

UCT SuccessFactors Recruiting guide for Recruitment Administrators

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March 2025

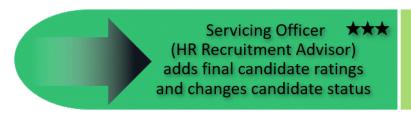
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Process overview: Part 1



Process overview: Part 2



HR Recruitment Administrator attaches referee reports for shortlisted candidates

HR Recruitment Administrator schedules candidate interviews

Servicing Officer starts offer approval process

Servicing Officer reviews all candidate interview ratings and recommended candidate(s)

Selection committee members add candidate interview ratings and indicate recommended candidate(s)

Servicing Officer manages and monitors offer approvals

After approvals, Servicing
Officer sends offer
letter to candidate



Candidate accepts offer





Servicing Officer changes candidate status to *Hired*

Servicing Officer changes candidate status to *Ready to Hire* and requisition is automatically closed

Servicing Officer changes candidate status to Offer Accepted

Logging in to SuccessFactors

Background

SuccessFactors Recruiting offers a centralised recruitment system for applicants, line managers, selection committee members and HR support staff.

Staff members can access the platform using their existing UCT login details.

Support

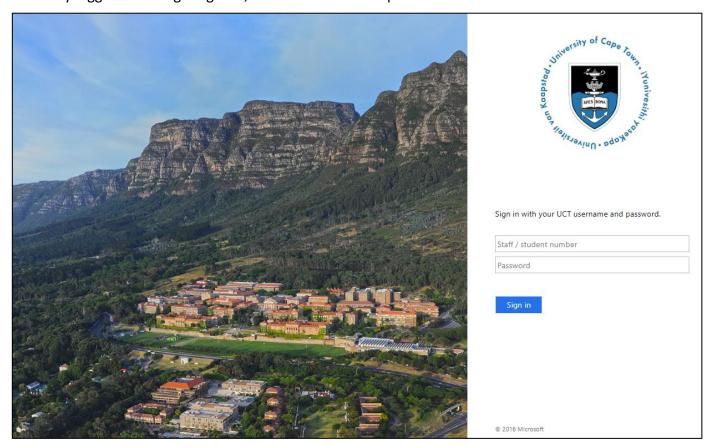
If you are unable to access SuccessFactors or are experiencing other technical difficulties, please contact the <u>IT</u> Service Desk.

Procedure

- 1. Open a web browser (e.g. Google Chrome, Mozilla Firefox, Microsoft Edge).
- 2. Log in to SuccessFactors via www.successfactors.uct.ac.za.

Note: You can also access SuccessFactors via the HR website by clicking *SuccessFactors* at the top of the page.

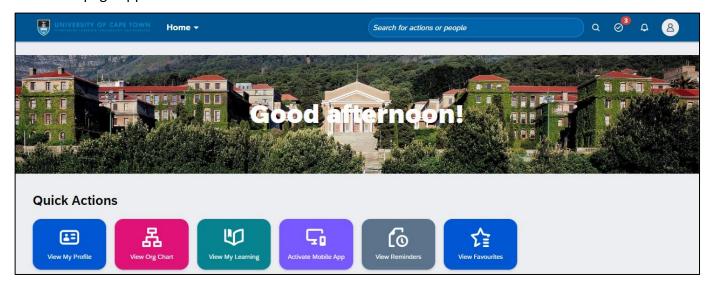
3. If not already logged on to single sign-on, the UCT sign in page appears. the *Sign in to your account* page appears. If already logged in, the *Home* page immediately appears (see step 4). If already logged in to single sign-on, SuccessFactors will open.



- In the Staff / student number field, enter your UCT staff number.
 Note: UCT staff number only, third party "T" accounts will not work.
- In the *Password* field, enter your network password.
- Click Sign in

Logging in to SuccessFactors

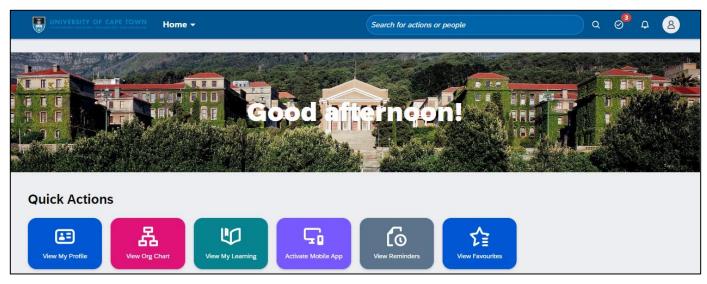
4. The *Home* page appears.



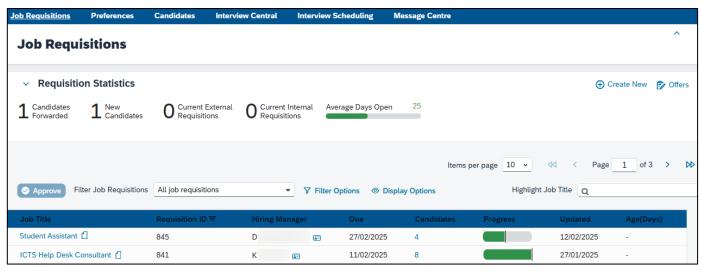
Background

The Recruitment Administrator starts the online recruitment process by creating a new job requisition using the information from the submitted HR202 form (Request to commence a formal recruitment process for posts to be advertised).

- 1. Log in to SuccessFactors and access the Home page.
- 2. The *Home* page appears.



- Choose *Home > Recruiting*.
- 3. The Job Requisitions page appears.

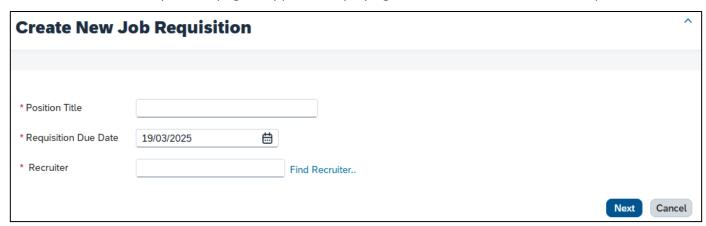


Click Create New.

4. The Create New Job Requisition page appears.

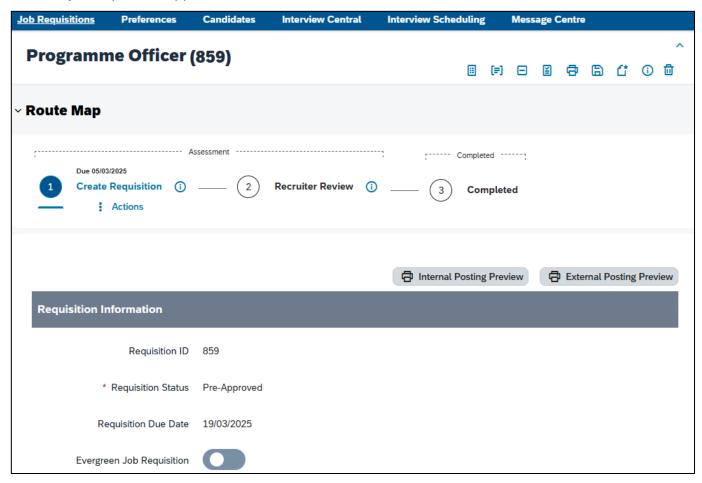


- Click Create New Job Requisition from Blank Template.
- 5. The Create New Job Requisition page reappears, displaying the initial fields for the new requisition.



- Enter the Position Title.
- In the Recruiter field, enter part or all of the Recruitment Advisor's name and select the person from the dropdown list.
- Click Next

6. The new job requisition appears.

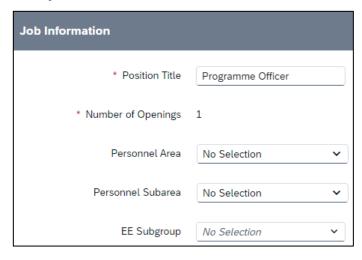


The Route Map at the top of the page provides an overview of the required approvals process. The
Recruitment Administrator will complete step 1 by creating the job requisition and then send to the
Recruiter/Servicing Officer (Recruitment Advisor) for review.

Requisition Information section:

- This section shows the job Requisition ID, the Requisition Status and the Requisition Due Date.
- The Evergreen Job Requisition is not currently in use at UCT.

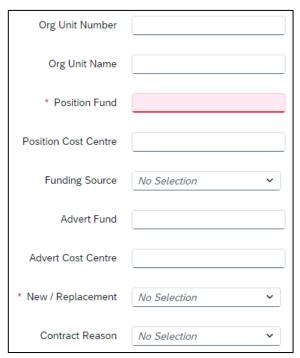
Job Information section:



- Ensure the *Position Title* is correct.
- Select the Personnel Area e.g. Faculty of Commerce.

Job Information section (continued):

- Select the Personnel Subarea e.g. PASS 5 12.
- Select the EE Subgroup e.g. permanent.



- Enter the SAP Organisational (Org) Unit Number.
- Enter the SAP Org Unit Name.

Note: The organisational unit name will appear on the advertised job listing so it must be a name and not a code.

- Enter the Position Fund.
- Enter the Position Cost Centre.
- Select the appropriate Funding Source i.e. GOB (General Operating Budget), Non-GOB or Research.
 Note: If Non-GOB or Research funding sources are selected, an Information message indicates that additional fields are mandatory. Click OK to acknowledge the message.
- If selected funding source is Non-GOB or Research:
 - Enter the Advert Fund.
 - Enter the Advert Cost Centre.
- In the New / Replacement field, select the appropriate option. New Appointment should only be used when recruiting for a new job with no previous holder.
- If a temporary (T1/T2) appointment, select the Contract Reason.

Compensation Information section:



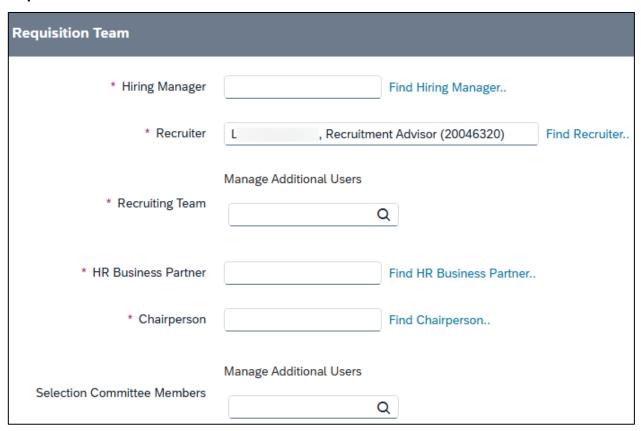
In the Pay Scale Group field, select the PASS payclass or academic level.

EE Mandate section:



- In the EE Mandate field, select the appropriate Employment Equity mandate i.e. standard or open.

Requisition Team section:



- In the Hiring Manager field, enter part or all of the manager's name and select the person from the dropdown list.
- The *Recruiter* field shows the previously selected Recruitment Advisor.
- In the Recruiting Team field, add yourself and any other members of the recruitment team that would need access to this job requisition.

Note: If the Recruitment Administrator is not added to the requisition, they will not be able to attach referee reports or schedule candidate interviews.

- Add the appropriate HR Business Partner.
- Add the *Chairperson*.
- Add the Selection Committee Members.

Note: If the Chairperson and HR Business Partner are voting members of the committee, they must be added in the *Selection Committee Members* field.

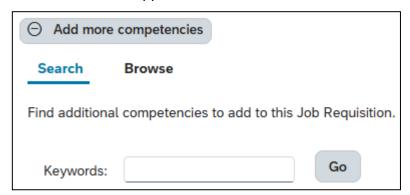
Job Posting Information section:



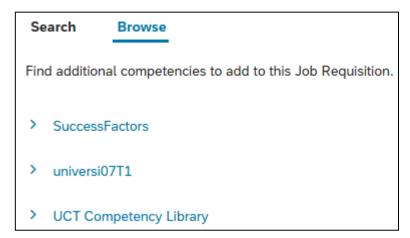
Skip the Questions section, this will be completed by the Recruitment Advisor.



- In the Competencies section, click Add more competencies
 - The Search tab appears.



• Select the Browse tab.



• In the Browse tab, expand UCT Competency Library > Candidate Interview Rating and select Overall Rating.



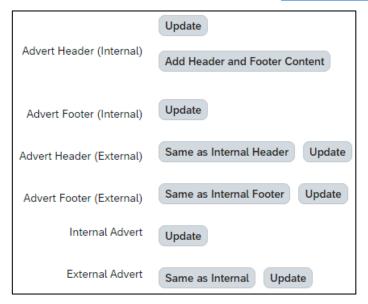
• Click Add

Note: If other competencies will be assessed in the recruitment process, the Recruitment Advisor will add these later.

The Overall Rating competency appears in the Competencies section.



Add the internal and external advert, see <u>Adding advert content</u>.



- In the Requisition Documents field, click Attach a document to attach the:
 - HR202 form (Request to commence recruitment process for posts to be advertised)
 - HR191 form (Position description)
 - draft advertisement
 - any other relevant documents (e.g. motivation, EE mandate, funding approval).

See Adding requisition documents (attachments) for instructions on how to add the files.

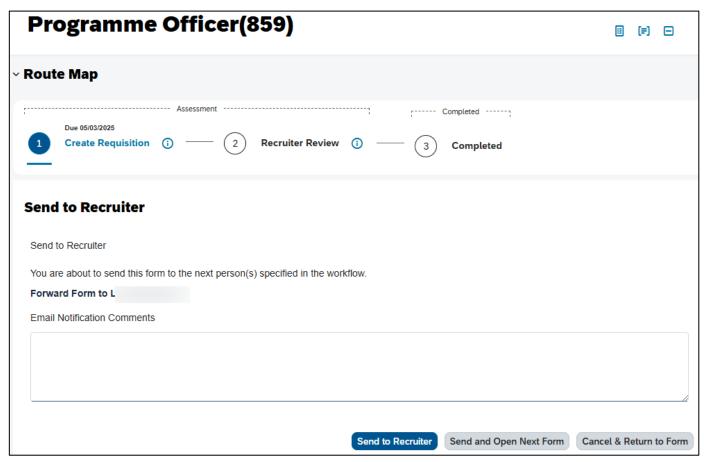
Comments section:



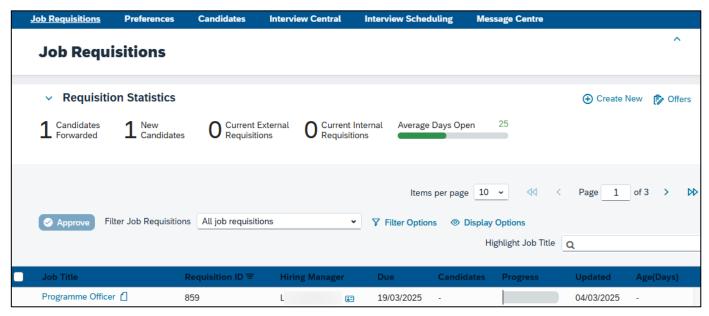
- If there is an Employment Equity Representative on the committee, use the Additional Comments field to indicate who will fill the role.
- Click → Send to Recruiter

Note: The *Save and Close* option will not move the job requisition; it will remain with you until you use *Send to Recruiter*. The *Get Feedback* option is not currently in use at UCT.

7. The Send to Recruiter page appears.

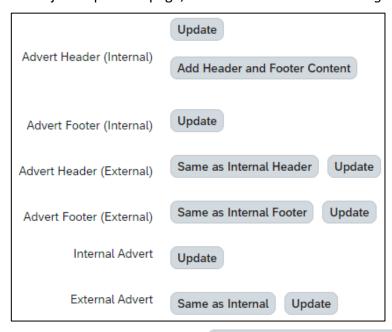


- If applicable, enter a comment in the *Email Notification Comments* section.
 Note: This comment will only be sent with the email notification to the Recruiter. It will not be saved in the job requisition on SuccessFactors Recruiting.
- Click Send to Recruiter
- 8. The *Job Requisitions* page appears. This page provides an overview of all the job requisitions you are involved in as a Recruitment Administrator. The *Requisition Statistics* section will change over time as job requisitions move through the recruitment process.

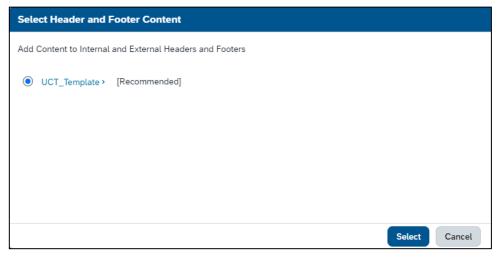


Procedure

1. In the job requisition page, scroll down to the *Job Posting Information* section.

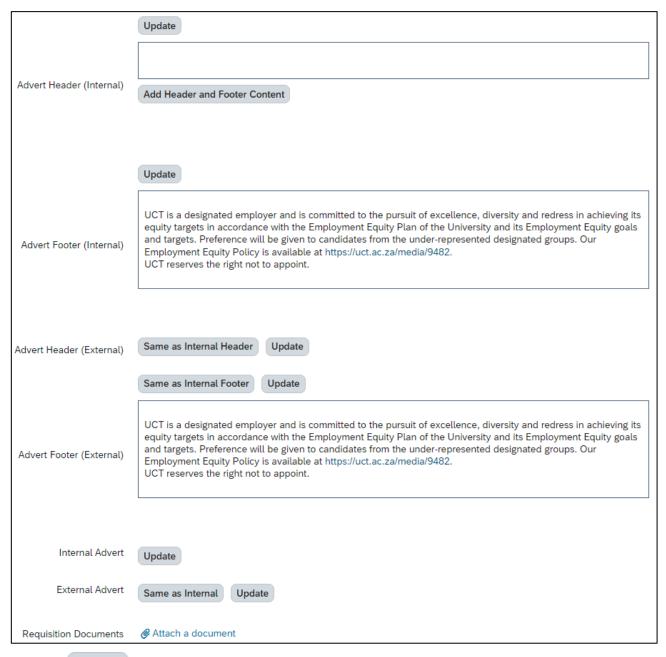


- In the advert section, click
 Add Header and Footer Content next to Advert Header (internal).
- 2. The Select Header and Footer Content dialogue box appears.

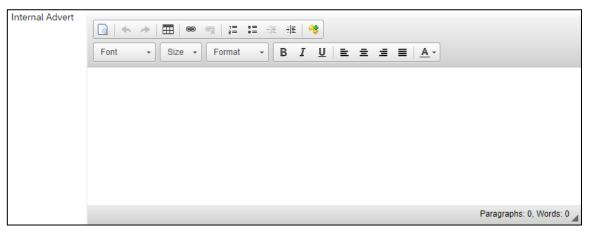


- Ensure UCT_Template is selected.
- Click Select

3. The job requisition page reappears, displaying the selected header and footer for both the internal and external adverts.

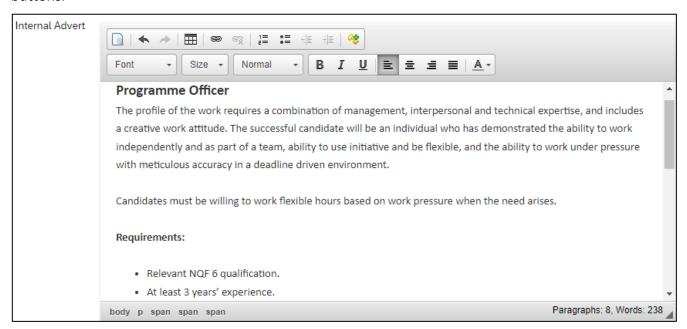


- Click Update next to Internal Advert at the bottom of the section.
- 4. An editable space appears next to Internal Advert.



Paste the advert content and use the formatting buttons as required.

Note: Pasting from Microsoft Word reduces the need for formatting after pasting. If there are any issues with formatting, delete any pasted content and right-click to choose *Paste as plain text*. Formatting (e.g. bold text, bulleted lists, hyperlinks) will need to be re-applied using the formatting buttons.



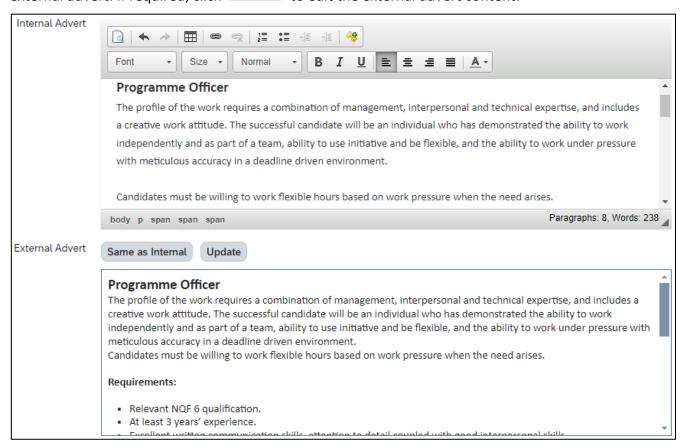
The editing space can be resized using the grey triangle in the bottom right.



Click Preview to review the advert in a separate browser tab.



- Next to External Advert, click Same as Internal to copy the internal advert content to use for the external advert. If required, click Update to edit the external advert content.



- Return to Creating a new job requisition.

Adding requisition documents (attachments)

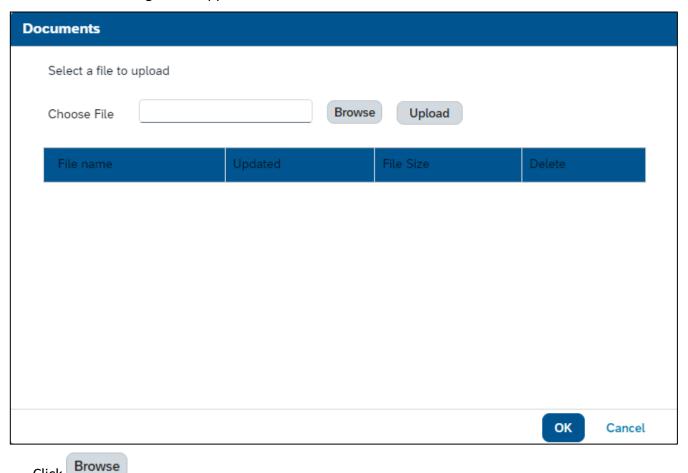
Procedure

Click

1. In the job requisition page, scroll down to the bottom of the *Job Posting Information* section.



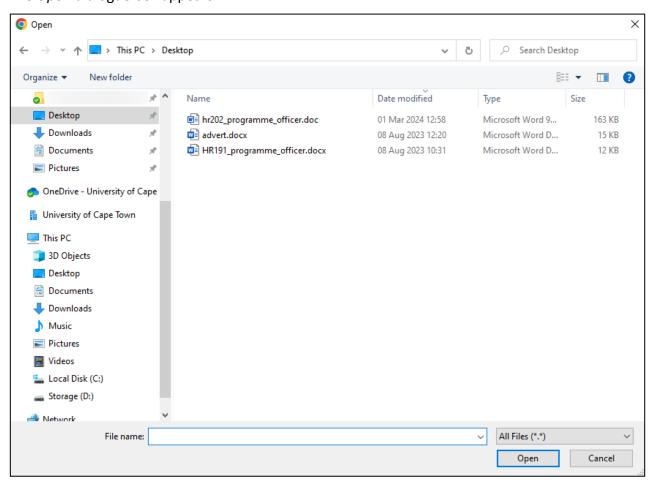
2. The *Documents* dialogue box appears.



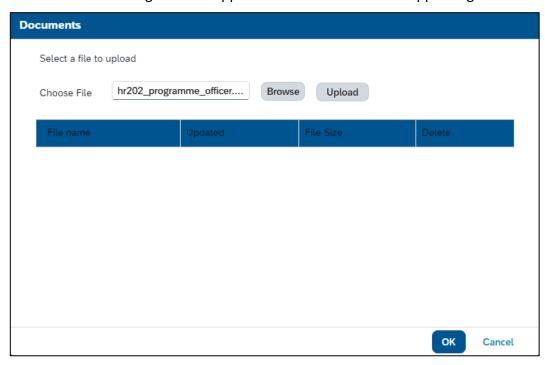
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Adding requisition documents (attachments)

3. The Open dialogue box appears.



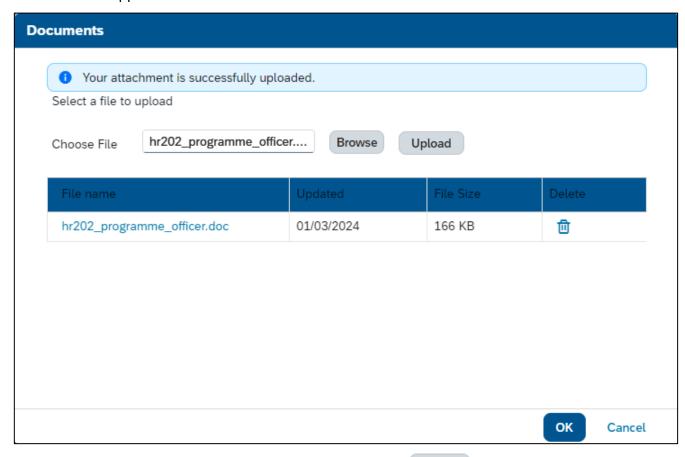
- Select the first document e.g. HR202 form.
- Click Open
- 4. The Documents dialogue box reappears with the selected file appearing in the Choose File field.



- Click Upload

Adding requisition documents (attachments)

- The file details appear in the table below the *Choose File* field.



- Add another document (e.g. draft advertisement) by clicking Browse and repeating the previous steps.
- When all documents have been uploaded, click
- 5. The job requisition reappears with the *Requisition Documents* field indicating the number of attached documents.



Return to <u>Creating a new job requisition</u>.

Creating a private posting

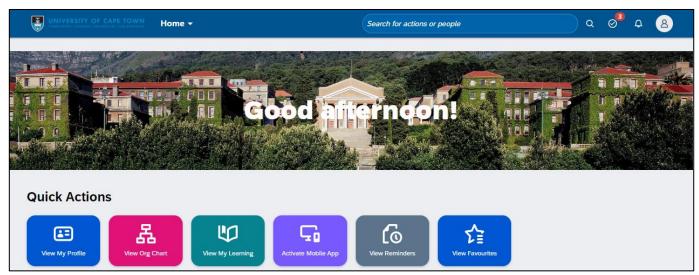
Background

A private posting is used to allow candidates to apply for a job after the closing date, provided they have a valid reason (e.g. problem accessing the system). It can also be used for ad hoc or external staff (employed by a recruitment agency) who are allowed to apply for an internal vacancy.

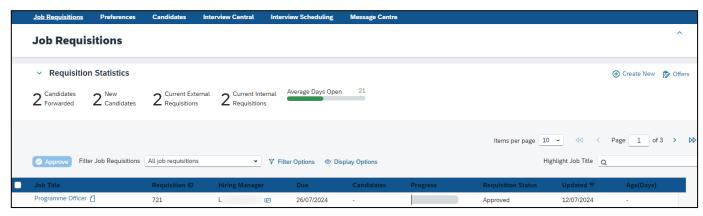
Note: The link sent to the candidate could be used by others if shared with them. Ensure that the applications are monitored, and you advise the candidate that the link is only for their own use.

Procedure

- 1. Log in to SuccessFactors and access the Home page.
- 2. The *Home* page appears.



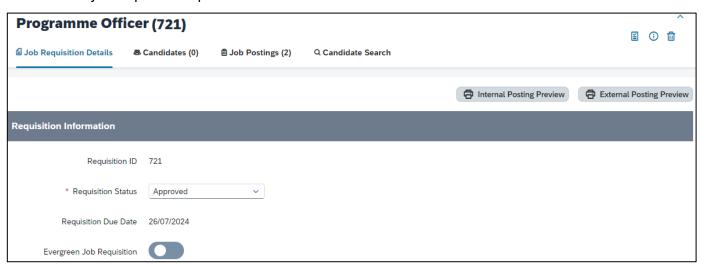
- Choose *Home > Recruiting*.
- 3. The Job Requisitions page appears.



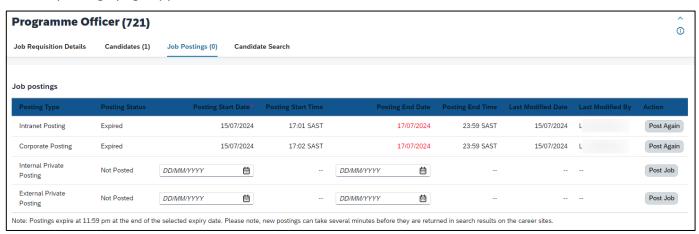
Select the appropriate job requisition by clicking the Job Title e.g. Programme Officer.
 Note: Job (advert) postings can also be accessed by clicking View Menu Options to the right of the job title and choosing Job Postings. Continue from step 5 below.

Creating a private posting

4. The selected job requisition opens.



- Click Job Postings
- 5. The Job postings page appears.



 Depending on requirements, create an internal private posting for UCT staff or an external private posting (see next page) for an external candidate.

Internal Private Posting (only for UCT staff who can log in to SuccessFactors with their staff number)

- In the Internal Private Posting line, select the Posting Start Date and Posting End Date. The posting end time is always 23:59 on the Posting End Date.
- Click Post Job
- A message in green shading indicates that the changes have been saved.



 Click Copy URL alongside Internal Private Posting to copy the advert web link to your clipboard for use elsewhere. This web link is sent to the candidate to submit their application.

Note: The link sent to the candidate could be used by others if shared with them. Ensure that the applications are monitored and advise the candidate that the link is only for their use.

Creating a private posting

External Private Posting

- In the External Private Posting line, select the Posting Start Date and Posting End Date. The posting end time is always 23:59 on the Posting End Date.
- Click Post Job
- A message in green shading indicates that the changes have been saved.



Click Copy URL alongside External Private Posting to copy the advert web link to your clipboard for use elsewhere. This web link is sent to the candidate to submit their application.

Note: The link sent to the candidate could be used by others if shared with them. Ensure that the applications are monitored and advise the candidate that the link is only for their use.

Background

Before using this procedure, first try creating a <u>private posting</u> for the candidate. In special cases, a candidate profile can be created, e.g. if the person can't access SuccessFactors due to a blocked IP address.

The first part of this procedure is creating the candidate profile. The second part is forwarding the profile to the appropriate job requisition.

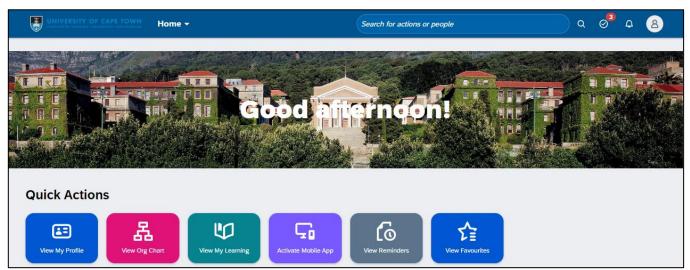
Before you begin

To create the candidate profile, you will need:

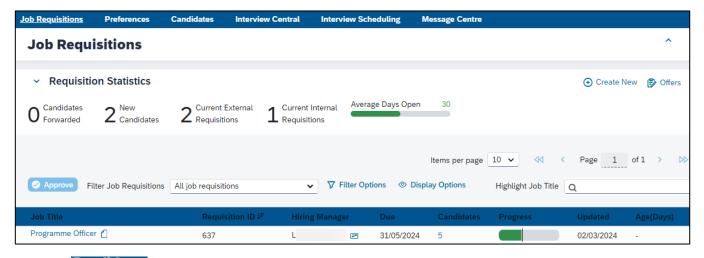
- Candidate's email address
- Candidate's phone number
- Candidate's CV
- Additional candidate information (gender, ethnicity, nationality, city & country of residence)

Procedure

- 1. Log in to SuccessFactors and access the Home page.
- 2. The *Home* page appears.



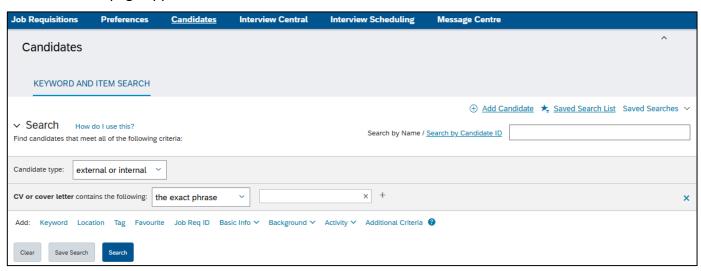
- Choose Home > Recruiting.
- 3. The Job Requisitions page appears.



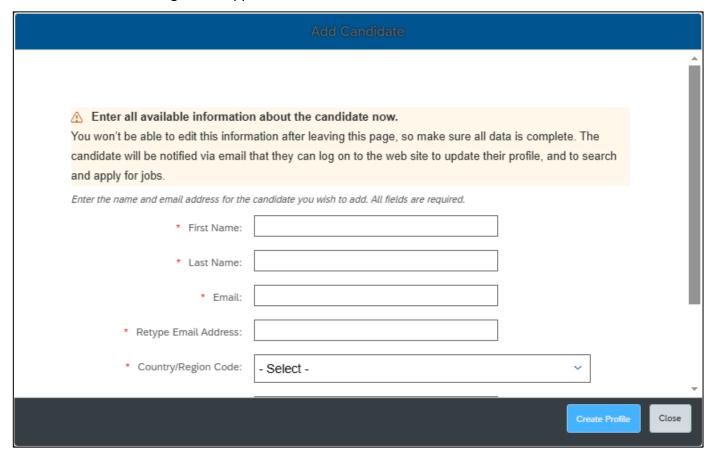
Click Candidates.

Part 1: Creating candidate profile

4. The Candidates page appears.

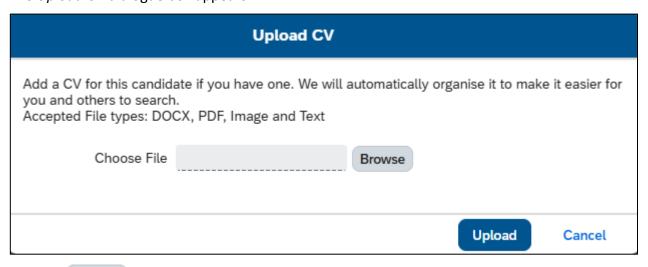


- 5. The Add Candidate dialogue box appears.

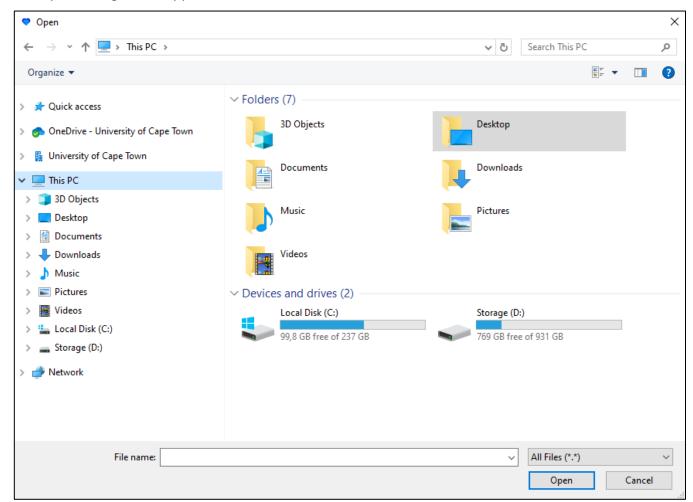


- Enter the required candidate information in the available fields.
- Click Create Profile

6. The Upload CV dialogue box appears.

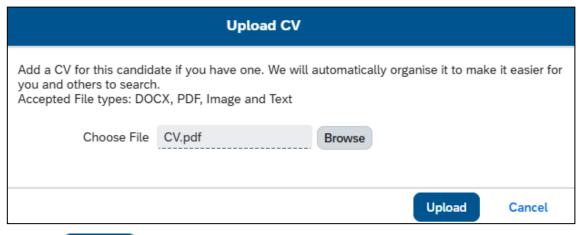


- Click Browse
- 7. The Open dialogue box appears.

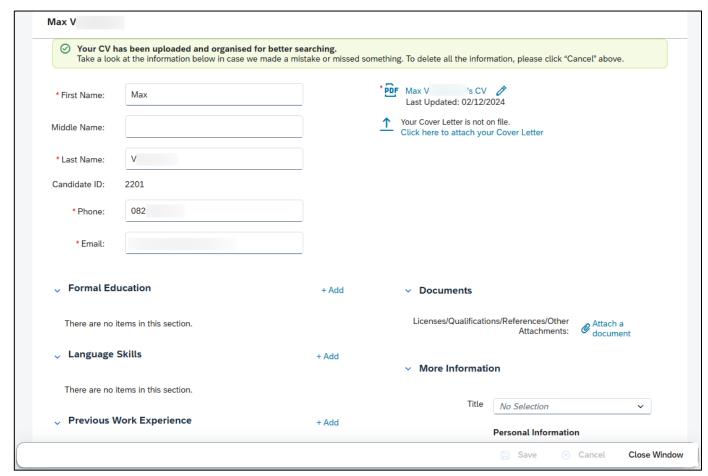


- Select the candidate's CV.
- Click Open

8. The Upload CV dialogue box reappears, with the selected file appearing in the Choose File field.

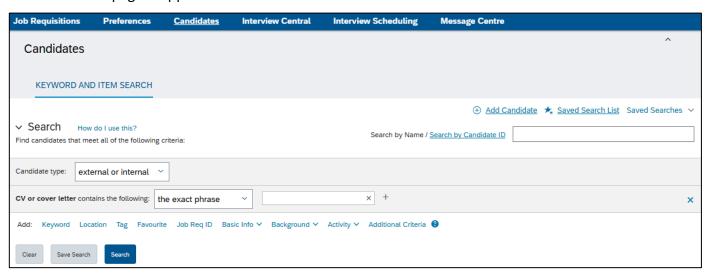


- Click Upload
- 9. The Candidate Profile appears in a separate window.



- Make a note of the candidate ID number for easier searching in the future.
- Complete the mandatory profile fields (Gender, Ethnicity, Nationality, City & Country of Residence).
- Click Save.
- Click Close Window.

10. The Candidates page reappears.



Part 2: Forwarding candidate profile to a job requisition

 On the Candidates page, search by candidate name or candidate ID using one of the search methods below.

Search by candidate name

- Enter part of the candidate's name (e.g. last name) in the Search by Name box on the right.
- If there are candidates that match the name, they will appear in a list below the search field.



Click the appropriate candidate's name to view their profile.

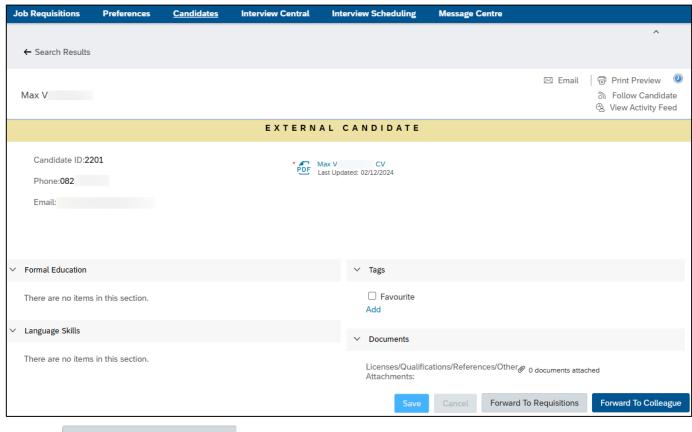
Search by candidate number

- Click Search by Candidate ID on the right.
- Enter the candidate ID in the search field.



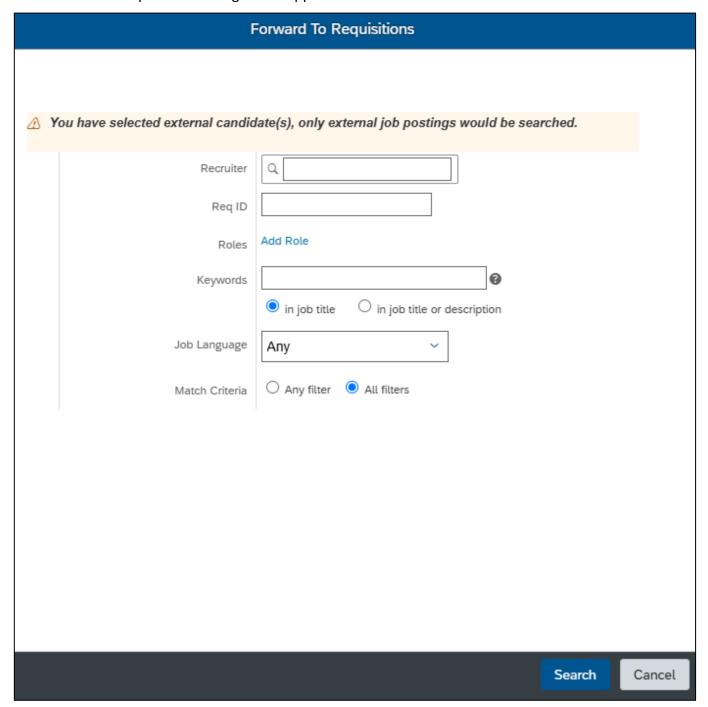
Click the candidate's name below the search field to view their profile.

11. The candidate profile appears.



- Click Forward To Requisitions

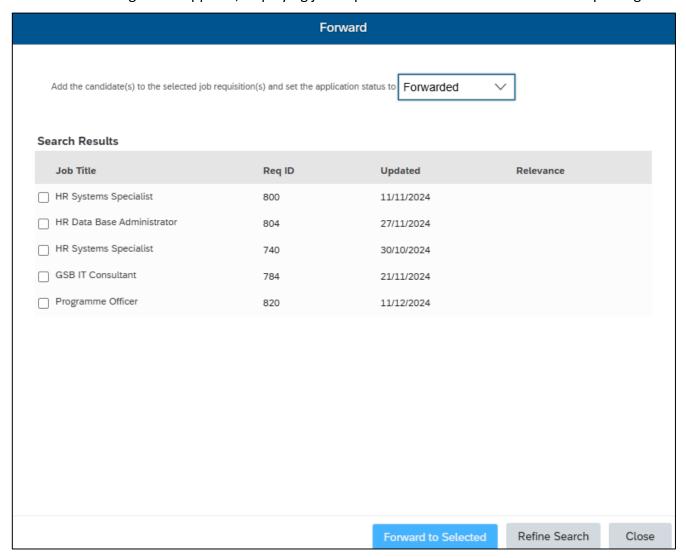
12. The Forward To Requisitions dialogue box appears.



Enter search criteria to find the correct job requisition, e.g. Recruiter (Servicing Officer), Req ID.
 Note: You can only forward to job requisitions with an active external advert posting.

– Click Search

13. The Forward dialogue box appears, displaying job requisitions with active external advert postings.



Select one or more job requisitions using the checkbox(es).



 A message at the top of the Forward dialogue box confirms that the candidate was successfully forwarded to the requisition.

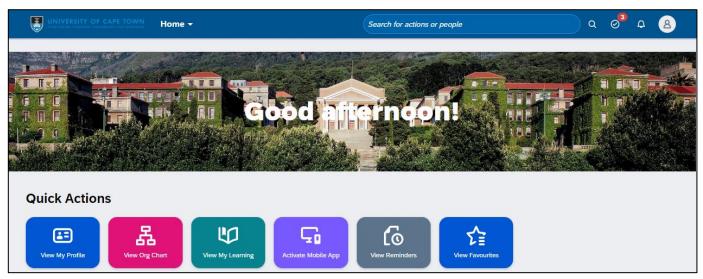


Check the selected job requisition(s) to ensure the forwarded candidate appears in the applicant list.

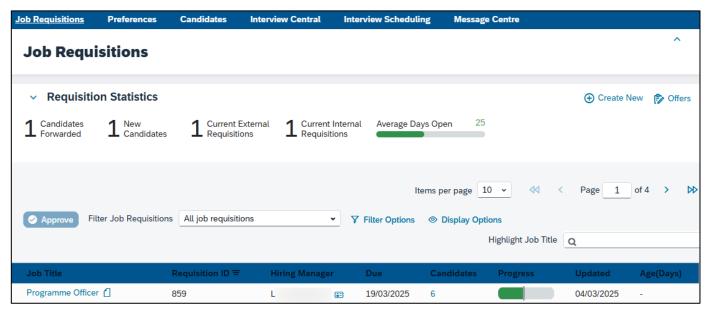
Attaching a referee report for an applicant

Procedure

- 1. Log in to SuccessFactors and access the Home page.
- 2. The *Home* page appears.



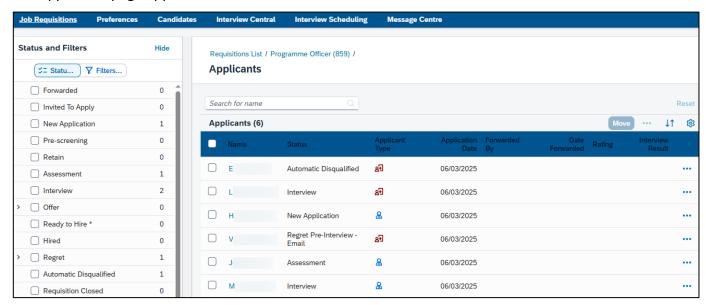
- Choose Home > Recruiting.
- 3. The Job Requisitions page appears.



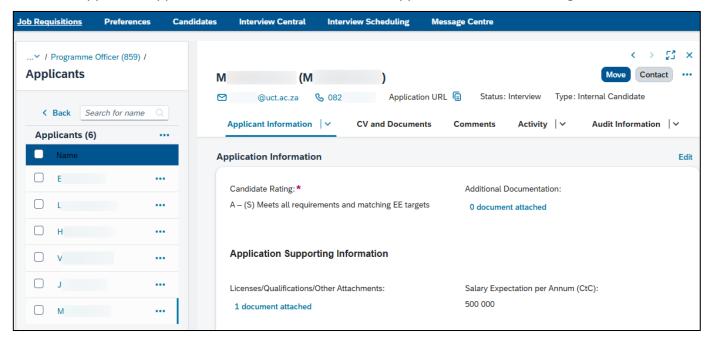
 Click the number in the Candidates column (e.g. 6 above) or click View Menu Options to the right of the job title and choose Candidate Summary.

Attaching a referee report for an applicant

4. The Applicants page appears.



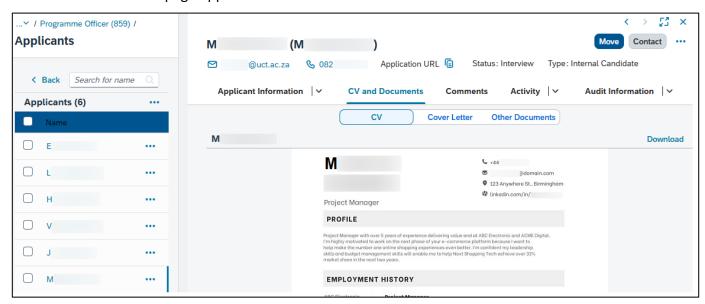
- The Status and Filters section shows all possible statuses and the number of applicants per status. In the example above there are 6 applicants in total, each with a different status.
 Note: Applicants with the New Application status can edit/change their attachments, profile information and answers to the application questions. Once they move to another status, they will no longer be allowed to make changes.
- The Status and Filters section can be hidden by clicking Hide. Click Status and Filters to show it again.
- Click Settings to select columns to show, columns to hide and/or change the column order. A
 maximum of 9 columns can be selected.
- Click In Sort to select ascending or descending sort order or to choose a specific column to sort by.
- Select an applicant to view by clicking their name in the Name column.
- 5. The list of applicants appears on the left with the selected applicant's details on the right.



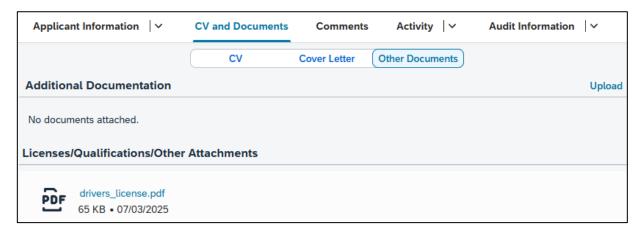
Click the CV and Documents tab.

Attaching a referee report for an applicant

6. The CV and Documents page appears.



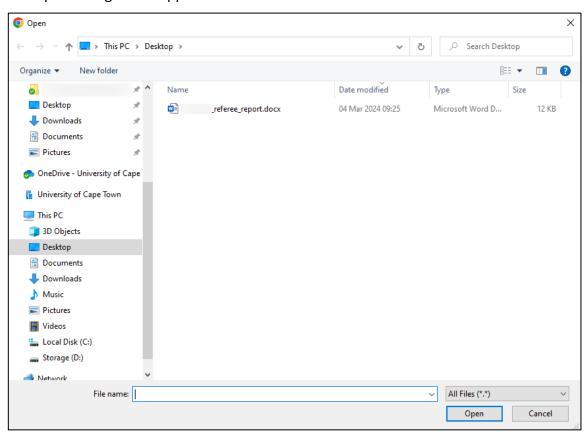
- Click Other Documents.



Click Upload.

Attaching a referee report for an applicant

7. The Open dialogue box appears.



- Select the referee report document from your computer.
- Click Open
- 8. The *CV* and *Documents* page reappears, with the referee report file appearing in the *Additional Documentation* section.



- To upload additional referee reports for the same applicant, click Upload and repeat from step 6
 above.
- If there are additional referee reports to add, select the next applicant by clicking their *Name* on the left and repeat from step 5 above.
- Click Job Requisitions to return to the Job Requisitions overview page
- Inform the selection committee that the referee report(s) is/are available.

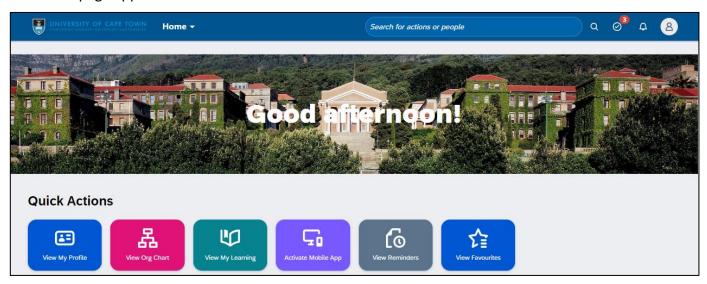
Before you begin

Candidates (applicants) must be moved the Interview status to be available for interview scheduling.

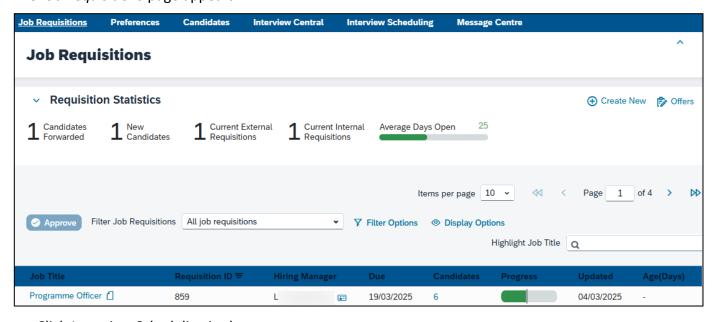
Assessments and presentations are arranged and booked outside of the SuccessFactors Recruiting system.

Procedure

- 1. Create a block booking(s) in Microsoft Outlook for the venue and selection committee members, include any additional discussion time before or after the interviews. Each candidate will be booked individually on SuccessFactors Recruiting.
- 2. Log in to SuccessFactors and access the Home page.
- 3. The *Home* page appears.

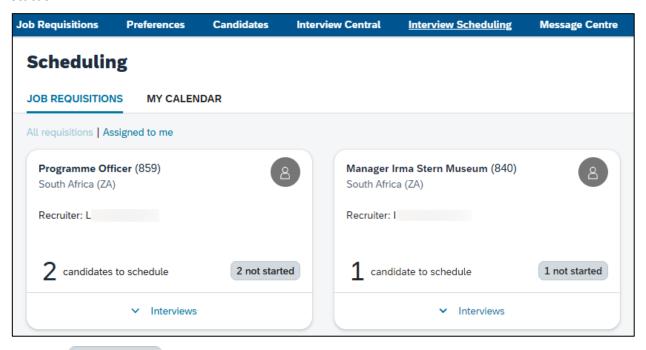


- Choose Home > Recruiting.
- 4. The Job Requisitions page appears.

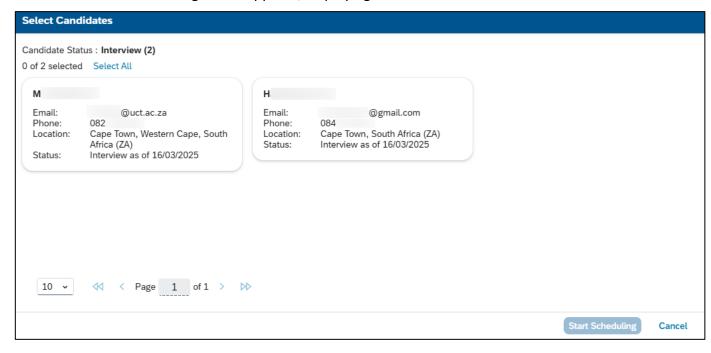


Click Interview Scheduling in the top menu.

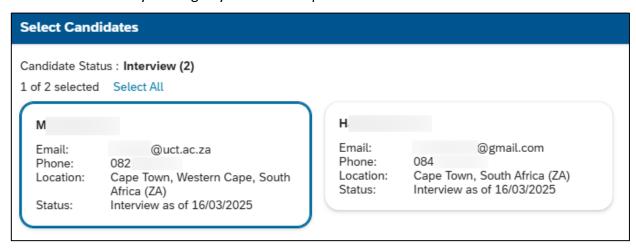
5. The *Interview Scheduling* page appears, listing any job requisitions that have candidates with the *Interview* status.



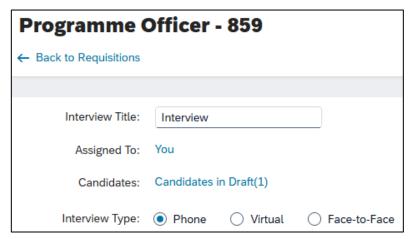
- Click not started to select a candidate to schedule for an interview.
- 6. The Select Candidates dialogue box appears, displaying all candidates with the Interview status.



Select a candidate by clicking anywhere in the person's tile.



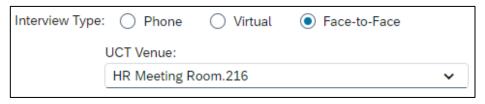
- Click Start Scheduling
- 7. The *Interview Scheduling* page appears.

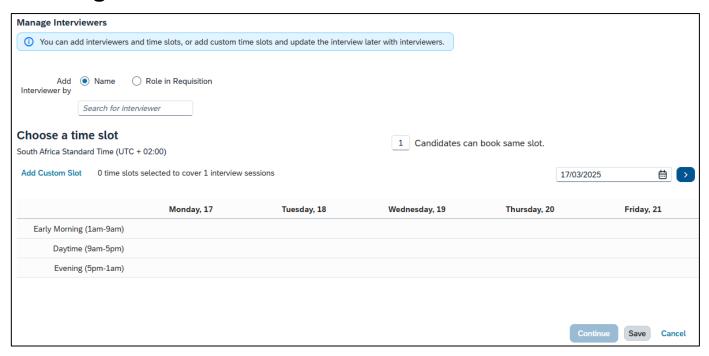


In the Interview Title field, enter the candidate's full name, replacing the existing text.
 Note: If required, check the selected candidate's name by clicking Candidates in Draft.



- In the Interview Type field, select Face-to-Face.
- The UCT Venue field appears after choosing Face-to-Face interview type above. Select the appropriate
 UCT venue. Note: The venue selection will appear in the email to the candidate, the venue must be
 booked off system.

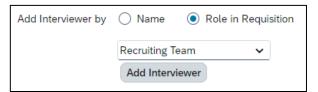




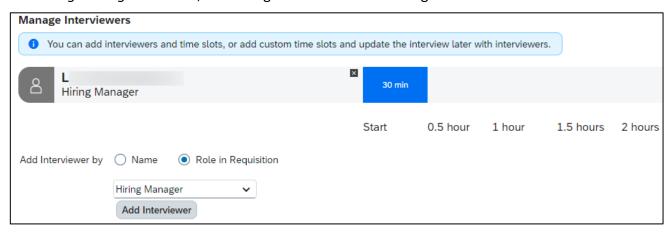
Manage Interviewers section:

Note: Anyone who should rate the candidate after the interview **must** be added as an interviewer to access the ratings page.

 In the Add Interviewer by section, select Role in Requisition. A dropdown list appears below the radio button selection.



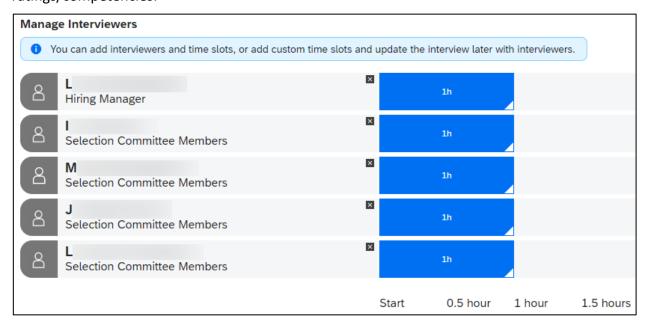
- Select Hiring Manager from the dropdown list.
- Click Add Interviewer
- The Hiring Manager is added, defaulting to a 30-minute meeting.



 If applicable, change the length of the interview by dragging the end of the time slot to the appropriate length e.g. 1 hour. Note: The interview time is set for the first interviewer and will then default for interviewers that are added afterwards.



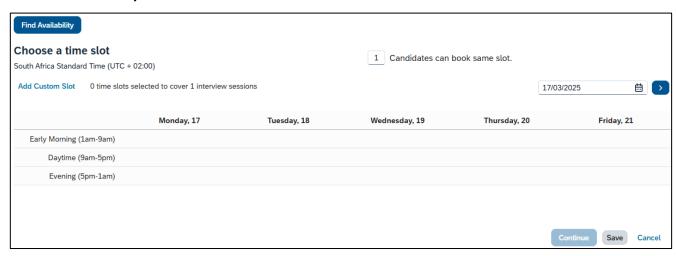
Add the rest of the selection committee by selecting the required role using the dropdown list (e.g. Selection committee members) and clicking Add Interviewer. Note: The Servicing Officer (Recruiter) may ask to be added so they can see the selection committee view of the interview ratings/competencies.



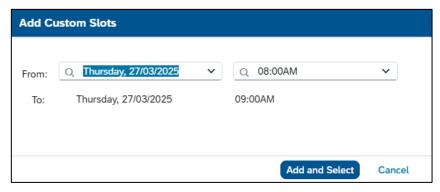
- If a person was added accidentally, remove them by clicking
 ■ in the top right of the box containing their name.
- If there are other UCT staff members to add to the interview, select Name in the Add Interview by section and use the Search for interviewer field to select the appropriate person.



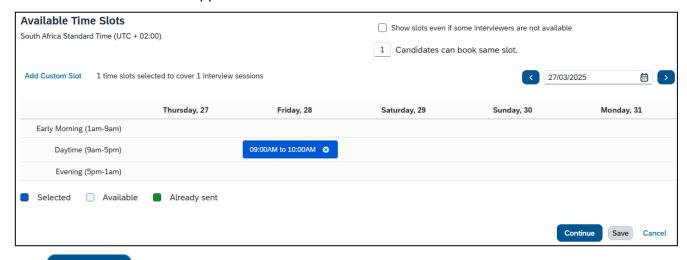
Choose a time slot / Available Time Slots section:



- If not scheduling the interview for the current week, select the appropriate week using the calendar or the arrow buttons.
- Click Add Custom Slot.
- The Add Custom Slots dialogue box appears.

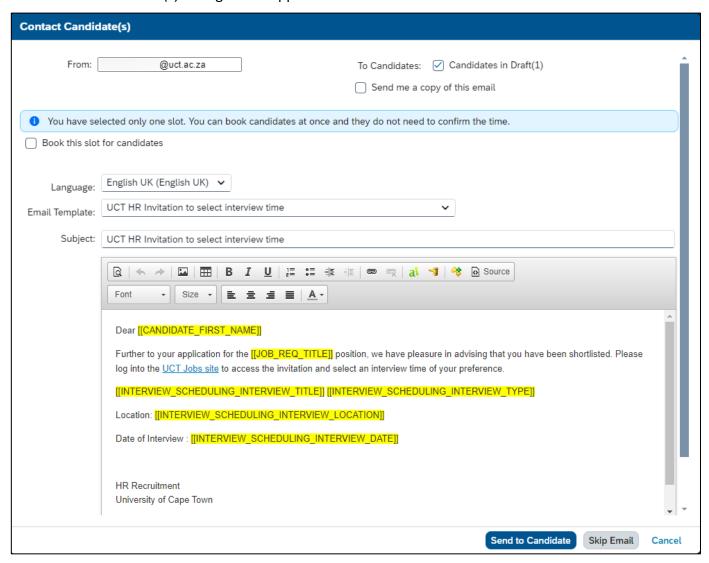


- In the *From* field, select the appropriate day and then select the appropriate start time alongside the day. The end time of the interview will adjust after selecting the start time.
- Click Add and Select
- The selected interview slot appears in the calendar.



- Click Continue

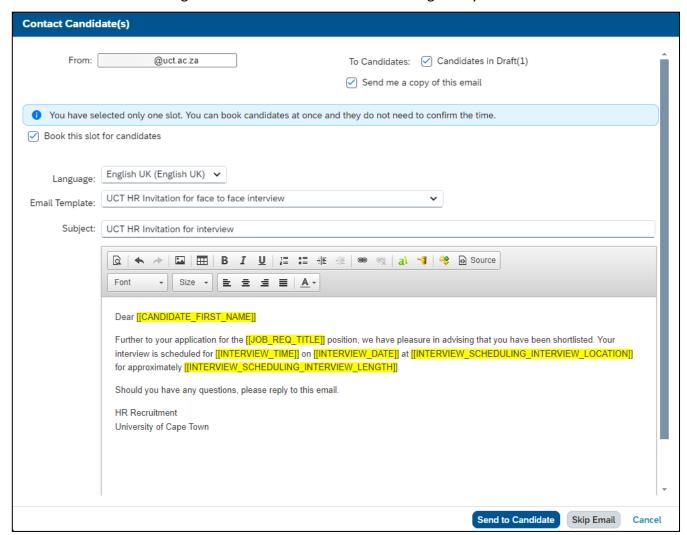
8. The Contact Candidates(s) dialogue box appears.



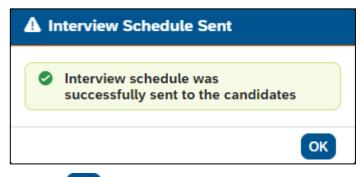
- Select the Send me a copy of this email checkbox to ensure you receive a copy of the interview invitation email sent to the candidate.
- Select the Book this slot for candidates checkbox.
 Note: This checkbox must be selected, it will ensure that the candidate is automatically booked for the interview slot.

In the *Email Template* field, select *UCT HR Invitation for face to face interview*.

Note: The yellow text indicates places where SuccessFactors will automatically populate information when it sends the email e.g. candidate's first name. Do not change the yellow fields.

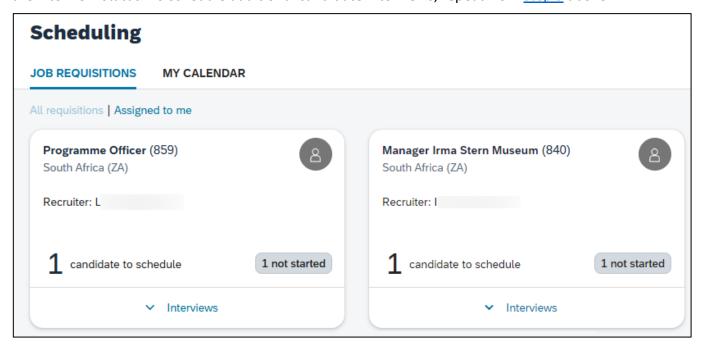


- The email template text can be edited in the space provided.
 Note: Location is only the room so the building information may need to be entered and possibly directions to campus or a link to the campus maps.
- Click Send to Candidate
- 9. The *Interview Schedule Sent* dialogue box appears.



– Click OK

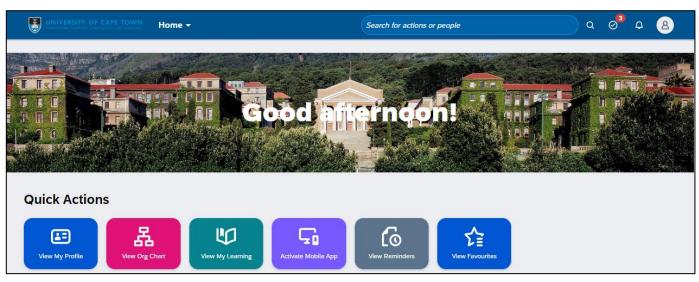
10. The *Interview Scheduling* page reappears, listing any remaining job requisitions that have candidates with the *Interview* status. To schedule additional candidate interviews, repeat from step 5 above.



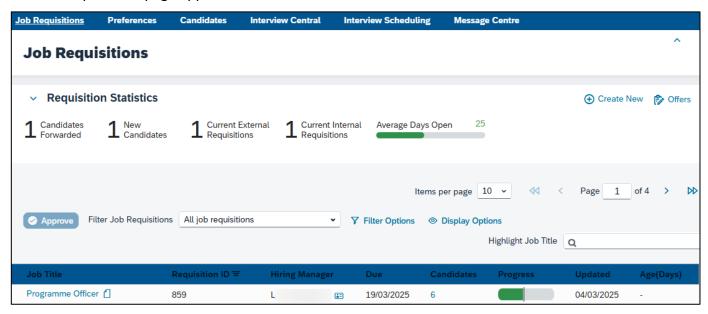
Displaying interview details

Procedure

- 1. Log in to SuccessFactors and access the Home page.
- 2. The *Home* page appears.



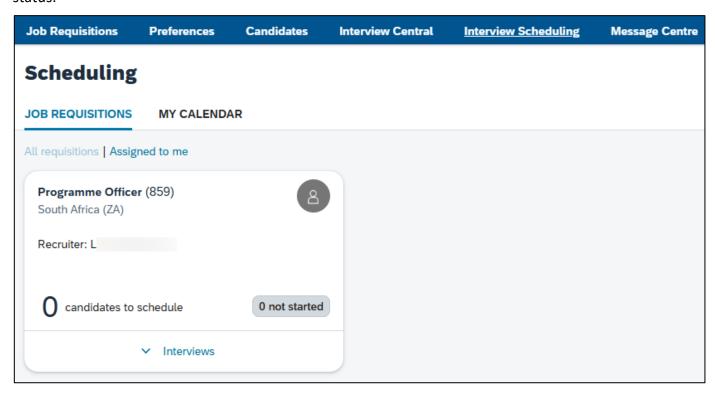
- Choose Home > Recruiting.
- 3. The Job Requisitions page appears.



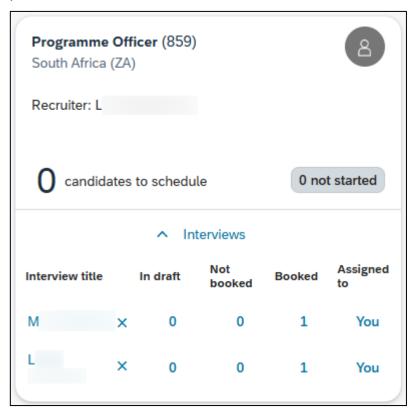
Click Interview Scheduling in the top menu.

Displaying interview details

4. The *Interview Scheduling* page appears, listing any job requisitions that have candidates with the *Interview* status.



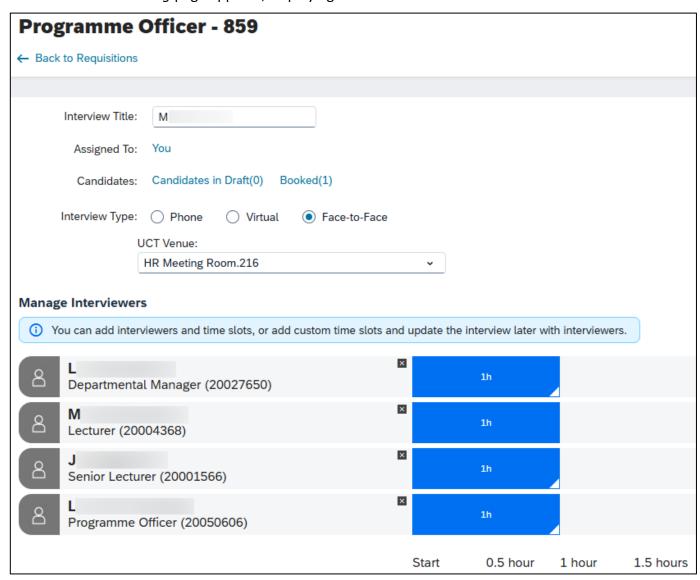
- Click ➤ Interviews
- The candidate interview details are displayed. Candidates in draft have interview details saved but not yet sent.



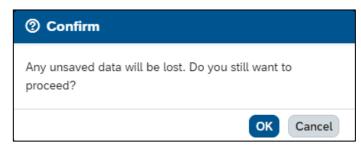
Click a name in the Interview title column to view the interview details.

Displaying interview details

5. The *Interview Scheduling* page appears, displaying the selected candidate's interview details.



- Scroll down the page to review the interview details.
- Click Cancel.
- The Confirm dialogue box appears.



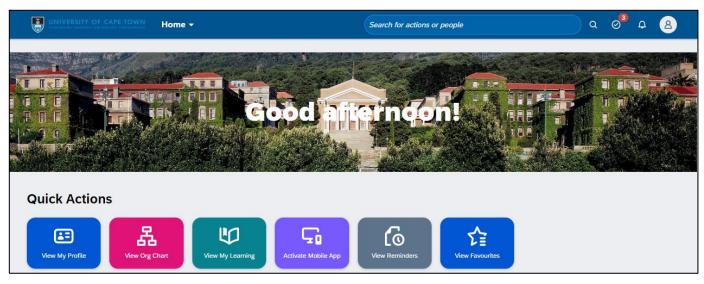
- Click ok to return to the *Interview Scheduling* page.

Background

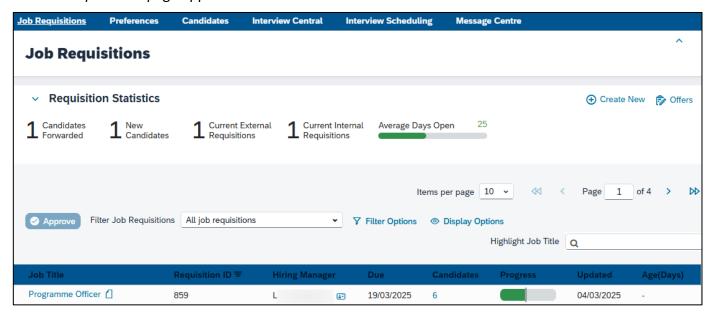
The room, committee members and interview date/time can be changed for a scheduled interview.

Procedure

- 1. Log in to SuccessFactors and access the Home page.
- 2. The Home page appears.

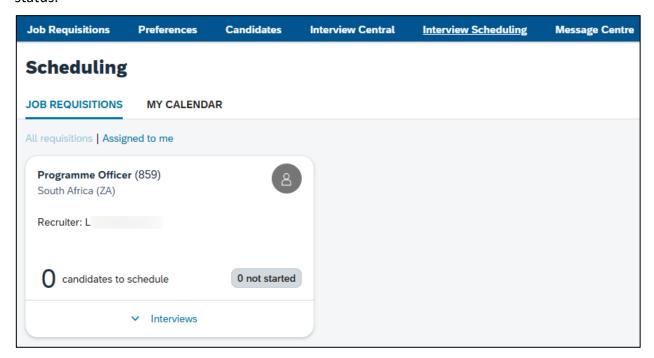


- Choose Home > Recruiting.
- 3. The Job Requisitions page appears.

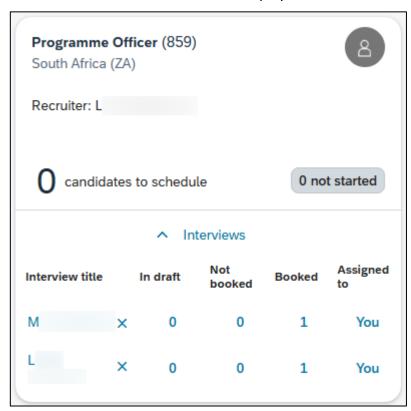


Click Interview Scheduling in the top menu.

4. The *Interview Scheduling* page appears, listing any job requisitions that have candidates with the *Interview* status.

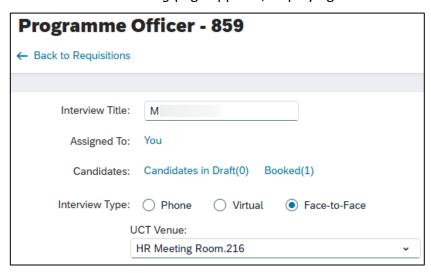


- Click V Interviews.
- The candidate interview details are displayed.

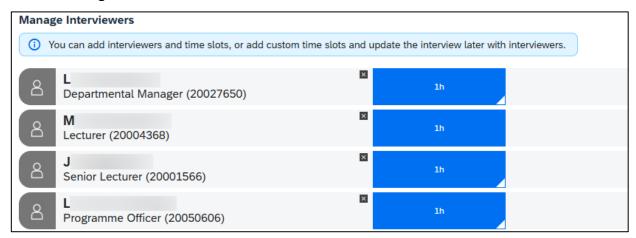


Click a name in the Interview title column to view the interview details

5. The Interview Scheduling page appears, displaying the selected candidate's interview details.



- To change the interview room, select the new room in the *UCT Venue* field.
 Note: Ensure that the block booking in Microsoft Outlook is also updated as SuccessFactors Recruiting is not integrated with Outlook.
- To remove a committee member: In the Manage Interviewers section, click
 in the top right of the box containing their name.



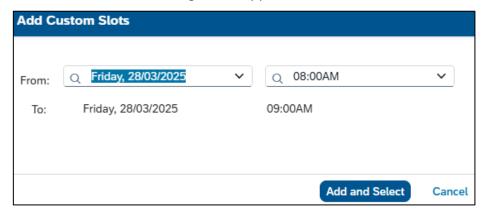
To add a committee member: In the *Add Interviewer by* section, either add via *Role in Requisition* and click Add Interviewer or select *Name* and use the search field to select the appropriate person.



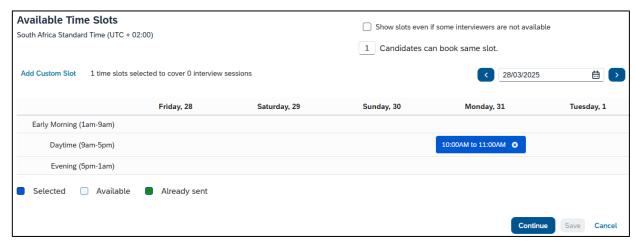
- To change the interview date/time:
 - In the Previously Selected Slots section, delete the existing slot by clicking $ar{f m}$ Delete the slot.



- If not scheduling the interview for the current week, select the appropriate week using the calendar or the arrow buttons.
- Click Add Custom Slot.
- The Add Custom Slots dialogue box appears.

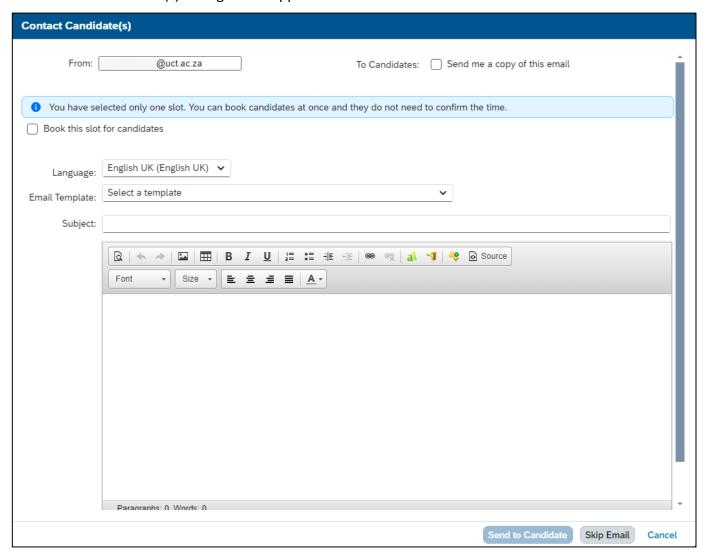


- In the *From* field, select the appropriate day and then select the appropriate start time alongside the day. The end time of the interview will adjust after selecting the start time.
- Click Add and Select
- The selected interview slot appears in the calendar.



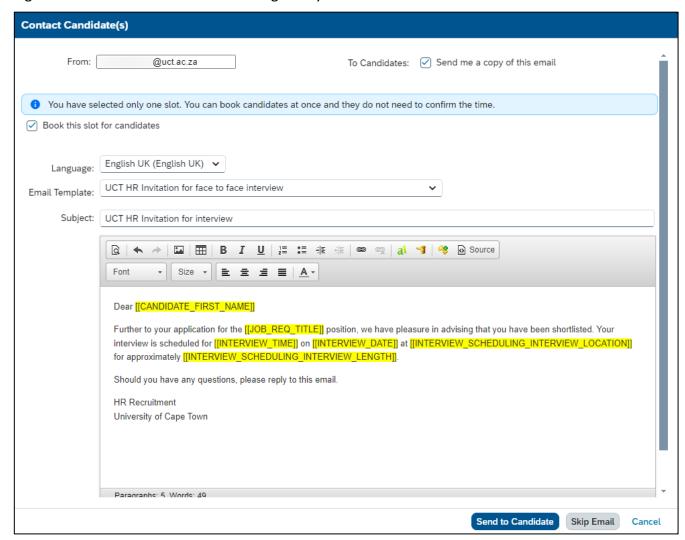
- Click Continue

6. The Contact Candidates(s) dialogue box appears.

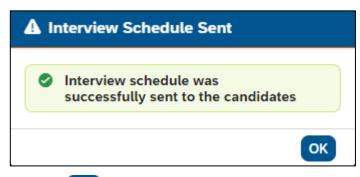


- Select the Send me a copy of this email checkbox to ensure you receive a copy of the interview invitation email sent to the candidate.
- Select the Book this slot for candidates checkbox.
 Note: This checkbox MUST be selected, it will ensure that the candidate is automatically booked for the interview slot.

In the Email Template field, select UCT HR Invitation for face to face interview. Note: The yellow text
indicates places where SuccessFactors will automatically populate information when it sends the email
e.g. candidate's first name. Do not change the yellow fields.

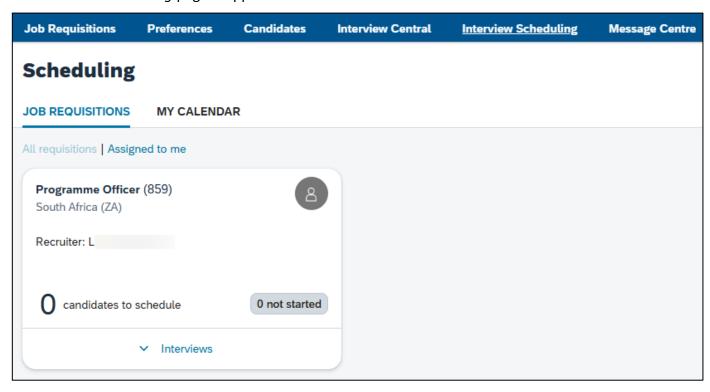


- The email template text can be edited in the space provided.
 Note: Location is only the room so the building information may need to be entered and possibly directions to campus or a link to the campus maps.
- Click Send to Candidate
- 7. The Interview Schedule Sent dialogue box appears.



– Click OK

8. The Interview Scheduling page reappears.



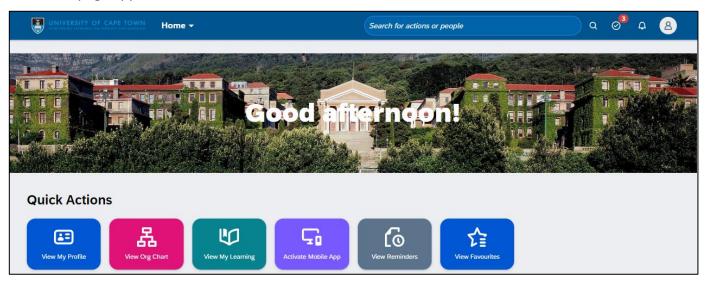
Deleting a scheduled interview

Background

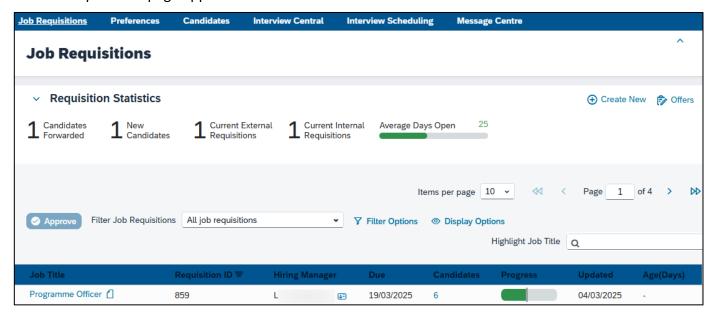
The candidate will receive a notification when the interview is deleted.

Procedure

- 1. Log in to SuccessFactors and access the Home page.
- 2. The Home page appears.



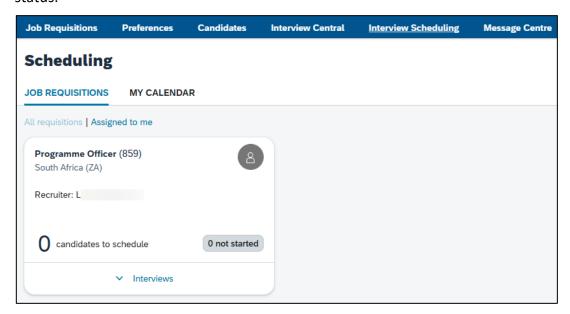
- Choose Home > Recruiting.
- 3. The Job Requisitions page appears.



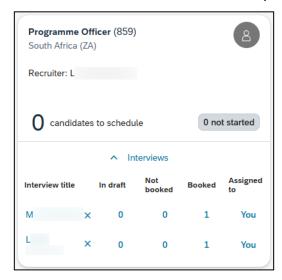
Click Interview Scheduling in the top menu.

Deleting a scheduled interview

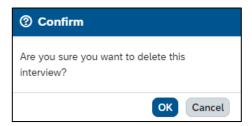
4. The *Interview Scheduling* page appears, listing any job requisitions that have candidates with the *Interview* status.



- Click V Interviews.
- The candidate interview details are displayed.



- In the *Interview title* column, click × *Delete* alongside the interview to be deleted.
- 5. The Confirm dialogue box appears.



- Click OK
- A message briefly appears near the top of the page, indicating that the interview was successfully deleted.

