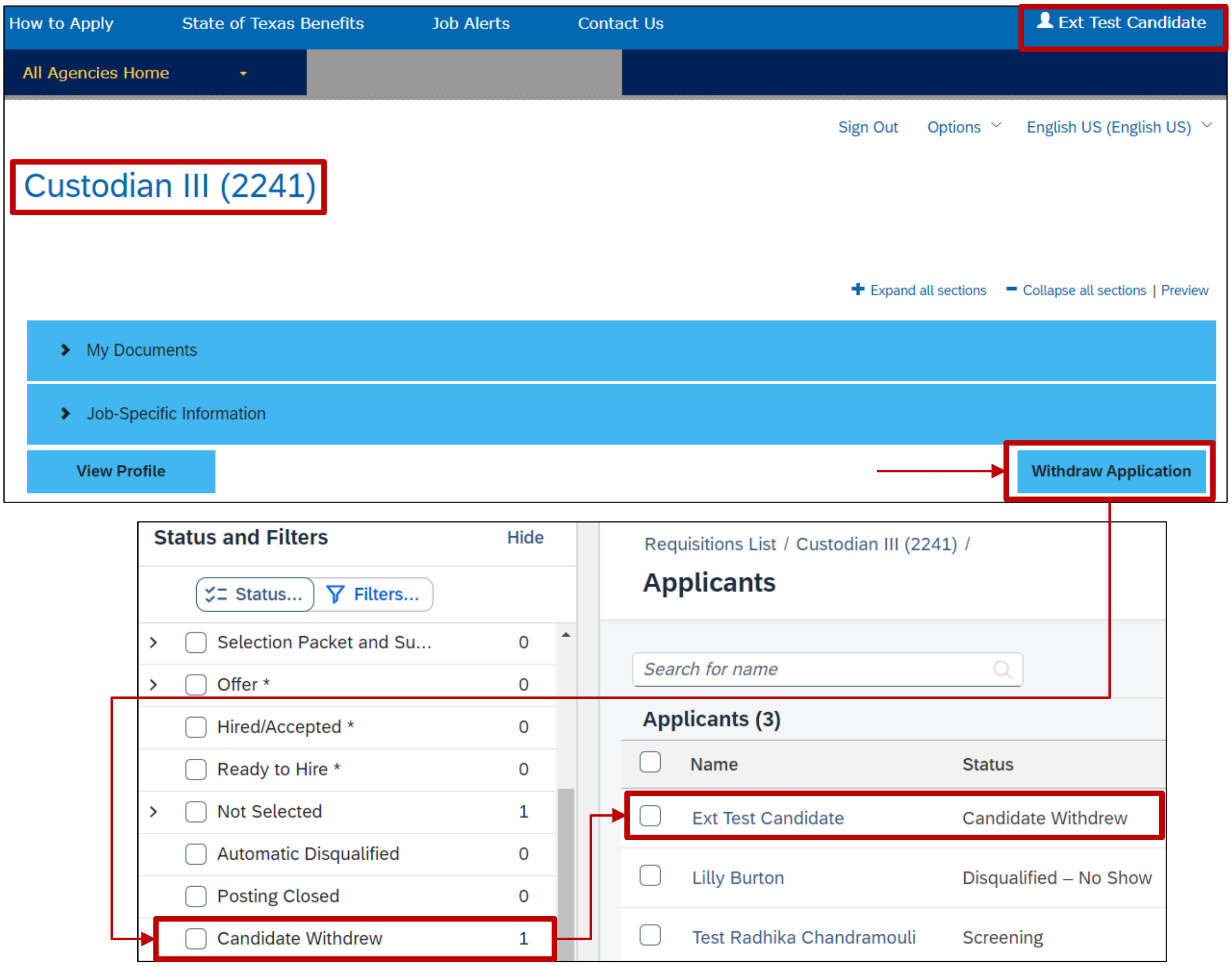
8.10.3. Posting Closed

If it is decided that a JP should be closed (e.g. after finding a suitable candidate, cancelling the position or the *Number of Openings* for a JP reach 0 remaining openings), there could still be candidates currently in an active application process. These candidates will be moved to the *Posting Closed* stage and therefore disqualified for the respective JP.



8.10.4. Candidate Withdrew

If a candidate (who applied **online**) decides that a JP is not personally relevant anymore, there is the option to withdrew an active application through the internal or external portal (review SoT_Candidate_Guide). Those candidates will be automatically moved into the *Candidate Withdrew* stage and will not be considered for the job further on.



9. Reporting Center

This section will walk you through the ***Reporting*** section of the platform.

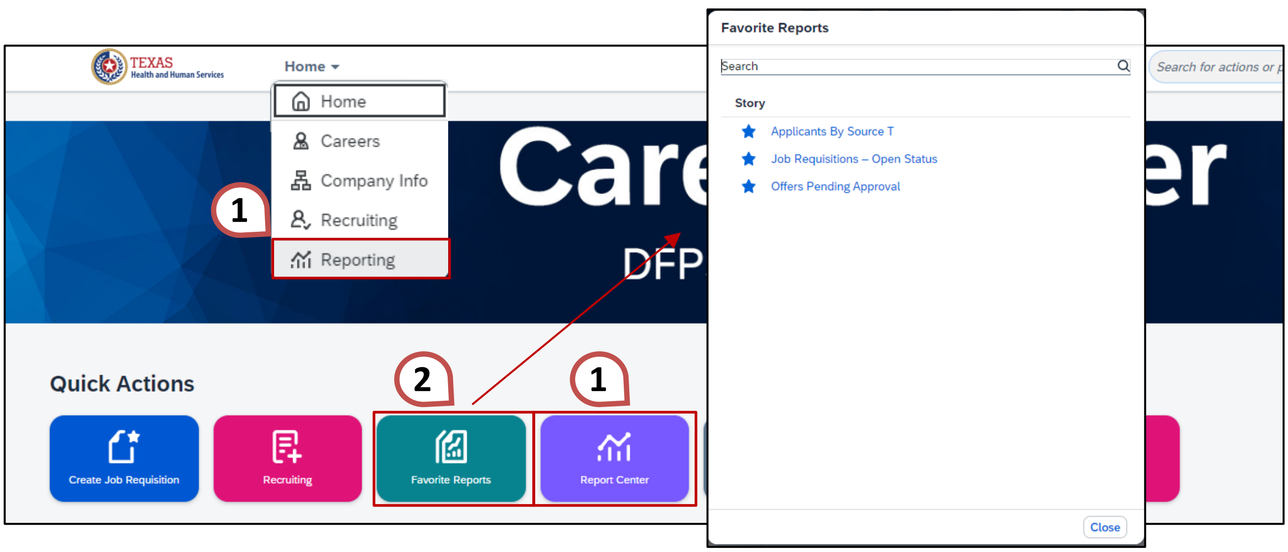
SuccessFactors *Reporting* will:

D) Centralize all the reporting components from different analytical tools.
E) Edit and run reports from a central location.

9.1. Overview of Report Center

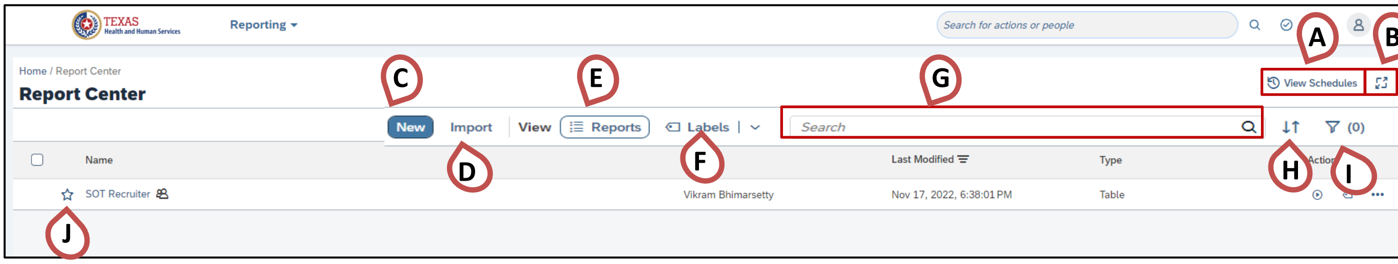
The Report Center centralizes all the reporting components from different analytical tools in Career Center. The analytical tools are, Tiles, Dashboards, Table, Canvas, and Story reports. This centralization allows you to edit and run reports from a central location.

9.1.1. Access to Report Center



1. Access to the Report Center from your homepage, click on the menu and then on Reporting, or go through the Quick Actions button.
2. In the Quick Actions button Favorite Reports, the user can access the reports saved previously as favorite reports.

9.1.2. Report Center basic navigation



A) View Schedules: Click the icon to view list of schedules available in your instance or created by you. You can also view the list of jobs based on its occurrence set by you while creating a scheduling.

B) Full Screen: Click the icon to view the Report Center page in full screen.

C) New: Click the button to create a new report.

D) Import: Click the button to import an XML report in to Report Center.

E) Reports: Click the button to view the report list independent of the label tagged to a report name.

F) Labels: Click the button to view the reports under the label to which it is tagged.

G) Search: Click the icon to search after typing the required report or author name in the Search field.

H) Sort: Click the icon to sort the report list in ascending or descending order based on the column:
   a. Name
   b. Author
   c. Last Modified
   d. Type

I) Filter: Click the icon to filter the report based on the:
   a. Report type
   b. Author of the report
   c. Last modified date of the report
   d. Labels tagged to the reports

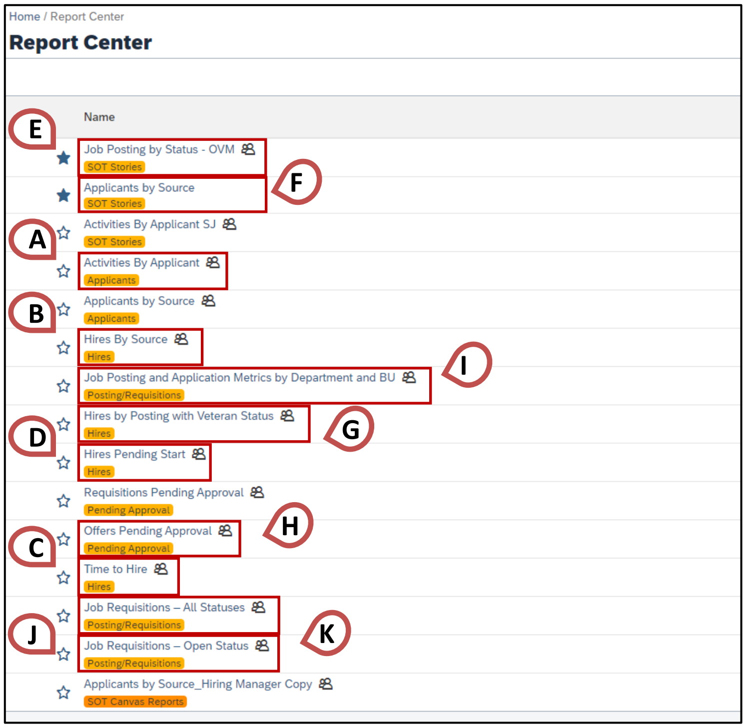
J) Favorites: This icon precedes the report name. If it's clear, it indicates that the report is not marked as favorite. When you select it, the report is marked as a favorite report that you can access from the home page.

K) Shared: This icon next to a report name indicates that the report is shared with another user, group, or role.

9.2. Reports

With the Reporting Center Hiring Managers have access to eleven Standard Reports. There are presentation-style reports that use charts, visualizations, text, and images to describe the data. This data will be based on each person's access level.

The reports are categorized by labels: Hires, Posting/ Requisitions, SOT Stories; Pending Approval, Applicants and SOT Canvas Reports.



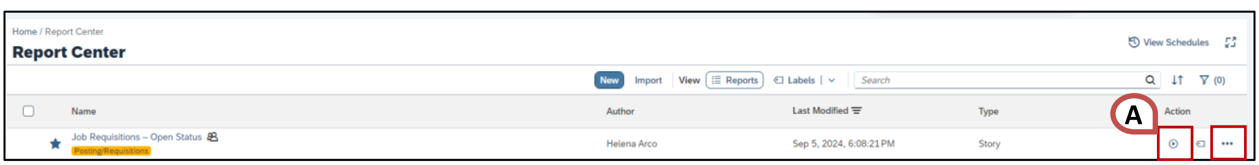
There are the Standard reports visible for the Hiring Manager:

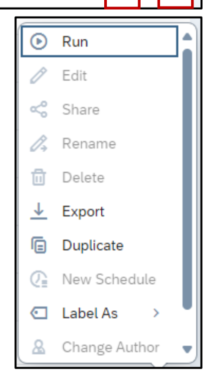
A) Activities By Applicant
B) Hires By Source
C) Time to Hire
D) Hires Pending Start
E) Job Postings by Status-OVM
F) Applicants by Source
G) Hires by Posting with Veteran Status
H) Offers Pending Approval
I) Job Posting and Application Metrics by Department and BU
J) Job Requisitions – Open Status
K) Job Requisitions – All Statuses

9.2.1. Reports by Label Category

1. **Hires**
   a. Hires by Posting with Veteran Status
   b. Hires By Source
   c. Time to Hire
   d. Hires Pending Start
2. **Posting/ Requistions**
   a. Job Requisitions – All Statuses
   b. Job Requisitions – Open Status
   c. Job Postings and Application Metrics by Department and BU
3. **SOT Stories**
   a. Job Posting by Status - OVM
   b. Activities By Applicant*
   c. Applicants by Source*
4. **SOT Canvas**
   a. Applicants by Source_Hiring Manager Copy
5. **Pending Approval**
   a. Offers Pending Approval
   b. Requisitions Pending Approval
6. **Applicants**
   a. Activities By Applicant*
   b. Applicants by Source*

9.3. Report Center Actions





A) <u>Run</u>: Click on Run to run the report with the actual data and define the date requirements.
B) <u>Actions:</u> Click on the actions button to select what to do with the report, run, duplicate, export, etc.