

SAP SuccessFactors

PUBLIC
SAP Best Practices for SAP SuccessFactors Recruiting
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Recruiting in SAP SuccessFactors: Test Script

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1 Recruiting in SAP SuccessFactors

The detailed procedure for testing the scope item **Recruiting in SAP SuccessFactors** after solution activation is described in the following. Each process step is covered in its own section.

This document describes the complete attract-to-hire process in SAP SuccessFactors Recruiting Management. The audience for this document is the business owner who has SAP SuccessFactors in place and needs to use it for concrete business requirements.

The aim of a recruiting application in general is to support the hiring manager and recruiter in selecting and hiring the best candidate that has applied for a particular job published based on the job requisition request of the hiring manager.

At a high level, the complete attract-to-hire process in SAP SuccessFactors Recruiting is as follows:

- Create evergreen and standard job requisitions based on the requirements for the job,
- Post this requisition in internal and external channels,
- Review and assess candidates who have applied in standard or quick way for the posted job requisition,
- Make a job offer to the most suitable candidate,
- Convert external candidate to be employee,
- Flag the candidate as "hired" in the system.

Throughout the entire process, the recruiters and external candidates are supported by the key functionalities of SAP SuccessFactors Recruiting Marketing (which will be referred as "RMK" in this document). **Recruiting Marketing** helps recruiters with sourcing and candidate engagement in one platform, providing career site optimization, multi-channel job posting, social network integration and mobile career site.

Recruiters can also make use of the SAP SuccessFactors Candidate Relationship Management features for greater versatility in managing candidate relationships.

2 Prerequisites

This section summarizes all prerequisites to conducting the test in terms of systems, users, and other test data and business conditions.

2.1 System Access and Roles

The test is conducted in the following system:

System	Details
SAP SuccessFactors	<Provide details on how to access the system, for example system client or URL>

Use the following standard test users or assign roles to testers, respectively:

Business Role	Business Role Description	Business Role ID	Log On
Candidate	Users that apply to the job.	SFCC Employee on Self	For internal candidate, for testing purposes, proxy as the role using superuser role As external candidate, sign in on the external career site.
Recruiter	Users with access to recruiting features.	SFCC Recruiter	For testing purposes, proxy as the role using superuser role.
Sourcing Recruiter	Users with access to recruiting features and responsible for sourcing	SFCC Recruiter	For testing purposes, proxy as the role using superuser role.
Recruiting Administrator	Users with access to recruiting features and responsible for recruiting administration.	SFCC Recruiter	For testing purposes, proxy as the role using superuser role.
Recruiting Team Lead	Users with access to recruiting and recruiting admin features	SFCC Recruiting Administrator	For testing purposes, proxy as the role using superuser role.
Hiring Manager	Users who create requisitions, interview candidates, and approve offers.	SFCC Manager on Team	For testing purposes, proxy as the role using superuser role.

Business Role	Business Role Description	Business Role ID	Log On
Next Level Manager	Users who are managers of hiring managers. They can review and approve job requisitions, interview candidates, and approve offers.	SFCC Manager on Team	For testing purposes, proxy as the role using superuser role.

2.2 Business Conditions

Before this scope item can be tested, the organizational structure of your company should be created in your system. You must ensure that the employee-related basic data of the managers, recruiters, and internal candidates are available in the instance.

2.3 Preliminary Steps

2.3.1 Choose Display Options for Job Requisitions

Purpose

The Recruiter chooses the columns, which are to be shown for the job requisitions on the *Job Requisitions* screen. Especially the parent job requisition ID and job requisition type are of importance when it comes to evergreen job requisitions.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
2.	**Access Recruiting module**	Choose ▶ *Home* ▶ *Recruiting* ▶ from the menu in the top left corner. Then choose the *Job Requisitions* tab.	The *Job Requisitions* screen is displayed.	
3.	**Access Display Options**	On top of the table, choose *Display Options*.	The *Display Options* dialog box is displayed, where you can select which columns should be shown in the *Job Requisitions* table.	
4.	**Choose Fields to be Displayed**	In the *Filter Info* section, flag the *Parent Job Requisition ID* and *Job Requisition Type* checkboxes. Choose *Update Screen*.	The selected fields display in the *Job Requisitions* table.	

2.3.2 Mass Upload of Resumes (Optional)

Purpose

The Recruiting Administrator can upload up to 100 resume files. The system automatically parses the resumes and creates candidate profiles from the information in the resumes.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiting Administrator*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose ▶ *Home* ▶ *Recruiting* ▶ from the menu in the top left corner.	The *Dashboard* screen is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Access Mass Upload Resumes**	Choose the *Candidates* tab and then choose the *Add Candidate* > *Mass Upload Resumes* hyperlink.	The *Mass Upload Resumes* screen is displayed.	
4.	**Perform Mass Upload**	On the *Mass Upload Resumes* screen, make the following entries: • Enter a name in the *Batch Name* field. • In the *If resume parsing cannot determine country/region, then make a selection from the drop-down below:* list, select a country/region. Choose + in the top right of the *Resumes* section and choose the resumes to upload from your local disk. **Note** While parsing and candidate creation is in progress, you will see the progress indicator in the *Resumes* section. Be patient and do **NOT** close the page until all resumes have been processed.	The mass uploading result is displayed. If successful, you can see the number of resumes that successfully parsed. You can choose the *View the successfully uploaded candidates* hyperlink to go to the candidate search page with the 'Batch Name' as search criteria. **Note** An email notification will be sent automatically to each candidate to inform that he or she is added to the company's candidate database. Username to access the company's career site is provided in the email, as well as the password reset hyperlink. If failed, you can see the resumes, which had problems, displayed in the *Unsuccessful Uploads* section.	

2.3.3 Bulk Creation of Candidates via .CSV File (Optional)

Purpose

The Recruiting Administrator uploads a .CSV file containing data of up to 1000 candidates in each file. The system creates automatically candidate profiles from the uploaded information.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiting Administrator*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose *Home* > *Recruiting* from the menu in the top left corner.	The *Dashboard* screen is displayed.	
3.	**Access Bulk Create Candidates from .CSV File screen**	Choose the *Candidates* tab and then choose the *Add Candidate* > *Bulk Create Candidates from .CSV File* hyperlink.	The *Bulk Create Candidates from.CSV File* screen is displayed.	
4.	**Download Blank Template**	On the *Bulk Create Candidates from .CSV File* screen, follow the instructions displayed on the left part of the screen. To prepare the candidate csv file, choose the *Download Blank .CSV Template* hyperlink to download the template firstly. Then fill it with candidate data.		
5.	**Upload Spreadsheet**	Once you have prepared the spreadsheet with candidates' information, make on the *Bulk Create Candidates from .CSV File* screen the following entries: • Enter a name in the *Batch Name* field. • Choose the candidate csv file from your local disk by choosing *Browse* next to the *Select a File* field. Choose *Upload File*. In the upcoming *.CSV File Upload Confirmation* window, choose *OK*.	The candidate csv file is uploaded successfully. The candidate creation is in progress with a background job. **Note** An email notification will be sent automatically to each candidate to inform that he or she is added to the company's candidate database. Username to access the company's career site is provided in the email, as well as the password reset hyperlink.	

2.3.4 Candidate Relationship Management Talent Pool

2.3.4.1 Create Talent Pool

Purpose

The Recruiter creates a talent pool as group of contacts for a targeted method of candidate sourcing.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose ▶ *Home* > *Recruiting* ◀ from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	
3.	**Access Talent Pool**	Choose the *Candidates* tab and then choose the *TALENT POOLS* tab.	The *Talent Pools* screen is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
4.	**Create Talent Pool**	Choose the *Create Talent Pool* hyperlink. In the upcoming *Create New Talent Pool* dialog box, make the following entries: **`<Talent Pool Name>`**, **`<Description>`**, **`<Pipeline Status>`**, **`<Default Candidate Status>`** **Note** The *Talent Pool Name* must be unique. If you provide a talent pool name already in use, SAP SuccessFactors suggests alternatives created by appending your username and the numbers to the talent pool name you entered. Choose *Save*. Maintain the *Visibility* of the talent pool as follows: • If you want the talent pool to be visible only to the user who created it and to users with whom the talent pool has been shared, choose *Private*. Then, choose *Shared with 0 People* or *Shared with 0 Groups* to define whom you want to share this talent pool with. • If you want the talent pool to be visible to all users who have the Talent Pool permission, choose *Public*. Choose *Save* again.	A talent pool has been created.	

2.3.4.2 Add Candidates to Talent Pool

Purpose

The Recruiter adds appropriate candidates to talent pools. There are two ways of adding candidates to talent pools:

1) through candidate search; and

2) through candidate profile.

Note

In case no external candidates exist in your tenant yet, you can execute this preliminary step by searching only for internal candidates (employees of your company) and add them to your talent pools. In real business world, this step can be performed at any time for both internal and external candidates.

Procedure

Option 1: Add candidate to talent pool through candidate search:

Test Step #	Test Step Name	Instruction	Expected Result
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.
2.	**Access Candidate Search**	Choose *Home* > *Recruiting* > *Candidates* from the menu in the top left corner.	The *Candidates > KEYWORD AND ITEM SEARCH* screen is displayed.
3.	**Search Candidate**	You can search the internal candidates by name, by keyword and item, by tag. **Note** For the detailed procedures, refer to process step Search and Assign Candidates from Talent Pool [page 66], test step **#4a**, **#4b** or **#4c**. You can also search the external candidates by batch name in case you performed preliminary step *Mass Upload of Resumes* or *Bulk Creation of Candidates via .CSV File*. **Note** For the detailed procedures, refer to section Assign Candidates from Mass Uploaded Resumes and/or Bulk Created Candidates (Optional) [page 69], test step **#4**.	The search result list is displayed.
4.	**Add Candidate to Talent Pool**	Flag the checkbox in front of the *Candidate ID* for those candidate(s) you want to add to the talent pool, then choose *Actions* and choose the *Add to Talent Pool* hyperlink. In the upcoming *Add to Talent Pool* dialog box, choose the *Talent Pool Name*, then select a *Place in Status* value from the dropdown list. **Note** If you do not select a status, the selected members will be placed in the default status you have chosen for the talent pool. Choose *Submit*.	The candidate(s) has (have) been successfully added to your talent pool. A success message is displayed on the screen. **Note** In the *Success* dialog box, choose *OK*.

Option 2: Add candidate to talent pool through candidate profile:

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Candidate Search**	Choose *Home* > *Recruiting* > *Candidates* from the menu in the top left corner.	The *Candidates > KEYWORD AND ITEM SEARCH* screen is displayed.	
3.	**Search Candidate**	In the *Add:* row, choose *Activity* > *Created profile*. In the *and created a profile* dropdown list, choose a date range, for example *in the past three months*. Then choose *Search*.	If candidates who meet the entered criteria are found, a *Search Results* dialog box is displayed, to show the number of candidates that match your search criteria.	
		In the *Search Results* dialog box, choose *Accept*.	The search result list is displayed.	
4.	**Access Candidate Profile**	Select the candidate's name whom you want to add to the talent pool.	The *Candidate Profile* screen is displayed.	
5.	**Add Candidate to Talent Pool**	Go to the *Talent Pools* portlet of the candidate profile. Choose *+ Add*. In the upcoming *Add to Talent Pool* dialog box, choose the *Talent Pool Name*, then select a *Place in Status* value from the dropdown list. **Note** If you do not select a status, the selected members will be placed in the default status you have chosen for the talent pool. Choose *Submit*.	The candidate has been successfully added to your talent pool. A success message is displayed on the screen. **Note** In the *Success* dialog box, choose *OK*.	

Note

After the candidate has been added to the talent pool with a specific status, the recruiter can change the candidate's status from time to time according to the latest situation of the candidate. For example, if the recruiter has contacted the candidate and gets to know that the candidate is not interested at the moment to find a new job, then the recruiter can move the candidate to status *Not Actively Seeking*. To do so, go to *Recruiting* > *Candidates* > *TALENT POOLS* and choose the *<Talent Pool Name >* to open the candidate list that is assigned to this talent pool. Flag the checkbox in front of the *Candidate ID* for whom you want to change the status, choose *Actions* > *Change Status*, select another status from the *Place in Status* dropdown list, and choose *Submit*. Pay attention, you can only change the status for candidates who are in the pool that you created.

2.3.5 Candidate Relationship Management Email Campaign

2.3.5.1 Create Email Campaign

Purpose

The Recruiter creates an email campaign to communicate, via email, with a large selection of candidates.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Email Campaign**	Choose *Home* > *Recruiting* > *Marketing* from the menu in the top left corner.	The *Marketing > EMAIL CAMPAIGNS* screen is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Create Email Campaign**	Choose the *New Email Campaign* hyperlink. On the upcoming *Create Email Campaign* screen, make the following entries in the *Create Email Campaign* section: **`<Email Campaign Name>`**, **`<Locale>`**, **`<Brand>`**, **`<Email Campaign Code>`**, **`<Campaign Description>`** **Note** The Email Campaign Code is generated automatically from the campaign name to be used as part of the URL. The email campaign code must be URL-compliant, containing only letters, numbers, underscores, and dashes. If you enter a campaign code containing a space, the system automatically will replace the space with an underscore to create a valid campaign code. In the *Email Details* section, enter the *From Display Name* that will show as the email sender. Enter the *Email Subject Line* that you want to show as the email subject. Select the *Email Layout* (defined in Career Site Builder) and enter the body of the email in the *Content (Email Body)* box. **Note** To preview an email layout, select an email layout from the *Email Layout* dropdown menu, and choose the *Preview Layout* link. **Note** To add a link to the email body, choose the *Insert/Edit Link* icon in the menu above the *Content* field. To remove a link from the email body, select the linked word or phrase, and choose the *Remove Link* icon from the *Insert/Edit Link* dialog box, and choose *OK*. Choose *Save*.	The email campaign has been created.	

2.3.5.2 Add Candidates to Email Campaign

Purpose

The Recruiter adds appropriate candidates to email campaigns. There are two ways of adding candidates to email campaigns:

1) through candidate search; and

2) through candidate profile.

> **Note**
>
> In case no external candidates exist in your tenant yet, you can execute this preliminary step by searching only for internal candidates (employee of your company) and add them to your email campaigns. In real business world, this step can be performed at any time for both internal and external candidates.

Prerequisites

The candidates have not explicitly denied their participation at an email campaign.

The email campaign is in draft status.

Procedure

Option 1: Add candidate to email campaign through candidate search:

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Candidate Search**	Choose *Home* > *Recruiting* > *Candidates* from the menu in the top left corner.	The *Candidates > KEYWORD AND ITEM SEARCH* screen is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Search Candidate**	You can search the internal candidates by name, by keyword and item, or by tag. For the detailed procedures, refer to process step Search and Assign Candidates from Talent Pool [page 66], test step **#4a**, **#4b** or **#4c**. You can also search the external candidates by batch name in case you performed preliminary step *Mass Upload of Resumes* or *Bulk Creation of Candidates via .CSV File*. For the detailed procedures, refer to process step Assign Candidates from Mass Uploaded Resumes and/or Bulk Created Candidates (Optional) [page 69], test step **#4**.	The search result list is displayed.	
4.	**Add Candidate to Email Campaign**	Flag the checkbox in front of the *Candidate ID* for those candidate(s) you want to add to the email campaign, then choose *Actions* and choose the *Add to Email Campaign* hyperlink. In the upcoming *Add to Email Campaign* dialog box, select the email campaign from the *Email Campaign* dropdown list. Then, choose *Submit*.	The candidate(s) has (have) been successfully added to your email campaign. A success message is displayed. **Note** In the *Success* dialog box, choose *OK*.	

Option 2: Add candidate to email campaign through candidate profile:

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Candidate Search**	Choose ▶ *Home* > *Recruiting* > *Candidates* ▶ from the menu in the top left corner.	The *Candidates > KEYWORD AND ITEM SEARCH* screen is displayed.	
3.	**Search Candidate**	In the *Add* row, choose ▶ *Activity* > *Created profile* ▶. In the *and created a profile* dropdown list, choose a date range, for example *in the past three months*. Then choose *Search*.	If candidates who meet the entered criteria are found, a *Search Results* dialog box is displayed, to show the number of candidates that match your search criteria.	
		In the *Search Results* dialog box, choose *Accept*.	The search result list is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
4.	**Access Candidate Profile**	Select the candidate's name whom you want to add to the email campaign.	The *Candidate Profile* screen is displayed.	
5.	**Add Candidate to Email Campaign**	Go to the *Email Campaigns* portlet of the candidate profile. Choose *+ Add*. In the upcoming *Add to Email Campaign* dialog box, select the email campaign from the *Email Campaign* dropdown list, then choose *Submit*.	The candidate has been successfully added to your email campaign. A success message is displayed. **Note** In the *Success* dialog box, choose *OK*.	

2.3.5.3 Add Talent Pool to Email Campaign

Purpose

The Recruiter adds a talent pool to an email campaign such that the email campaign can be sent to all member of that talent pool.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose *Home* > *Recruiting* from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	
3.	**Access Talent Pool**	Choose the *Candidates* tab and then choose the *TALENT POOLS* tab.	The *Talent Pools* screen is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
4.	**Add Talent Pool to Email Campaign**	Select one or more talent pool(s) from the list by flagging the checkbox in front of the name, choose the *Actions* icon and select *Add to Email Campaign*. In the upcoming *Add to Email Campaign* dialog box, enter in the *Email Campaign Name* field the name of the email campaign you have created in preliminary step *Create Email Campaign*, then choose *Submit*.	The talent pool(s) has/have been added to a specific email campaign.	

> **Note**
>
> A talent pool can be deleted from an email campaign as long as the email campaign has not been sent out.

> **Note**
>
> The email campaign is now ready to be sent out to the recipients. For details refer to section *More Information > Email Campaigns* within this document.

2.4 Activate SAP SuccessFactors Mobile Application

In this Best Practices solution, mobile feature is enabled for Recruiting. Before mobile related process steps can be executed, you need to **install** and **activate** your SAP SuccessFactors Mobile application on your mobile device firstly. There are four ways to activate the SAP SuccessFactors Mobile Application on mobile devices, and this document only describes the QR Code Activation. For other ways and more deployment information on how to set up Mobile application, refer to the **SAP SuccessFactors Mobile Deployment Guide** located on SAP Help Portal.

To activate your SAP SuccessFactors Mobile application using the QR code:

1. Download and install the SAP SuccessFactors Mobile App in your mobile device (from App Store).
2. The user (who needs to execute the mobiles processes) logs in to the SAP SuccessFactors website.
3. Select the dropdown menu and select *Options*.
4. On the *Options* screen, select *Mobile*.
5. Select *Activate via Camera* option.
6. The camera is activated, and you have 30 seconds to scan the displayed QR Code.
7. Open the SAP SuccessFactors Mobile App on your mobile device.
8. Tap the *Add Profile* box and tap *Scan QR Code*, scan the QR Code displayed in your SAP SuccessFactors website.
9. If the QR Code expires, select *Get New Code* to generate a new QR Code.
10. Once the QR Code is validated, the *User License* screen appears on your **Mobile Device**. Read the *End User License Agreement (EULA)* and make the appropriate selections on the mobile device to accept the *User License Agreement*.

11. The SAP SuccessFactors mobile application is now activated. The corresponding user profile is added.

> **Note**
>
> For testing purpose, you can use one mobile device for different business roles involved in the Recruiting process. To realize this, repeat the steps listed above using different users, you can then get all user profiles prepared in your SAP SuccessFactors Mobile App.

In this package, following users should be prepared before you perform the process steps:

- Next Level Manager
- Recruiter
- Hiring Manager

3 Overview Table

The scope item **Recruiting Management in SAP SuccessFactors** consists of several process steps provided in the table below.

Process Step	Business Role	Transaction	Expected Results
Create Job Requisition (Sub-Process) [page 29]			
Create Job Requisition [page 29]	Hiring Manager	Company Instance URL	A new standard job requisition has been created and sent for follow-up processes.
Approve Job Requisition [page 32]	Next Level Manager	Company Instance URL/ Mobile App	The standard job requisition has been approved by the Next Level Manager.
Analyze Candidate Pipeline and Talent Pools [page 36]	Recruiter	Company Instance URL	The Recruiter has checked if suitable candidates for the job requisition would be available in the company's talent pools.
Review Job Descriptions [page 37]	Recruiter	Company Instance URL	The Recruiter has updated the job description as per the review they had with the Hiring Manager.
Define Pre-Screening Questions [page 39]	Recruiter	Company Instance URL	The Recruiter has maintained the pre-screening questions as per the discussion with the Hiring Manager.
Adapt and Approve Job Requisition [page 41]	Recruiter	Company Instance URL	The job requisition has been reviewed and updated and is ready for posting.
Link as Child to Evergreen Job Requisition (Optional) [page 43]	Recruiter	Company Instance URL	A child job requisition has been added to an Evergreen Job Requisition from the User Interface.
Create Evergreen Job Requisition (Sub-Process) [page 45]			
Create Pipeline Job Requisition [page 46]	Recruiter	Company Instance URL	A new pipeline job requisition has been created and sent for follow-up processes.
Add Child Job Requisition to Evergreen Job Requisition (Optional) [page 50]	Recruiter	Company Instance URL	A child job requisition has been added to the Evergreen Job Requisition from the User Interface.
Advertise Job Requisition (Sub-Process) [page 52]			
Review Advertising Strategy (Process Step Outside Software) [page 53]	Recruiter / Hiring Manager	Outside software	The Recruiter and the Hiring Manager have aligned on the recruiting approach and decided on which channels the job requisition should be posted.
Check and Remove Internal Job Posting [page 53]	Recruiter	Company Instance URL	The job requisition has been posted on the company's intranet.

Process Step	Business Role	Transaction	Expected Results
Post Job on External Career Site [page 55]	Recruiter	Company Instance URL	The job requisition has been posted on the company's external career site.
Post Job to External Job Boards [page 56]	Recruiter	Company Instance URL	The job requisition has been posted to external job boards.
Post Job to Job Boards (Optional) [page 57]	Recruiter	Company Instance URL	The job requisition has been posted to job boards.
Post Job Private Internal [page 59]	Recruiter	Company Instance URL	The URL link has been sent to internal candidates for applying to the job.
Post Job Private External [page 60]	Recruiter	Company Instance URL	The URL link has been sent to external candidates for applying to the job.
Post Job to Agency [page 61]	Recruiter	Company Instance URL	The job requisition has been posted on recruiting agency portals.
Perform Talent Search (Sub-Process) [page 62]			
Review Job Requisition Type [page 62]	Recruiter	Company Instance URL	The type of job requisition has been checked, based on which different steps of assigning candidates to the job requisition will be performed.
Assign Candidates from Related Evergreen Job Requisition [page 63]	Recruiter	Company Instance URL	Candidates, who applied to an evergreen job requisition and might fit to the child of the evergreen job requisition, have been assigned to that child requisition.
Assign Candidates from Talent Pool [page 65]	Recruiter	Company Instance URL	Candidates from the company's talent pool have been assigned to the job requisition.
Search and Assign Candidates from Talent Pool [page 66]	Sourcing Recruiter	Company Instance URL	Searches in cover letters and resumes, using tags and other key fields, have revealed potential candidates, who have then been assigned to the job requisition.
Assign Candidates from Mass Uploaded Resumes and/or Bulk Created Candidates (Optional) [page 69]	Sourcing Recruiter	Company Instance URL	Searches among the candidates, who have been entered into the system via mass uploaded resumes or uploaded via a csv file, have revealed potential candidates, who have then been assigned to the job requisition.
Run Candidate DB Search in RMK and Search Through Other Channels (Optional Sub-Process) [page 71]			
Search Candidate in Recruiting Dashboard [page 71]	Sourcing Recruiter	Company Instance URL	Potential candidates, who might fit to the job requisition, have been searched via the RMK dashboard.
Search Candidate Through Other Channels (Process step Outside Software) [page 72]	Sourcing Recruiter	Outside software	Potential candidates, who might fit to the job requisition, have been searched through other channels.
Add Suitable Candidate to Job Requisition [page 73]	Sourcing Recruiter	Company Instance URL	The potential candidates, who have been found during search, have been assigned to the job requisition.
Candidate Experience (Sub-Processes Bundle) [page 74]			
Internal Candidate Experience (Sub-Process) [page 75]			

Process Step	Business Role	Transaction	Expected Results
Access Career Opportunities Site and Review Job Postings [page 75]	Employee (Internal Candidate)	Company Instance URL	The Employee has reviewed the job posting details in the internal career site.
Complete Candidate Profile and Submit Application [page 76]	Employee (Internal Candidate)	Company Instance URL	The Employee has finalized the maintenance of their candidate profile and has applied for a job.
Start Automated Screening of Application [page 80]	Automatically by System	-	An automated screening of the internal candidate's application has been executed. Based on the outcome, the internal candidate is progressed in the recruiting process or is automatically disqualified.
Create Job Alert (Optional) [page 80]	Employee (Internal Candidate)	Company Instance URL	The Employee has set up the saved searches as job alerts to get informed whenever new jobs are posted that match their interests.
Manage Job Applications (Optional) [page 81]	Employee (Internal Candidate)	Company Instance URL	The status of job applications has been viewed and submitted job applications have been adapted as necessary.
Refer Job to Friend (Optional) [page 83]	Employee (Internal Candidate)	Company Instance URL	The Employee has referred his or her friend to the specific job requisition.
Add Referral (Optional) [page 85]	Employee (Internal Candidate)	Company Instance URL	The Employee has referred his or her friend to the generic talent pool.
External Candidate Experience (Sub-Process) [page 87]			
Access External Career Site, Review Job Postings, and Choose Apply [page 87]	External Candidate	External Career Site URL	The External Candidate has reviewed the job posting details on the external career site and has decided to apply for the job of interest. Depending, if the external candidate has a user account on the external career site or not, and if the job requisition is enabled for quick apply or not, different subsequent process steps will be executed.
Create Account and Agree to Data Privacy [page 89]	External Candidate	External Career Site URL	In case the job requisition is not enabled for quick apply, the External Candidate, who applies for the first time to a job in the company, has created an account on the external career site and agreed to the data privacy statement.
Complete Candidate Profile and Submit Application [page 91]	External Candidate	External Career Site URL	The External Candidate, who applies for the first time to a job in the company, has completed the candidate profile maintenance and submitted the application.

Process Step	Business Role	Transaction	Expected Results
Complete Reduced Candidate Profile and Submit Application [page 94]	External Candidate	External Career Site URL	In case the job requisition is enabled for quick apply, the External Candidate, who applies for the first time to a job in the company, has completed a reduced candidate profile and submitted the application.
Sign In, Update Candidate Profile, and Submit Application [page 96]	External Candidate	External Career Site URL	The External Candidate, who already has a user account on the external career site, has submitted the application for the job.
Start Automated Screening of Application [page 99]	Automatically by System	-	An automated screening of the external candidate's application has been executed. Based on the outcome, the external candidate is progressed in the recruiting process or is automatically disqualified.
Create Job Alert (Optional) [page 99]	External Candidate	External Career Site URL	The External Candidate has set up the saved searches as job alerts to get informed whenever new jobs are posted that match their interests.
Manage Job Applications (Optional) [page 101]	External Candidate	External Career Site	The status of job applications has been viewed and submitted job applications have been adapted as necessary.
Select Candidate (Sub-Processes Bundle) [page 102]			
Perform Pre-Screening (Sub-Process) [page 103]			
Perform Pre-Screening [page 103]	Recruiter	Company Instance URL	The Recruiter has pre-screened candidates that have applied to job requisitions.
Set Candidate Status to "Pre-Screen" [page 107]	Recruiter	Company Instance URL	The Recruiter has moved the qualified candidate to status *PreScreen*.
Review Candidates (Sub-Process) [page 108]			
Review Candidate [page 108]	Recruiter	Company Instance URL	The Recruiter has reviewed the detailed application of candidates who have passed the pre-screening.
Set Candidate Status to "Hiring Manager Review" [page 111]	Recruiter	Company Instance URL	The Recruiter has moved the candidate to status *Hiring Manager Review*.
Perform Phone Screening with Candidate (Process Step Outside Software) [page 112]	Recruiter	Outside software	The Recruiter has contacted a candidate to clarify if the candidate would be suitable for the posted job.
Confirm Candidate Shortlist (Sub-Process) [page 113]			
Review Candidate [page 113]	Hiring Manager	Company Instance URL	The Hiring Manager has decided who can be added to the Candidate Shortlist for interview.
Set Candidate Status to "Proceed" [page 115]	Hiring Manager	Company Instance URL	The Hiring Manager has moved the candidate to status *Manager Review → Proceed*

Process Step	Business Role	Transaction	Expected Results
Set Candidate Status to "Schedule Interview" [page 116]	Recruiter	Company Instance URL	The Recruiter has moved the candidate to status *Schedule Interview*.
Interview Candidates (Sub-Process) [page 118]			
Organize Interview and Publish Available Time Slots [page 118]	Recruiting Administrator	Company Instance URL	The Recruiting Administrator has organized interviews, selected interview type, location, and interviewers, and then published available time slots to candidates.
Confirm Interview Time Slot [page 122]	(External/ Internal) Candidate	Company Instance URL	The Candidate received the interview invitation and has chosen the proper time slot to confirm his or her availability for an interview.
Receive Interview Invitation Meeting Request and Confirm Interview Time Slot (Process Step Outside Software) [page 124]	Hiring Manager	Outside software	The Hiring Manager has received and accepted the interview invitation meeting request.
Send Interview Reminder [page 125]	Automatically by System	-	An email notification and possibly a SMS has been sent out to the candidate, reminding about the interview taking place shortly.
Receive Interview Reminder via Email and SMS (Process Step Outside Software) [page 126]	(External/ Internal) Candidate	Outside software	The Candidate has received the email and SMS reminder for the upcoming interview.
Conduct Interview (Process Step Outside Software) [page 126]	Hiring Manager / Recruiter / Candidate	Outside software	The job interview has taken place on the specified date and time.
Conduct Interview Evaluations, Ratings and Notes [page 127]	Hiring Manager	Company Instance URL/ Mobile App	The candidate has been assessed by the interviewer.
Decide on Candidate Prioritization [page 130]	Hiring Manager	Company Instance URL	The Hiring Manager has communicated his or her decision about whether to make a job offer to the candidate.
Receive Final Feedback via Email (Process Step Outside Software) [page 131]	Recruiter	outside software	The Recruiter has received the final feedback from the hiring manager.
Initiate Pre-Offer Background / Reference Check for External Candidate (Optional) [page 132]	Recruiting Administrator	Company Instance URL	The Recruiting Administrator has moved the external candidate to status *Pre-Offer Background Check*.

Process Step	Business Role	Transaction	Expected Results
Perform Pre-Offer Background / Reference Check of External Candidate (Process Step Outside Software) [page 134]	Recruiting Administrator	Outside software	The Recruiting Administrator has performed a background/reference check of the external candidate before sending the offer to them.
Set Candidate Status to "Prepare Offer" [page 134]	Recruiter	Company Instance URL	The Recruiter has moved the candidate to status *Prepare Offer*.
Reject Candidate (Sub-Process) [page 136]			
Check Candidate Suitability for Other Job Requisition [page 136]	Recruiter	Company Instance URL	The Recruiter has checked for possibilities in proceeding with candidates who have been rejected for the posted job.
Assign Candidate to Other Job Requisition [page 138]	Recruiter	Company Instance URL	The Recruiter has assigned the candidates to other job requisition.
Add Candidate to Talent Pool(s) [page 138]	Recruiter	Company Instance URL	The Recruiter has added the candidates to the company's talent pool(s).
Set Candidate Status to "Declined" [page 139]	Recruiter	Company Instance URL	The Recruiter has moved the candidate to status *Declined*.
Prepare Offer (Sub-Process) [page 140]			
Prepare Offer Details and Trigger Offer Approval [page 141]	Recruiter	Company Instance URL	A job offer has been created for the suitable candidate and sent to the hiring manager for approval.
Approve Offer [page 143]	Hiring Manager	Company Instance URL/ Mobile Device	The job offer has been approved by the Hiring Manager and has been sent to the next level manager for approval.
Approve Offer (Approved by Hiring Manager) [page 146]	Next Level Manager	Company Instance URL/ Mobile Device	The job offer has been approved by the Next Level Manager.
Discuss Verbal Offer with Candidate (Process Step Outside Software) [page 149]	Recruiter	outside software	The recruiter has discussed the verbal offer content with the candidate.
Close Recruiting Process (Sub-Process) [page 150]			
Prepare and Send Online Offer Letter to Candidate [page 150]	Recruiting Administrator	Company Instance URL	The online offer letter has been created and sent to the candidate.
Accept Online Offer [page 152]	(External/ Internal) Candidate	Company Instance URL	The Candidate has accepted the offer from the company.

Process Step	Business Role	Transaction	Expected Results
Set Candidate Status to "Offer Accepted" [page 153]	Recruiter	Company Instance URL	The Recruiter has moved the candidate to status *Offer Accepted*.
Initiate Post-Offer Background / Reference Check for External Candidate (Optional) [page 155]	Recruiting Administrator	Company Instance URL	The Recruiting Administrator has moved the external candidate, who has accepted the offer and for whom no pre-offer background/reference check has been performed, to status *Post-Offer Background Check*.
Perform Post-Offer Background / Reference Check of External Candidate (Process Step Outside Software) [page 156]	Recruiting Administrator	Outside software	The Recruiting Administrator has performed a background / reference check of the external candidate. Based on the check outcome, the Recruiter will proceed different.
Rescind Offer and Inform Candidate and Manager [page 157]	Recruiter	Company Instance URL	The candidate has not passed the background check and has been moved to status *Declined*.
Set Candidate Status to “Ready to Hire” [page 159]	Recruiter	Company Instance URL	The candidate has passed the background check successfully and has been moved to status *Ready to Hire*.
Check Suitability of Other Candidates [page 161]	Recruiter	Company Instance URL	The suitability for other job requisitions of the candidates, who have applied to the job requisition and have been rejected, has been checked.
Hire Candidate and Close Job Requisition			
Maintain Candidate Data in HCM Core Component (Process Step Outside Software) [page 163]	HR Administrator	Outside software	The HR Administrator has transferred the data of the external candidate to the company's HCM Core Component or has adapted the data of the internal candidate in the company's HCM Core Component.
Remove Job Postings [page 164]	Recruiter	Company Instance URL	The Recruiter has removed the job posting once the job has been filled and no more posting is needed.
Close Job Requisition [page 164]	Recruiter	Company Instance URL	The job requisition has been closed.

4 Test Procedures

This section describes the test procedures for each process step that belongs to this scope item.

The trigger for the recruiting process is the approval of a new resource request. This new position needs to be staffed as soon as possible.

The process as described is clustered into several sub-processes:

- A job requisition is created. After all the necessary steps required to finalize and approve the job requisition are completed, it is posted across various channels.
- Once the job is posted, existing talent pools within the company will be used to search for appropriate candidates. The candidates, who fit best to the job requirement, are assigned to the job requisition, and will be invited to apply.

  > **Note**
  >
  > This is detailed in the *Perform Talent Search* sub-process.

- Persons from inside and outside the company check the job postings and apply to jobs they are interested in.

  > **Note**
  >
  > This is detailed in the *Candidate Experience (Sub-Processes Bundle)*.

- Among all the applications received, the hiring manager, recruiter, and recruiting administrator select the most appropriate candidate.

  > **Note**
  >
  > This is detailed in the *Select Candidate (Sub-Processes Bundle)*.

- Once the candidate accepts the offer from the company, the data of the candidate is transferred/ maintained in the HCM core component as defined in your instance.

  > **Note**
  >
  > An external candidate will be hired into the system, while for an internal candidate, the existing record in the HCM core component will be adapted.

- Once all openings have been filled with successful candidates, the posting of the job in the various channels is removed and the requisition is closed.

> **Note**
>
> For ease of consumption of the documentation within this test script, it is recommended to check in parallel the process flow sketched in the appropriate process diagram.

4.1 Create Job Requisition (Sub-Process)

Purpose

Once a new resource request has been approved, and clear job description are in place, the process of executing on the company's actual staffing needs can start. First step would be the creation of an appropriate job requisition.

This sub-process refers to the creation of a job requisition and all the necessary steps required to update and approve the final agreed requisition.

4.1.1 Create Job Requisition

Purpose

The Hiring Manager creates a new job requisition using the **Recruiting** module. He or she creates the new job requisition from a blank template, maintains at least the required fields, and forwards the form to the next level manager for approval.

The job requisition XML template provided within the SAP Best Practices solution has *Quick Apply* configured with all the necessary read or write permissions for the operators, such as the Hiring Manager. The Hiring Manager can mark the job requisition for quick apply. Quick Apply allows candidates to complete a job application in the fewest clicks possible, without having to fill out a complete profile, by displaying one-page view for the account creation and application fields.

> ⚠ Caution
>
> Quick Apply is not supported for Internal Career Sites.

> ⓘ Note
>
> If the new job requisition has similar attributes as an existing one, you can create it by copying the existing job requisition and adjusting some of the attributes.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Hiring Manager*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose ▶ *Home* ▶ *Recruiting* ▶ from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	
3.	**Create New Job Requisition**	Select the *Create New* link and on the upcoming *Create New Job Requisition* screen, choose the *Standard Job Requisition* link. Then choose the *Create New Job Requisition From Blank Template* link from *Options*. Make following entries: **`<Job Title>`**, **`<Due Date>`** (using calendar help), **`<Hiring Manager>`** (for example **`<your name>`**), and **`<Recruiter>`**. **Note** The **`<Recruiter>`** is defaulted if you define the default primary user in ▶ *Admin Center* ▶ *Recruiting Team Settings* ▶; keep as is or enter a different recruiter using the *Find User* link. Choose *Next*.	You are progressed to the *<Job Title>* screen.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
4.	**Maintain Job Requisition Fields**	On the *<Job Title>* screen, enter data in the following mandatory fields describing the job requisition in more detail: **<Job Code>** (use *Update* and select from the dropdown the appropriate *Job Family*. Pay attention that when using JDM2.0, you need to have *Manage Job Profile Builder* permissions), **<Job Start Date>**, **<Internal Job Title>**, **<External Job Title>**, **<Job Function>**, **<Level of Experience>**, **<Required Travel>**, **<Location>**, **<Position Country/Region>**, **<Number of Opening>**, **<Legal Entity>**, **<Business Unit>**, **<Division>**, **<Department>**, **<Cost Center>**, **<Currency>**, **<Job Grade>**, **<Hiring Manager>**, **<Recruiter>**, **<Recruiting Team Lead>** **Note** For some of the fields, such as *External Job Title*, you can choose to keep it same as internal value or enter a different value. Save your entries by choosing the *Save* icon in the upper right side of the screen. Choose the *View Job Profile* button and maintain the **Internal Job Description** and **External Job Description** by choosing *Update* or *Same as Internal* (for *External Job Description*). Then choose *Save*. **Note** If you do not use JDM 2.0, you can maintain the **Internal Job Description** and **External Job Description** fields directly on the *Job Requisition Detail* tab by choosing *Update* or *Same as Internal* (for *External Job Description*). Optionally, you can turn on the toggle button for field *Quick Apply*. **Note** Quick Apply allows external candidates to complete an application without needing to fill out a full profile thus saving time and effort. Choose *Send to Hiring Manager's Manager* .	The *<Job Title>* screen is displayed containing a *Comment* area.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
5.	**Send Job Requisition to Next Processor**	On the *<Job Title>* screen, maintain a comment in the *Email Notification Comments* area, and choose *Send to Hiring Manager's Manager* .	The standard job requisition has been created and maintained by the hiring manager. The job requisition has been sent to the Manager of the Hiring Manager (Next Level Manager) for approval. The Next Level Manager will receive an email notification about the new job requisition to be approved.	

4.1.2 Approve Job Requisition

Purpose

The Next Level Manager processes the job requisition routed from the Hiring Manager. He or she can approve it or send it back to the hiring manager for changes.

If the SAP SuccessFactors Mobile application has been activated on the Next Level Manager's mobile device as described in section *2 Prerequisites*, in addition to the requisition received on the company instance website, the Next Level Manager will receive it also on the mobile device. The job requisition can be approved either on the **company instance website** [page 33] or on the **mobile device** [page 34].

These options are detailed below.

4.1.2.1 Approve Job Requisition on Company Website

Purpose

The Next Level Manager processes on the company website the job requisition routed from the Hiring Manager. He or she can approve the request or send it back to the hiring manager for changes.

> **Note**
>
> In this document, we consider the straightforward case, when the next level manager approves the job requisition on the company website.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Next Level Manager*.	The *Home* page is displayed.	
2.	**Open Newly Created Job Requisition**	On the *Home* page, in the *Approvals* section, choose the *Job Requisition / <Job Title>* card. **Note** In case there are several job requisitions waiting for approval, the *View All* link will be displayed in the *Job Requisition* card. Choose that link; in the upcoming dialog box, choose the appropriate *Job Requisition* card. **Note** Alternatively, you can access the job requisition form from *Home* > *Recruiting*. Select the newly created job requisition by hovering over the job title: a dialog box to the right will be displayed for *Requisition Actions*. Then choose the *View or Edit Requisition* link.	The *<Job Title>* form is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Review and Route Job Requisition to Next Processor**	On the *<Job Title>* screen, review the form and if satisfied, choose *Send to Recruiter*. **Note** In case you need further information on the requisition or require changes, you can send the form back to the hiring manager by choosing the appropriate button.	The *<Job Title>* screen is displayed, containing a *Comments* area.	
4.	**Send Job Requisition to Next Processor**	On the *<Job Title>* screen, maintain a comment in the *Email Notification Comments* area, and choose *Send to Recruiter*.	The job requisition has been approved by the Next Level Manager. The job requisition has been sent to the *Recruiter* for review and approval. The Recruiter will receive an email notification about the new job requisition.	

4.1.2.2 Approve Job Requisition via Mobile Device

Purpose

If mobile application is enabled, the Next Level Manager can also process the job requisition routed from the Hiring Manager on his/her Mobile device. He or she can approve the request or send it back to the hiring manager for changes.

Note

In this document, we consider the straightforward case, when the next level manager approves the job requisition via Mobile device.

Note

In this document, we only describe the screen elements of the iOS system. The SAP SuccessFactors Mobile application also supports the Android platform, while the Android interface might be a little bit different.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Open the SAP SuccessFactors mobile app and log on as Next Level Manager by tapping the corresponding username on the *Multi-Profile* screen.	The *SAP SuccessFactors* home page is displayed.	
2.	**Open Newly Created Job Requisition**	In the *To-Do* tile, tap the *Approve Requests*.	The *Details* screen for the Job Requisition Approval is displayed.	
3.	**Review and Route Job Requisition to Next Processor**	On the *Details* screen, review the form and if satisfied, tap *Send to Recruiter*. **Note** In case you need further information on the requisition or require changes, you can send the form back to the hiring manager by tapping the *Send to [username]* button and choose the hiring manager accordingly.	The job requisition has been approved by the Next Level Manager on mobile device. The same approval task on the company website will be set as completed automatically. The job requisition has been sent to the Recruiter for review and approval. The *Recruiter* will receive an email notification about the new job requisition.	

4.1.3 Conduct Strategy Alignment Meeting with Hiring Manager (Sub-Process)

Purpose

This sub-process refers to the alignment between the dedicated recruiter assigned to process the job requisition and the hiring manager about the appropriate approach for finding and selecting the best candidate. During the alignment various topics need to be discussed, such as: review of job description, required skills and competencies, analysis of candidate pools, planning of marketing channels, pre-screening questions, and so on.

4.1.3.1 Analyze Candidate Pipeline and Talent Pools

Purpose

After having discussed with the Hiring Manager about the required skill profile and position conditions, the Recruiter checks if in the company's talent pools, suitable candidates for the job requisition would be available.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Talent Pools**	Choose *Home* > *Recruiting* from the menu in the top left corner. Choose the *Candidates* tab and then choose the *TALENT POOLS* tab.	The *Talent Pools* screen is displayed, containing the list of existing talent pools within the company.	
3.	**Review Talent Pool Members**	Of interest are the pools which already have members. Choose the *<Name>* hyperlink of such a talent pool. On the upcoming *<Talent Pool Name>* screen, review the details of the members. For example, check their candidate profile and resume.	Details to the members of talent pools have been viewed.	
4.	**Check Pipeline**	Check the status of the pool members within the *Candidate Status* pipeline.	Depending on their status, you might contact the person(s), if suitable for the new job.	

Result

Next, the Recruiter and Hiring Manager agree on the sourcing strategy and posting channels according to the nature of the job to be staffed.

4.1.3.2 Review Job Descriptions

Purpose

The Recruiter reviews together with the Hiring Manager the job description as maintained in the job profile of the requisition. Based on their discussions, the Recruiter may update the descriptions. He or she will also add the skills and competencies the successful candidate needs to fulfill.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Open Newly Created Job Requisition**	On the *Home* page, in the *Approvals* section, choose the *Job Requisition / <Job Title>* card. **Note** In case there are several job requisitions waiting for processing, the *View All* link will be displayed in the *Job Requisition* card. Choose that link; in the upcoming dialog box, choose the appropriate *Job Requisition* card. **Note** Alternatively, you can access the job requisition form from *Home* > *Recruiting* > *Job Requisitions*. Select the newly created job requisition by hovering over the job title: a dialog box to the right will be displayed for *Requisition Actions*. Then choose the *View or Edit Requisition* link.	The *Job Title* form is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Review Job Descriptions**	Choose the *Job Profile* tab. Review the *Internal Job Description* and *External Job Description*. If adaptions are required, choose *Update*, and make the appropriate changes. Then choose *Save*. **Note** The *External Job Description* can be made same as the *Internal Job Description* by choosing *Same as Internal*. **Note** If you don't use JDM 2.0, you can maintain the **`Internal Job Description`** and **`External Job Description`** fields directly on the *Job Requisition Detail* tab by choosing *Update* or *Same as Internal* (for *External Job Description*).	The job description as they will be visible on the career site have been reviewed and possible adapted.	
4.	**Add Competencies**	To add the competencies the successful candidate needs to fulfill, choose *Add more Competencies*. **Note** The competencies are needed for the candidate's assessment as described in process step **Conduct Interview Evaluations, Ratings and Notes**. **Note** You can either use the standard competency library or create your own competencies library. Flag the checkbox in front of each competency you want to add and choose *Add*. Then choose *Save*. **Note** If you don't use JDM 2.0, you can add competencies directly in the *Job Requisition Detail* tab by choosing *Add more Competencies* and including expected rating and weight.	The competencies needed for the job have been added.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
5.	**Save Job Requisition**	Go back to the *Job Requisition Detail* tab and choose *Save and Close*.	The updates in the job requisition have been saved.	

4.1.3.3 Define Pre-Screening Questions

Purpose

The Recruiter and Hiring Manager decide upon the screening questions to be used as minimum selection criteria. The Recruiter maintains these questions in the job requisition form.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
2.	**Open Newly Created Job Requisition**	On the *Home* page, in the *Approvals* section, choose the *Job Requisition / <Job Title>* card. **Note** In case there are several job requisitions waiting for processing, the *View All* link will be displayed in the *Job Requisition* card. Choose that link; in the upcoming dialog box, choose the appropriate *Job Requisition* card. **Note** Alternatively, you can access the job requisition form from *Home* > *Recruiting* > *Job Requisitions*. Select the newly created job requisition by hovering over the job title: a dialog box to the right will be displayed for *Requisition Actions*. Then choose the *View or Edit Requisition* link.	The *Job Title* form is displayed.	
3.	**Add Screening Questions**	To add the questions to be answered by the candidates during the job application, choose *Add more questions*. **Note** This link is located in the *Posting Information* section of the *Job Requisition Details* tab, next to the *Questions* field. You can browse through the question library, flag the checkbox in front of each question you want to add, and choose *Add*. **Note** You can also create questions directly on the requisition form.	The questions together with their answer format are listed in the *Questions* field.	
4.	**Mark Question as Disqualifier**	Mark the appropriate questions as *Disqualifier*, by flagging the checkbox in the appropriate column. Add the appropriate *Weight* for each question.		
5.	**Save Job Requisition**	Choose *Save and Close*.	The pre-screening questions have been added to the job requisition. The questions, whose answers may lead to disqualifying the candidate from the recruiting process, have been marked.	

Result

Next, the Recruiter asks the Hiring Manager for confirming the discussed recruitment strategy. Once the final confirmation has been obtained, the Recruiter can finalize the job requisition.

4.1.4 Adapt and Approve Job Requisition

Purpose

Once the final confirmation on the recruitment strategy has been received from the hiring manager, the Recruiter adapts the newly created job requisition accordingly and finally approves it.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Open Newly Created Job Requisition**	On the *Home* page, in the *Approvals* section, choose the *Job Requisition / <Job Title>* card. **Note** In case there are several job requisitions waiting for approval, the *View All* link will be displayed in the *Job Requisition* card. Choose that link; in the upcoming dialog box, choose the appropriate *Job Requisition* card. **Note** Alternatively, you can access the job requisition form from *Home* > *Recruiting* > *Job Requisitions*. Select the newly created job requisition by hovering over the job title: a dialog box to the right will be displayed for *Requisition Actions*. Then choose the *View or Edit Requisition* link.	The *<Job Title>* form is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Maintain Job Requisition**	On the *<Job Title>* screen, make a final review of the form. **Note** In case the *Employee Referral Program* is applicable to this job requisition, you need to maintain the *ERP Amount*.		
4.	**Maintain Recruiting Roles**	Ensure that the Sourcing Recruiter's name is maintained in the *Sourcer* field. **Note** The Sourcing Recruiter will perform follow up process steps, such as Search and Assign Candidates from Talent Pool. Ensure that the Recruiting Administrator's name is maintained in the *Service Center* field. **Note** The Recruiting Administrator will perform follow up process steps, such as **Organize Interview and Publish Available Time Slots**. After the job requisition has been refined, choose *Ready for Posting*. **Note** In case you need further information on the requisition or require changes, you can send the form back to the hiring manager or the next level manager by choosing the appropriate button.		
5.	**Approve Job Requisition for Posting**	On the *<Job Title>* screen, choose *Ready for Posting*.	The job requisition has been adapted and approved by the Recruiter. The status of the job requisition has turned to `approved`.	

Result

The Recruiter can now check if the job requisition should be linked to an evergreen job requisition. In case the new requisition aims at acquiring profiles that are either:

- recurringly sought by the organization,

- hard to fill,

- high volume,

the link with an *Evergreen Job Requisition* is relevant. In this case, continue in the process execution with process step Link as Child to Evergreen Job Requisition (Optional) [page 43].

Otherwise, the Recruiter can directly follow up with posting the job requisition. In this case, continue in the process execution with Advertise Job Requisition (Sub-Process) [page 52].

4.1.5 Link as Child to Evergreen Job Requisition (Optional)

Purpose

In case the new requisition aims at acquiring profiles that are either:

- recurringly sought by the organization,
- hard to fill,
- high volume,

the Recruiter should link the job requisition to an evergreen job requisition. The linkage is done from the User Interface.

Single or multiple requisitions can be added as a child of an evergreen requisition. A child requisition can be associated with only one evergreen requisition. In turn, an evergreen requisition can have multiple child requisitions.

The requirements of an evergreen requisition are more generic and not linked to a specific office location. The child requisition will contain the detailed requirements, as well as the concrete job location.

> ⚠ Caution
>
> A pre-approved, deleted, closed, an evergreen, or a requisition that is a child to another evergreen requisition **cannot** be added as child requisitions! Only an approved job requisition can be linked as child.

Procedure

> **Note**
>
> A child requisition can be linked to a posted evergreen requisition to which candidates have possibly applied already, a draft (not yet posted) evergreen requisition, or to an evergreen requisition, which has already other children. In the below procedure we consider that the evergreen job requisition has not been posted yet.

> **Note**
>
> In order to proceed as described below, preliminary step Choose Display Options for Job Requisitions [page 6] must have been executed.

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose ▶ *Home* ▶ *Recruiting* ▶ from the menu in the top left corner. Then choose the *Job Requisitions* tab.	The *Job Requisitions* screen is displayed.	
3.	**Choose Evergreen Job Requisition**	Select the evergreen job requisition by hovering the mouse over the job title: a dialog box to the right will be displayed for *Requisition Actions*. Choose the *View or Edit Requisition* link.	The *Job Title* screen is displayed.	
4.	**Add Child Job Requisition**	Scroll to the *Child Requisitions* field and choose the *Add Child Requisitions* link.	The *Search to Add Child Requisitions* dialog box is displayed.	
		In the *Search to Add Child Requisitions* dialog box, enter search criteria and choose *Search*. **Note** You can also choose directly *Search*, then all applicable job requisitions will be listed.	The *Add Child Requisitions* dialog box is displayed, in which all job requisitions are listed, that could be defined as child requisitions of the evergreen job requisition.	
		In the *Add Child Requisitions* dialog box, flag the check box in front of the relevant requisition(s) and choose *Add*.	The `Save the evergreen job requisition to link the child and evergreen requisitions.` information message is displayed in the upper part of the *Add Child Requisitions* dialog box.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
		Choose *Close*.	You return to the *Job Title* screen, on which the linked child requisition is listed in the *Child Requisitions* field.	
5.	**Save Changes**	Choose *Save Changes*. Choose the *Job Requisitions* hyperlink to go back to the *Job Requisition* screen.	You return to the *Job Requisitions* screen. In the *Job Requisition Type* column, the job requisition linked to the evergreen job requisition displays as `Child of Evergreen`. In the *Parent Job Requisition ID* column, the ID of the evergreen job requisition selected in test step **#3** is displayed. The evergreen job requisition can be posted accordingly.	

> ⓘ Note
>
> In case of an already posted evergreen job requisition you can directly add a child requisition by choosing in test step **#3** the *Select Add Child Requisitions* link.

> ⓘ Note
>
> To unlink multiple child requisitions, choose on the *Job Title* screen the *View All Child Requisitions (#)* link. In the upcoming *Child Requisitions* dialog box, choose the *Unlink* link in the *Action* column. The *Link* and *Unlink* links are toggled based on the linking and unlinking of a requisition.

Result

Continue in the process execution with Advertise Job Requisition (Sub-Process) [page 52].

4.2 Create Evergreen Job Requisition (Sub-Process)

Purpose

This sub-process refers to creating job requisitions even if there are no current job opening for certain position (there is no approved headcount). With this approach recruiting teams can try to collect candidate information

for different types of jobs and fill talent pools. When headcount is approved and job requisitions are published, recruiters can invite candidates from talent pools to apply to certain vacancies.

4.2.1 Create Pipeline Job Requisition

Purpose

The Recruiter creates a pipeline job requisition to build the candidate pipelines and candidate pools that can be used for the company's ongoing talent acquisition.

The job requisition XML template provided within the SAP Best Practices solution has been configured to mark job requisitions as evergreen job requisitions.

An *Evergreen Requisition* is created to build a pool of candidates for critical positions within the organization. Typically, these are posted for a longer period and not linked to a specific position within the organization.

Evergreen requisition lets you pool potential candidates for positions that are critical and are hard to fill, or when many positions are available and require a permanent list of potential candidates. The requirements are more generic and not linked to a specific office location as an example.

In addition, the job requisition XML template provided within the SAP Best Practices solution has *Quick Apply* configured with all the necessary read or write permissions for the operators, such as the Recruiter. The Recruiter can mark the job requisition for quick apply.

Quick Apply allows candidates to complete a job application in the fewest clicks possible, without having to fill out a complete profile, by displaying one-page view for the account creation and application fields.

> ⚠ Caution
>
> Quick Apply is not supported for Internal Career Sites.

Procedure

> ⓘ Note
>
> In order to proceed as described below, preliminary step Choose Display Options for Job Requisitions [page 6] must have been executed.

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose ▶ *Home* ▶ *Recruiting* ▶ from the menu in the top left corner. Then choose the *Job Requisitions* tab.	The *Job Requisitions* screen is displayed.	
3.	**Create New Job Requisition**	Choose the *Create New* link and in the upcoming *Create New Job Requisition* screen, choose the *Pipeline Job Requisition* link. Then choose from *Options* the *Create New Job Requisition From Blank Template* link. Make following entries: **`<Job Title>`** and **`<Due Date>`** (using calendar help) Choose *Next*.	You are progressed to the *Job Title* screen.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
4.	**Maintain Job Requisition Fields**	On the *Job Title* screen, enter data in following mandatory fields describing the job requisition in more detail: **`<Job Code>`** (for this, choose *Update* and select from the dropdown the appropriate *Job Family*. Pay attention that when using JDM2.0, you need to have the *Manage Job Profile Builder* permissions), **`<Internal Job Title>, <External Job Title>, <Job Function>, <Level of Experience>, <Required Travel>, <Legal Entity>, <Business Unit>, <Division>, <Department>, <Cost Center>, <Hiring Manager>, <Recruiter>, <Location>, <Country/Region>`**. **Note** For some of the fields, such as *External Job Title*, and so on, you can choose to keep it same as internal value or enter a different value. When adding questions for applicants via choosing *Add more questions*, the question library can be browsed and the questions in the library can be selected. Questions can also be directly created on the requisition form. Make sure to mark appropriate questions as *Disqualifier*, if appropriate. Save your entries by choosing *Save* in the upper right side of the screen, then go to the *Job Profile* tab and maintain the **`Internal Job Description`** and **`External Job Description`** by choosing *Update* or *Same as Internal* (for *External Job Description*). Then, choose *Save*. **Note** If you do not use JDM2.0, you can maintain the **`Internal Job Description`** and **`External Job Description`** fields directly in the *Job Requisition Detail* tab by choosing *Update* or *Same as Internal* (for *External Job Description*).	The required data in the job requisition form have been maintained. In case the job requisition should be marked as evergreen requisition, continue with test step **#5**. Else, continue with test step **#6**.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
		Also, add competencies via choosing *Add more competencies*. These are needed for later candidate's assessment described in process step **Conduct Interview Evaluations, Ratings and Notes**. Then, choose *Save*. When done, choose *View Details* to go back to the *Job Requisition Detail* tab. **Note** You can either use the standard competency library or create your own competencies library. If you don't use JDM 2.0, you can add competencies via choosing *Add more competency* directly on the *Job Requisition Detail* tab, including expected rating and weight. Optionally, you can turn on the toggle button for field *Quick Apply*. **Note** Quick Apply allows external candidates to complete an application without needing to fill out a full profile thus saving time and effort.		
5.	**Make Job Requisition as Evergreen Job Requisition (Optional)**	Next to the *Evergreen Job Requisition* field, turn on the toggle button. Choose *Save and Close*.	You return to the *Job Requisitions* screen. In the *Job Requisition Type* column, the job requisition displays as `Evergreen`. When hovering the mouse over the newly created job requisition, the dialog box to the right will display *Requisition Actions* `Add Child Requisition`.	
6.	**Send Job Requisition to Next Processor**	Choose *Send to Next Step*. On the *Job Title* screen, choose again *Send to Next Step*.	The pipeline job requisition has been created and maintained by the recruiter. The job requisition can be posted accordingly.	

Result

Depending, if the job requisition has been marked as “evergreen” or not, continue in the process execution as follows:

- In case of a non-evergreen requisition, continue in the process execution with Advertise Job Requisition (Sub-Process) [page 52].
- In case of an evergreen requisition, you can add child requisitions before posting the requisition. In the assumption that standard job requisitions have already been created (meaning, **Create Job Requisition (Sub-Process)** has already been executed), continue in the process execution with process step Add Child Job Requisition to Evergreen Job Requisition (Optional) [page 50].

4.2.2 Add Child Job Requisition to Evergreen Job Requisition (Optional)

Purpose

The Recruiter adds child job requisitions to an Evergreen Job Requisition from the User Interface.

Single or multiple requisitions can be added as a child of an evergreen requisition. A child requisition can be associated with only one evergreen requisition. In turn, an evergreen requisition can have multiple child requisitions.

The requirements of an evergreen requisition are more generic and not linked to a specific office location. The child requisition will contain the detailed requirements, as well as the concrete job location.

> ⚠ Caution
>
> A pre-approved, deleted, closed, an evergreen, or a requisition that is a child to another evergreen requisition **cannot** be added as child requisitions! Only an approved job requisition can be linked as child.

Procedure

> ⓘ Note
>
> A child requisition can be linked to a posted evergreen requisition to which candidates have possibly applied already, a draft (not yet posted) evergreen requisition, or to an evergreen requisition, which has already other children. In the below procedure we consider that the evergreen job requisition has not been posted yet.

> **Note**
>
> In order to proceed as described below, preliminary step Choose Display Options for Job Requisitions [page 6] must have been executed.

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose *Home* > *Recruiting* from the menu in the top left corner. Then choose the *Job Requisitions* tab.	The *Job Requisitions* screen is displayed.	
3.	**Choose Evergreen Job Requisition**	Select the evergreen job requisition by hovering the mouse over the job title: a dialog box to the right will be displayed for *Requisition Actions*. Choose the *View or Edit Requisition* link.	The *Job Title* screen is displayed.	
4.	**Add Child Job Requisition**	Scroll to the *Child Requisitions* field and choose the *Add Child Requisitions* link.	The *Search to Add Child Requisitions* dialog box is displayed.	
		In the *Search to Add Child Requisitions* dialog box, enter search criteria and choose *Search*. **Note** You can also choose directly *Search*, then all applicable job requisitions will be listed.	The *Add Child Requisitions* dialog box is displayed, in which all job requisitions are listed, that could be defined as child requisitions of the evergreen job requisition.	
		In the *Add Child Requisitions* dialog box, flag the check box in front of the relevant requisition(s) and choose *Add*.	The `Save the evergreen job requisition to link the child and evergreen requisitions.` information message is displayed in the upper part of the *Add Child Requisitions* dialog box.	
		Choose *Close*.	You return to the *Job Title* screen, on which the linked child requisition is listed in the *Child Requisitions* field.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
5.	**Save Changes**	Choose *Save Changes*. Choose the *Job Requisitions* hyperlink to go back to the *Job Requisition* screen.	You return to the *Job Requisitions* screen. In the *Job Requisition Type* column, the job requisition linked to the evergreen job requisition displays as `Child of Evergreen`. In the *Parent Job Requisition ID* column, the ID of the evergreen job requisition selected in test step **#3** is displayed. The evergreen job requisition can be posted accordingly.	

> **Note**
>
> In case of an already posted evergreen job requisition you can directly add a child requisition by choosing in test step **#3** the *Select Add Child Requisitions* link.

> **Note**
>
> To unlink multiple child requisitions, choose on the *Job Title* screen the *View All Child Requisitions (#)* link. In the upcoming *Child Requisitions* dialog box, choose the *Unlink* link in the *Action* column. The *Link* and *Unlink* links are toggled based on the linking and unlinking of a requisition.

Result

Continue in the process execution with Advertise Job Requisition (Sub-Process) [page 52].

4.3 Advertise Job Requisition (Sub-Process)

Purpose

This sub-process refers to advertising job requisition via different posting channels. After the hiring manager and recruiter have aligned about the recruiting approach, the recruiter needs to post the job requisition such that candidates can apply. Multiple posting options exist, such as internal posting, external posting on career site (or external job boards), private internal posting, private external posting, and posting via recruiting agencies.

The Recruiter can opt to execute all subsequent process steps or only some of them, depending which posting channel is relevant for the concrete job requisition.

> ⚠ Caution
>
> New postings can take several minutes before they are returned in search results on the career sites.

4.3.1 Review Advertising Strategy (Process Step Outside Software)

Purpose

The Recruiter and the Hiring Manager align about the recruiting approach and decide on which channels the job requisition should be posted.

Procedure

This process step takes place outside the delivered software.

Result

After the alignment on the recruiting approach has taken place, the Recruiter posts the job requisition. He or she can execute some or all the below described process steps, depending on the decision taken with the Hiring Manager.

4.3.2 Check and Remove Internal Job Posting

Purpose

The Recruiter auto posts the job on the company's intranet, such that it will be visible only to the employees of the company.

The auto posting can be checked and edited or removed, if not required to be posted.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose ▶ *Home* ▶ *Recruiting* ▶ *Job Requisitions* ▶ from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	
3.	**Open Newly Created Job Requisition**	Select the newly created job requisition by hovering over the job title: a dialog box to the right will be displayed for *Requisition Actions*. Choose the *Job Postings* link.	The *Job Title* screen is displayed.	
4.	**Auto Post Job Internally**	On the *Job Title* screen, can view auto post, *Intranet Posting* with prefilled the **<Posting Start Date>** and **<Posting End Date>**.	The job requisition is auto posted on the internal site.	
5.	**Edited or Remove Auto Post Job Internally**	**<Posting Start Date>** and **<Posting End Date>** fields can be checked and edited or removed. and fields can be checked and edited or removed. Once edited the posting fields, choose *Post Job*. To remove, *Intranet Posting*, choose *Remove Post*.	The job requisition is reposted with new dates on the internal site or removed respectively.	

Result

The auto posting is edited and reposted with new posting dates such that it will be visible in the search results on the career sites only for employees of the company on new posting dates.

Or the auto posting is removed so its not visible to the employees of the company.

4.3.3 Post Job on External Career Site

Purpose

The Recruiter posts the job on the company's external career site, such that it will be visible to everyone accessing that site.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose ▶ *Home* > *Recruiting* > *Job Requisitions* ▶ from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	
3.	**Open Newly Created Job Requisition**	Select the newly created job requisition by hovering over the job title: a dialog box to the right will be displayed for *Requisition Actions*. Choose the *Job Postings* link.	The *Job Title* screen is displayed.	
4.	**Post Job Externally**	On the *Job Title* screen, enter for *Corporate Posting* the **`<Posting Start Date>`** and **`<Posting End Date>`**. Choose *Post Job*.	The job requisition is posted on the external site.	

Result

The external job posting will be visible in the search results on the career sites.

> **Note**
>
> Only if you have posted the job to both the intranet and corporate career sites, the employee can refer a candidate by using *Refer Friend to Job* in the career portal.

After posting the job on the External Career Site, you can choose to post the job to external Job Boards by continuing with process step Post Job to External Job Boards [page 56].

In case you use the *Recruiting Posting* module, after posting the job on the External Career Site, you can choose to post the job to Job Boards by continuing with process step Post Job to Job Boards (Optional) [page 57].

4.3.3.1 Post Job to External Job Boards

Purpose

The Recruiter posts the job to external job boards.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose *Home* > *Recruiting* > *Job Requisitions* from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	
3.	**Open Newly Created Job Requisition**	Select the newly created job requisition by hovering over the job title: a dialog box to the right will be displayed for *Requisition Actions*. Choose the *Campaign URL Builder* link.	The *Job Title* screen is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
4.	**Post Job to External Job Boards**	Choose the *Source Tracker* tab. Select the desired post type and source from the *Type* and *Source* dropdown list. **Note** The values available in the *Source* dropdown list are determined by the value chosen from the *Type* dropdown list. In the *Campaign Name* field, enter the custom campaign name. For example, to track jobs marketed as part of college recruiting, you could name the campaign **`Campus_Recruiting`**. The *Campaign URL* and *Campaign HTML Link* are generated automatically. Choose *Copy URL* to get the URL links for your follow-up processes. To create a short URL, select from the *Short URL* dropdown your preferred URL shortener (**`Bitly`** or **`Google`**), then choose *Generate Short URL*. To use the short link, choose *Copy URL*. You can share the URL via a social network. For this, choose *Share on LinkedIn*, *Share on Twitter*, *Share on Facebook*, or *Share on Xing*.	The job distribution URLs to global vendors and social networks are generated.	

4.3.3.2 Post Job to Job Boards (Optional)

Purpose

In case the *Recruiting Posting* module is used in the company and the job has been posted on the external site, the Recruiter can post the job to external job boards.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose ▶ *Home* ▶ *Recruiting* ▶ *Job Requisitions* ▶ from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	
3.	**Open Newly Created Job Requisition**	Select the newly created job requisition by hovering over the job title: a dialog box to the right will be displayed for *Requisition Actions*. Choose the *Job Postings* link.	The *Job Title* screen is displayed.	
4.	**Post Job to Job Boards**	Select in the *Job Board Posting - Recruiting Posting* section, choose *Post and Manage Jobs*. On the *Job postings / Post a job* screen, choose the posting profile you want to post the job for, and choose *Next*. **Note** In case you have only one posting profile assigned to your user, you will not see the profile selection screen. Continue with the next activity. On the *Select job boards* screen, flag the check box(es) of the job board(s) you want to post the job for, and choose *Next*. On the *Complete specific fields* screen, maintain the required fields in the *Company profile* and *Common fields* sections. Flag the appropriate checkboxes in the *<job board(s)>* you have selected. When done, choose *Next*. On the *Review your posting* screen, check the job posting information. If the maintained data is correct, choose *Submit*.	The job requisition has been posted to job board(s) using Recruiting Posting functions.	

4.3.4 Post Job Private Internal

Purpose

The Recruiter performs a private internal posting of the job. This means that the job posting will not return in the search results but will have a custom-created URL that can be sent out to internal applicants via email or copied and pasted elsewhere and be accessible to selected potential internal applicants only.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose ▶ *Home* > *Recruiting* > *Job Requisitions* ▶ from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	
3.	**Open Newly Created Job Requisition**	Select the newly created job requisition by hovering over the job title: a dialog box to the right will be displayed for *Requisition Actions*. Choose the *Job Postings* link.	The *Job Title* screen is displayed.	
4.	**Post Job Private Internal**	On the *Job Title* screen, enter for *Internal Private Posting* the **<Posting Start Date>** and **<Posting End Date>**. Choose *Post Job*. Choose the paper-clip icon next to *Internal Private Posting* to get the URL.	The job requisition is posted privately.	

Result

You can send the URL link to internal candidates.

4.3.5 Post Job Private External

Purpose

The Recruiter performs a private external posting of the job. This means that the job posting will not return in the search results but will have a custom-created URL that can be sent out to external applicants via email or copied and pasted elsewhere and be accessible to selected potential external applicants only.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose *Home* > *Recruiting* > *Job Requisitions* from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	
3.	**Open Newly Created Job Requisition**	Select the newly created job requisition by hovering over the job title: a dialog box to the right will be displayed for *Requisition Actions*. Choose the *Job Postings* link.	The *Job Title* screen is displayed.	
4.	**Post Job Private External**	On the *Job Title* screen, enter for *External Private Posting* the **<Posting Start Date>** and **<Posting End Date>**. Choose *Post Job*. Choose the paper-clip icon next to *External Private Posting* to get the URL.	The job requisition is posted privately.	

Result

You can send the URL link to external candidates.

4.3.6 Post Job to Agency

Purpose

The Recruiter posts the job on recruiting agency portals.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose *Home* > *Recruiting* > *Job Requisitions* from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	
3.	**Open Newly Created Job Requisition**	Select the newly created job requisition by hovering over the job title: a dialog box to the right will be displayed for *Requisition Actions*. Choose the *Job Postings* link.	The *Job Title* screen is displayed.	
4.	**Post Job to Agency**	Choose *Add Agencies*. In the upcoming *Add Agency Listings* dialog box, the available agencies are listed. Use the check boxes to select which agencies will be able to view and post candidates to the requisition. Enter the *Start Date* and *End Date* the agency may view the requisition. Choose *Post Jobs* to post the requisition to the agency portal.	The job requisition has been posted to the agency.	

4.4 Perform Talent Search (Sub-Process)

Purpose

Once the job requisition is posted, the Recruiter and Sourcing Recruiter search in the company's talent pool for the best candidates that fit to the job profile, which then can be assigned to the job requisition.

This sub-process refers to utilizing existing talent pools of already registered candidates in the system or external candidate pools. After appropriate candidates have been identified, the recruiter needs to reach out to them, verify if they are interested and invite them to apply to the posted job.

4.4.1 Review Job Requisition Type

Purpose

The Recruiter checks if the job requisition is a standard requisition, an evergreen requisition, or the child of an evergreen requisition. Based on the type of the job requisition, different steps of assigning candidates to the job requisition will be performed.

Procedure

> **Note**
>
> In order to proceed as described below, preliminary step Choose Display Options for Job Requisitions [page 6] must have been executed.

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose *Home* > *Recruiting* > *Job Requisitions* from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Check Job Requisition Type**	Check for the job requisition, to which you want to assign candidates, the value displayed in the *Job Requisition Type* column.	The *Job Requisition Type* is either `Evergreen`, or `Standard` or `Child of Evergreen`.	
4.	**Check Candidates for Evergreen Job Requisitions**	For the job requisition type `Evergreen`, check in the *Candidates* column, if there are already applications submitted.		

Result

Continue in the process execution as follows:

- If the *Job Requisition Type* of the job requisition is `Evergreen`, and applications have already been submitted for this job, stay on the *Job Requisitions* screen and continue in the process execution with process step Assign Candidates from Related Evergreen Job Requisition [page 63].
- If the *Job Requisition Type* of the job requisition is `Standard` or `Child of Evergreen`, continue in the process execution as follows:
  - In case **no Sourcing Recruiter is needed**, continue with process step Assign Candidates from Talent Pool [page 65].
  - In case a **Sourcing Recruiter is needed**, continue with process step Search and Assign Candidates from Talent Pool [page 66] and subsequent.

4.4.2 Assign Candidates from Related Evergreen Job Requisition

Purpose

The Recruiter checks if the candidates, who applied to an evergreen job requisition, can be assigned to the job requisition, which is a child of the evergreen job requisition.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Go to List of Candidates of Evergreen Requisition**	On the *Job Requisitions* screen, hover over the *<job title>* link of the evergreen job requisition. From the dialog box displaying to the right, choose *Candidate Actions* > *Candidate Summary*.	You are directed to the *<Job Title> (<Requisition ID>)* screen, on which the *CANDIDATES* tab displays per default. It contains the list of all candidates who have applied to the evergreen job requisition.	
2.	**Open Candidate Application Details**	To view the candidate's details, choose the candidate's name.	A summary view of the candidate is displayed containing information, such as: • Whether the candidate is internal or external • Name and contact information • Cover Letter and Resume, if submitted • Profile data, if maintained • Application information • Jobs, he or she has applied for • Email correspondence so far between candidate and hiring company • Screening details, if available.	
3.	**Open** *Forward As Applicant* **dialog box**	View the application details. In case you are of the opinion that the candidate is suitable for the evergreen child requisition, choose on the upper right of the summary view *More Actions for <candidate name>* > *Forward* > *Forward as Applicant*.	The *Forward As Applicant* dialog box displays, containing search fields.	
4.	**Assign Candidate to Child of Evergreen Requisition**	Flag the checkbox in front of the child job requisition and choose *Next*, then choose *Forward*.	The success message `1/1 candidates successfully forwarded.` displays in the *Forward As Applicant* dialog box.	
5.	**Close dialog box**	Choose *Close*.	You return to the candidate summary view page, in which the linked child requisition is listed in the *Jobs Applied* section.	

Result

An automatic confirmation of having received this application is sent out by the system via email to the forwarded candidate.

On the *Job Requisitions* screen, the forwarded candidate displays in the *Candidates* column of the `Child of Evergreen` job requisition.

In the Talent Pipeline of the linked child requisition, the forwarded candidate will be in status *New Application*. In the candidate summary view page, the candidate is marked as being forwarded as applicant. In the *Jobs Applied* section, the job requisition from which the candidate was forwarded as an applicant is marked accordingly.

Continue in the process execution as follows:

- In case **no Sourcing Recruiter is needed**, continue with process step Assign Candidates from Talent Pool [page 65].
- In case a **Sourcing Recruiter is needed**, continue with process step Search and Assign Candidates from Talent Pool [page 66] and subsequent.
- As **Candidate**, continue with Candidate Experience (Sub-Processes Bundle) [page 74].

4.4.3 Assign Candidates from Talent Pool

Purpose

The Recruiter searches in the company's talent pool for the best candidates that fit to the job profile and assigns them to the posted job requisition.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose *Home* > *Recruiting* from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Access Talent Pool**	Choose the *Candidates* tab and then choose the *TALENT POOLS* tab.	The *Talent Pools (#)* screen is displayed.	
4.	**Access Talent Pool Candidate List**	Choose the appropriate talent pool by choosing the corresponding *<Talent Pool Name>* hyperlink.	The *Candidates* screen is displayed.	
5.	**Forward Candidate**	Choose in the *Candidate Status* pipeline the status according to your requirement. In the candidate list table that displays below, choose the candidate(s) who is suitable for the job by flagging the checkbox in front of the *Candidate ID*. Then choose the *Forward Selected to Job Requisitions* hyperlink. In the upcoming *Forward to Requisitions* dialog box, enter in the *Req ID* field the ID of the job requisition created in process step *Create Job Requisition*, then choose *Search*. In the upcoming *Forward* dialog box, choose **`New Application`** for *Add the candidate(s) to the selected job requisition(s) and set the application status to*. For the job requisition you want to assign the candidate to, flag the checkbox in front of the *Job Title*. Then choose *Forward to Selected*.	A success message is displayed. The selected candidates have been forwarded to the job requisition. An appropriate email notification has been sent out to them.	

4.4.4 Search and Assign Candidates from Talent Pool

Go back to *Add Candidates to Talent Pool* [page 12]

Go back to *Add Candidates to Email Campaign* [page 16]

Purpose

The Sourcing Recruiter searches, by using tags and other key fields, in cover letters and resumes, for possible candidates. In the eventuality of a successful search, the Sourcing Recruiter will assign the potential candidates to the posted job requisition.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Sourcing Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose *Home* > *Recruiting* > *Job Requisitions* from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	
3.	**Access Candidate Search**	Select the job requisition created in process step *Create Job Requisition* by hovering over the job title: a dialog box to the right will be displayed for *Candidate Actions*. Choose the *Search For Candidates* link.	The *Search for Candidates: <Job Title>* screen is displayed.	
4.	**Search Candidate**	You can search the candidates by name, by keyword and item, or by tag. These possibilities are detailed below.	Continue with test step **#4a**, **#4b**, or **#4c**. Then continue with test step **#5**.	
4a.	**Search Candidate by Name**	Type the candidate's name in the *Search by Name / Search by Candidate ID* text box.	If a candidate with the name you entered exists, his or her candidate profile is displayed automatically.	
4b.	**Search Candidate by Keyword and Item**	Select an appropriate value from the *Candidate type* dropdown. Select the type of key words from the *Resume or cover letter contains the following* dropdown, and then type the key words as per your requirement. **Note** You can search for exact phrases, any or all of keywords to match, or a keyword Boolean string. If you want to search in more criteria, choose the categories in the *Add:* row, for example, *Basic Info / Background / Activity / Any of / Job Requisition ID*, and then choose the detailed items, for example *Outside Work Experience* within *Background*. Then the new criteria are added to the screen. You can select your own conditions accordingly. Choose *Search*.	If candidates who meet the entered criteria are found, a *Search Results* dialog box is displayed, to show the number of results that matches.	
		In the *Search Results* dialog box, choose *Accept*.	The search result list is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
4c.	**Search Candidate by Tag**	**Note** Before you search by Tag, the candidates' tag information must be maintained first. This can be done by the Recruiter in the candidates' Candidate Profile, *Tags* block. Choose *Tag* in the *Add:* row and select the tag you need in the upcoming dialog box, then choose *Done*. Choose *Search*.	If candidates who meet the entered criteria are found, a *Search Results* dialog box is displayed, to show the number of results that matches.	
		In the *Search Results* dialog box, choose *Accept*.	The search result list is displayed.	
5.	**Check Candidate**	In case you have searched the candidate by name, review the candidate's profile and choose the *<Candidate Name>'s Resume* hyperlink to check if the candidate is suitable for your job requisition. In case you have searched the candidate by "Keyword and Item" or by "Tag", choose the *Resume* hyperlink to review and check if the candidate is suitable for your job requisition. You can also choose the candidate's name to review and check his or her candidate profile. Repeat this activity till all the candidates in the search result list are checked.	The potential candidates have been checked.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
6.	**Forward Candidate**	In case you have searched the candidate by name, choose *Forward to Requisition* in the bottom right corner of the searched candidate profile. In the upcoming *Forward Candidates* dialog box, choose **`New Application`** for *Add the candidate(s) to the selected job requisition(s) and set the application status to*. Choose *Forward* and *OK* to confirm the message that returns. In case you have searched the candidate by "Keyword and Item" or by "Tag", flag the checkbox(es) in front of the candidate(s) you searched out, and choose the *Forward Selected to Job Requisition* hyperlink. In the upcoming *Forward Candidates* dialog box, choose **`New Application`** for *Add the candidate(s) to the selected job requisition(s) and set the application status to*. Choose *Forward* and *OK* to confirm the message that returns.	The selected candidates have been forwarded to the job requisition. An appropriate email notification has been sent out to them.	
7.	**Check Candidate**	Choose the *Job Requisition* tab to go back to the job requisition screen. Choose the *CANDIDATES (No. of candidate)* tab. In the *Applicant Workbench* choose *Status and Filers*, choose the *New Application* status.	The forwarded candidate appears in the status *New Application*.	

4.4.5 Assign Candidates from Mass Uploaded Resumes and/or Bulk Created Candidates (Optional)

Go back to *Add Candidates to Talent Pool* [page 12]

Go back to *Add Candidates to Email Campaign* [page 16]

Purpose

The Sourcing Recruiter searches in the company's candidate pool for the best candidates that have been entered into the system via mass uploaded resumes or uploaded via a csv file. The Sourcing Recruiter then assigns the candidates to the posted job requisition.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Sourcing Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose *Home* > *Recruiting* from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	
3.	**Access Candidate Search**	Select the job requisition created in process step *Create Job Requisition* by hovering over the job title: a dialog box to the right will be displayed for *Candidate Actions*. Select the *Search For Candidates* link.	The *Search for Candidates: <Job Title>* screen is displayed.	
4.	**Search Candidate by Batch Name**	Choose category *Activity* in the *Add:* row, then choose *Created via Bulk Upload*. In the *and Batch Name* box, choose the batch name from the list that you entered in preliminary step *Mass Upload of Resumes* or *Bulk Creation of Candidates via .CSV File*. Choose *Search*.	If candidates who meet the entered criteria are found, a *Search Results* dialog box is displayed, to show the number of results that matches.	
		In the *Search Results* dialog box, choose *Accept*.	The search result list is displayed.	
5	**Check Candidate**	Choose the *Resume* hyperlink (if existing) of the listed candidate to review and check if the candidate is suitable for your job requisition. You can also choose the candidate's name to review and check his or her candidate profile. Repeat this step till all the candidates in the search result list are checked.	The potential candidates have been checked.	
6.	**Forward Candidate**	Flag the checkbox(es) in front of the candidate(s) you searched out and choose the *Forward Selected to Job Requisition* hyperlink. In the upcoming *Forward Candidates* dialog box, choose *New Application* for *Add the candidate(s) to the selected job requisition(s) and set the application status to*. Choose *Forward* and choose *OK* to confirm the message that returns.	The selected candidates have been forwarded to the job requisition and then received email notification.	
7.	**Check Candidate**	Choose the *Job Requisition* tab to go back to the job requisition screen. Choose the *CANDIDATES (No. of candidate)* tab. In the *Applicant Workbench* choose *Status and Filers*, choose the *New Application* status.	The forwarded candidate appears in the status *New Application*.	

4.4.6 Run Candidate DB Search in RMK and Search Through Other Channels (Optional Sub-Process)

Purpose

In case the Sourcing Recruiter cannot find proper candidates from the company's talent pool, he or she may need to perform further candidate search by running candidate database in RMK or search through other channels.

4.4.6.1 Search Candidate in Recruiting Dashboard

Purpose

The Sourcing Recruiter searches for proper candidates using the *Recruiting Dashboard*.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Sourcing Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose *Home* > *Recruiting* from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	
3.	**Access Recruiting Dashboard**	Choose the *RMK Dashboard* link on the top right of the screen.	The *Recruiting Dashboard* screen is displayed.	
4.	**Search Candidate**	You can search the candidates by keyword, by visitors, members or by applicants. These possibilities are detailed below.	Continue with test step #4a, #4b, #4c, or #4d. Then continue with test step #5.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
4a.	**Search Candidate by Key Words**	On the *Home* tab, under the *Search Your Talent Community* area, type the keywords as per your requirement and choose *Search Now*.	The search result list is displayed.	
4b.	**Search Candidate by Visitors**	Choose the *Visitors* tab, limit the filtering criteria, such as *Visit Date*, *Referrer Type*, *Referrer Engine*, *Country/Region*, *Keyword*, *Source* or *Campaign*, then choose *Go*.	The search result list is displayed.	
4c.	**Search Candidate by Members**	Choose the *Members* tab, limit the filtering criteria, such as *Date Added*, then choose *Search*.	The search result list is displayed.	
4d.	**Search Candidate by Applicants**	Choose the *Applicants* tab, limit the filtering criteria in *Source View*, *Recruiter View*, or *Groups View*, then choose *Go*.	The search result list is displayed.	
5.	**Review Candidate**	In the search result list, choose the candidate's name to review the candidate's detailed information. Decide who is suitable for the job and take a note of their contact information.	You can contact the candidate(s) by mail or phone to verify if they are interested in the job.	

4.4.6.2 Search Candidate Through Other Channels (Process step Outside Software)

Purpose

In case no suitable candidate(s) have been found so far, the Sourcing Recruiter searches candidates through other channels.

Procedure

This step takes place outside the delivered software and will therefore be described briefly.

Search candidate through your own channels. When proper candidate(s) are identified, contact the candidate(s) by mail or phone to verify if they are interested in the job.

4.4.6.3 Add Suitable Candidate to Job Requisition

Purpose

The Sourcing Recruiter adds suitable candidate(s), who have been found during the search, manually to the specific job requisition.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors Company* instance as *Sourcing Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose *Home* > *Recruiting* from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	
3.	**Access Candidate Search**	Select the job requisition created in process step **Create Job Requisition** by hovering over the job title: a dialog box to the right will be displayed for *Candidate Actions*. Select the *Add Candidate* link.	The *Search for Candidates: <Job Title>* screen is displayed.	
4.	**Open Add Candidate Screen**	On the *Search for Candidates: <Job Title>* screen, choose the *Add Candidate* link and then choose *Add a Single Candidate*. In the upcoming *Add Candidate* dialog window, make following entries: **`<First Name>`**, **`<Last Name>`**, **`<Email>`**, **`<Retype Email Address>`**, **`<Phone>`**, **`<Country/Region>`** Choose *Create Profile*.	The external candidate is added to the recruiting candidate database. The candidate will be notified by email that he or she can log on to the web site to update the profile, and to search and apply for jobs. The status of the candidate in the Talent Pipeline is *Forwarded*.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
5.	**Maintain External Candidate Profile (optional)**	In the upcoming *<Candidate Name>* window, you can complete the profile of the external candidate. **Note** You can skip this step and ask the external candidate to complete the profile by themself.	The external candidate profile has been maintained.	

Result

After potential candidates have been assigned to job requisitions, they can apply for the job.

Also, interested persons can search for jobs in the company and apply. This is detailed in Candidate Experience (Sub-Processes Bundle) [page 74].

4.5 Candidate Experience (Sub-Processes Bundle)

Purpose

This bundle of sub-processes refers to the candidates who apply for the openings posted in the different posting channels.

The application procedure to be executed by the employees of the company (the so-called internal candidates) and the candidates coming from outside the company differs and will be described separately.

4.5.1 Internal Candidate Experience (Sub-Process)

Purpose

This sub-process describes the procedure to be followed by the Internal Candidate (active employee of the company) when searching for open jobs posted on the internal career site, maintaining the own candidate profile, applying to job(s) of interest, and referring job(s) to friend(s).

4.5.1.1 Access Career Opportunities Site and Review Job Postings

Purpose

The Employee (Internal Candidate) searches for open job postings on the internal Career Site.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Access Career Site**	Log on to **SAP SuccessFactors Company** instance as *Employee*. Choose *Home* > *Careers* from the menu in the top left corner.	The *Career Opportunities* screen is displayed.	
2.	**Maintain Search Criteria**	On the *Career Opportunities* screen, enter data as needed to search through the posted jobs, for example: **<Job Function>** **<Level of Experience>** **<Job Location (Country/Region)>** Choose *Search Jobs*.	The list of internally posted jobs, matching your search criteria, is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**View Job Details**	View details of the job by choosing the appropriate *<job title>* link.	The details of the posted job are displayed.	

Result

If after viewing the details of the posted job, the Employee finds the job interesting, he or she can apply for the job. Continue in the process execution with process step Complete Candidate Profile and Submit Application [page 76] and subsequent.

> ⓘ Note
>
> The Employee can also refer the job to a friend (described in process step Refer Job to Friend (Optional) [page 83]) or add a friend from outside the company to the candidate pool (described in process step Add Referral (Optional) [page 85]).

4.5.1.2 Complete Candidate Profile and Submit Application

Purpose

Employees can directly apply to jobs posted on the Internal Career Site without creating an additional account. However, to apply for a job, the employee needs to complete their candidate profile, which will be used in the job application processes. Once the candidate profile has been completed, the Employee can apply for the open jobs posted on the Career Site.

> ⓘ Note
>
> The Employee can also decide to save the candidate profile and apply later for the job. In this case, this process step would be split into two process steps *Complete Candidate Profile* and *Apply for Job*.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Access Career Site**	Log on to **SAP SuccessFactors Company** instance as *Employee*. Choose ▶ *Home* > *Careers* ▶ from the menu in the top left corner.	The *Career Opportunities* screen is displayed.	
2.	**Select Job to Apply**	On the *Career Opportunities* screen, choose *Search Jobs* to find the job you want to apply for. In the search result list, choose *Select Action* next to the job requisition of interest, and from the dropdown, which expands, select *Apply*.	The *My Candidate Profile* screen is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Complete Candidate Profile**	In the *Upload Resume* window, choose *Choose File*, add the Resume file from your local disk and choose *Upload*. An acceptance message displays showing that the resume is successfully parsed and information from the uploaded resume has been parsed into the designated candidate profile fields. **Note** If an error about standardized mapping for resume parsing occurs, you can confirm the message and continue the process. Since client instances are highly configurable, some third-party sources may map to standardized fields. If these features are not in use, the standardization mapping does not need to be performed. For internal candidates, most fields in the Candidate Profile are derived automatically from fields in the Employee Profile, for example, *Email*. The data will be prepopulated in the candidate profile if the information is maintained in the employee profile. If you change these fields in the Candidate Profile, the corresponding field data in the Employee Profile will be changed accordingly. Check the candidate profile fields that have been parsed from the resume and fill in all required fields and other additional fields, if necessary. Pay attention to maintain the *Country/Region* field. In addition, flag the *Send me SMS notifications* checkbox right below the *Phone* field in case you allow SMS notification to be sent to your mobile phone. Upload, for example, the *Cover Letter*. **Note** You can also maintain all candidate profile fields manually without uploading a CV. Flag the *Hear more about career opportunities* checkbox as per your own requirements.	The *Apply <Job Title> (<Requisition ID>)* screen is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
		Note Flagging *Hear more about career opportunities* means you agree to opt in to email campaigns. You will not receive any campaign emails unless you flag this checkbox. When done, choose *Next*.		
4.	**Apply for Job**	Confirm the *Click to view Internal Transfer Guidelines* and answer the questions required for submitting the application. Then choose *Apply*.	You have applied for the job. A success message is displayed by the system and an automatic confirmation of having received this application is sent out by the system via email. Your application has been moved in the Talent Pipeline to status *New Application*. **Note** You have the possibility to go back to the job search page to search for further jobs, or return to the jobs you have applied.	

Result

The process execution continues with the automated process step Start Automated Screening of Application [page 80].

As **Internal Candidate** you can set up alerts to receive new job posting notifications. In this case, continue in the process execution with process step Create Job Alert (Optional) [page 80].

4.5.1.2.1 Start Automated Screening of Application

Purpose

After the employee (internal candidate) has applied to a job, the system starts the automated screening of the submitted application.

Procedure

This is an automated step, and no manual execution is required.

Result

If the internal candidate's answers toward the pre-screening questions, which are marked as *Disqualifiers*, meet the pre-defined requirements, the application will be processed and the employee will be part of the Select Candidate (Sub-Processes Bundle) [page 102].

If the internal candidate's answers toward the prescreening questions, which are marked as *Disqualifiers*, do not meet the pre-defined requirements, the internal candidate will fail the prescreen. The application will be placed automatically by the system into *Automatically Disqualified* .

4.5.1.3 Create Job Alert (Optional)

Purpose

The Employee sets up saved searches, such that they can easily re-use search criteria. The Employee then sets up these saved searches as job alerts to get informed whenever new jobs are posted that match their interests.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Access Job Alerts**	Log on to **SAP SuccessFactors Company** instance as *Employee*. Choose *Home* > *Careers* from the menu in the top left corner. Choose the *Saved Searches/Alerts* tab.	The *Job Alerts* screen is displayed.	
2.	**Create New Job Alerts**	Choose *Create New Job Alert*. In the upcoming *Create New Job Alert* dialog box, enter the following data: *Name of Saved Search/Alert*: give a name to the saved search/alert *Email me*: select the sending frequency of the notification email, for example `Daily` *Send email only when new jobs are available*: flag checkbox Enter criteria for searching the new job requisition, such as *Keywords*, *Job Language*, *Posted within the last <no.> days*, *Requisition Number*, *Job Function*, *Level of Experience*, *Job Location (Country/Region)*, and *Job Location (region)*, *Required Travel* . Choose *Save*.	Job alerts have been created. A background job will run automatically per the defined frequency. If a new job requisition is posted, which meets the defined criteria, the notification email will be sent automatically to the employee.	

Result

As **Internal Candidate** you can manage the job applications you have submitted so far. Continue in the process execution with process step Manage Job Applications (Optional) [page 81].

4.5.1.4 Manage Job Applications (Optional)

Purpose

The Employee manages the submitted job applications on the Career Site.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Access Career Site**	Log on to **SAP SuccessFactors Company** instance as *Employee*. Choose *Home* > *Careers* from the menu in the top left corner. Choose the *Job Applications* tab. **Note** Alternatively, stay on the *Home* page, and in the *Job Applications* card within the *For You Today* section, choose *My Applications*. **Note** In case there are several jobs you have applied for, the *View All* link will be displayed in the *Job Applications* card. Choose that link; in the upcoming dialog box, choose *My Applications* in the appropriate *Job Applications* card.	The *Job Applications* screen is displayed, containing the *Jobs Applied* table.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
2.	**Manage Job Applications**	On the *Jobs Applied* screen, you can see the status of your application and what the next steps are. **Note** Candidates may also withdraw their application, if desired, by selecting in the *Actions* column the *Select* dropdown and from there the *Withdraw Application* option. **Note** If the system is configured to allow application updates after submission, you may access the application from this screen to make any necessary additions/modifications. Proceed as follows: • In the *Actions* column, choose from the *Select* dropdown *View /Edit Application and Add Attachment*. • Make any necessary additions/modifications or add attachments if needed. • Choose *Update*. **Note** Alternatively, you can stay on the *Home* page and in the *Job Applications* card within the *For You Today* section, choose the *View Details* link for your application, make any necessary additions/modifications or add attachments, if needed. Then choose *Update*.	The Internal Candidate has viewed the status of their application(s) and has adapted the job application(s), as necessary.	

4.5.1.5 Refer Job to Friend (Optional)

Purpose

The Employee refers a certain job posting to a friend outside the company.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Access Career Site**	Log on to **SAP SuccessFactors Company** instance as *Employee*. Choose *Home* > *Careers* from the menu in the top left corner.	The *Career Opportunities* screen is displayed.	
2.	**Refer Friend to Job**	On the *Career Opportunities* screen, choose *Search Jobs* to display all open job requisitions. From the *Select Action* dropdown next to the job requisition of interest select *Email this job to a friend*. Fill out the fields in the *Mail Job to Friend* dialog box: **`<Your friend's name:`**, **`Your friend's email address:`**. Choose *Send*.	An email was sent to the referral. **Note** The system checks automatically if the candidate is already registered. If the candidate already exists in the system, he or she will receive an email notification `Employee Referral Notification Existing Candidate`. If the candidate is new in the system, he or she will receive an email `Employee Referral Notification New Candidate`.	

Result

The email sent to the referral contains the access for applying to the job.

As **Referral** open the link and follow the activities performed by an **External Candidate** as described insubprocess *External Candidates*. When you access for the first time the career site via the referral link, you need to reset your password and accept the data privacy consent statement.

4.5.1.6 Add Referral (Optional)

Purpose

The Employee adds a friend from outside the company to the candidate pool as a general referral submission, not for a specific job posting.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Access Career Site**	Log on to **SAP SuccessFactors Company** instance as *Employee*. Choose *Home* > *Careers* from the menu in the top left corner.	The *Career Opportunities* screen is displayed.	
2.	**Access Referral Tracking**	Go to the *Referral Tracking* tab on the upper right part of the screen.	The *Referral Tracking* screen is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Add a Referral**	Choose *Add a Referral!*. Fill out the fields in the *Add Referral* dialog box: **<First Name>**, **<Last Name>**, **<Email>**, **<Phone>**, **<Country/Region>**. Choose *Send*. **Note** If the email address already exists in the system, adding a general referral is not allowed. This is a way to add a candidate to the system; if they already exist, you will be prompted to refer them to a job. If the candidate does not exist, an external account is created with his or her email address. The referral becomes searchable in *Candidate Search* and will receive an email informing him/her that he/she has been added via *Employee Referral*. The email contains the referral's username and a URL where the referral can set the password. Once the password is set, the referral lands on the job page of the external career site to search and apply for jobs.	The email for general submission was sent to the referral. The referral was added to the general candidate pool.	

Result

The employee can track the referred candidates he or she has added to the pool. For more details, refer to section Referral Tracking [page 171] of this document.

4.5.2 External Candidate Experience (Sub-Process)

Purpose

This sub-process describes the procedure to be followed by the External Candidate when applying for jobs, which are posted externally. The external career site is supported by RMK.

To apply for a certain job, external candidates need to create a candidate profile and either go through a regular application or “one-click” application if quick apply is enabled.

> ⓘ Note
>
> There are multiply ways to access the External Career Site supported by RMK, for example, from search engines, such as Google, from social networks, such as Twitter, from job boards or from URL link in email (for example, Employee Referral), depending on different business cases. In this document, to make it straight forward to test, we provide the direct URL link of the external career site for you to access.

4.5.2.1 Access External Career Site, Review Job Postings, and Choose *Apply*

Purpose

The External Candidate searches for open job postings on the external Career Site.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Access Career Site**	Access the External Career Site via following link directly: `https://<sitename>.valhalla.stage.jobs2web.com`	The company’s *Career Site* is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
2.	**Select Language**	On the top right corner of the screen, select from the *Language* dropdown list your preferred log in language.	The language of the screen changes accordingly.	
3.	**Maintain Search Criteria**	In the middle of screen, enter in the *Search by Keyword* field keywords of the job you are interested in, then choose *Search Jobs*.	You receive a list of externally posted jobs.	
4.	**View Job Details**	View details of the job by selecting the name of the job.	The details of the posted job are displayed.	
5.	**Apply for Job**	If you are going to apply for the job, choose *Apply now*.	Depending, if the job requisition is enabled for quick apply or not, different screens display: • If the **job requisition** is **enabled** for **quick apply**, the *Career Opportunities: <Job Title> (<Requisition ID>)* screen displays. It contains account creation fields and application fields arranged in a logical order that helps you to fill out the details. This feature allows you to complete a job application in the fewest clicks possible, without having to fill out a complete profile, by displaying one-page view for the account creation and application fields. • If the **job requisition** is **not enabled** for **quick apply**, the *Career Opportunities: Sign In* screen displays.	

Result

Stay on the screen to continue as follows:

- If you are a new candidate, who has no user account on the external career site yet, then
  - if the **job requisition** is **not enabled** for **quick apply**: execute process step Create Account and Agree to Data Privacy [page 89], followed by process step Complete Candidate Profile and Submit Application [page 91], or
  - if the **job requisition** is **enabled** for **quick apply**: execute process step Complete Reduced Candidate Profile and Submit Application [page 94].
- If you have already a user account on the external career site, then, no matter if the job requisition is enabled or not for quick apply, execute process step Sign In, Update Candidate Profile, and Submit Application [page 96].

4.5.2.2 Create Account and Agree to Data Privacy

Purpose

An External Candidate, who is not yet registered on the external career site of the company, needs to create an account and agree to the data privacy statement.

> ⓘ Note
>
> This is a one-time activity the External Candidate needs to execute.

> ⚠ Caution
>
> For a candidate, who has been added to the company's candidate database either via mass upload of resumes or bulk creation via csv file, an account has been automatically created upon successful mass upload or bulk creation. This candidate has already received an email notification with login details to the company's career site and needs to reset the initial password.

Procedure

New external candidate creates account

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Create Account**	On the *Career Opportunities: Sign In* screen, choose the *Create an account* link. **Note** This **Note** is valid for scope item *Recruiting with Integration to Position Management and Onboarding (3EK)* only, and in the assumption that you will be the successful candidate for the job requisition! The language you have selected in process step **Access External Career Site, Review Job Postings, and Choose** *Apply*, will be the language in which the account is created. It will also be the language of the system, for which you get limited access prior to the first day at work for submitting the data required for completing the hiring task.	The *Career Opportunities: Create an Account* screen is displayed.	
2.	**Enter Account Information**	Fill out the fields: **`<Email Address>`**, **`<Retype Email Address>`**, **`<Choose Password>`**, **`<Retype Password>`**, **`<First Name>`**, **`<Last Name>`**, **`<Country/Region of Residence>`** Flag the *Notification: Receive new job posting notifications* and *Hear more about career opportunities* checkboxes as per your own requirements. **Note** Flagging *Hear more about career opportunities* means you agree to opt in to email campaigns. You will not receive any campaign emails unless you flag this checkbox.		
3.	**Accept Data Privacy Statement**	Choose the *Read and accept the data privacy statement* link. In the upcoming *Data Privacy Consent Statement* dialog box, read the data privacy consent statement and choose *Accept*.	After accepting the data privacy statement, you are allowed to create an account on the career site.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
4.	**Create Account**	Choose *Create Account*.	The user account has been created and you are automatically logged on to the career site. The *<Job Title> (<Requisition ID>)* screen for completing the candidate profile and application form for the selected job displays. Stay on this screen to continue with process step Complete Candidate Profile and Submit Application [page 91].	

Candidate created via mass upload or bulk csv resets password

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Access Password Reset**	In the email having subject *You have been entered into the recruiting candidate database*, choose the *Password* hyperlink.	The *Career Opportunities : Password Reset* screen is displayed.	
2.	**Set Password**	Enter your password in the **<New Password>** and **<Retype New Password>** fields. Then choose *Submit*.	Your password has been set.	
3.	**Sign in the Career Site**	On the *Career Opportunities: Password Reset* screen, choose *Sign In*. Enter your **<Email Address>** and **<Password>**, and choose *Sign In*. In the *Data Privacy Consent Statement* dialog box, choose *Accept*.	You have signed into the career site. Stay on this screen to continue with process step Complete Candidate Profile and Submit Application [page 91].	

4.5.2.3 Complete Candidate Profile and Submit Application

Purpose

The External Candidate maintains their candidate profile and submits the job application.

Procedure

> **Note**
>
> It is assumed that the External Candidate did not sign out from the *Career Site* but stayed on the *<Job Title> (<Requisition ID>)* screen.

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Complete Candidate Profile**	On the *<Job Title> (<Requisition ID>)* screen for completing the candidate profile and application form for the selected job, expand the *My Documents* section and choose the *(+)* icon in the *Resume/CV* box to add your resume/CV. You can choose to upload the file from your local device, Dropbox, or Google Drive. **Note** In case your candidate profile was created via mass upload of resume, your resume has already been stored in the instance, and you don't need to upload it again. **Note** When successfully uploaded, information from the resume is automatically parsed into the designated candidate profile fields. If appropriate, you can also attach a cover letter by choosing the *(+)* icon in the *Cover Letter* box. Fill in the mandatory fields (marked with a red asterisk) and any further relevant fields, such as *Phone* and *Province/State* in the *Profile Information* section. Complete background element sections, such as *Outside Work Experience*, *Formal Education*, *Language Skills*, and *Geographic Mobility* if necessary. **Note** You can also maintain all candidate profile fields manually without uploading your CV.		

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
2.	**Complete Application Form**	In the *Job-Specific Information* section, fill in the mandatory fields (marked with a red asterisk) and any further relevant fields under *Employment Information*, as well as in other country/region specific sections. **Note** In the SAP Best Practices solution, we provide some GB- and US-specific fields, respectively, as example. Answer all the prescreening questions, too.		
3.	**Submit Application**	Choose *Apply*.	You have applied for the job. A success message is displayed by the system and an automatic confirmation of having received this application is sent out by the system via email. **Note** You can decide to return to the job search page, to the jobs applied, or to sign out.	

Result

The process execution continues with the automated process step Start Automated Screening of Application [page 99].

As **External Candidate** you can set up alerts to receive new job posting notifications. In this case, stay after the application submission on the *Your application has been sent* screen and continue in the process execution with process step Create Job Alert (Optional) [page 99].

4.5.2.4 Complete Reduced Candidate Profile and Submit Application

Purpose

In case the job requisition has been enabled for quick apply, the External Candidate, who applies for the first time to a job in the company, can complete the job application in the fewest clicks possible, without having to fill out a complete profile.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Complete Application Form**	On the *Career Opportunities: <Job Title> (<Requisition ID>)* screen, choose the *(+)* icon in the *Resume/CV* box to add your resume/CV. You can choose to upload the file from your local device, Dropbox or Google Drive. **Note** When successfully uploaded, information from the resume is automatically parsed into the designated candidate profile fields. **Note** You can also maintain all candidate profile fields manually without uploading your CV. If appropriate, you can also attach a cover letter by choosing the *(+)* icon in the *Cover Letter* box. Fill in all the required fields (marked with a red asterisk) in the *Employment Information* section, other country/region specific sections, and *Statement of Agreement* section. **Note** In the SAP Best Practices solution, we provide some GB- and US-specific fields, respectively, as example. Next to the *Terms of Use* field, choose the *Read and accept the data privacy statement* link. In the upcoming *Data Privacy Consent Statement* dialog box, choose *Accept*.		

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
2.	**Apply for Job**	Choose *Apply*.	You have applied for the job. A success message is displayed by the system and an automatic confirmation of having received this application is sent out by the system via email. **Note** You can decide to return to the job search page, to your candidate profile, or to sign out.	

Note

An account has been created for the external candidate. When now applying for another job requisition (with or without quick apply enabled), the external candidate needs to sign into this account prior submitting the job application.

Result

The process execution continues with the automated process step Start Automated Screening of Application [page 99].

As **External Candidate** you can set up alerts to receive new job posting notifications. In this case, stay after the application submission on the *Your application has been sent* screen and continue in the process execution with process step Create Job Alert (Optional) [page 99].

4.5.2.5 Sign In, Update Candidate Profile, and Submit Application

Purpose

An External Candidate, who already has a user account on the external career site, can directly log on to this site, update the candidate profile, if needed, and submit the application for the job.

In case the job requisition has been enabled for quick apply, the candidate can complete the job application in the fewest clicks possible, otherwise the candidate needs to review and possibly update their complete profile.

Procedure

Job requisition is not enabled for quick apply

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Sign In**	On the *Career Opportunities: Sign In* screen, enter your **<Email Address>** and **<Password>**, and choose *Sign In*.	The *<job title>* screen for completing the candidate profile and application form for the selected job is displayed.	
2.	**Update Candidate Profile**	Upload an updated *Resume/CV* or *Cover Letter*, if appropriate. Update required or other additional fields, if applicable.		
3.	**Complete Application Form**	In the *Job-Specific Information* section, fill in the mandatory fields (marked with a red asterisk) and any further relevant fields under *Employment Information* as well as in other country/region specific sections. **Note** In the SAP Best Practices solution, we provide some GB- and US-specific fields, respectively, as example. Answer all the prescreening questions, too.		
4.	**Submit Application**	Choose *Apply*.	You have applied for the job. A success message is displayed by the system and an automatic confirmation of having received this application is sent out by the system via email. **Note** You can decide to return to the job search page, to the jobs applied, to your candidate profile, or to sign out.	

Job requisition is enabled for quick apply

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Sign In**	On the *Career Opportunities: <Job Title> (<Requisition ID>)* screen, choose the *Please sign in* link. In the upcoming *Sign In* dialog box, enter your **<Email Address>** and **<Password>**, and choose *Sign In*.	The *Career Opportunities: <job title>* screen displays with the one-page view for job application. The resume and possibly cover letter, which you have uploaded in the past to your *Candidate Profile* on the career site, display as well.	
2.	**Complete Application Form**	Upload an updated *Resume/CV* or *Cover Letter*, if appropriate. Update required or other additional fields, if applicable. Fill all relevant fields under *Employment Information*, other country/region specific sections, and *Statement of Agreement*. **Note** In the SAP Best Practices solution, we provide some GB- and US-specific fields, respectively as example.		
3.	**Submit Application**	Choose *Apply*.	You have applied for the job. A success message is displayed by the system and an automatic confirmation of having received this application is sent out by the system via email. **Note** You can decide to return to the job search page, to the jobs applied, to your candidate profile, or to sign out.	

Result

The process execution continues with the automated process step Start Automated Screening of Application [page 99].

As **External Candidate** you can set up alerts to receive new job posting notifications. In this case, stay after the application submission on the *Your application has been sent* screen and continue in the process execution with process step Create Job Alert (Optional) [page 99].

4.5.2.5.1 Start Automated Screening of Application

Purpose

After the External Candidate has applied to a job, the system starts the automated screening of the submitted application.

Procedure

This is an automated step, and no manual execution is required.

Result

If the external candidate's answers toward the pre-screening questions, which are marked as *Disqualifiers*, meet the pre-defined requirements, the application will be processed and the external candidate will be part of the Select Candidate (Sub-Processes Bundle) [page 102].

If the external candidate's answers toward the prescreening questions, which are marked as *Disqualifiers*, do not meet the pre-defined requirements, the external candidate will fail the prescreen. The application will be placed automatically by the system into *Automatically Disqualified*.

4.5.2.6 Create Job Alert (Optional)

Purpose

The External Candidate sets up job alerts to get informed whenever new jobs are posted, which match their interests.

Procedure

> **Note**
>
> It is assumed, that after executing one of below process steps:
>
> - *Complete Candidate Profile and Submit Application*, or
> - *Complete Reduced Candidate Profile and Submit Application*, or
> - *Sign In, Update Candidate Profile, and Submit Application*,
>
> the External Candidate didn't leave the Career Site but stayed on the *Your application has been sent* screen.

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Access Candidate Profile**	On the *Your application has been sent* screen, choose *View Profile*.	The *Candidate Profile* screen is displayed, containing your profile.	
2.	**Access Job Alerts**	In the top right corner of the screen, choose *Options* and from the dropdown menu that expands, choose *Job Alerts*.	The *Job Alerts* list screen is displayed.	
3.	**Create New Job Alert**	Choose *Create New Job Alert*. On the upcoming screen, enter in *Search by Keyword* or *Search by Location* appropriate keywords or the location of the job you would like to set as search criteria for the alert. Then enter a number in the *Send me alerts every <#> days* field to define the alert frequency. Choose *Create Alert*.	The External Candidate has created the job alerts. A background job will run automatically as per the defined frequency. If a new job requisition is posted, which meets the defined criteria, the notification email will be sent automatically to the candidate.	
4.	**Go Back to Job Alerts List**	Choose *Return to Job Alerts*.	The *Job Alerts* screen is displayed.	

Result

As **External Candidate** you can manage the job applications you have submitted so far. This process step can be executed several times and at any point in time within this scope item. You can continue in the process execution with process step Manage Job Applications (Optional) [page 101].

4.5.2.7 Manage Job Applications (Optional)

Purpose

The External Candidate manages the submitted job applications on the *External Career Site*.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Additional Information	Pass / Fail
1.	**Access Career Site**	Access the External Career Site supported by RMK via following link directly: **`https://<sitename>.valhalla.stage.jobs2web.com`**	The company's *Career Site* is displayed.	In case you execute this process step immediately after process step *Set Future Job Alerts* without having logged off from the *Career Site*, you can skip test steps **#1** and **#2** and execute directly test step **#3**.	
2.	**Access Candidate Profile**	On the *Careers Home* screen, choose the *View Profile* link. The *Sign In* screen is displayed. Enter your **`Email Address`** and **`Password`** to log on to the career site.	The *Candidate Profile* screen is displayed.		

Test Step #	Test Step Name	Instruction	Expected Result	Additional Information	Pass / Fail
3.	**Manage Job Applications**	Go to the *Job Applied (#)* section and expand that section. You can see the status of your application and what the next steps are. Select the *Job Title* card related to the application you want to update. **Note** Candidates may also withdraw their application, if desired, by choosing *Withdraw Application*. **Note** If the system is configured to allow application updates after submission, the candidate may make any necessary additions/modifications in the *My Documents* or *Job-Specific Information* sections. Make any necessary additions/modifications or add attachments if needed. Choose *Update*.	The External Candidate has viewed the status of his/her application and has adapted his/her job application, as necessary.		

4.6 Select Candidate (Sub-Processes Bundle)

Purpose

This bundle of sub-processes highlights all the steps involved in the selection of a candidate, from pre-screening to offer management.

4.6.1 Perform Pre-Screening (Sub-Process)

Purpose

This sub-process provides an overview of a standard pre-screening, to sort between potential candidates and unsuitable ones.

4.6.1.1 Perform Pre-Screening

Purpose

The Recruiter performs a pre-screening of the candidates on a regular basis to eliminate candidates who do not meet the basic requirements of the job. The Recruiter reviews the candidate's credentials, profile, application, and so on.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose *Home* > *Recruiting* > *Job Requisitions* from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Open Applicant Workbench for Job Requisition**	On the *Job Requisitions* screen in the displayed list of jobs, search for the row with your requisition. **Note** The existence of new candidates is shown by **`(<no.of new candidates> New)`** in the *Candidates* column. These candidates have status **`New Application`** (or similar) in the Talent Pipeline. Navigate to the Applicant's Workbench either by choosing the *<number>* hyperlink in the *Candidates* column, or by hovering over the job title and selecting *Candidate Actions: Candidate Summary*.	The *<Job Title>* screen is displayed, containing the *Status and Filers* and the candidate(s) who have applied for that job.	
4.	**View Candidates**	In the Applicant's Workbench, you can view candidates in two ways: • View all candidates in the *Applicant's* screen or • Filter candidates by status by selecting the appropriate status from the *Status and Filers* table on the left of the screen.		

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
5.	**View Candidate Details**	To view the candidate's details, choose the candidate's name from the *Applicants* table. A summary view of the candidate is displayed, containing details, like: • Name • Status • Forwarded by • Forwarded from Requisition • Date Forwarded • Applicant Type • Interview Result • Overdue Interviews • Rating • Last Updated • Application Date • Unread Choose *Settings* on the right conner, manage columns by selecting fields (maximum of 9 fields can be selected). It can be *filtered* and *sorted*. Clicking on the Name of Applicant, hyperlink to open screen with detailed applicant and application information. **Note** In case you are of the opinion that this candidate can be added to certain talent pool(s), choose *More* and choose *Add to Talent Pool*. Choose *Talent Pool* and *status* and *Submit*.	Details of candidates, who have applied to a particular job requisition, have been viewed. • In case the job requisition has been marked as an evergreen job requisition, you can forward the candidate to an appropriate child requisition. Continue with test step **#6**.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
6.	**Forward Candidate as Applicant to Child Requisition (Optional)**	In case the job requisition is an evergreen requisition, then, if appropriate, you can forward the candidate to a child requisition. In the top left corner of the *Applicant Summary* view page, right conner to the *Name of applicant* Click *More* and choose *Forward* > *Forward as Applicant* . In the upcoming *Forward as Applicant* dialog box, flag the check box in front of the relevant job requisition and click *Next* and choose *Forward*. The `#/# candidates successfully forwarded.` information message is displayed in the upper part of the *Forward as Applicant* dialog box. Choose *Close*.	You return to the candidate summary view page, in which the linked child requisition is listed in the *Jobs Applied* section. An automatic confirmation of having received this application is sent out by the system via email to the forwarded candidate. **Note** In the Talent Pipeline of the linked child requisition, the forwarded candidate will be in status *New Application*. On the Applicants summary view page, the candidate is marked as being forwarded as applicant. In the *Jobs Applied* section, the job requisition from which the candidate was forwarded as an applicant is marked accordingly.	

Result

The candidate's application has been pre-screened.

Continue in the process execution as follows:

- In case you are of the opinion that the candidate is qualified for the posted job, stay on the screen, and continue with process step Set Candidate Status to "PreScreen" [page 107].

  Note

  Of course, you can also perform this process step later on; in this case you need to log on to the Applicant's Workbench of this job requisition.

- In case you are of the opinion that the candidate is not qualified for the posted job, continue with Reject Candidate (Sub-Process) [page 136].

4.6.1.2 Set Candidate Status to "PreScreen"

Purpose

The Recruiter moves the candidate who is qualified for the posted job to status **`PreScreen`**.

Procedure

> **Note**
>
> It is assumed that the Recruiter did not sign out from the *Applicant's Workbench*.

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Move Candidate to PreScreen Status**	Use one of the following methods to move the candidate of interest in the Talent Pipeline from status **`New Application`** to status **`Screen → PreScreen`**: • Flag the check box to the left of the candidate's name for one or more candidates and choose *Move* to move them to the next status in the pipeline. • Flag the check box to the left of the candidate's name for one or more candidates and choose *More > Move Applicant* to move them to the next status in the pipeline. • Flag the check box to the left of the candidate's name for one or more candidates and choose *More > Move Applicant* to a status selected from the dropdown.	A dialog window is displayed for maintaining a comment (except the last method).	
2.	**Maintain Comment and Apply Updates**	Flag the check box to the left of the candidate's name for one or more candidates and choose *More > Add Comment* to add comments.	The candidate is in status **`PreScreen`**.	

Result

The number of potential candidates has been reduced to a number that is manageable for the recruiter to deep-dive in.

4.6.2 Review Candidates (Sub-Process)

Purpose

After pre-screening has been performed, the recruiter performs a detailed analysis of the remaining candidates, during which applicants, where further discussion is necessary, are contacted to decide if they are a good match. Those that do not seem to be a good match even after the initial pre-screening, are going to be rejected.

4.6.2.1 Review Candidate

Purpose

The Recruiter reviews the candidates in detail after the pre-screening has been performed.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose *Home* > *Recruiting* > *Job Requisitions* from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	
3.	**Open Applicant Workbench for Job Requisition**	On the *Job Requisitions* screen, search in the displayed list of jobs for the row with your requisition. Navigate to the Applicant's Workbench either by choosing the *<number>* hyperlink in the *Candidates* column, or by hovering over the job title and selecting *Candidate Actions: Candidate Summary*.	The *Applicant's* screen is displayed, containing the candidate(s) who have applied for that job.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
4.	**View Candidates**	Select status *Screen* > *Prescreen* in the Talent Pipeline. The candidate shows up in the list. To view the candidate's details, choose the candidate's name from the *Applicant's* table. A summary view of the candidate is displayed containing details like : • Name • Status • Forwarded by • Forwarded from Requisition • Date Forwarded • Applicant Type • Interview Result • Overdue Interviews • Rating • Last updated • Application Date • Unread Choose *Settings* on the right corner, manage columns by selecting fields (maximum of 9 fields can be selected). It can be **filtered** and **sorted**. Choose the *Name of Applicant* hyperlink to open screen with detailed applicant and application information. **Note** Email Correspondence enables Recruiters to have the complete history of manual email communication with candidates. For details refer to section Email Correspondence and Message Center [page 175] within this document.	Details of the candidates, who have applied to a particular job requisition, are displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
5.	**Move Candidate to Recruiter Review Status**	Use one of the following methods to move the candidate of interest in the Talent Pipeline from status **`PreScreen`** to status **`Screen → Recruiter Review`**: • Flag the check box to the left of the candidate's name for one or more candidates and choose *Move* to move him/her to the next status in the pipeline. • Flag the check box to the left of the candidate's name for one or more candidates and choose *More* > *Move Applicant* to move them to the next status in the pipeline. • Flag the check box to the left of the candidate's name for one or more candidates and choose *More* > *Move Applicant* to a status selected from the drop-down.	A dialog window is displayed for maintaining a comment (except the last method).	
7.	**Maintain Comment and Apply Updates**	Flag the check box to the left of the candidate's name for one or more candidates and choose *More* > *Add Comment* to add comments.	The candidate is in status **`Recruiter Review`**.	

Result

Based on the summary view of the candidate's application, the Recruiter can now evaluate if the candidate is suitable for the posted job requisition. The recruiter checks all the details provided by the candidate. Once done, the recruiter continues in the process execution as follows:

- In case the outcome of the detailed check is that the candidate is suitable, continue with process step Set Candidate Status to "Hiring Manager Review" [page 111].
- If the recruiter is unsure whether the candidate is a match or not, continue with process step Perform Phone Screening with Candidate (Process Step Outside Software) [page 112].
- In case the outcome of the detailed check is that the candidate is not suitable, continue with Reject Candidate (Sub-Process) [page 136].

.

4.6.2.2 Set Candidate Status to "Hiring Manager Review"

Purpose

After having reviewed the application details submitted by the candidate and concluded that the application should be forwarded to the hiring manager for a detailed check, the Recruiter moves the candidate to status `Hiring Manager Review`.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose *Home* > *Recruiting* > *Job Requisitions* from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	
3.	**Open Applicant Workbench for Job Requisition**	On the *Job Requisitions* screen, search in the displayed list of jobs for the row with your requisition. Navigate to the Applicant's Workbench either by choosing the *<number>* hyperlink in the *Candidates* column, or by hovering over the job title and selecting *Candidate Actions: Candidate Summary*.	The *Applicant's* screen is displayed, containing candidate(s) who have applied for that job.	
4.	**Select Candidate**	To view the candidate, the applicants name are displayed in the *Applicants* table.	The candidate shows up in the list.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
5.	**Move Candidate to Hiring Manager Review Status**	• Flag the check box to the left of the candidate's name for one or more candidates and choose *Move* to move him/her to the next status in the pipeline. • Flag the check box to the left of the candidate's name for one or more candidates and choose *More* > *Move Applicant* to move them to the next status in the pipeline. • Flag the check box to the left of the candidate's name for one or more candidates and choose *More* > *Move Applicant* to a status selected from the drop-down.	A dialog window is displayed for maintaining a comment (except the last method).	
6.	**Maintain Comment and Apply Updates**	Flag the check box to the left of the candidate's name for one or more candidates and choose *More* > *Add Comment* to add comments.	The candidate is in status **`Hiring Manager Review`**.	
7.	**Forward Candidate to Hiring Manager**	Inform the Hiring Manager about your decision to invite him or her to view the candidate. You can do this either verbally, or on the top left corner of the *Applicant Summary* view page, right conner to the Name of applicant, choose *More* and choose *Forward* > *Forward To Colleague* functionality.	The candidate has been forwarded to the hiring manager for further review.	

4.6.2.3 Perform Phone Screening with Candidate (Process Step Outside Software)

Purpose

In case the Recruiter is unsure, if the candidate is suitable for the posted requisition, he or she can contact the applicant via phone for further discussion.

This process step takes place outside the delivered software and will therefore be described briefly.

Procedure

Call the applicant and do a phone interview with them. The questions asked during the phone interview as well as the answers provided by the applicant are noted down.

Result

In case the potential of the candidate has been confirmed, the Recruiter can move the candidate to status **`Hiring Manager Review`**. Proceed as described in process step Set Candidate Status to "Hiring Manager Review" [page 111].

In case the candidate does not seem to be a good match even after the phone screening, the Recruiter can continue in the process execution with Reject Candidate (Sub-Process) [page 136].

4.6.3 Confirm Candidate Shortlist (Sub-Process)

Purpose

After the recruiter has reviewed the candidates and submitted a list of the most suitable ones, the hiring manager selects the ones that should be invited to the interview.

4.6.3.1 Review Candidate

Purpose

The Hiring Manager reviews candidates who have applied to job requisitions and have been recommended by the recruiter. He or she will decide who can be added to the Candidate Shortlist for interview.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Hiring Manager*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose *Home* > *Recruiting* from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	
3.	**Open Applicant Workbench for Job Requisition**	On the *Job Requisitions* screen in the displayed list search for the row with your requisition. Navigate to the Applicant Workbench either by choosing the *<number>* hyperlink in the *Candidates* column, or by hovering over the job title and selecting *Candidate Actions: Candidate Summary*.	The *<Job Title>* screen is displayed, containing the *Talent Pipeline*.	
4.	**View Candidates**	Select status *Screen* > *Recruiter Review* in the Talent Pipeline. The candidate shows up in the list. To view the candidate's details, choose the candidate's name from the *Applicants* table. A summary view of the candidate is displayed containing details like: • Name • Status • Forwarded by • Forwarded from Requisition • Date Forwarded • Applicant Type • Interview Result • Overdue Interviews • Rating • Last Updated • Application Date • Unread Choose *Settings* on the right conner, manage columns by selecting fields (maximum of 9 fields can be selected). It can be **filtered** and **sorted**. Choose the *Name of Applicant* hyperlink to open screen with details of the applicant and application information.	Details of the candidates recommended by the Recruiter have been reviewed.	

Result

The candidate's application has been reviewed in detail.

Continue in the process execution as follows:

- In case you are of the opinion that the candidate is suitable to be invited to an interview, stay on the screen, and continue with process step Set Candidate Status to "Proceed" [page 115].

  > **Note**
  >
  > Of course, you can also perform this process step later on; in this case you need to log on to the Applicant Workbench of this job requisition.

- In case you are of the opinion that the candidate is not suitable and thus should not be invited to an interview, continue with Reject Candidate (Sub-Process) [page 136].

4.6.3.2 Set Candidate Status to "Proceed"

Purpose

The Hiring Manager moves the candidate who should be invited to an interview to status **`Proceed`**.

Procedure

> **Note**
>
> It is assumed that the Hiring Manager did not sign out from the *Applicant Workbench*.

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Move Candidate to Proceed Status**	Use one of the following methods to move the candidate of interest in the Talent Pipeline from status **`Recruiter Review`** to status **`Manager Review → Proceed`**: • Flag the check box to the left of the candidate's name for one or more candidates and choose *Move* to move them to the next status in the pipeline. • Flag the check box to the left of the candidate's name for one or more candidates and choose *More > Move Applicant* to move them to the next status in the pipeline. • Flag the check box to the left of the candidate's name for one or more candidates and choose *More > Move Applicant* to a status selected from the drop-down.	A dialog window is displayed for maintaining a comment (except the last method).	
2.	**Maintain Comment and Apply Updates**	Flag the check box to the left of the candidate's name for one or more candidates and choose *More > Add Comment* to add comments.	The candidate is in status **`Proceed`**.	
3.	**Forward Candidate to Recruiter**	Inform the recruiter about your decision to invite the candidate to a face-to-face interview. You can do this either verbally or on the top left corner of the *Applicant Summary* view page, right corner to the *Name of Applicant* choose *More* and choose *Forward > Forward To Colleague* functionality.	The Hiring Manager has reviewed the candidate and communicated his or her decision to the Recruiter about whether to invite the candidate to an interview.	

4.6.3.3 Set Candidate Status to "Schedule Interview"

Purpose

Since the hiring manager has decided to invite the candidate to an interview, the Recruiter changes the candidate's status to **`Schedule Interview`**.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose *Home* > *Recruiting* > *Job Requisitions* from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	
3.	**Open Applicant Workbench for Job Requisition**	On the *Job Requisitions* screen, search in the displayed list for the row with your requisition. Navigate to the Applicant Workbench either by choosing the *<number>* hyperlink in the *Candidates* column, or by hovering over the job title and selecting *Candidate Actions: Candidate Summary*.	The *<Job Title>* screen is displayed containing the *Talent Pipeline*.	
4.	**Select Candidate**	To view the candidate, the applicants name is displayed in the *Applicants* table.	The summary view of the selected candidate is displayed.	
5.	**Change Candidates' Status**	Use one of the following methods to move the candidate of interest in the Talent Pipeline from status **`Proceed`** to status **`Interview → Schedule Interview`**: • Flag the check box to the left of the candidate's name for one or more candidates and choose *Move* to move them to the next status in the pipeline. • Flag the check box to the left of the candidate's name for one or more candidates and choose *More > Move Applicant* to move them to the next status in the pipeline. • Flag the check box to the left of the candidate's name for one or more candidates and choose *More > Move Applicant* to a status selected from the dropdown.	A dialog window is displayed for maintaining a comment (except the last method).	
6.	**Maintain Comment and Apply Updates**	Flag the check box to the left of the candidate's name for one or more candidates and choose *More > Add Comment* to add comments	The candidate is in status **`Schedule Interview`**.	

4.6.4 Interview Candidates (Sub-Process)

Purpose

This sub-process describes how the Recruiting Administrator is involved in the recruitment process to coordinate interview scheduling. The interviewer(s) conduct the interview(s), then provide feedback, which can lead to either the selection of the candidate and the preparation of an offer, or the rejection of the candidate.

4.6.4.1 Organize Interview and Publish Available Time Slots

Purpose

The Recruiting Administrator organizes the interview: this includes selecting the interview type and the interviewers and publishing available time slots to candidates for them to choose and confirm the actual interview time.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiting Administrator*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose ▶ *Home* ▶ *Recruiting* ▶ from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	
3.	**Access Interview Scheduling tab**	Choose the *Interview Scheduling* tab.	The *Scheduling* screen is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
4.	**Start Scheduling**	On the *JOB REQUISITIONS* tab, you can see the job requisition card that you are currently processing. In the corresponding card, choose on the *No. not started* next to *No. candidates to schedule*.	The *Select Candidates* dialog box is displayed.	
5.	**Select Candidate for Interview Scheduling**	On the top of the screen, choose the Candidate Status: *Schedule Interview*. Select the candidate(s), for whom you want to schedule interview(s), by choosing their name card, then choose *Start Scheduling*.	The *<Job Title> - <Job Requisition ID>* screen is displayed.	
6.	**Select Type of Interview**	Enter a name in the *Interview Title* field. Choose the *Interview Type* by checking the appropriate radio button: *Phone* or *Virtual* or *Face-to-Face*. *Enable Online Meeting Options: MS Teams* (*This feature is* available *if WorkTech integration is done*)		
7.	**Select Interview Room (optional)**	Choose the *Select Rooms* hyperlink. In the upcoming *Add Interview Rooms* dialog box, flag the checkbox of the room you want to book for the interview, then choose *Update*.		

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
8.	**Select Interviewers**	In the *Manage Interviewers* section, choose *Add Interviewer by* either by *Name* or by *Role in Requisition*, then enter the interviewer names or select the roles from the dropdown list. **→ Tip** We suggest that you select the Hiring Manager as interviewer. **ⓘ Note** If you add more than one interviewer, the interview will become a panel style interview where all interviewers are required to interview the candidate at the same time. The default interview duration is 30 minutes. Extend the arrow in the bottom right corner of the 30 minutes' duration bar to the right to increase the duration in 15 minutes intervals if needed. To create back-to-back interviews (interviews with different interviewers who are not all present at the same time), you can select and drag the interviewer's duration bar to adjust the interview order of the interviewers or schedule a break between interviews.	The Interviewers have been selected and the decision about interview duration and order has been taken.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
9.	**Find Availability**	Choose *Find Availability*. All available time slots that fit the interview criteria will be shown in the *Availability Grid* below. **Note** A slot shown in light blue means that the slot is fully available. Sky blue means that the slot has already been sent out for another interview. Dark blue are slots that have been selected or sent already. Slots that have already been booked by candidates on this interview will not show as available times. **Note** Since in SAP Best Practices solution, interview scheduling is integrated with outlook, any times that the interviewers have free on their outlook calendar within their Exchange work hours will be used to get available slots. If you do not use outlook integration, interviewers need to firstly maintain their availabilities manually. For this, they need to log on to the instance, and navigate to *Recruiting* > *Interview Scheduling* > *My Calendar*, where they can provide their preferred times. For detailed information, refer to the *Recruiting Handbook*. **Note** Availability from Outlook is captured in the Employee Profile time zone of the Interviewer and displayed for the logged in Recruiter's time zone.	The *Available Time Slots* section is displayed.	
10.	**Select Interview Time Slot**	In the *Available Time Slots* grid, select the time slot(s) for your interview by selecting the corresponding blank time bars. The bar then turns to blue meaning that the timeslot is selected successfully by you. If no suitable time slot existed, you can select *Add Custom Slot* to create and select your own custom time slot. After maintaining the *From* time, choose *Add and Select*. **Note** You can select several time slots to give the candidate the opportunity to choose the best fitting one.	The interview time slot(s) has been selected.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
11.	**Set Reminder via SMS (optional)**	In the *Remind Candidates via SMS* section, choose the *Add a reminder* link. Enter the number of days in the *day(s) before interview* box.		
12.	**Continue**	Choose *Continue*.	The *Contact Candidate(s)* screen is displayed.	
13.	**Send Email to Contact Candidate**	On the *Contact Candidate(s)* screen, choose **`Candidate Self-Schedules Interview`** in the *Email Template*, and adjust the email Subject or Body if necessary. Choose *Send to Candidate*. In the upcoming *Interview Schedule Sent* dialog box, choose *OK*.	The email with the invitation to the interview has been sent to the candidate.	

4.6.4.2 Confirm Interview Time Slot

Purpose

The Candidate checks their email account and sees the scheduling for an interview. The candidate then logs on to the Career Site via the link provided in the email and confirms the interview time slot.

Prerequisite

The candidate has received an interview invitation email.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Access your Career Site**	Access your Email account and review the email for the interview scheduling. Choose the link provided in the email to log on to your career site.	The *My Interviews* screen is displayed. Depending if you are an internal or external candidate, continue either with test step **# 2a** or test step **# 2b**.	
2a.	**Confirm Interview Time Slot (for Internal Candidate)**	**In case you are an Internal Candidate:** In the *<No> Open Slots* card, choose the *Select* hyperlink to view the detailed interview time slot in the calendar view. **Note** In case the recruiter has suggested only one time slot, the *Select* hyperlink is not available. Instead, you can proceed directly with the below instruction. Choose the timeslot that is suitable for you (for multiple timeslots) or choose the *Confirm* link (for only one time slot), and in the upcoming *Schedule Interview* dialog box, choose *Book Interview*. **Note** In case the time slot is not suitable for you, you can choose the *Decline* hyperlink in the *<No> Open Slots* card (for multiple times slots) or *Interview Date/Time* (for only one-time slot). In the upcoming *Decline Interview* dialog box, enter the explanation on your decision in the *Add a note* field, then choose *Decline Interview*. The recruiting administrator will receive an email notification saying that the candidate declined the proposed interview time slot. The recruiting administrator then needs to re-schedule the interview and send the invitation out again.	The system message `Interview appointment booked successfully` is displayed. The Interviewer(s) will receive an Outlook meeting request for the confirmed interview time with the defined meeting room information.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
2b.	**Confirm Interview Time Slot (for External Candidate)**	**In case you are an External Candidate:** First log on to the career site with your *Email Address* and *Password*. In the *Jobs Applied* section, choose the *Job Requisition* card, to which the interview invitation relates, having the notification *Pending scheduled interview*. In the *My Interviews* section, choose the *View/Confirm Scheduled Interview* hyperlink. If only one timeslot is suggested, choose directly the *Confirm* link of the time slot, and in the upcoming *Schedule Interview* dialog box, choose *Book Interview*. If multiple timeslots are suggested, choose in the *<No> Open Slots* card the *Select* hyperlink to view the detailed interview time slot in the calendar view. Choose the suitable timeslot, and in the upcoming *Schedule Interview* dialog box, choose *Book Interview*. **Note** In case the time slot is not suitable for you, you can choose the *Decline* hyperlink. In the upcoming *Decline Interview* dialog box, enter the explanation on your decision in the *Add a note* field, then choose *Decline Interview*. The recruiting administrator will receive an email notification saying that the candidate declined the proposed interview time slot. The recruiting administrator then needs to re-schedule the interview and send the invitation out again.	The system message `Interview appointment booked successfully` is displayed. The Interviewer(s) will receive an Outlook meeting request for the confirmed interview time with the defined meeting room information.	

4.6.4.3 Receive Interview Invitation Meeting Request and Confirm Interview Time Slot (Process Step Outside Software)

Purpose

The Interviewer (Hiring Manager) checks their outlook account to see the invitation meeting request for the interview, confirmed by the candidate, with detailed time and date information. The Interviewer then accepts the meeting request .

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Access your Outlook**	Access your Outlook account and review the meeting request for the interview.	The interview time, date, location, and candidate information are displayed.	
2.	**Accept the Meeting Request**	In the meeting request, choose *Accept* to confirm the interview. **Note** In case the time slot is not suitable for you, you can choose *Decline* in the meeting request. The *Proposing a new time* function is currently not supported. The Recruiting Administrator will receive an email about your decline. He or she can then choose to rebook the interview or let the interview take place with another interviewer.	The meeting request is saved in your calendar. The recruiting administrator will receive an email notification about the response of the interviewer.	

4.6.4.3.1 Send Interview Reminder

Purpose

One day before the interview takes place, an appropriate reminder is sent out to the candidate. The reminder is sent out as email notification, and optionally as SMS.

Prerequisites

The SMS reminder can only be sent if the candidate maintained a valid mobile phone number and flagged the *Send me SMS notifications* checkbox in their candidate profile . In addition, the SMS reminder must have been maintained as described in process step Organize Interview and Publish Available Time Slots [page 118], test step **#11** *Set Reminder via SMS*.

Procedure

This is an automated step, and no manual execution is required.

Result

An email notification and possibly a SMS has been sent out to the candidate, reminding about the interview taking place shortly.

4.6.4.4 Receive Interview Reminder via Email and SMS (Process Step Outside Software)

Purpose

The Candidate receives the email notification and possibly also a SMS, in which they are reminded about the interview taking place shortly.

This process step takes place outside the delivered software and will therefore be described briefly.

Procedure

Access your Mobile Device and review the SMS message reminding about the interview time and date.

Access your mailbox and review the email notification reminding about the interview time and date.

4.6.4.5 Conduct Interview (Process Step Outside Software)

Purpose

The Hiring Manager, as nominated by the recruiter, interviews the Candidate with the support from HR business partner, recruiter, or any other interviewers.

This process step takes place outside the delivered software and will therefore be described briefly.

Procedure

The hiring manager interviews the candidate who has applied for a certain job. The interview takes place at the date and time as specified in the invitation. The answers given by the candidate to the questions during application on the job application page, can be, for example, reviewed during the interview (use the Historical Results for this).

4.6.4.6 Conduct Interview Evaluations, Ratings and Notes

Purpose

The Interviewer (Hiring Manager) conducts interview evaluations, ratings, and notes for the candidate.

If the SAP SuccessFactors Mobile application has been activated on the mobile device of the interviewer as described in section *2 Prerequisites*, the particular interviewer has the option to assess the candidate either on the **company instance website** [page 127] or via the **mobile device** [page 129] .

These options are detailed below.

4.6.4.6.1 Conduct Interview Evaluations, Ratings and Notes on Company Website

Purpose

The Interviewer conducts the interview evaluations, ratings, and notes for the candidate on the company website.

Each participant at the interview (as maintained in the list of interviewers) must execute this step.

In our concrete use case, we consider the Hiring Manager executing this process step.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Hiring Manager*.	The *Home* page is displayed.	
2.	**Open Interview Assessment**	On the *Home* page, in the *For You Today* section, choose in the *Provide Interview Feedback* card, the *Go to Interview Assessment* link. **Note** In case there are several interview assessments waiting for processing, the *View All* link will be displayed in the *Provide Interview Feedback* card. Choose that link; in the upcoming dialog box, choose the *Go to Interview Assessment* link in the appropriate *Provide Interview Feedback* card. **Note** Alternatively, you can access the *Interview Assessment* page from *Home* > *Recruiting*. On the *Job Requisitions* screen, navigate to the *Interview Central* tab. Choose the *Job*, for which you performed the interview, and in the *Overall Ratings* column, choose the *Rate now* link next to the candidate you want to assess.	The *Interview Assessment: <Job Title>* screen is displayed.	
3.	**Maintain Competencies Score**	On the *Interview Assessment: <Job Title>* screen, rate the listed competencies for the interviewed candidate. **Note** The competencies are visible only if they have been assigned to the job requisition (see details in process step *Review Job Descriptions*). Choose *Save*.	The competencies score has been maintained.	
4.	**Maintain Overall Rating**	In the *Overall Rating* section, choose the *Recommended* or *Not Recommended* icon to rate the candidate. Optionally you may enter a comment by using the *Comments* icon and choose *Done*. Choose *Save*. Choose *I'm Done*.	The candidate has been assessed.	

4.6.4.6.2 Conduct Interview Evaluations, Ratings and Notes via Mobile Device (optional)

Purpose

If the mobile application is enabled on their devices, the interviewers can access the interview portlet to view and assess both overall interview feedback and candidate competency ratings via mobile device.

In our concrete use case, we consider the Hiring Manager to execute this process step.

> ⓘ Note
>
> If the mobile application is not enabled, this option is not available and only option described in *Conduct Interview Evaluations, Ratings and Notes on Company Website* can be executed.

> ⓘ Note
>
> In this document, we only describe the screen elements of the iOS system. The SAP SuccessFactors Mobile application also supports the Android platform, while the Android interface might be a little bit different.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Open the SAP SuccessFactors mobile app and log on as Interviewer (Hiring Manager) by tapping the corresponding username in the *Multi-Profile* screen.	The *SAP SuccessFactors* home page is displayed.	
2.	**Open Newly Created Candidate Assess**	In the *To-Do* tile, tap *Assess Candidates*, and then *<Job Title> (<Job Requisition ID>) - <number> out of <total number> Interview Assessment pending for <Job Title> (<Job Requisition ID>)*.	The *Candidate Assessments* screen is displayed.	
3.	**Access Candidate Assess**	Tap the *<Candidate Name>* tile.	The *Details* screen for the candidate assessment is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
4.	**Maintain Overall Rating and Competencies Score**	On the *Details* screen, in the *Overall Rating* section, tap the *Recommended* or *Not Recommended* icon to rate the candidate. Under *Ratings*, review the listed competencies and rate each competency for the candidate. You can also enter comments in the *Add Overall Comments* box. Tap *Submit*. In the *Feedback Submitted* dialog box, tap *OK*.	The candidate has been assessed.	

4.6.4.7 Decide on Candidate Prioritization

Purpose

Based on the interview evaluations, ratings, and notes, the Hiring Manager decides on the final prioritization of the candidates with respect to their suitability for the posted job requisition. Then, the decision is communicated to the Recruiter.

The final feedback can be provided either verbally or via email. The latter can be done also using SAP SuccessFactors, which will be described in this document.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Hiring Manager*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose *Home* > *Recruiting* > *Job Requisitions* from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Open Job Requisition**	In the list displayed on the *Job Requisitions* screen, search for the row with your requisition and choose on the *Job Requisition*.	The *Job Requisitions* screen is displayed.	
4.	**Go to Candidate Ratings**	Choose the *View Candidate Ratings (No.)* tab.	The *Candidate Ratings: <Job Title>* screen is displayed.	
5.	**View the Stack Ranking**	In the *Stack Ranking* section displayed in the right side of the screen, check the candidates' ranking results.	The Hiring Manager decides the priority of the candidates on their suitability for the posted job requisition.	
6.	**Forward Candidate to Recruiter**	Inform the recruiter about your decision on the candidate to invite the candidate for a face-to-face interview. You can do this verbally, In the top left corner of the *Applicant Summary* view page, right corner to the *Name of Applicant* choose *More* and choose *Forward* ▶ *Forward To Colleague* functionality.	The Hiring Manager has communicated the decision to the Recruiter about which candidate would be considered as the first choice.	

4.6.4.8 Receive Final Feedback via Email (Process Step Outside Software)

Purpose

The Recruiter checks their email account to review the final feedback provided by the hiring manager with respect to the interviewed candidate.

This process step takes place outside the delivered software and will therefore be described briefly.

Procedure

Access your Email account.

Review the email from the hiring manager.

Result

Depending on the final feedback of the hiring manager, the recruiter can continue in the process with different process step sequences.

- For candidate(s) who are still considered after the interview, the recruiter decides if another interview is required. If yes, the recruiter can move the candidate to status **`Interview → 2nd Interview`** and ask the Recruiting Administrator to re-start the interview-related sub-process Interview Candidates (Sub-Process) [page 118].
- If no other interview is necessary, then, depending, if the candidate is external or internal, the recruiter can continue in the process execution as follows:
  - in case of an external candidate, the candidate can be moved to status **`Pre-Offer Background Check`**, and the background / reference check can be started, if necessary (process step Initiate Pre-Offer Background / Reference Check for External Candidate (Optional) [page 132] and subsequent).
  - in case of an internal candidate, the recruiter continues with process step Set Candidate Status to "Prepare Offer" [page 134].
- For candidate(s) who are not considered anymore after the interview, the recruiter will perform Reject Candidate (Sub-Process) [page 136].

4.6.4.9 Initiate Pre-Offer Background / Reference Check for External Candidate (Optional)

Purpose

After an external candidate passed successfully the interview, the Recruiting Administrator can initiate the pre-offer background/reference check of that candidate.

The Recruiting Administrator moves the external candidate from status **`Interview`** to status **`Pre-Offer Background Check`**.

Prerequisite

The candidate is an external person to the company.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiting Administrator*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose *Home* > *Recruiting* > *Job Requisitions* from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	
3.	**Open Applicant Workbench for Job Requisition**	On the *Job Requisitions* screen, in the displayed list, search for the row with your requisition. Navigate to the Applicant Workbench either by choosing the *<number>* hyperlink in the *Candidates* column, or by hovering over the job title and selecting *Candidate Actions: Candidate Summary*.	The *<Job Title>* screen is displayed, containing the *Talent Pipeline*.	
4.	**Select External Candidate**	To view the candidate, the applicants name is displayed in the Applicants table. The candidate shows up in the list. Choose the external candidate's name.	The summary view of the selected candidate is displayed.	
5.	**Change External Candidates' Status**	Use one of the following methods to move the external candidate in the Talent Pipeline from status **`Interview`** to status **`Pre-Offer Background Check`**: • Flag the check box to the left of the candidate's name for one or more candidates and choose *Move* to move them to the next status in the pipeline. • Flag the check box to the left of the candidate's name for one or more candidates and choose *More* > *Move Applicant* to move them to the next status in the pipeline • Flag the check box to the left of the candidate's name for one or more candidates and choose *More > Move Applicant* to a status selected from the dropdown.	A dialog window is displayed for maintaining a comment (except the last method).	
6.	**Maintain Comment and Apply Updates**	Flag the check box to the left of the candidate's name for one or more candidates and choose *More* > *Add Comment* to add comments.	The candidate is in status `Pre-Offer Background Check`.	

4.6.4.10 Perform Pre-Offer Background / Reference Check of External Candidate (Process Step Outside Software)

Purpose

The Recruiting Administrator performs a pre-offer background/reference check of the external candidate. This check is executed in order to ease the decision of making a job offer to the external candidate who passed the interview assessment successfully.

This step takes place outside the delivered software and will therefore be described briefly.

Procedure

Investigate the background of the external candidate and verify the accuracy of his/her claims as well as researching any possible criminal history, worker's compensation claims, or employer sanctions. Check, for example:

- Citizenship, immigration, or legal working status,
- Employment records,
- Education records,
- Gaps in employment history,
- Identity and address.

Result

In case of a favorable check outcome, the candidate can be moved to status **`Prepare Offer`**.

4.6.4.11 Set Candidate Status to "Prepare Offer"

Purpose

The Recruiter sets the status of the successful candidate to **`Prepare Offer`**.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose *Home* > *Recruiting* > *Job Requisitions* from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	
3.	**Open Applicant Workbench for a Job Requisition**	On the *Job Requisitions* screen, in the displayed list search for the row with your requisition. Navigate to the Applicant Workbench either by choosing the *<number>* hyperlink in the *Candidates* column, or by hovering over the job title and selecting *Candidate Actions: Candidate Summary*.	The *<Job Title>* screen is displayed, containing the *Talent Pipeline*.	
4.	**Select Candidate**	To view the candidate, the applicants name is displayed in the *Applicants* table. The candidate shows up in the list. Choose the candidate's name.	The summary view of the selected candidate is displayed.	
5.	**Change Candidates' Status**	Use one of the following methods to move the candidate in the Talent Pipeline from 1. status **`Interview`** to status **`Offer → Prepare Offer`** (in case of an internal candidate): 2. status **`Pre-Offer Background Check`** to status **`Offer → Prepare Offer`** (in case of an external candidate): • Flag the check box to the left of the candidate's name for one or more candidates and choose *Move* to move them to the next status in the pipeline. • Flag the check box to the left of the candidate's name for one or more candidates and choose *More* > *Move Applicant* to move them to the next status in the pipeline. • Flag the check box to the left of the candidate's name for one or more candidates and choose *More* > *Move Applicant* to a status selected from the drop-down.	A dialog window is displayed for maintaining a comment (except the last method).	
6.	**Maintain Comment and Apply Updates**	Flag the check box to the left of the candidate's name for one or more candidates and choose *More* > *Add Comment* to add comments.	The candidate is in status **`Prepare Offer`**.	

Result

For the suitable candidate, the process continues with the Prepare Offer (Sub-Process) [page 140].

4.6.5 Reject Candidate (Sub-Process)

Purpose

This sub-process describes the possible activities that can take place after a candidate is rejected from a given job requisition. The rejection may happen at any stage of the candidate selection process and can lead either to a simple rejection without other follow-up activities, or to a redirection towards another job requisition that is more suitable, or to the addition to a talent pool to keep contact with the candidate until a more relevant job requisition opens.

Prerequisites

Candidates have been placed in rejected step at some point of the candidate selection process.

4.6.5.1 Check Candidate Suitability for Other Job Requisition

Purpose

The Recruiter processes the candidates who are not suitable for the specific job requisition. To decide which way to go, the Recruiter checks if the candidate would be suitable for other open job requisitions.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose *Home* > *Recruiting* from the menu on the top left corner.	The *Job Requisitions* screen is displayed.	
3.	**Open Applicant Workbench for Job Requisition**	On the *Job Requisitions* screen, in the displayed list search for the row with your requisition. Navigate to the Applicant Workbench either by choosing the *<number>* hyperlink in the *Candidates* column, or by hovering over the job title and selecting *Candidate Actions: Candidate Summary*.	The *<Job Title>* screen is displayed, containing the *Talent Pipeline*.	
4.	**Select Candidate**	To view the candidate, the applicants name is displayed in the *Applicants* table. The candidate shows up in the list. From the *Candidates* table on the left of the screen, choose the *<candidate's name>* link of the candidate who is not qualified or suitable for the current job requisition.	The summary view of the selected candidate is displayed.	
5.	**Review Candidate Details**	Check the candidate's profile to figure out if the candidate would be suitable for another job requisition or could be added to the company's talent pool. View the cover letter and resume submitted by the candidate, as well as any other information maintained in the profile.		

Result

Stay on the summary view page of the candidate and continue in the process execution as follows:

- In case the candidate is suitable for another job requisition, call the candidate on the phone and check if they would be interested in another active job requisition. In case the candidate is interested, continue with process step Assign Candidate to Other Job Requisition [page 138].
- In case the candidate is not suitable for another job requisition or is not interested in any other active job requisition but could be added to the company's talent pool for future job requisitions, continue with process step Add Candidate to Talent Pool(s) [page 138].
- In case none of the above apply, continue with process step Set Candidate Status to "Declined" [page 139].

4.6.5.2 Assign Candidate to Other Job Requisition

Purpose

The Recruiter had a phone communication with the candidate to check if he or she is interested in another active job requisition. As the answer of the candidate was positive, the Recruiter assigns the candidate to that other job requisition.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Forward Candidate to Other Job Requisition**	Forward the candidate to another active job requisition as follows: Flag the check box to the left of the candidate's name. In the *Click the More* and choose *Forward* > *Forward To Requisition* functionality. In the upcoming *Forward* dialog box, enter filtering criteria as per your requirements and choose *Search*. In the *Search Results* list, flag the checkbox in front of the job requisition, to which you want to forward the candidate, choose *Next* and choose *Forward* field.	The candidate has been forwarded to another posted job requisition.	

4.6.5.3 Add Candidate to Talent Pool(s)

Purpose

The candidate is suitable to be added to talent pool(s) of the company. The Recruiter adds the candidate to a talent pool, where they will be considered for future job requisitions.

> ⚠ Caution
>
> This process step can only be performed by a Recruiter who has the appropriate permissions for talent pools. The Recruiter should be the owner of at least one talent pool or be shared with at least one talent pool.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Go to Candidate Profile**	On the summary view page of the candidate, choose the *View Profiles* hyperlink.	The *Candidate Profile* page opens in a new window.	
2.	**Add Candidate to Talent Pool**	Scroll to the *Talent Pools* portlet of the candidate profile. Choose *+ Add*. In the upcoming *Add to Talent Pool* dialog box, choose the *Talent Pool Name*, then select a *Place in Status* value from the dropdown list. **Note** If you do not select a status, the selected members will be placed in the default status you have chosen for the talent pool. Choose *Submit*.	The candidate has been added to your talent pool. A success message is displayed on the screen. **Note** In the *Success* dialog box, choose *OK*.	

Result

The candidate will be considered for future job requisitions, for which he or she is qualified or suitable.

4.6.5.4 Set Candidate Status to "Declined"

Purpose

In case the candidate is not suitable for any posted job requisitions, nor for the company's talent pool(s), the Recruiter will move the candidate to status `Declined` in the Talent Pipeline. Before doing so, the recruiter possibly calls the candidate to inform them about the company's decision.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Change Candidates' Status**	Move the candidate in the Talent Pipeline as follows: Flag the check box to the left of the candidate's name in the *Applicant* table and choose *Move > Move Applicant*. Select the appropriate **`Declined`** status according to your own situation. **Note** In the SAP Best Practices solution, there are a couple of rejection statuses in the Talent Pipeline. **Note** If you select the *Declined* status from the *Regret With Email* group, the candidate will receive a regret email sent automatically by the system.	A dialog window is displayed for maintaining a comment.	
2.	**Maintain Comment and Apply Updates**	Flag the check box to the left of the candidate's name for one or more candidates and choose *More* > *Add Comment* to add comments.	The candidate is in status **`Declined`**.	

Result

The candidate has been rejected.

4.6.6 Prepare Offer (Sub-Process)

Purpose

This sub-process describes the offer preparation for the suitable candidate for the job.

The recruiter interacts with the hiring manager to confirm the negotiation range then provides a first offer to the candidate. Based on the candidate's answer, either the process moves towards the formalization of it into a contract, a new discussion to provide a second offer, or the rejection of a candidate and selection of another one.

4.6.6.1 Prepare Offer Details and Trigger Offer Approval

Purpose

The Recruiter prepares offer details for the candidate, who passed successfully the selection, all assessment activities, and the background check (in case of an external candidate). This offer will then be sent to the hiring manager and to the hiring manager's manager for approval.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose *Home* > *Recruiting* from the menu on the top left corner.	The *Job Requisitions* screen is displayed.	
3.	**Open Applicant Workbench for Job Requisition**	On the *Job Requisitions* screen, in the displayed list search for the row with your requisition. Navigate to the Applicant Workbench either by choosing the *<number>* hyperlink in the *Candidates* column, or by hovering over the job title and selecting *Candidate Actions: Candidate Summary*.	The *<Job Title>* screen is displayed, containing the *Talent Pipeline*.	
4.	**Select Candidate**	To view the candidate, the applicants name is displayed in the *Applicants* table. Choose the candidate's name.	The summary view of the selected candidate is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
5.	**Maintain Offer Details**	In the candidate's view, choose *Edit* in *Application Information* and fill in the necessary information in both *Offer Information* and *Compensation Information* sections. Enter, for example, **<Type of Hire>**, **<Start Date>**, **<Offered Base Salary>**, **<Base Pay Frequency>**, and so on. **Note** Dynamic offer letter generation enables recruiters to automate content personalization within offer letters, thereby enhancing workflow efficiency and minimizing manual intervention. This allows talent acquisition teams to allocate more time to strategic recruitment activities. To use Dynamic Offer Letter, select Picklist for < Transportation Allowance>, <RSU>, < Target Bonus> which is required and also add respective fields with values. According to the different scenarios, offer letter will be dynamically generated. **Caution** This caution is valid for scope item *Recruiting with Integration to Position Management and Onboarding (3EK)* only! In case integration with the **Onboarding** module is in scope for your company, you must enter an **<ONB Preferred Locale>** as well! Due to the *Recruit-to-Hire Data Mapping*, the language selected here will be mapped in the **Onboarding** module to field *Native Preferred Language* in the *Provide Personal Data* screen. Choose *Save*.	The offer details have been maintained.	
6.	**Select Offer Approval**	Choose *More* dropdown on top of the candidate detail area, select *Initiate Offer Approval*.	The *Offer Approval: <candidate name> for < Job Title >* screen is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
7.	**Send Offer Approval Email to Approvers**	On the *Offer Approval: <candidate name> for < Job Title >* screen, select from the *Select Offer Template* dropdown the appropriate template (**`Offer Detail Template`**). Review the offer details. In the *Approvers* section, the Hiring Manager and One Above Manager (Manager of Hiring Manager) are predefined as approvers. Add a comment if appropriate. Choose *Save*. Choose *Send For Approval*. In the *Confirmation* dialog box, you are requested to confirm the sending of the offer for approval. Choose *Yes*.	The Recruiter has created a job offer and has sent it out for approval. The Recruiter returns to the *Offer Approval: <candidate name> for < Job Title >* screen.	

4.6.6.2 Approve Offer

Purpose

The Hiring Manager approves the job offer provided by the recruiter for the successful candidate.

If the SAP SuccessFactors Mobile application has been activated on the Hiring Manager's mobile device as described in section *2 Prerequisites*, in addition to the offer for approval received on the company instance website, the Hiring Manager will receive it also on their mobile device. He or she can approve the offer either on the **company instance website** [page 144] or on the **mobile device** [page 145].

These options are detailed in the following chapters.

4.6.6.2.1 Approve Offer on Company Website

Purpose

The Hiring Manager approves on the company website the job offer provided by the recruiter for the successful candidate.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Hiring Manager*.	The *Home* page is displayed.	
2.	**Access Offer Form**	On the *Home* page, in the *Approvals* section, choose in the *Job Offer* card. **Note** In case there are several job offers waiting for approval, the *View All* link will be displayed in the *Job Offer* card. Choose that link; in the upcoming dialog box, choose the appropriate *Job Offer* card.	The *Offer Approval: <Candidate Name> for <Job Title> (requisition no.)* screen is displayed.	
3.	**Review Offer Details**	On the *Offer Approval: <Candidate Name> for <Job Title> (requisition no.)* screen check the details, add a *Comment*, and choose *Approve*.	A *Confirmation* dialog box is displayed asking you to confirm the approval of the offer detail.	
4.	**Approve Offer**	In the *Confirmation* dialog box, choose *Yes*.	The Hiring Manager has approved the job offer. The job offer has been sent to the Next Level Manager for approval.	

Note

In case you need to decline the offer, enter an appropriate comment, justifying your decision, and choose *Decline*. In the upcoming *Confirmation* dialog box, choose *Yes*. The offer returns to the Recruiter. In the Talent Pipeline, the candidate is moved automatically to status `Offer Declined by Approver`. The Recruiter can now adapt the offer as per the feedback received from the approver. The procedure for doing so is as follows:

- On the *Home* page, in the *Approvals* section, choose in the *Job Offer* card the *Review and Approve* link.

- On the upcoming *Offer Approval: <candidate name> for <Job Title> (requisition no.)* screen, choose *Cancel Offer*. In the upcoming *Confirmation* dialog box, choose *Yes*. As a result, the offer disappears from your to-do list.
- Go to the *Job Requisition* screen, and in the row of the appropriate job requisition, choose the *<number>* hyperlink in the *Candidates* column.
- In the Talent Pipeline, select status *Offer* > *Offer Declined by Approver*. In the upcoming list of candidates, click on the candidate's name. At the bottom of the candidate's profile page, choose *Move Candidate*, select status **`Offer`** and sub item **`Prepare Offer`**, and choose *Apply Updates*.
- Now you can adapt the offer and send it again for approval. For this, proceed as described in process step Prepare Offer Details and Trigger Offer Approval [page 141].

4.6.6.2.2 Approve Offer via Mobile Device (Optional)

Purpose

If the mobile application is enabled on his/her device, the Hiring Manager can also approve via Mobile device the job offer provided by the recruiter for the successful candidate.

> ⓘ Note
>
> If the mobile application is not enabled, this option is not available and only the option described in *Approve Offer on Company Website* can be executed.

> ⓘ Note
>
> In this document, we only describe the screen elements of the iOS system. The SAP SuccessFactors Mobile application also supports the Android platform, while the Android interface might be a little bit different.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Open the SAP SuccessFactors mobile app and log on as Hiring Manager by tapping the corresponding username in the Multi-Profile screen.	The *SAP SuccessFactors* home page is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
2.	**Access Offer Form**	In the *To - Do* tile, tap *Approve Requests*.	The *Details* screen for the Job Offer Approval is displayed.	
3.	**Review Offer Details**	On the *Details* screen, review the offer details and if satisfied, tap *Approve*. On the *Add comment* screen, add a comment, and then tap *Done*.	The job offer has been approved by the Hiring Manager on mobile device. The same offer on the company website will be automatically set as approved. The job offer has been sent to the Next Level Manager for approval.	

> **Note**
>
> In case you need to decline the offer, enter an appropriate comment, justifying your decision, and tap *Decline*. The offer returns to the Recruiter. In the Talent Pipeline, the candidate is moved automatically to status `Offer Declined by Approver`. The Recruiter can now adapt the offer as per the feedback received from the approver, and submit it again for approval.

4.6.6.3 Approve Offer (Approved by Hiring Manager)

Purpose

The Next Level Manager approves the job offer, which has already been approved by the hiring manager.

If the SAP SuccessFactors Mobile application has been activated on the Next Level Manager's mobile device as described in section *2 Prerequisites*, in addition to the offer for approval received on the company instance website, the Next Level Manager will receive it also on their mobile device. He or she can approve the offer either on the **company instance website** [page 147] or on the **mobile device** [page 148].

These options are detailed in the following chapters.

4.6.6.3.1 Approve Offer on Company Website

Purpose

The Next Level Manager approves on the company website the job offer, which has already been approved by the hiring manager, for the successful candidate.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Next Level Manager*.	The *Home* page is displayed.	
2.	**Access Offer Form**	On the *Home* page, in the *Approvals* section, choose in the *Job Offer* card. **Note** In case there are several job offers waiting for approval, the *View All* link will be displayed in the *Job Offer* card. Choose that link; in the upcoming dialog box, choose the appropriate *Job Offer* card.	The *Offer Approval: <Candidate Name> for <Job Title> (requisition no.)* screen is displayed.	
3.	**Review Offer Details**	On the *Offer Approval: <Candidate Name> for <Job Title> (requisition no.)* screen check the details, add a *Comment*, and choose *Approve*.	A *Confirmation* dialog box is displayed asking you to confirm the approval of the offer detail.	
4.	**Approve Offer**	In the *Confirmation* dialog box, choose *Yes*.	The Next Level Manager has approved the job offer. The candidate is moved automatically to status `Offer Approved`.	

Note

In case you need to decline the offer, enter an appropriate comment, justifying your decision, and choose *Decline*. In the upcoming *Confirmation* dialog box, choose *Yes*. The offer returns to the Recruiter. In the Talent Pipeline, the candidate is moved automatically to status `Offer Declined by Approver`. The Recruiter can now adapt the offer as per the feedback received from the approver. For the detailed procedure, refer to the **Note** in process step Approve Offer on Company Website [page 144].

Result

Once the candidate is in status `Offer Approved` in the Talent Pipeline, the recruiter can discuss the verbal offer with the candidate.

4.6.6.3.2 Approve Offer via Mobile Device (Optional)

Purpose

If the mobile application is enabled on their device, the Next Level Manager can also approve via Mobile device the job offer approved by the hiring manager for the successful candidate.

> ⓘ Note
>
> If the mobile application is not enabled, this option is not available and only the option described in *Approve Offer on Company Website* can be executed.

> ⓘ Note
>
> In this document, we only describe the screen elements of the iOS system. The SAP SuccessFactors Mobile application also supports the Android platform, while the Android interface might be a little bit different.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Open the SAP SuccessFactors mobile app and log on as Next Level Manager by tapping the corresponding username in the *Multi-Profile* screen.	The *SAP SuccessFactors* home page is displayed.	
2.	**Access Offer Form**	In the *To-Do* tile, tap *Approve Requests* > *Job Offer Approval for <Candidate Name>*.	The *Details* screen for the Job Offer Approval is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Review Offer Details**	On the *Details* screen, review the offer details and if satisfied, tap *Approve*. On the *Add comment* screen, add a comment and then tap *Done*.	The job offer has been approved by the Next Level Manager on the mobile device. The same offer on the company website will be set automatically as `Offer Approved`.	

> **Note**
>
> In case you need to decline the offer, enter an appropriate comment, justifying your decision, and tap *Decline*. The offer returns to the Recruiter. In the Talent Pipeline, the candidate is moved automatically to status `Offer Declined by Approver`. The Recruiter can now adapt the offer as per the feedback received from the approver, and submit it again for approval.

Result

Once the candidate is in status `Offer Approved` in the Talent Pipeline, the recruiter can discuss the verbal offer with the candidate.

4.6.6.4 Discuss Verbal Offer with Candidate (Process Step Outside Software)

Purpose

The Recruiter discusses the verbal offer with the candidate to see if the candidate agrees to accept the offer.

This step takes place outside the delivered software and will therefore be described briefly.

Procedure

Introduce the offer details to the candidate and get to know if it is acceptable for him or her.

The Candidate evaluates the verbal offer and provides appropriate feedback.

Result

Depending on the feedback of the candidate, the recruiter can continue in the process with different process step sequences.

- If the (internal/external) candidate has accepted the verbal offer, continue with process step Prepare and Send Online Offer Letter to Candidate [page 150] and subsequent.
- If the (internal /external) candidate has rejected the verbal offer, the recruiter will evaluate if this offer is the last one or an adjustment would be possible.
  - If it is the last offer, the recruiter will perform Reject Candidate (Sub-Process) [page 136].
  - If it is not the last offer, the recruiter can discuss internally with the hiring manager about the candidate's request and decide on the details of a new offer. Afterwards, the recruiter will discuss again about the verbal offer with the candidate.

4.6.7 Close Recruiting Process (Sub-Process)

Purpose

After an external candidate has accepted the verbal offer, the Recruiting Administrator can initiate the pre-offer background/reference check of that candidate. In case of a favourable outcome, an online offer is sent to the candidate. After the offer is accepted, the Recruiting Administrator can initiate the post-offer background check. In case of a favourable outcome, the candidate is ready to be hired into the HCM system. Remaining candidates will be informed about the outcome of the selection process and the job requisition will be closed.

4.6.7.1 Prepare and Send Online Offer Letter to Candidate

Purpose

The Recruiting Administrator prepares the offer letter and sends it to the successful candidate.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiting Administrator*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose *Home* > *Recruiting* > *Job Requisitions* from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	
3.	**Open Applicant Workbench for Job Requisition**	Search in the list displayed on the *Job Requisitions* screen for the row with your requisition. Navigate to the Applicant Workbench either by choosing the *<number>* hyperlink in the *Candidates* column, or by hovering over the job title and selecting *Candidate Actions: Candidate Summary*.	The *<Job Title>* screen is displayed, containing the *Talent Pipeline*.	
4.	**Select Candidate**	To view the candidate, the applicants name is displayed in the *Applicants* table. Choose the candidate's name.	The summary view of the selected candidate is displayed.	
5.	**Select Offer Letter**	From the *More* dropdown at the top of the candidate detail area, select Se*nd Offer Letter*.	The *Offer Letter : <candidate name> for <Job Title>* screen is displayed.	
6.	**Maintain and Preview Offer Letter**	On the *Offer Letter : <candidate name> for <Job Title>* screen, select the appropriate country/region and language from the *Country/Region* and *Language* dropdown, and the appropriate offer letter template from the *Template* dropdown. Adapt the mail body if needed. **Note** Use the *Preview* button to review the letter and ensure all tokens are populated with the correct information. Choose *Back* to return to the offer letter. Choose *Next Step*.	The Offer Letter has been created and previewed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
7.	**Select Sending Method**	Select the option for sending the offer letter. Following options are available: • For sending the offer letter online, choose *Online Offer* (this is the preferred option). • For sending the offer letter as PDF attachment, choose *Email as PDF attachment*. • For sending the offer letter as text, choose *Email as text*. • For making a verbal offer, choose *Verbal Offer*. Choose *Online Offer*.	The next page of the *Offer Letter : <candidate name> for <Job Title>* screen is displayed.	
8.	**Maintain E-Mail with Online Offer Letter Link included**	Select from the *Template* dropdown the email template **`Online Offer`** that will be sent to the candidate containing the online offer letter hyperlink. Adapt the email body if needed. Choose *Next*.	The next page for sending the email in the *Offer Letter : <candidate name> for <Job Title>* screen is displayed.	
9.	**Send Offer Letter**	Review the email, and if satisfied, send the email by choosing *Send*. A system message is generated confirming that your offer letter was sent successfully via email. Choose *I'm Done*.	The offer letter has been created and sent to the candidate.	

Result

The link to the online offer has been sent to the candidate via email.

4.6.7.2 Accept Online Offer

Purpose

The Candidate has received an email notification with the link to the online offer made by the company. The Candidate checks this offer and eventually accepts it.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Access your Career Site**	Access your Email account and review the email from the system including the online offer hyperlink. Choose the link provided in the email to log on to your career site.	The *My Offers* screen is displayed, containing the offer letter *<Job Title> (requisition no.) - Pending* sent by the company.	
2.	**Accept Offer**	Review the content of the offer letter. If all the terms of the offer are understood and agreed, choose in the right side of the screen *Accept*.	The *Accept* button is switched to *Accepted MM/DD/YYYY*. The candidate has accepted the offer. The recruiter and hiring manager will receive an email notification about the acceptance.	

> **Note**
>
> In case of questions from your side, you can email to the recruiter. To do so, choose *Email Recruiter*, enter in the upcoming dialog box an email content as appropriate, and choose *Send*.

> **Note**
>
> If you decline the offer, your application will automatically move to status `Offer Declined by Candidate` in the talent pipeline. The Recruiter can then move the candidate in the Talent Pipeline to the appropriate `Declined` status.

4.6.7.3 Set Candidate Status to "Offer Accepted"

Purpose

The Recruiter moves the candidate who accepted the online offer to status **`Offer Accepted`**.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose *Home* > *Recruiting* > *Job Requisitions* from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	
3.	**Open Applicant Workbench for Job Requisition**	On the *Job Requisitions* screen in the displayed list search for the row with your requisition. Navigate to the Applicant Workbench either by selecting the *<number>* hyperlink in the *Candidates* column, or by hovering over the job title and selecting *Candidate Actions: Candidate Summary*.	The *<Job Title>* screen is displayed, containing the *Talent Pipeline*.	
4.	**Select Candidate**	Select status group *Offer* in the *Talent Pipeline*. The candidate shows up in the list. Choose the name of the candidate who accepted the job offer.	The summary view of the selected candidate is displayed.	
5.	**Change Candidate's Status**	Use one of the following methods to move the candidate of interest in the *Talent Pipeline* to status **`Offer → Offer Accepted`**: • Flag the check box to the left of the candidate's name for one or more candidates and choose *Move* to move them to the next status in the pipeline. • Flag the check box to the left of the candidate's name for one or more candidates and choose *More > Move Applicant* to move them to the next status in the pipeline. • Flag the check box to the left of the candidate's name for one or more candidates and choose *More > Move Applicant* to a status selected from the drop-down.	A dialog window is displayed for maintaining a comment (except the last method).	
6.	**Maintain Comment and Apply Updates**	Flag the check box to the left of the candidate's name for one or more candidates and choose *More* > *Add Comment* to add comments.	The candidate has been moved to status **`Offer Accepted`**.	

4.6.7.4 Initiate Post-Offer Background / Reference Check for External Candidate (Optional)

Purpose

> ⚠ Caution
>
> This process step is relevant only in case due to different reasons **no** pre-offer background / reference check has been performed for the successful external candidate. Otherwise, you can skip this process step and the subsequent process step *Perform Post-Offer Background / Reference Check of External Candidate* as well.

The Recruiting Administrator moves the external candidate to status **`Post-Offer Background Check`**. The post-offer background check is performed prior hiring the candidate into the company.

Prerequisite

The candidate is an external person to the company.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiting Administrator*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose *Home* > *Recruiting* > *Job Requisitions* from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	
3.	**Open Applicant Workbench for a Job Requisition**	Search in the list displayed on the *Job Requisitions* screen for the row with your requisition. Navigate to the Applicant Workbench either by choosing the *<number>* hyperlink in the *Candidates* column, or by hovering over the job title and selecting *Candidate Actions: Candidate Summary*.	The *<Job Title>* screen is displayed, containing the *Talent Pipeline*.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
4.	**Select External Candidate**	To view the candidate, the applicants name display in *Applicants* table. The candidate shows up in the list. Choose the external candidate's name.	The summary view of the selected candidate is displayed.	
5.	**Change External Candidates' Status**	Use one of the following methods to move your external candidate in the Talent Pipeline from status **`Offer Accepted`** to status **`Ready to Hire`** → **`Post-Offer Background Check`**: • Flag the check box to the left of the candidate's name for one or more candidates and choose *Move* to move them to the next status in the pipeline.. • Flag the check box to the left of the candidate's name for one or more candidates and choose *More* > *Move applicant* to move them to the next status in the pipeline. • Flag the check box to the left of the candidate's name for one or more candidates and choose *More* > *Move Applicant* to a status selected from the dropdown. •	A dialog window is displayed for maintaining a comment (except the last method).	
6.	**Maintain Comment and Apply Updates**	Flag the check box to the left of the candidate's name for one or more candidates and choose *More* > *Add Comment* to add comments.	The candidate is in status `Post-Offer Background Check`.	

4.6.7.5 Perform Post-Offer Background / Reference Check of External Candidate (Process Step Outside Software)

Purpose

The Recruiting Administrator performs a post-offer background / reference check of the external candidate. This check is executed to ease the decision of hiring the external candidate into the company officially.

This step takes place outside the delivered software and will therefore be described briefly.

Procedure

Investigate the background of the external candidate and verify the accuracy of his/her claims, as well as researching any possible criminal history, worker's compensation claims, or employer sanctions. Check, for example:

- Citizenship, immigration, or legal working status,
- Employment records,
- Education records,
- Gaps in employment history,
- Identity and address.

Result

Depending on the result of the background check, the recruiter can continue in the process with different process step sequences.

- For candidate(s) who passed the background check successfully, the recruiter can perform process step Set Candidate Status to "Ready to Hire" [page 159].
- If the candidate(s) failed the background check, an appropriate notification is sent to the recruiter. The recruiter then needs to perform process step Rescind Offer and Inform Candidate and Manager [page 157].

4.6.7.6 Rescind Offer and Inform Candidate and Manager

Purpose

After having received the notification that the external candidate failed the post-offer background check, the Recruiter sets the status of this candidate to **`Declined`**.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose *Home* > *Recruiting* from the menu on the top left corner.	The *Job Requisitions* screen is displayed.	
3.	**Open Applicant Workbench for Job Requisition**	On the *Job Requisitions* screen, in the displayed list search for the row with your requisition. Navigate to the Applicant Workbench either by choosing the *<number>* hyperlink in the *Candidates* column, or by hovering over the job title and selecting *Candidate Actions: Candidate Summary*.	The *<Job Title>* screen is displayed, containing the *Talent Pipeline*.	
4.	**Select Candidate**	To view the candidate, the applicants name is displayed in the *Applicants* table. Choose the candidate who failed the background check.	The summary view of the selected candidate is displayed.	
5.	**Change Candidates' Status**	Use one of the following methods to move the candidate of interest in the Talent Pipeline: • Flag the check box to the left of the candidate's name for one or more candidates and choose *Move* to move them to the next status in the pipeline. • Flag the check box to the left of the candidate's name for one or more candidates and choose *More > Move applicant* to move them to the next status in the pipeline. • Flag the check box to the left of the candidate's name for one or more candidates and choose *More > Move applicant* to a status selected from the dropdown. In the SAP Best Practices solution, there are a few options of rejection statuses in the Talent Pipeline. Choose the proper **`Declined`** status according to your own situation. **Note** If you choose *Declined* status from the *Regret With Email* group, the candidate will receive a regret email automatically sent by the system.	A dialog window is displayed for maintaining a comment (except the last method).	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
6.	**Maintain Comment and Apply Updates**	Flag the check box to the left of the candidate's name for one or more candidates and choose *More > Add Comment* to add comments.	The candidate is in status **`Declined`**.	

Result

The Recruiter informs the hiring manager and the candidate about the rejection of the candidate's application.

The Recruiter needs to execute the offer-related sub-process Prepare Offer (Sub-Process) [page 140] again.

4.6.7.7 Set Candidate Status to "Ready to Hire"

Purpose

The Recruiter moves the candidate, who will be hired officially on the posted job, to status **`Ready to Hire`**.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose *Home* > *Recruiting* > *Job Requisitions* from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Open Applicant Workbench for a Job Requisition**	On the *Job Requisitions* screen in the displayed list search for the row with your requisition. Navigate to the Applicant Workbench either by choosing the *<number>* hyperlink in the *Candidates* column, or by hovering over the job title and selecting *Candidate Actions: Candidate Summary*.	The *<Job Title>* screen is displayed, containing the *Talent Pipeline*.	
4.	**Select Candidate**	To view the candidate, the applicants name is displayed in the *Applicants* table. Choose the name of the candidate who has accepted the job offer.	The summary view of the selected candidate is displayed.	
5.	**Change Candidate's Status**	Use one of the following methods to move the candidate of interest in the Talent Pipeline to status **`Ready to Hire`**→**`Ready to Hire`**: • Flag the check box to the left of the candidate's name for one or more candidates and choose *Move* to move them to the next status in the pipeline. • Flag the check box to the left of the candidate's name for one or more candidates and choose *More > Move applicant* to move them to the next status in the pipeline. • Flag the check box to the left of the candidate's name for one or more candidates and choose *More > Move Applicant* to a status selected from the dropdown.	A dialog window is displayed for maintaining a comment (except the last method).	
6.	**Maintain Comment and Apply Updates**	For each of these methods (except the last one) you may enter a comment on the status change in the dialog box. In this dialog box, choose *Apply Updates*. If there's only one opening for this job requisition, the *When you complete this action, no openings will remain for this job requisition, and the job requisition will be closed.* dialog box will show up.	The candidate has been moved to status **`Ready to Hire`**.	

4.6.7.8 Check Suitability of Other Candidates

Purpose

The Recruiter checks if the other candidates, who have applied to the job requisition and have been rejected, could be considered for other job requisitions posted by the company, or for the company's talent pools.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose *Home* > *Recruiting* from the menu on the top left corner.	The *Job Requisitions* screen is displayed.	
3.	**Open Applicant Workbench for Job Requisition**	On the *Job Requisitions* screen, in the displayed list search for the row with your requisition. Navigate to the Applicant Workbench either by choosing the *<number>* hyperlink in the *Candidates* column, or by hovering over the job title and selecting *Candidate Actions: Candidate Summary*.	The *<Job Title>* screen is displayed, containing the *Talent Pipeline*.	
4.	**Select Candidate**	To view the candidate, the applicants name is displayed in the *Applicants* table. Choose the candidate who has not been considered for hiring on the job.	The summary view of the selected candidate is displayed. Continue with one of the below mentioned options: • In case the candidate is suitable for another job requisition, continue with **Option 1** [page 162]. • In case the candidate is suitable to be added to a talent pool, continue with **Option 2** [page 162].	

Option 1: The candidate is suitable for another posted job requisition:

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
5.	**Provide Phone Feedback (optional)**	The Recruiter makes a phone communication with the candidate to check if he or she is interested in another job requisition. This test step is performed outside software.		
6.	**Forward Candidate to Other Job Requisition**	If the candidate is interested in another job requisition, use the following methods to forward the candidate to that job requisition: • Flag the check box to the left of the candidate's name for one or more candidates and choose *More* and choose *Forward > Forward as to Requisitions*. In the *Search Results* list, flag the checkbox in front of the job requisition to which you want to forward the candidate, and in the *Add the candidate(s) to the selected job requisition(s)*, choose *Forward*.	The candidate has been forwarded to another posted job requisition.	

Option 2: The candidate is suitable for adding to certain talent pool(s):

> ⚠ Caution
>
> This step can be performed only by a Recruiter who has the appropriate permissions for talent pools. The Recruiter should be the owner of at least one talent pool or be shared with at least one talent pool.

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
5.	**Go to Candidate Profile**	Choose the *Applicant Name* hyperlink.	The *Candidate Profile* screen is displayed.	
6.	**Add Candidate to Talent Pool**	Go to the *Talent Pools* portlet of the candidate profile. Choose *+ Add*. In the upcoming *Add to Talent Pool* dialog box, choose the *Talent Pool Name*, then select a *Place in Status* value from the dropdown list. > ⓘ Note > If you do not select a status, the selected members will be placed in the default status you have chosen for the talent pool. Choose *Submit*.	The candidate has been successfully added to your talent pool. A success message is displayed on the screen. > ⓘ Note > In the *Success* dialog box, choose *OK* .	

Result

In case the candidate is neither interested in another job requisition, nor can be considered for the company's talent pools, continue in the process execution with process step Set Candidate Status to "Declined" [page 139].

4.7 Maintain Candidate Data in HCM Core Component (Process Step Outside Software)

Purpose

The data of the candidate, who is in status Ready to Hire, will be maintained in the HCM Core Component application. For this, the HR Administrator either

- takes over the external candidate's data to the HCM Core component used by the company, or
- adapts the record of the internal candidate in the HCM Core component used by the company.

Procedure

Transfer or maintain the data of the candidate to/in your HCM core component as defined in your instance.

This step takes place outside the delivered software.

Result

The successful candidate has been hired/transferred to the new job in the system.

On the candidate's first day at work, the Recruiter changes the Candidate Status in the Talent Pipeline to **`Hired`**.

4.8 Remove Job Postings

Purpose

Once all openings for the job have been filled, the posting of that job on the various channels is no longer required. Thus, the Recruiter can remove the job postings.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose *Home* > *Recruiting* from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	
3.	**Go to Job Postings**	Select the job requisition for which the job posting needs to be removed by hovering over the job title: a dialog box to the right will be displayed for *Actions*. Choose the *Job Postings* link.	The *<Job Title>* screen is displayed.	
4.	**Remove Posting**	Choose *Remove Post* for each Posting Type.	The Job Postings are removed.	

4.9 Close Job Requisition

Purpose

Once all openings for the job have been filled, the Recruiter closes the job requisition.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Recruiting module**	Choose ▶ *Home* > *Recruiting* ▶ from the menu in the top left corner.	The *Job Requisitions* screen is displayed.	
3.	**Open Job Requisition Form**	Select the job requisition to be closed by hovering over the job title: a dialog box to the right will be displayed for *Requisition Actions*. Choose the *View or Edit Requisition* link.	The *<Job Title>* form is displayed.	
4.	**Close Job Requisition**	From the *Status* dropdown list, select **`Closed`** and at the bottom of the screen choose *Close Job Requisition*. In the upcoming dialog box, which informs you that you are about to close the job requisition, choose *OK*.	The job requisition is closed. On the *Job Requisitions* screen in the list of **`All job requisitions`**, this job requisition is marked in a different color to indicate that it is no longer open. **Note** Once the job requisition is closed, all in-progress candidates that are still left in the talent pipeline (meaning, they have not been hired) will have their statuses changed automatically by the system to **`Requisition Closed`**.	

5 More Information

5.1 Email Campaigns

5.1.1 Delete Email Campaign

Purpose

The Recruiter can delete email campaigns that have not been sent.

Prerequisite

The email campaign has not been sent yet.

The email campaign has no recipients associated with it, whether manually added, opted in, or added by talent pool.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to SAP SuccessFactors Company instance as Recruiter.	The *Home* page is displayed.	
2.	**Access Email Campaign**	Choose *Home* > *Recruiting* > *Marketing* from the menu in the top left corner.	The *Marketing > EMAIL CAMPAIGNS* screen is displayed.	
3.	**Delete Email Campaign**	Flag the checkbox in front of the name of the email campaign you want to delete, choose the *Take Action* icon, then choose *Delete Email Campaign*. In the upcoming *Confirmation* window, choose *OK*.	The email campaign has been successfully deleted.	

5.1.2 Send Campaign Email

Purpose

The Recruiter can send campaign emails to groups of recipients he or she has identified.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to SAP SuccessFactors Company instance as Recruiter.	The *Home* page is displayed.	
2.	**Access Email Campaign**	Choose *Home* > *Recruiting* > *Marketing* from the menu in the top left corner.	The *Marketing > EMAIL CAMPAIGNS* screen is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Send Campaign Email**	Choose the *Campaign Name* for the email campaign that you want to send. On the *Edit Email Campaign* screen, choose *Review Email* and review the campaign details. If you are satisfied with the layout, choose *Send Email*. In the upcoming *Send Email* dialog box, you can choose to send the email immediately (by checking the *Send Immediately* radio button) or to specify a specific date and time at which the email is to be sent out (by checking the *Send at a Specific Date Time* radio button). If you check the *Send Immediately* radio-button, choose *Send Email*. If you check the *Send at a Specific Date Time* radio-button, you need to maintain the detailed date and time in the *Send Date and Time* field. Then choose *Schedule Email*. In the upcoming *Email Confirmation* dialog box, choose *Schedule*. **Note** If something prevented the campaign from being sent, an error message is displayed explaining the problem and what you can do to resolve it. An email campaign is not sent if no recipients have been identified for the campaign. A warning message will be displayed if the campaign email body has no content. **Note** If the recipients for the campaign include talent pools with more than 30 members, the status of the campaign is changed to *In Progress*. Recruiting adds a job to the job queue to remove duplicate email addresses from the complete list of recipients, and to send the campaign emails. An email is sent to the sender reporting that the job has been initiated. Another email is sent to the sender later, confirming that the campaign emails have been sent.	The campaign email has been successfully sent.	

5.1.3 View Email Campaign Details

Purpose

The Recruiter can view on the *Email Campaign Details* page a panel containing details about emails sent and a panel containing campaign details.

Prerequisite

The email campaign must have been already sent out.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to SAP SuccessFactors Company instance as Recruiter.	The *Home* page is displayed.	
2.	**Access Email Campaign**	Choose *Home* > *Recruiting* > *Marketing* from the menu in the top left corner.	The *Marketing* > *EMAIL CAMPAIGNS* screen is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**View Email Campaign Details**	Choose the *Campaign Name* of the email campaign with *Status* `Sent`, for which you want to view details. In the *Emails (# Recipient)* portlet of the *Email Campaign Details* screen, you can view following information: • **Views**: the number of recipients who viewed the email • **Clicks**: the number of recipients who clicked on the link in the email • **Unsubscribed**: the number of recipients who unsubscribed from the marketing emails. These candidates now have their opt-in setting set to false. • **Undeliverable**: the number of emails not sent because of invalid email addresses or other technical problems • **Not Sent**: the number of emails not sent for any other reason, such as restricted permissions To view tooltips containing summary information for *Views*, *Clicks*, *Unsubscribes*, *Undeliverable*, or *Not Sent*, hover the cursor over any of these charts. To view additional details for any of the graphs, double-click the graph desired. **Note** A dialog box is displayed containing names and email addresses for the individuals counted in the chart you selected. **Note** To find a particular individual, enter a name into the *Search First Name* field, or the *Search Last Name field*, and choose *Go*. To view details about the talent pools to which the campaign emails are sent, choose *# Talent Pools*. **Note** The *Talent Pool Receipts* dialog box is displayed, showing the names and number of members drawn from each of the talent pools for the campaign. **Note** To view the names of individual recipients within one of the listed talent pools, choose the right-pointing arrow > to the right of the name of the talent pool desired.	The email campaign details have been reviewed.	

5.2 Referral Tracking

Purpose

The Employee who referred a candidate checks the *Referral Tracking* page.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to SAP SuccessFactors Company instance as Employee.	The *Home* page is displayed.	
2.	**Access Referral Tracking Module**	Choose *Home* > *Careers* from the menu in the top left corner. Navigate to the *Referral Tracking* tab.	The *Referral Tracking* screen is displayed, which contains the portlets *Your Referrals* and *Referral Timeline*.	

3.	**Check Page Details**	Review the details in each portlet of the *Referral Tracking* screen as follows:
		• In the *Your Referrals* portlet:
		This area contains a configurable message added in the *Employee Referral settings* in Admin Tools.
		  • *Total Referrals by Percent*: Bar graph showing how far referrals have progressed in the application process. (The percentages are calculated based on the number of applicant statuses visible to employees).
		  • *Earning Potential*: Shows the Employee Referral amount sum of all referrals a user has made. If an employee makes referrals to jobs with different currencies, the sum for each currency is displayed separately.
		• *Referral Timeline*: The left-hand side section shows a summary of the selected referral, or if no referral is selected, a summary of the referral with the highest percentage completion. The right-hand side section shows the overall referral progress.
			The data as shown in the *Referral Tracking* page is correct.	

5.3 Activity Tracking & Dashboard

5.3.1 Activity Feed Actions

Purpose

The Recruiter checks the specific actions that the followed candidates have completed in the activity feed. The actions will appear on the feed with the most recent event showing at the top. From the feed, the Recruiter can navigate to the candidates' profile and take actions, such as adding the candidate to a talent pool or email campaign.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to SAP SuccessFactors Company instance as Recruiter.	The *Home* page is displayed.	
2.	**Access Candidate Activity Feed**	Choose *Home* > *Recruiting* from the menu in the top left corner. Navigate to the *Dashboard* tab and review the feed. **Note** The feed is populated by the candidates that are being followed and the actions they take. The following actions will appear on the feed: • Candidate Logs In to the Career Site • Candidate Completes a Data Capture Form • Candidate Saved a Draft of a Job application • Candidate Abandons Job Application • Candidate Applies to a Job	The *Dashboard* screen is displayed, and the feed is reviewed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Set Email Notification Frequency (optional)**	In the top right corner of the *Candidate Activity Feed* section, choose the *Settings* icon to open the *Activity Feed Settings* screen. Go to the *Email Notification* tab and choose from the *Email Notifications Frequency* dropdown list the frequency, with which you want to receive email notifications related to your activity feed.	The email notification frequency has been set.	
4.	**Take Action from the Activity Feed**	On the *Candidate Feed Activity* screen, you can add the candidate to a talent pool and email campaign, or unfollow the candidate. Choose the name card icon to the right of the candidate's name, then choose the *Take Action* hyperlink. **To add a candidate to a talent pool:** Choose the *Add to Talent Pool* hyperlink to open the *Add to Talent Pool* dialog box. Choose in the *Talent Pool Name* field your talent pool and select a status for the candidate in the *Place in Status* field. Then choose *Submit*. **To add a candidate to an email campaign:** Choose the *Add to Email Campaign* hyperlink to open the *Add to Email Campaign* dialog box. Choose your email campaign in the *Email Campaign* field. Then choose *Submit*. **To unfollow the candidate:** Choose the *Unfollow Candidate* hyperlink, and in the upcoming warning dialog box, choose *Yes*.	The candidate has been added to talent pool, email campaign, or unfollowed.	
5.	**Access Candidate Profile**	In the *Candidate Feed Activity* screen, choose the *<candidate name>* hyperlink to open the candidate's profile.	The *Candidate Profile* screen is displayed.	
6.	**Access Job Requisition**	In case the candidate has applied to a job, you can choose in the *Candidate Feed Activity* screen the *<job requisition>* hyperlink next to the candidate's name, to open the job requisition talent pipeline.	The *Job Requisition Talent Pool* screen is displayed.	

5.3.2 Candidate Profile Actions

Purpose

The Recruiter can follow or unfollow candidates in their candidate profile, as well as check the most recent actions related to the candidates.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed.	
2.	**Access Candidate Profile**	Choose *Home* > *Recruiting* from the menu in the top left corner. Navigate to the *Candidates* tab. You can search the candidates by name, by keyword and item, or by tag. For the detailed procedures, refer to process step Search and Assign Candidates from Talent Pool [page 66], test step **#4a**, **#4b**, or **#4c**. Choose the *<candidate name>* hyperlink to open the candidate profile.	The *Candidate Profile* page is displayed.	
3.	**View Feed on Candidate Profile**	In the top right corner of the page, choose *View Activity Feed*. In the upcoming *Candidate Activity Feed* dialog box, you can review the most recent actions related to the candidate. **Note** This feed will appear on all profiles for external candidates even if the user is not following the individual. When done, choose *Close*.	The most recent actions related to the candidate has been reviewed.	
4.	**Follow or Unfollow Candidate**	In case you want to follow the candidate, choose *Follow Candidate* in the top right corner of the page. In the upcoming dialog box, choose *OK*. In case you want to unfollow the candidate, choose *Unfollow Candidate* in the top right corner of the page, and in the upcoming dialog box, choose *Yes*.	The candidate has been followed or unfollowed.	

5.4 Email Correspondence and Message Center

Purpose

Email Correspondence enables Recruiters to have a complete history of **manual** email communication with candidates. Recruiters initiate the email, and then the reply from the candidate is captured and logged in SAP SuccessFactors Recruiting. Then the Recruiter can either reply from the new *Message Center* or from their own email server and that reply is also captured and logged in SAP SuccessFactors Recruiting.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors Company** instance as *Recruiter*.	The *Home* page is displayed. Continue with test step **#2a** or **#2b**. Then continue with test step **#3**.	
2a.	**Access Candidate Profile**	Choose *Home* > *Recruiting* from the menu in the top left corner. Navigate to the *Candidate* tab. You can search the candidates by name, by keyword and item, or by tag. For the detailed procedures, refer to process step Search and Assign Candidates from Talent Pool [page 66], test step **#4a**, **#4b**, or **#4c**. Choose the *<candidate name>* hyperlink to open the candidate profile.	The *Candidate Profile* page is displayed.	
2b.	**Access Application Profile**	Choose *Home* > *Recruiting* from the menu in the top left corner. Navigate to the *Job Requisition* tab. Search for the row with your requisition, choose the *<number>* hyperlink in the *Candidates* column, then choose the candidate's name.	The *Application Profile* page is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Send Email to Candidate**	Go to the *Correspondence* section. **Note** In case email correspondences exist for the candidate, you can see the email threads in the *Correspondence* section. The number at the end of subject represents the number of emails in the email thread. Choosing your own email thread will take you directly to the *Message Center*. Choosing an email that was not originally sent by you will open the dialog box to show the original email. To send an email to the candidate, choose *Send Email* in the *Correspondence* section. On the *Candidate Correspondence* screen, enter the *Subject* and *Message* of the email. Choose *Next*, check the content, then choose *I'm Done*.	The email has been sent out to the candidate. **Note** The candidate receives the email in their mailbox and can reply to it from the own mail server. The reply will be recorded in the recruiting system and displayed in the *Email Correspondence* and *Message Center* screen.	
4.	**Access Message Center**	Choose *Home* > *Recruiting* from the menu on the top left corner. Navigate to the *Message Center* tab.	The *Message Center* screen is displayed.	
5.	**Review Email Threads**	The *Message Center* screen shows all your email threads with different candidates. **Note** Unread emails are in **bold**. Top filter allows you to toggle between 'All Messages' and 'Unread Only'. You can choose the *Display Option* icon to sort and filter the email threads.	The email threads have been reviewed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
6.	**Reply to Email**	In the left side panel, choose the email you want to reply to, and enter the email body in the empty box on the right side of the screen. Then choose *Send*. **Note** You can preview the email before sending it by choosing *Preview*. After sending the email to the candidate, the email is added to the email thread and will show up in the right pane. The email count will increase on the *Candidate Profile / Application Profile*> *Correspondence* portlet.	The reply to the candidate's email has been sent out.	

5.5 Recruiting Marketing Advanced Analytics

Purpose

Recruiting Marketing Advanced Analytics combines data from Recruiting Management and Recruiting Marketing to create full line-of-site data from a candidate's first visit to their eventual hire. It is a reporting application for reporting trends in analytics data. Recruiting Marketing Advanced Analytics has more sophisticated reporting than the Recruiting Dashboard, including reports on candidate quality, quantity, cost per hire, time to fill, and source behavior.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to SAP SuccessFactors Company instance as Recruiter.	The *Home* page is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
2.	**Access Advanced Analytics**	Choose *Home* > *Recruiting* from the menu in the top left corner. Navigate to the *Advanced Analytics* tab.	The *Advanced Analytics* screen is displayed; it displays the trend lines that can help you visualize sourcing data trends over period of time in graphical components.	
3.	**Review Data**	In the *Advanced Analytics > Brower* window, define the *Time Period*. Select a dimension of data from the *Source Type* area / *Source Type* column as follows: choose *<Source Type name>* and select from the dropdown that expands an appropriate *<dimension>*.	The sourcing data for the dimension you have selected displays.	
		You can display your data in graphs by choosing the *Show Trend*  icon on one or more rows of data.	Visual graphs appear vertically on the right of the data set table for all columns with a value for your selected time period.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
		Use the vertical scroll bar to view all graphs. Each column in the data table has a corresponding graph and represents the time period you defined for your data set. **Note** You can customize your display with additional actions listed below and the graphs update in real-time. • Hover over a line in the graph - this allows you to see the values for the column represented by that graph. • Select additional months - these appear as additional lines in the graphs. • When selecting *Month Number* as dimension and choose on a month in a graph - the line representing the month for that specific graph is removed from the view, and the month you choose becomes grayed out. This is a toggle; choose the month in the graph again to make the line visible. • Choose *Year over year* - this populates the graphs with lines for all 12 months for your defined time period. • Choose the expand graph icon (the small square icon with arrows pointing outward, located to the right of the *Year over year*) - this hides the table and expands the graph view. Use this to see the graph details. After having viewed the graphs, choose the *Close (X)* icon. To return to the initial display of the *Advanced Analytics > Brower* screen, choose the *Source Type* link located on the very left above the data table.	The trend lines of recruiting related data have been reviewed.	

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