SuccessFactors HCM Suite

CUSTOMER

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SuccessFactors Recruiting Marketing and Recruiting Management

Administration Guide

Content

1 Change History

The following table provides a historical overview of the most important changes made to this document since its initial publication.

Version	Date	Description
1411		• Marketing Central now supports third-party vendor Multiposting • Source Report available in Marketing Central

2 Integrating Recruiting Marketing with Recruiting Management

The Recruiting Marketing module can be integrated with the Recruiting Management module and Applicant Tracking System. This integration provides a number of extra features for customers, including Employee Referral, Real Time Job Sync and Single Sign On.

Recommended Recruiting Execution Features

These features are not required for the Rx Integration to function, but are recommended, as they will provide the best experience both for candidates and customers.

- Configure the On-Page Business Card. The on-page business card allows Rx clients to create a seamless workflow for candidates from the RMK public site, through the SSO experience and into RCM. The On-Page Business Card contains all of the same functionality of the existing Business card, but appears as a dialog box on the page the candidate applies from, rather than taking the candidate to a new page to complete the application process.
  - The On-Page Business Card should always have the e-mail, first name, and last name fields configured.
  - Set passwords for the On-Page Business Card to `manual entry` rather than `auto-generated.`
- Enable Rx Social Apply
  - Configure Social Apply as part of the Business Card configuration.
  - All available RMK social profile fields will need to be mapped to standard and custom client fields in RCM. If the mapping is not set up, then candidate full profiles will not be sent from RMK to RCM.

> **Note**
>
> Custom Fields configured on the Business Card are not available to be passed to the RCM Candidate Profile.

3 Candidate Single Sign On

Candidate SSO allows candidates to move from RMK to RCM using one set of login credentials.

When candidate SSO is configured, any change to the user's password in one system is automatically reflected in the other. When a candidate applies for a job via RMK, an account is automatically created in RCM if one does not already exist, based on the candidate's email address. The candidate does not need to enter login credentials when moving from RMK to RCM on apply if their passwords have been synchronized. If the passwords have not been synced, the candidate will be asked for their RCM password and if successfully verified, the two accounts will be linked.

If a candidate has an account in both the Talent Community and Job Management systems, the two accounts are linked upon login, creating the SSO experience.

> **Note**
>
> A RCM account is not created for a new candidate via Candidate SSO until the candidate has clicked "Apply" on the Recruiting Marketing site, filled out the business card (or its equivalent), and clicked "Next/Submit."

3.1 Prerequisites for Candidate Single Sign On

Enable required features for both Recruiting Management and Recruiting Marketing to configure a Recruiting Execution instance.

Recruiting Management Prerequisites

- Enable *Provisioning* > *Company Settings* > *Recruiting* > *Use email as external applicant userId*
- Enable *Provisioning* > *Company Settings* > *Recruiting* > *Enable Social Sourcing* > *Recruiting Marketing*
- Enable *Provisioning* > *Company Settings* > *Recruiting* > *Enable Separate Password Policy for External Candidates*
- Disable *Provisioning* > *Company Settings* > *Recruiting* > *Enable E-Mail Verification for Career Site*
- Check the box to *Disable CAPTCHA for external candidate account creation*
- If the customer is using DPCS, they must use DPCS 2.0 (or higher)

  > **Note**
  >
  > Use DPCS 2.0 with DRM 2.0 - the customer might need to upgrade to this version

Recruiting Marketing Prerequisites

- Configure the site for SSL.
- Disable the pre-apply page. Navigate to *Site Setup* > *Apply* and uncheck *Show Default Pre-Apply Page* and *Show Default Social Pre-Apply Page*
- Set first name and last name fields on the Business Card to required.
- User user-entered password. On the Business Card, ensure the password parameter is defined as <autoGeneratePassword value="disabled" >
- Set cookies type to permanent. Navigate to *Command Center* > *Site* > *Site Settings* > *Cookie Session type* > *Permanent (non-expiring).*

> **Note**
>
> Customers can use any cookie type with Recruiting Execution instances, but permanent cookies are recommended.

- Set the password on the business card to user-generated instead of auto-generated.

3.2 How to Configure Candidate Single Sign On

Configuring Candidate SSO requires initial configuration by Professional Services in both Recruiting Management and Recruiting Marketing.

Procedure

1. Navigate to SuccessFactors HCM *Admin Tools* > *Managing Recruiting* > *Manage External Password Policy* Set the external password policy so that it exactly matches the following requirements:
    - Minimum Length: 6
    - Maximum Length: 20
    - Maximum Successive Failed Login Attempts: 0 (this needs to be disabled)
    - Password Reset Email: BLANK (does not matter since account lockout is disabled)
    - Case Sensitive (recommended): ENABLED
    - Mixed Case required: DISABLED
    - Non-alpha characters required: DISABLED

    > **Note**
    >
    > : The above password settings must be adhered to exactly, or Candidate SSO will fail.

4 Recruiter Single Sign On

Recruiter single sign on gives recruiting users with appropriate permissions have one-click access to the RMK Dashboard from the RCM interface.

Recruiting users will see a link to *Recruiting Marketing* on the Job Requisitions page in RCM or a link to *Market Job* in the Requisition Actions or Job Requisition menu in RCM. Clicking these links opens the RMK Dashboard in a new window. Once a user clicks into the RMK environment, there is no SSO link back to RCM. The *Recruiting Marketing* link will take users to the Recruiting Dashboard. The Recruiting Dashboard is only available in English. The *Market Job* link takes users to the URL Builder for the corresponding job in Recruiting Marketing.

4.1 Prerequisites for Recruiter Single Sign On

Recruiter Single Sign On requires initial configuration by Professional Services.

Recruiting Management Prerequisites

Recruiting Marketing Prerequisites

- Configure a default role using either the Recruiting Dashboard or the Command Center System Users menu. If no default role is configured, the system default will be used.
- All Rx clients must use Real-Time Job Sync.
- If the client is using a job scrape, ensure that the RMK internal ID for jobs must include the locale, separated from the ID with a dash. Example: 1234-en_US where the job requisition ID is 1234 and the locale is en_US.
- Recruiter SSO can be configured in both Stage and Production Environments.

Related Information

Real-Time Job Sync [page 9]

4.2 How to Configure Recruiter Single Sign On

Configuring Recruiter Single Sign On requires set up in the Recruiting Marketing and Recruiting Management systems.

Procedure

1. Set permissions using Admin Tools
   - **Non-RBP:** *Admin Tools* > *Managing Recruiting* > *Recruiting Permissions* > Grant *Recruiter RMK SSO* permission.
   - **RBP:** *Manage Recruiting* > *Manage Security* > *Role Permissions* > *Recruiter RMK SSO Permission*

   > **Note**
   >
   > The user feed runs every 24 hours and does not require additional configuration. If you grant a user permissions and SSO is not working, you may need to wait up to 24 hours for the user feed to sync with RMK.

2. Configure SSO Settings in Command Center
   a. Once Recruiter SSO is enabled, an SSO Sync pane will open to manage the Recruiter Synchronization schedule for the site. The user will be able to enable or disable the schedule and set a time for the schedule to run each day. Note that the time the schedule will run will be based on the RMK server's time, which is shown. Data is exported from RCM and imported into RMK all in one step and can be scheduled once per day to run to best meet the needs of the customer. Engineering recommends this be run at the end of the working day for the company's primary geographic region

5 Real-Time Job Sync

For customers using real time job sync, jobs posted externally in Recruiting Management are sent to Recruiting Marketing in real time. Recruiting Management also sends real-time job detail updates and jobs deletes to RMK.

For existing Recruiting Management and new Recruiting Marketing customers who require a full feed job sync can enable a scheduled Quartz job to send a feed of jobs to RMK on a regular schedule.

Manual Job Entry and Real Time Job Sync

Recruiting Marketing uses the internal job id to determine uniqueness. For real time job sync, the internal job ID is a combination of the requisition ID and the job locale, for example "1234-en_US." Real time job sync does not modify manually entered jobs unless the internalid/clientjobid matches the id of a job in the feed. Manual changes to a real time job sync job are overwritten the next time the job appears in the feed. A manually created job with an ID unique from any other job in the feed is not modified by real time job sync, whether or not the manually entered flag is set. This behavior is different from that of scraped jobs.

For example, if the real time job sync feed contains only externally posted jobs from RCM, a recruiter could manually create a job in RMK for a job with an external private posting. The job created by the recruiter is a regular Recruiting Marketing job. The manually entered job is never picked up by the feed, unless an external posting is created.

5.1 How to Configure Real Time Job Sync

Real time job sync is sometimes referred to as Job ATS Integration or JATS in the Recruiting Marketing System.

Context

Configuring Real Time Job Sync involves Professional Services engagement from both Recruiting Marketing and Recruiting Management.

Procedure

1. - RBP: *Admin Tools* > *Manage Permission Roles* > *select Role* > *Permission* > *Manage Recruiting* > *Setup Recruiting Marketing Job Field Mapping*.
   - Non-RBP: *Admin Tools* > *Manage Recruiting Administration* > *Setup Recruiting Marketing Job Field Mapping.*

2. Once permission has been granted, map the RCM custom and standard Job Requisition fields to the RMK hard coded fields

> **Note**
>
> The customer must complete the mapping for every Job Requisition XML template.

Ensure existing RMK clients transitioning to Rx Real Time Job Sync have their RMK fields mapped to appropriately to RCM fields. Correctly aligning the fields requires PS engagement from the RMK team. The following fields are required.

- Job Title
- Job Description
- City
- State
- Country
- Zip or Postal Code

The state field is only required for jobs in the US. You can set this field to `required="false"` on the job requisition, in cases where customers have jobs both US and non-US jobs. Recruiters should understand the state field is required for US-based jobs

For customers using real-time job sync, jobs posted externally are sent to RMK in real-time. The Recruiting Management platform also sends real-time updates and closings to RMK.

RCM supports a standard Adcode field that can be used for job distribution. The Adcode field can be populated with options for job distribution, for example Monster or Career Builder. If this field is mapped and configured with XML distribution on the RMK side, the job will be sent to the selected distribution channels. The XML setup and job distribution requires additional PS engagement.

You can map a single RCM fields to multiple RMK fields for real time job sync.

Table 1: Mapping RMK fields to RCM fields for Real Time Job Sync

RMK Field	Required or Recommended	Supported RCM field types
Job Title	Yes	text, picklist
Job Description	Yes	richtext, textarea, text
City	Yes*	derived, text, picklist
State	Recommended, but not required	derived, text, picklist
Country	Yes*	derived, text, picklist
Zip/Postal Code	Yes	text, picklist
Department	No	enum, text, picklist
Category	No	enum, text, picklist
Shift	No	enum, text, picklist
Job Type	No	enum, text, picklist
Facility	No	enum, text, picklist
Product Service	No	enum, text, picklist

RMK Field	Required or Recommended	Supported RCM field types
Business Unit/Division	No	enum, text, picklist
Compensation/Salary	No	currency
Required Travel	No	text, picklist
Adcode	No	text, picklist, multi-select picklist
Brand	No	text, picklist
Employee Referral Amount	No	currency
Custom Field 1	No	text, picklist
Custom Field 2	No	text, picklist
Custom Field 3	No	text, picklist
Custom Field 4	No	text, picklist
Custom Field 5	No	text, picklist

*** Map these individual fields to their corresponding fields in RCM. Once this mapping is complete, these three fields are concatenated to populate the <location> field in the RMK system. Always map the RMK Country field to the RCM standard <country> field.**.

> **Note**
>
> When configuring job field mapping, the RMK country field must be mapped to the RCM standard <country> field, not any other field the client may be using for country information. If this field is not passed to RMK, populating the locations on jobs will fail. This mapping is also required to use Radial Search, in addition to configuring and mapping the zip code field to the standard RCM <postalcode> field.

3. Navigate to *Command Center* > *Integrations* > *Manage API Credentials*.
4. Click *Create New Provider User.* Enter a name or description for the system-generated ID (preferably one referencing the client, siteid, and source type, like SFSF-368-JATS).
5. In the first dropdown menu, select the site name that corresponds with the new API credentials.
6. Create a username. Username can be any mix of letters and numbers.
7. Click the *(Re)Generate* button next to the password field.
8. In the *Source Type* drop-down menu, select `JATS.` Leave source number as 1.
9. 10. Click *Save*.
10. Copy the username and password to provide to RCM PS.
11. Send the provider ID, username, and password to RCM Professional Services via a secure means (not e-mail or IM).
12. Navigate to *Command Center* > *Functions* > *Library* and search for `RCM.` Select the three available RCM functions and click *Copy.*
    - RCM - Remove Trailing Commas
    - RCM - Remove Leading Commas
    - RCM - Multi comma

13. Functions only apply when the job is added or updated via the import process. To apply functions, either run a full import, or run a full feed by deactivating all jobs in Command Center, then having RCM PS push a new jobs feed. PS engagement is required to process a Real Time Job Sync full feed.

6 Site Brands

Job branding can be consistent between RMK and RCM by associating RCM microsites with RMK brands. This allows for a user to view a job in RMK and then apply for the job in RCM and have the same brand experience.

Rx real-time sync includes a brand field for each job that is created in RCM. RCM users can select a brand on each job requisition – this brand is used in both RCM and RMK. The RCM microsite identifier is associated to one RMK brand identifier.

7 Employee Referral

Rx Employee Referral allows employees of a company to refer contacts to jobs at their company.

Employee Referral tracks the source and referring employee for each new candidate. Employees are able to view the status of all their referrals currently in the hiring process.

Employees can use Linkedin or Facebook contacts within the referral process. These social connections can be matched to the open jobs or generally for a company. The ER application allows an employee to share a job with their contact via a number of social networks or email or the employee may refer the contact and the system will generate a notification via email to the referred person.

To implement Employee Referral, some conditions must be met:

- Site must have Candidate SSO enabled and ERM enabled in Command Center
- Site must be implemented with Valhalla
- First and last name must be required on the Business Card

7.1 How to Configure Employee Referral

Procedure

1.
2. Add the Employee Referral Payout amount to the job requisition template. Employee Referral Payout is a currency field. If currency is not configured on the job requisition, add it to the template. If it is only declared, only the erpAmount is required. erpAmount can be sent to RMK via Real Time Job Sync, but not job scrape. XML information for both, erpAmount and erpCurrency is required. Permission these fields in addition to declaring them in the XML. Include this XML declaration for erpAmount and erpCurrency

```
<field-definition id="erpAmount" type="currency" required="false" custom="false">
<field-label><![CDATA[ERP Amount]]></field-label>
<field-description><![CDATA[Employee Referral Bonus Amount]]></field-description>
</field-definition>
<field-definition id="erpCurrency" type="currency" required="false"
custom="false">
<field-label><![CDATA[ERP Currency]]></field-label>
<field-description><![CDATA[Employee Referral Bonus Currency]]></field-
description>
</field-definition>
```

3. Grant Admin users permission to set up the Employee Referral Program a. b.
   - **Non RBP:** *Admin Tools* > *Managing Recruiting* > *Recruiting Administration* > *Employee Referral Program Setup*
   - **RBP:** *Admin Tools* > *Manage Security* > *Manage Permission Roles* > *Permissions* > *Recruiting Administrator Permissions* > *Manage Recruiting* > *Employee Referral Program Setup* p

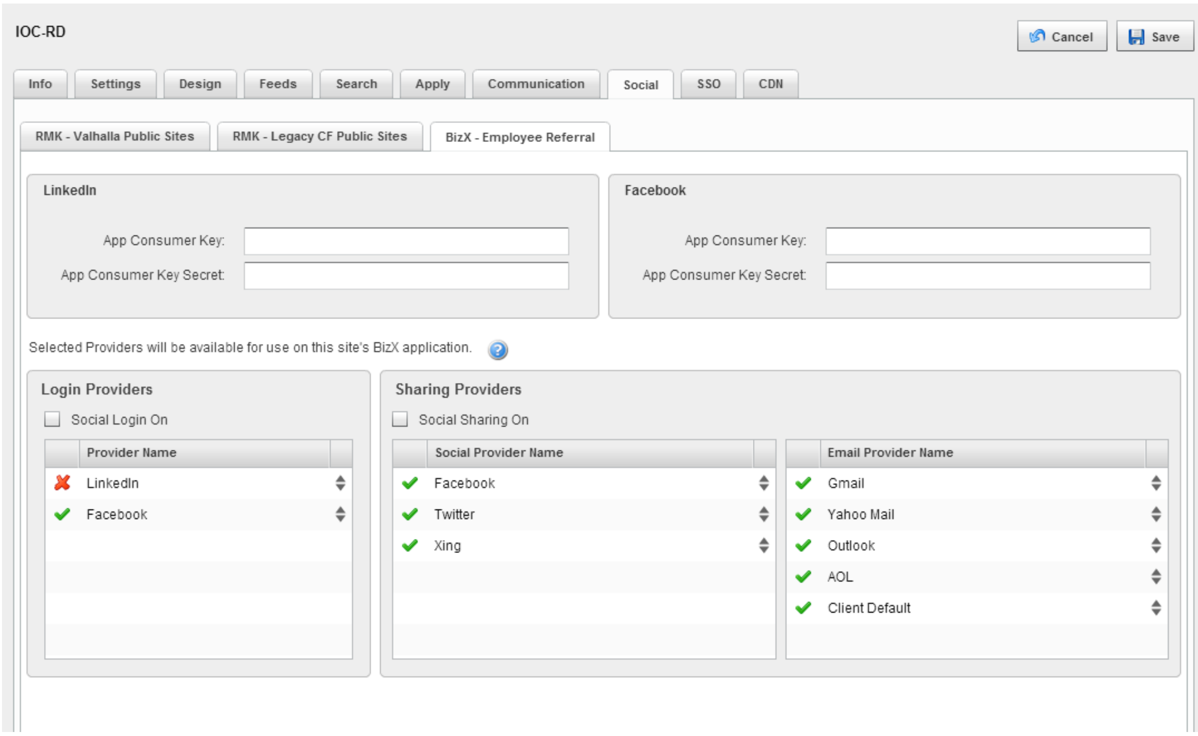
4. Set referral ownership rules in Admin Tools.
   - Ownership Options
     - Ownership by Requisition for Employee Referral Program
     - Ownership by Duration for Employee Referral Program
     - Employee shall maintain ownership over a referral for N days
   - Ownership start date should use
     - Initial submission date
     - Most recent submission date
   - Employee Referral Program- Program Information
     - Add up to 300 characters that will populate at the top of the Referral Tracking page
5. Enable Employee Referral e-mail for referrals. Navigate to *Admin Tools* > *System Properties* > *E-mail Notification Template Settings.* Add the *Enable Employee Referral Program Candidate* to the General pool notification. You can also associate the *Enable Employee Referral Program Candidate* to a job requisition. Admins can update the verbiage of the e-mail, but the URL tokens must remain in place.
6. Configure Referrer (employee) settings for the Applicant Status Trail. Referrer (employee) settings can be applied to all applicant statuses. .

   Table 2: Employee Referral Applicant Statuses

Setting Name	Description
Visible to Referrer (employee)	Whether the status is visible to the Referrer
Referrer (employee) Label	The label the Referrer (employee) sees when their Referral is in the corresponding status.
Referrer (employee) Next Step Text	The text the Referrer (employee) sees when their Referral is in the corresponding status.
Referrer (employee) Email	Select an e-mail template, which will be automatically sent to the Referrer (employee) when their Referral is moved to the corresponding status.

7. Navigate to *Admin Tools* > *Manage Recruiting* > *Edit Applicant Status Configuration.* Find the applicant status set for Job requisitions. For all statuses, the customer can update the Employee Referral Program Settings.
   - Visible to Referrer
   - Referrer Label
   - Refer Next Step Text
   - Referrer Email
8. Navigate to *Command Center* > *Site* > *Site Setup* > *SSO* and enable *ERM SSO.*
9. When ERM SSO is enabled, an SSO Sync pane will open to manage the Employee Synchronization schedule for the site. The user will be able to enable or disable the schedule and set a time for the schedule to run each day. Note that the time the schedule will run will be based on the time of the RMK server, which is shown. The Platform export scripts areset to run about 21:00 local to the datacenter it is running in. Schedule the Employee Sync shortly after this time and staggere the sync process, so they don't all run at the same time.
10. Navigate to *Site* > *Site Setup* > *Feeds* and configure the Employee Sync Source by clicking the green plus sign next to *Job Source FTP Settings*.

11. Navigate to *Site* > *Site Setup* > *ER* to configure the social sharing options. In this pane, add social login and social share providers by clicking the green plus sign next to the available providers in the left-hand columns. To remove a previously added provider, click the red X next to the selected provider in the right-hand column. The order of the providers can be controlled by changing their order in the configuration lists. These controls can be turned on and off in any combination. Both options are OFF by default.



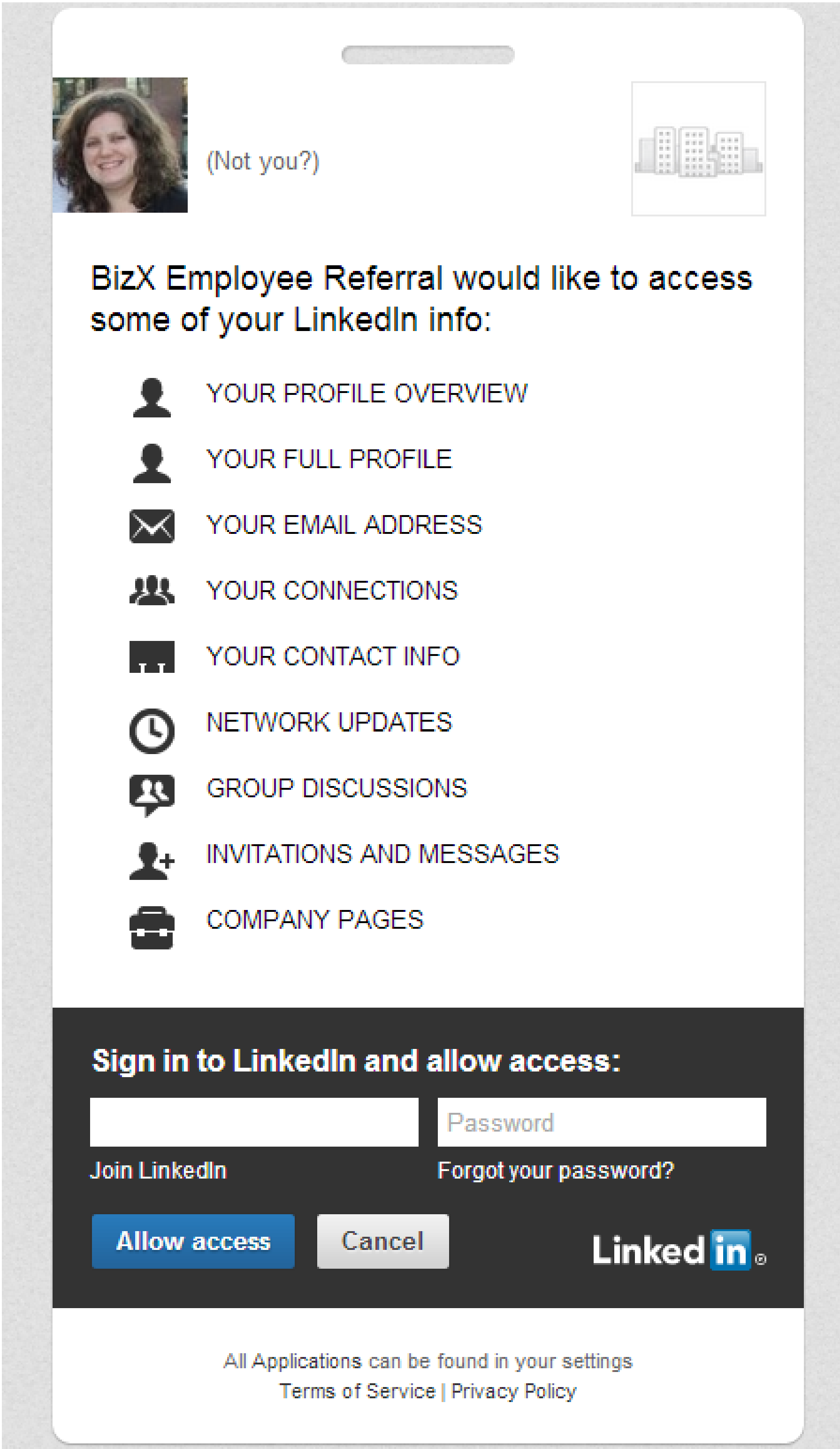
7.2 Refer Candidates Using Employee Referral

You have two options to refer candidates using Employee Referral, Social Referral and by manually searching jobs and referring contacts.

Social Referral

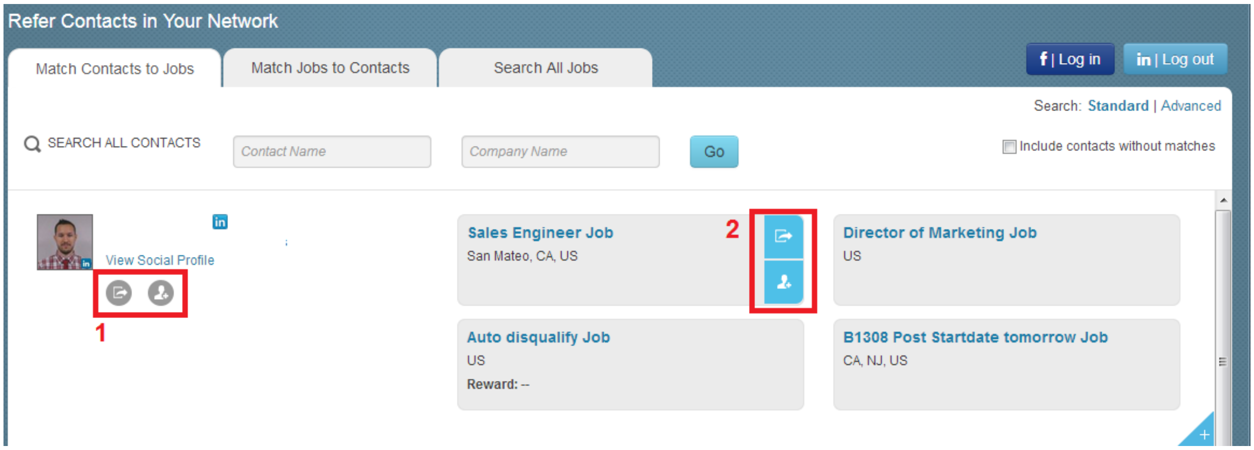
To match contacts from Facebook or LinkedIn to open positions, navigate to SuccessFactors HCM > *Careers* > *Employee Referral*. Using the *Employee Referral* tab, you can select which social network to login with by clicking the *Log in* buttons for either social network. You can log in with both social networks at the same time, but authenticate them separately.

After clicking *Log in*, a prompt to grant SuccessFactors HCM access to your social network and enter the corresponding password appears.



Once you have authenticated with your chosen social network, your contacts are imported, and those who already work at the company are filtered out, based on the Company Alias entered for that social network in Command

Center. If a contact's current employer contains the company alias, they will be filtered out during the import. This behavior applies for both LinkedIn and Facebook. Once you have enabled the social network and your contacts have been imported, you will be able to match contacts with jobs, or jobs with contact.



There are two different ways to create a referral in the *Match Contacts to Jobs* tab. By clicking the arrow icon in #1, an employee can share jobs at the company with an individual, either through the selected social network or by email. By clicking the person icon in #1, the employee can refer their contact directly to a recruiter. Using either of these referral options does not refer a contact to a specific job. Click *View Social Profile* to direct the employee to their contact's profile on the selected social network. When sharing jobs via LinkedIn, you can refer a specific contact to a specific job, or refer a contact to your company using LinkedIn, but you cannot share a job with your entire social network. Configure available social networks and e-mail providers in Command Center.

To refer the selected contact to a specific job, the employee can click the icons shown in #2. The arrow icon in this area refers the job to the contact, through a selected social network or e-mail. Clicking the person icon prompts the employee to enter their contact's information and begin a referral for that specific job. When matching jobs with contacts, you can refer your contact to all open positions at your company using a social network by clicking the arrow icon to the far left of the *Match Jobs to Contacts* window. When an employee clicks the person icon, the Employee Referral process begins and the employee is prompted to fill out the information of your referral. Neither of these processes refer your contact to a specific job, but rather to the company. When sharing jobs via LinkedIn, you can refer a specific contact to a specific job, or refer a contact to your company using LinkedIn, but you cannot share a job with your entire social network. Configure available social networks and e-mail providers in Command Center.

You can also refer a contact to a specific job by clicking the arrow or person icon shown next to their name and picture. The arrow icon refers your contact to the specified job using a social network or e-mail. The person icon begins the Employee Referral process for that job and contact. These two scenarios (beginning the Employee Referral process vs. sharing the job via social network) carry different reward amounts defined using Recruiting Management.

When matching jobs to contacts, only the first four matches will display initially. To show further matches for a given contact, click the plus sign icon in the lower right corner. Clicking the person icon to begin the Employee Referral process brings up the window below.

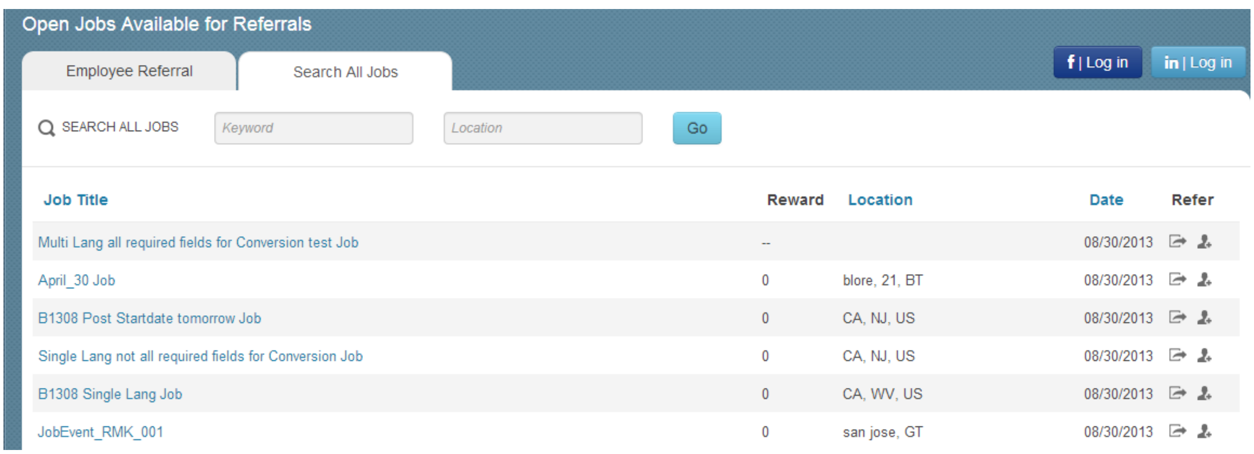
After you provide the contact information for your referral, the employee referral process begins. You can include contacts without job matches by activating the checkbox in this tab. The number of matches the employee referral application can display is limited, so you may not see all of your LinkedIn or Facebook connections in the results. When performing a search by company or contact name, the search goes against the entire results set, not only what is displayed in the matching tab.

Matching Jobs to Contacts works much the same way as Matching Contacts to Jobs, above. This option presents you with a job title matched to people in your network who may be a good fit for the job. The same referral behavior applies. You can either click the person icon to begin the referral process, or the share icon to send the job to your contact. You can also send the job to a contact not presented in the matching by clicking the person icon underneath the job title.

Advanced search provides an alternative way of filtering job results through two criteria: Title & Location. These searches are executed as "OR" operators with in each dropdown and as "AND" operators between each dropdown. For example, if you select three locations the filter will match any one of those three selected locations. If in addition to the three locations you also select two titles it will return results matching both any one of the locations and any one of the titles, so the job must match one of the criteria in each dropdown to be shown.

Manual Referral

If no social log in is enabled for a given client, users see the below *Search All Jobs* format upon visiting SuccessFactors HCM *Careers* > *Employee Referral.* If neither social network is enabled, the share icon in the *Refer* column will not display. You will still be able to send the job directly to a contact.



Click the *Search All Jobs* tab to see all open job postings. To initiate the referral process for a contact, click the person icon in the *Refer* column and enter the contact information for the referral target. You can also share a job on a social network by clicking the *Share* icon in the *Refer* column. This allows you to post the job to any of the social networks configured for the company. This behavior is the same as the behavior detailed above for Match Contacts to Jobs. The *Search All Jobs* tab also displays the referral award amount for any open job posting.

To get more information about the job, clicking on the job title opens a window with the Job Description, Job Title, Location, Referral Amount, Currency symbol specified for the job's referral amount, Date (post date or reference date configurable via the Recruiting Dashboard), Description (as it is shown in the current job page on the public site). The dialog box will not display: SEO Location, SEO segments, *Email similar jobs to me*, or *Find similar jobs.*

If the selected currency for a job does not match the currency for the job reward amount, the dialog box will display the currency code, rather than the currency symbol (USD vs. $)

To track referrals, log in to SuccessFactors HCM and select *Careers* > *Referral Tracking.* This opens the screen where you can track where your referral is in the hiring process, your referral reward amount, and other aspects of the referral. You can also click *Track Your Referrals* under the *Employee Referral* tab.

7.3 Manage Employee Referral Candidates

Candidate Search Page

Employee Referral icons indicate candidates in active Employee Referral in both Power and Conceptual Candidate Search. Active Employee Referral candidates are in a forwarded, invite-to-apply, or in-progress status on a job requisition. If ownership by duration is selected, active indicates a currently owned referral. On Candidate Power Search only, a recruiting user can filter by active or all referrals. For this filter, the definition of active is the same as the display in Candidate Search results. Selecting View All displays all candidates who were at one point an employee referral.

Candidate Profile

On the Candidate Profile, the Employee Referral Portlet shows the following information in this order: job requisition title, job requisition ID, name of the referrer and the date of the referral.

Candidate Summary Page

Employee Referral Candidates on the summary list page have an employee referral icon displayed next to them. The Candidate Summary also displays two source columns, Source and Candidate Source. For all employee referrals, the Source column will contain *Forwarded*. The Candidate Source will be *Employee Referral* during preapply. After the candidate applies, the Source column will display where the candidate applied for the job, that is, Corporate: Site Name. If the recruiting user clicks into an application, they can hover over the employee referral icon next to the referral name at the top of the page to display the name of the referrer.

Application

In the Application, the Employee Referral Information Portlet show the referrer and the date of referral for only the specified job Application Employee Referral Information Portlet All of the above behavior applies to both RCM stand-alone and RCM/RMK integrated Employee Referral.

Tracking

A user can track their referrals in SuccessFactors HCM *Careers* > *Referral Tracking.*

- *Your Referrals*: This area contains a configurable message added in the Employee Referral settings in Admin Tools. Any URL added will automatically open a new window.
- *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 (configured in the Applicant Status Setup Page). Job requisitions can have different status sets, so these percentages track them all uniformly regardless of the number of statuses for each requisition. Applicants are classified into percentages based on the leading number, for example, all percentage completions beginning with "1" will appear in the 10% section of the bar graph. The percentages displayed on the bar graph are not configurable and cannot be hidden from users.
- *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. . For example, if you refer jobs in both dollars and euros, you will see two separate entries for each currency. Up to five separate currencies will display. This is not configurable.
- *Referral Timeline*: The left-hand side shows a summary of the selected referral, or if no referral is selected, a summary of the referral with the highest percentage completion. This summary shows the referral's first and last name, corresponding requisition ID and title where applicable, the referral's current status for the requisition, the date of referral for that requisition, the apply date for that requisition, the referral amount for the requisition and the next step text configured for the referral's current status. Other jobs the referral has applied to are also shown, along with the requisition ID and job title.

The right-hand portion of the Referral Timeline shows the overall referral progress. A user can view all referrals or active referrals. "All" referrals includes disqualified and already hired candidates, as well as those currently in pipeline. Active includes referrals who have not yet applied, generic referrals and those in-progress on a requisition. Disqualified and hired referrals are excluded from the active set.

- The tiles in the overall referral progress show the referral's first and last name, the requisition and requisition ID, the current status and the referral amount where applicable. The percentage of the referral's progress in the applicant status pipeline is also shown. When adding a referral through this scenario:
  - If the e-mail 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 doesn't exist, an external account is created with their e-mail address. The referral becomes searchable in Candidate Search and will receive an e-mail informing them they've been added via Employee Referral. The e-mail contains the referral's username and a URL where the referral can set their password. Once the password is set, the referral lands on the job page of the external career site to search and apply for jobs.

8 Marketing Central

Marketing Central allows Recruiting Execution customers to distribute jobs to global vendors and via social networks.

Only user Marketing Central for Recruiting Execution customers. Marketing Central does not impact the existing Recruiting Management eQuest integration.

Known Behavior

- Success/Failure monitoring is not active
- When viewing requisitions “Job Postings” link will display when “Marketing Central” is active. “Job Postings” link is not involved in the “Marketing Central” posting process.
- Job distribution vendors have required fields that will not be pre-populated by the integration from the BizX Suite. Users may be required to manually enter a limited set of fields.
- After a job has been submitted to eQuest, the *Last Accessed* field displays under the eQuest posting button. After publishing a job to eQuest, and after the user accesses eQuest successfully, the eWhen a job has been pushed to eQuest and the user has accessed eQuest successfully, te the data is populated on each job for each user.
- The only jobs visible to users are those they posted to eQuest. Reporting for all jobs posted to eQuest for a single organization is not supported.
- Solique does not have a return path to the SuccessFactors HCM Suite. Users must logout of Solique and are redirected back to the Posting Options page in SuccessFactors HCM.. After a submitting a job to Solique, the *Last Accessed* field displays under the Solique posting button. After publishing a job to Solique, and after the user accesses Solique successfully, the data is populated on each job for each user.
- Not all changes made to requisitions in SuccessFactors HCM reflect on third party vendor sites. If the vendor does not support an automatic action, a user will not see changes made in SuccessFactors HCM in the third party vendor's site. For example, Solique does not support an automatic delete function. If a user deletes a job from the SuccessFactors HCM system, the job will not be automatically deleted from Solique. The user can manually delete the job on the Solique site.

Table 3: Supports Automatic Action on Third-Party Vendor Site?

Vendor	Add	Update	Delete
eQuest	Y	Y	Y
Solique	Y	N	N
Multiposting	Y	N	Y

8.1 How to Configure Marketing Central

Before using Marketing Central, set up Vendor Groups in Command Center, then assign users to the groups so they can market jobs using SuccessFactors HCM.

Prerequisites

- Recruiter SSO must be configured in order to use Marketing Central
- Marketing Central requires initial configuration by Professional Services.
- Before configuring Marketing Central, the customer must have credentials for the third-party marketing vendor. The customer should contact the vendor and inform them they are implementing the SuccessFactors Marketing Central integration, and that they will need both stage and production credentials.

Context

The available Marketing Central vendor are eQuest, Solique, and Multipostingl. You can configure multiple groups per vendor, but a user cannot be assigned to more than one group per vendor.

Procedure

1. Grant permissions for Job Marketing. Navigate to SuccessFactors *Admin Tools* > *Manage Recruiting* > *Recruiting Permissions* > *Job Marketing.*

   Once permissions for Job Marketing are granted, a Recruiter Sync is required before users can access Marketing Central.
2. Navigate to *Command Center* > *Integrations* > *Vendor Groups* > *Add Vendor Group.*
3. Click *Add New Vendor Group.* Enter the required Vendor Group information.
4. Assign admin users to the Vend Groups, using either Command Center or the Recruiting Dashboard.
   - To assign admin users in Command Center, navigate to *Integrations* > *Admin Vendor Group Assignment.* Use the search filter to find the client admin users you want to assign. Select the desired users, then choose *Add to Vendor Groups* from the *User Actions* menu. Select the vendor group to add the user to, then click the gear icon.
   - To assign admin users in the Recruiting Dashboard, first you must grant users the ability to assign users to vendor groups. Navigate to *Tools* > *Roles.* If an existing role with Vendor Group Assignment permissions is not configured, add the permisison to an existing role, or create a new role with that permission. Only users with the Vendor Group Assignment perission can add users to vendor groups. Once uesrs have this permission, they can navigate to *Tools* > *User Vendor Groups* and add users to the desired Vendor Groups.

> **Note**
>
> Vendor Groups can only be created in Command Center.

5. Define the sources available in Source Tracker. Navigate to *Command Center* > *Site* > *Site Source Editor.*
6. Search among the available *Referrer Types* list on the left by entering search terms in the *Find Name* field, or select from the available referrers. Clicking on the referrer type name highlights it and populates the available options in the *Engine* list on the right. You can also search among the available engine options by entering search terms in the *Find Name* field.
7. Click the plus sign to make the source engine (and by proxy, source type) active. A green check appears next to enabled source types and engines.
8. To run batch actions on the available sources, select *Check all Source Types* or *UnCheck All Source Types* from the *Actions* menu. Click the gear icon to enable or disable all source types. Similarly, you can select or unselect all engines for a selected source type by choosing *Check All Engines for Selected Source Type* or *UnCheck All Engines for Selected Source Type* and clicking the gear icon. Click *Undo All Changes* to revert any changes made to the sources and engines. Click *Save Work* when change are final.

   > **Note**
   >
   > To add sources to the *Site Source Editor,* engagement with RMK Professional Services is required.

8.2 Create a Custom Marketing URL for Job Distribution

SuccessFactorsSuite users can use the Source Tracker to create custom URLs to market jobs across a number of different channels.

Procedure

1. Navigate to SuccessFactors HCM *Recruiting* > *Job Requisitions* and hover over the requisition you would like market.
2. Click *Market Job.*
3. Choose the job language, where relevant, from the *Select Job Language* dropdown.
4. The *Posting Options* section displays the vendors the users has been assigned to. The Source Tracker is available for all users.
5. This prepopulates the Source Tracker with the URL of the job. Select the desired *Type* from the available dropdown list. This determines the options available in the *Engine* dropdown list.
6. Enter a custom campaign name, if necessary. For example, to track jobs marketed as part of college recruiting, you might name the campaign `Campus Recruiting.`
7. Once you have selected the *Type* and *Engine*, the *Campaign URL* and *Campaign HTML* links populate with the appropriate tracking information. Click *Copy URL* to copy the URL. The options available in these dropdowns are configured using the Site Source Editor in Command Center.

8. To create a short URL, choose your preferred URL shortener (bit.ly or Google) from the *Short URL* dropdown, then click *Generate URL.*
9. To share the URL via a social network, select from the listed social networks. Sharing the URL by choosing one of these buttons automatically populates the type and engine for tracking with social network information. Any manual selection made using the *Type* and *Engine* dropdown list will be overridden. Will populate with social network tracking information, even if the social network is not available in the *Type* or *Engine* dropdown.

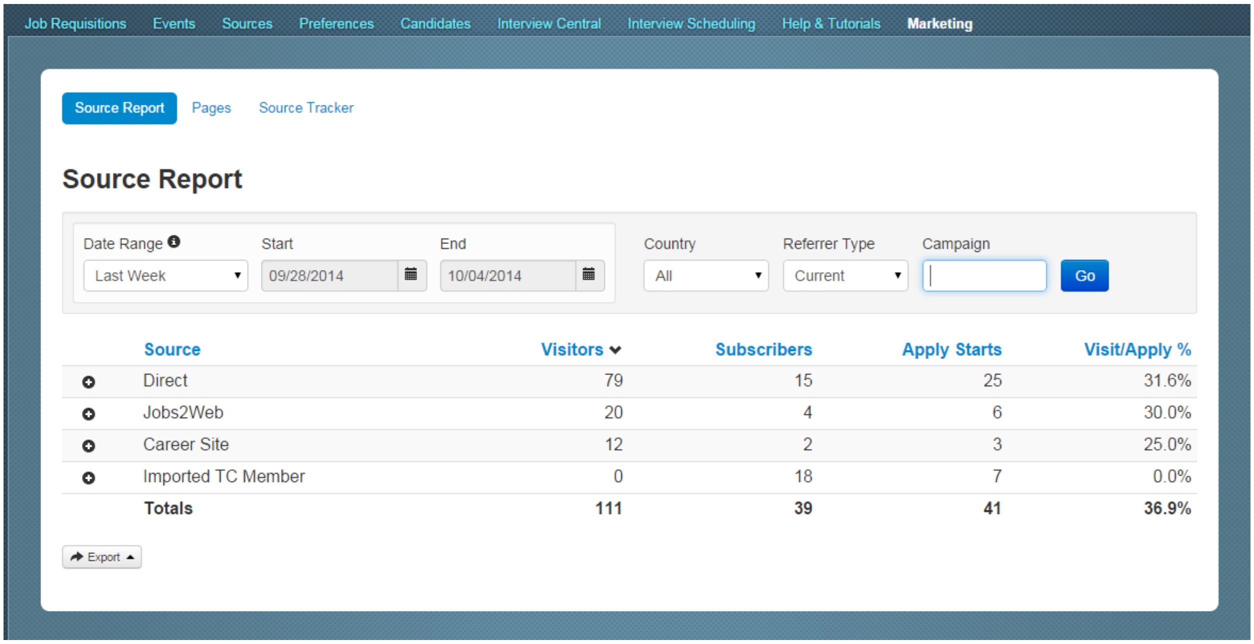
   Note

   SuccessFactors HCM cannot control the user workflow on the third-party vendor sites. If a client wants a customer workflow, work with the third-party vendor.

8.3 Source Report

The Source Report allows users to see the source of traffic to their career site, and filter the data to analyze trends.

- *Date Rang*e – A selectable predefined set of date ranges. Dates are based on the day the visitor was captured by RMK.
- *Start and End* – Displays the start and end date of the selected visit date range, and also allows you to enter a custom date range.
- *Country* – A dropdown list of a predefined set of countries. This field filters results based on the associated country from the visitor's IP address.
- *Referrer type* – A dropdown list of field allowing you to select how to display the type of referrer. Choices are Current Referrer and Original Referrer For current referrer, apply starts are groups by the source that referred each visitor. Original referrer groups apply starts by the source used when the applicant first joined the Talent Community.
- *Campaign* – A search field allowing you to search by campaign number. You must enter the exact campaign ID. The system will not search on partial campaign IDs.



The Source Report search returns the following fields:

Captured dates in the Source Report are set by the local user's machine time, which may differ from the customer's server time, so there may be a discrepancy between the user's actual visit data and the recorded server data.

- *Source* – Sources are categorized by RMK based on the custom rules engine.
- *Visitors* – Displays the visitor count for the selected source.
- *Subscribers* – Displays the subscriber count for the selected source.
- *Apply Starts* – Displays the apply start for the selected source. An Apply Start is recorded when a candidate clicks on the *Apply Now* button on a job on a Recruiting Marketing public site.
- *Visit/Apply %* - Percent of applies per visit. This measure is calculated by dividing the number of Apply Starts by the number of Visits.

The beginning of the apply process tracked in the RMK is called an Apply Start. Apply Starts are summarized in slightly different ways in reporting from Advanced Analytics. These reports only count the first time a given Talent Community Member begins to apply for a particular job. If a single user begins to a apply for a job this week, and then starts a second apply for the same job next week, analytics will only count the first of these two apply starts. This applies for Source Reporting. Reporting not powered by Advanced Analytics summarizes apply starts differently. These reports include one apply start per person, per job for a selected time period. For example, if a user applies for a job this month, and again next month, a report run for the month will count one apply start for the user. A report run for next month would also count one apply start. A report run for both months would count a single apply start.

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