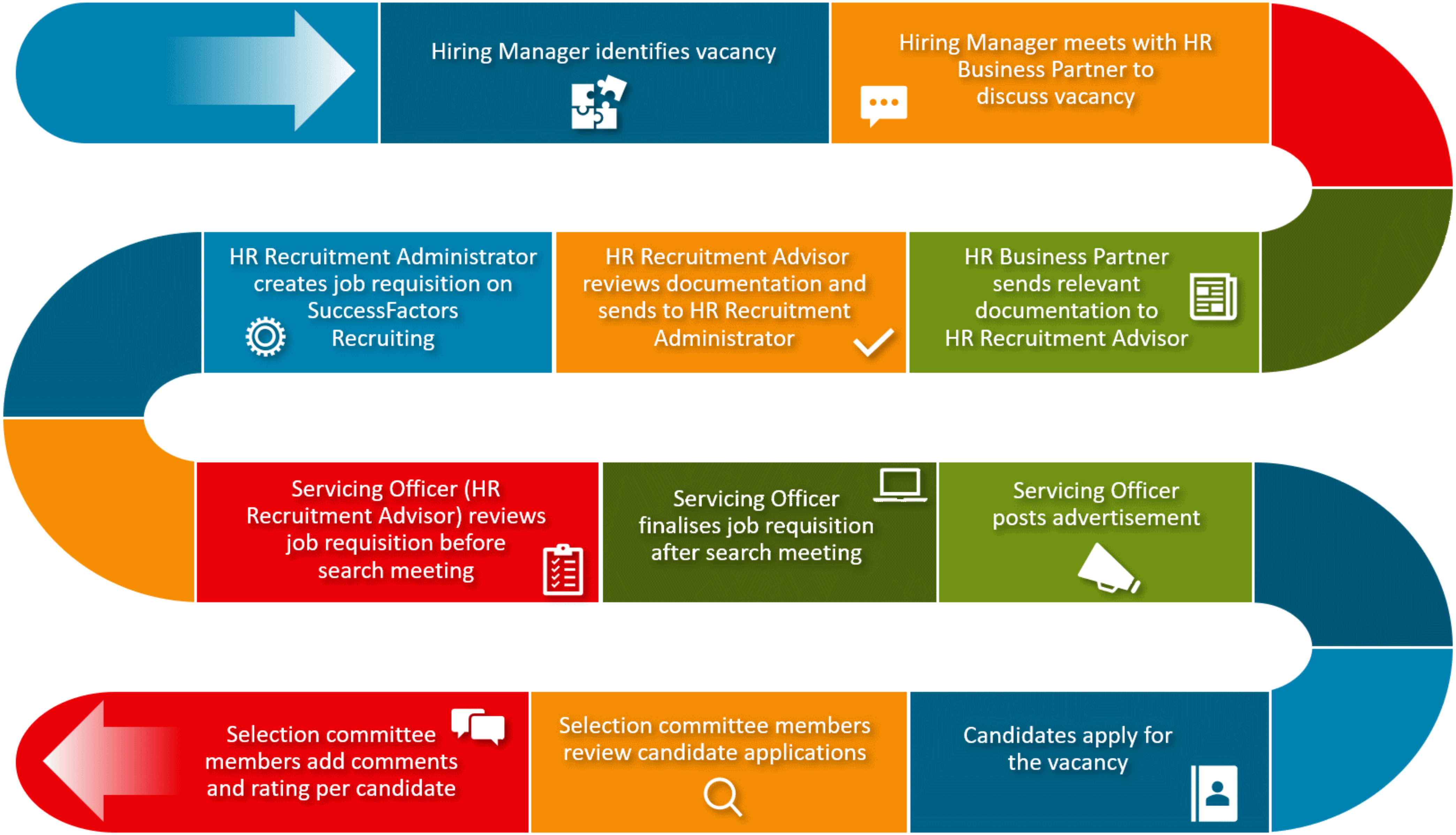
UNIVERSITY OF CAPE TOWN
IYUNIVESITHI YASEKAPA • UNIVERSITEIT VAN KAAPSTAD

UCT SuccessFactors Recruiting guide for Recruitment Administrators

Issued by UCT Human Resources
July 2024

Contents

Process overview: Part 1



Process overview: Part 2

Logging in to SuccessFactors

Background

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

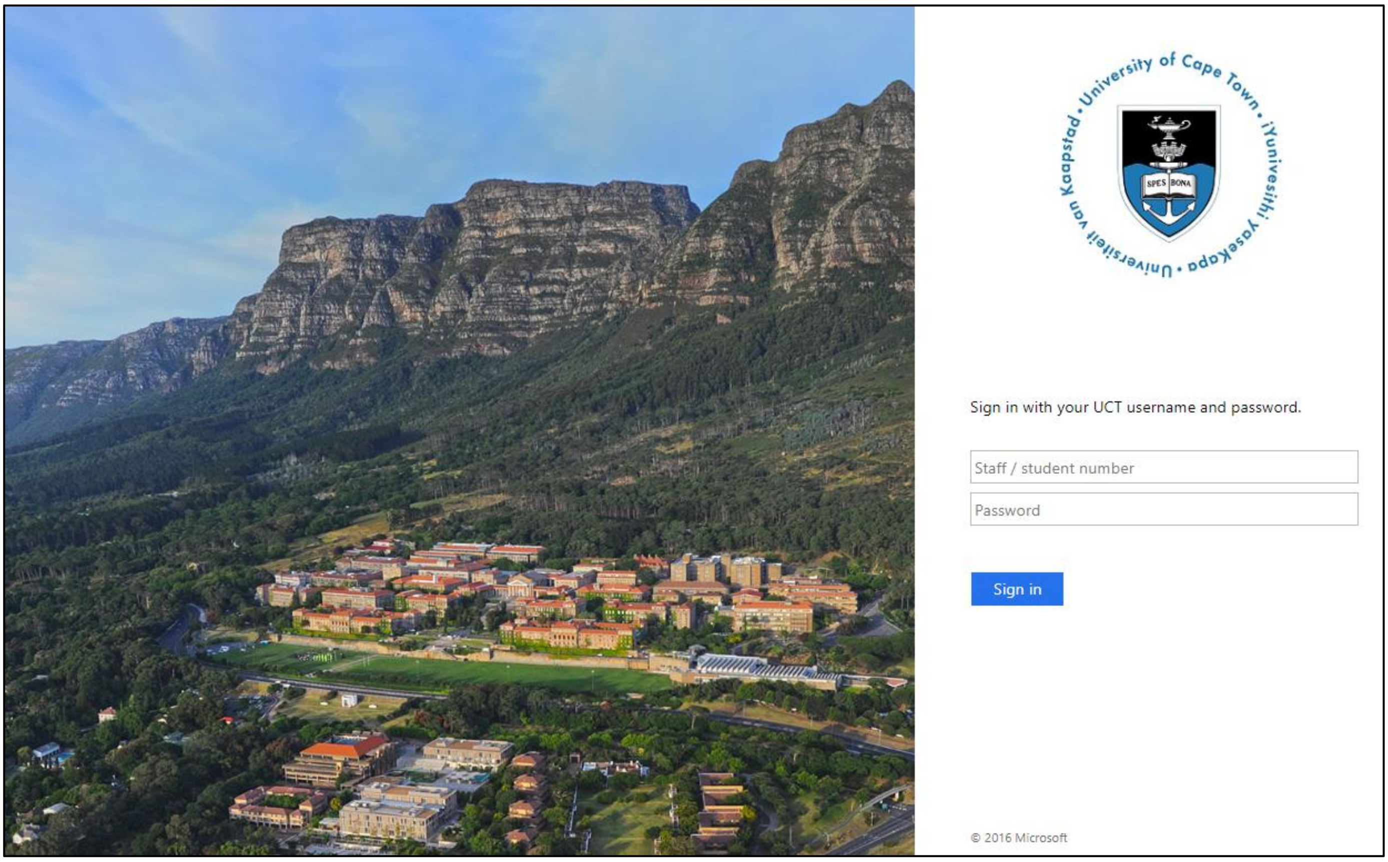
Staff members can access the platform using their existing UCT login details.

Support

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

Procedure

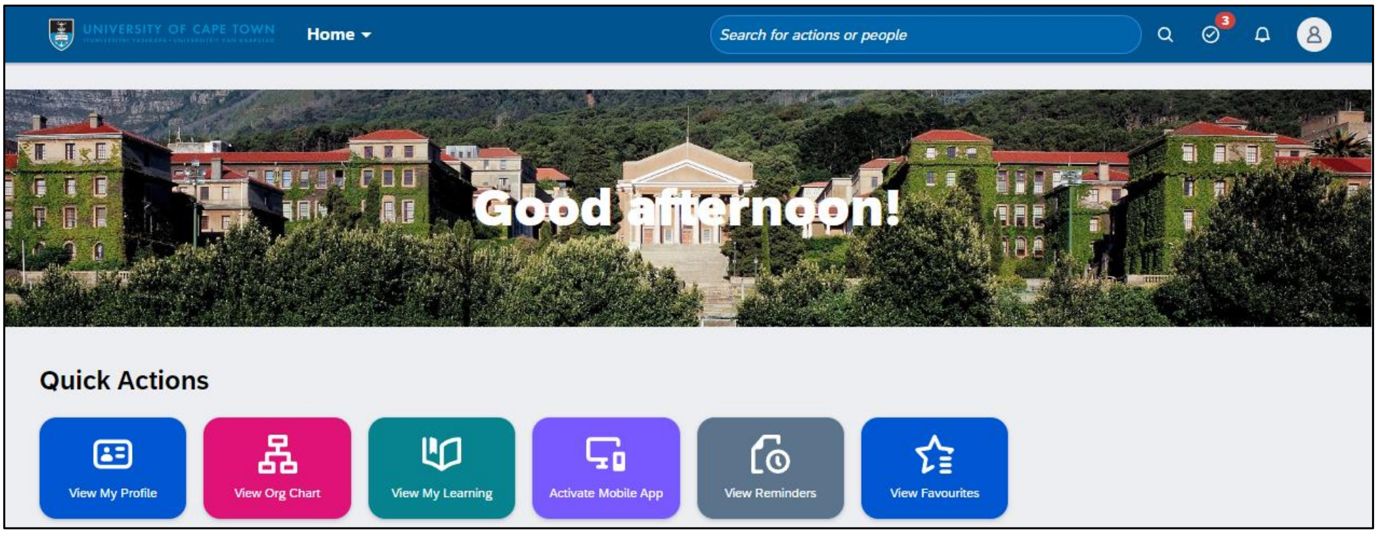
1. Open a web browser (e.g. Google Chrome, Mozilla Firefox, Microsoft Edge).
2. Log in to SuccessFactors via www.successfactors.uct.ac.za.
3. If not already logged on to single sign-on, the UCT sign in page appears.
   If already logged in to single sign-on, SuccessFactors will open.



- 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.

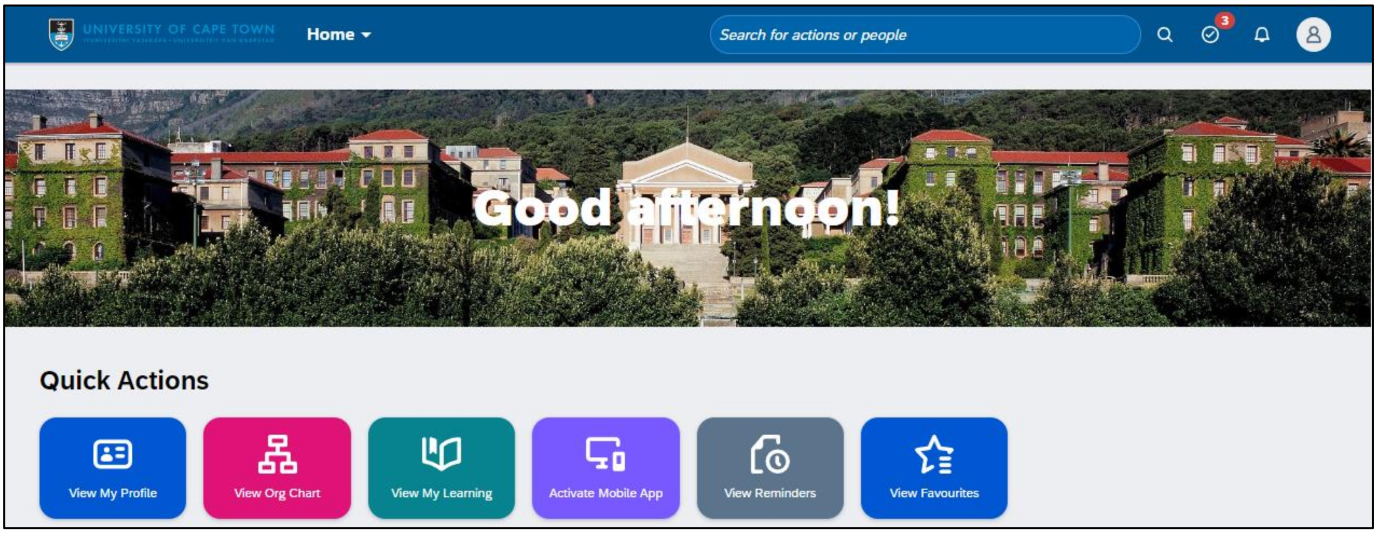


Creating a new job requisition

Background

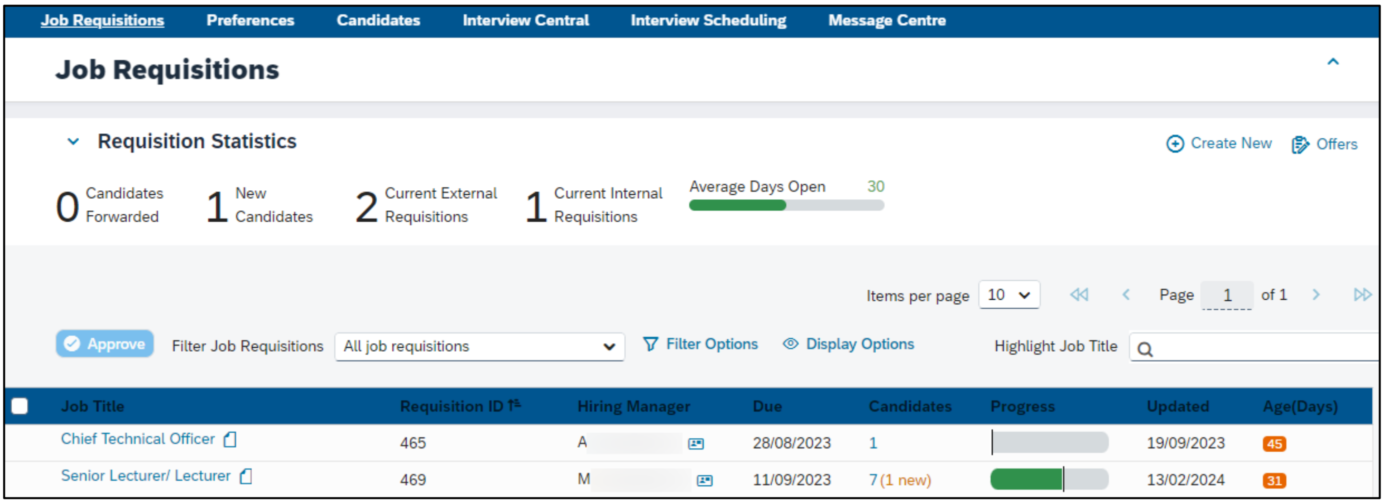
The Recruitment Administrator starts the online recruitment process by creating a new job requisition using the information from the submitted HR202 form (Request to commence a formal recruitment process for posts to be advertised).

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.

Creating a new job requisition

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.

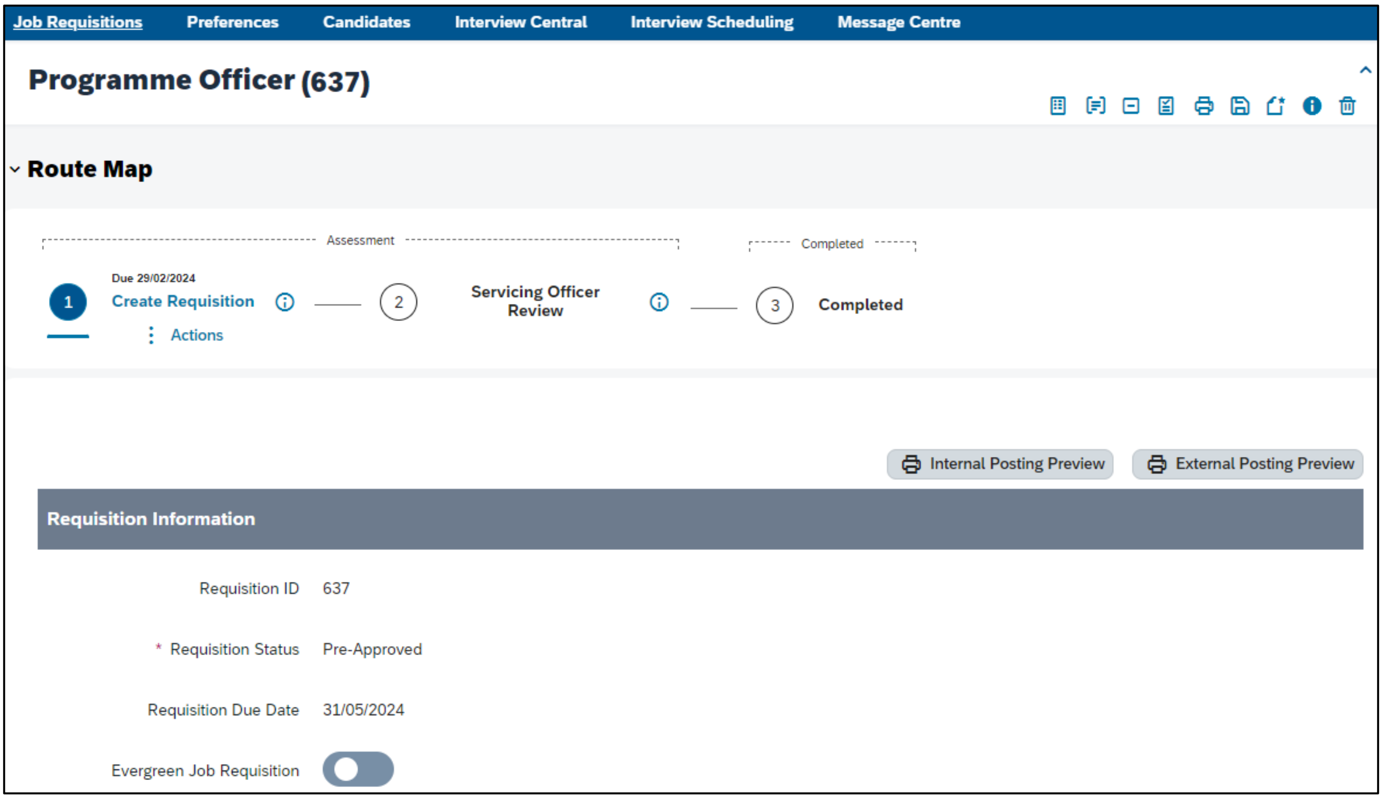
   – Enter the *Position Title*.

   – In the *Servicing Officer* field, enter part or all of the Recruitment Advisor’s name and select the person from the dropdown list.

   – Click Next.

Creating a new job requisition

6. The new job requisition appears.

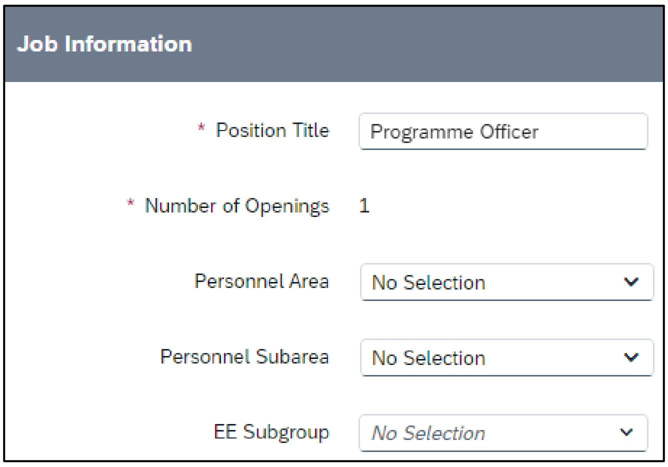


- The *Route Map* at the top of the page provides an overview of the required approvals process. The Recruitment Administrator will complete step 1 by creating the job requisition and then send to the Servicing Officer (Recruitment Advisor) for review.

***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**:

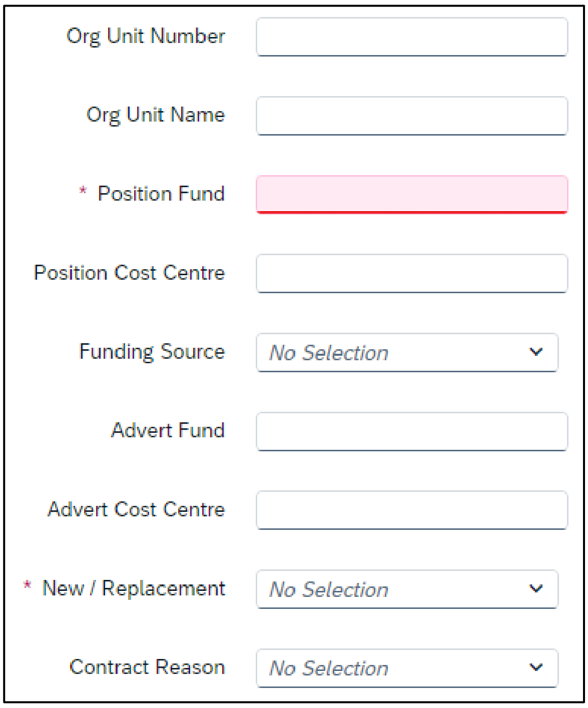


- Ensure the *Position Title* is correct.
- If recruiting for more than one of the same position, change the *Number of Openings*.
- Select the *Personnel Area* e.g. Faculty of Commerce.

Creating a new job requisition

***Job Information* section (continued)**:

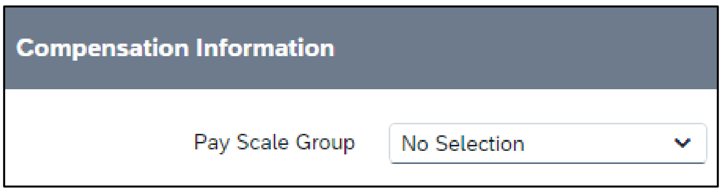
- Select the *Personnel Subarea* e.g. PASS 5 – 12.
- Select the *EE Subgroup* e.g. permanent.



- 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*.

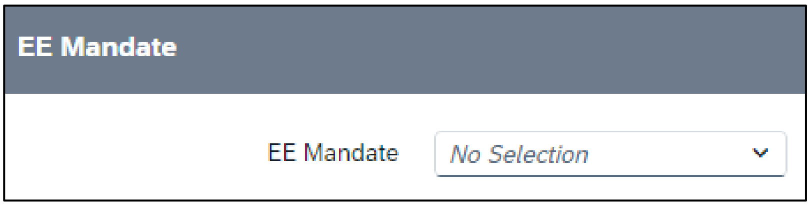
Compensation Information section:



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

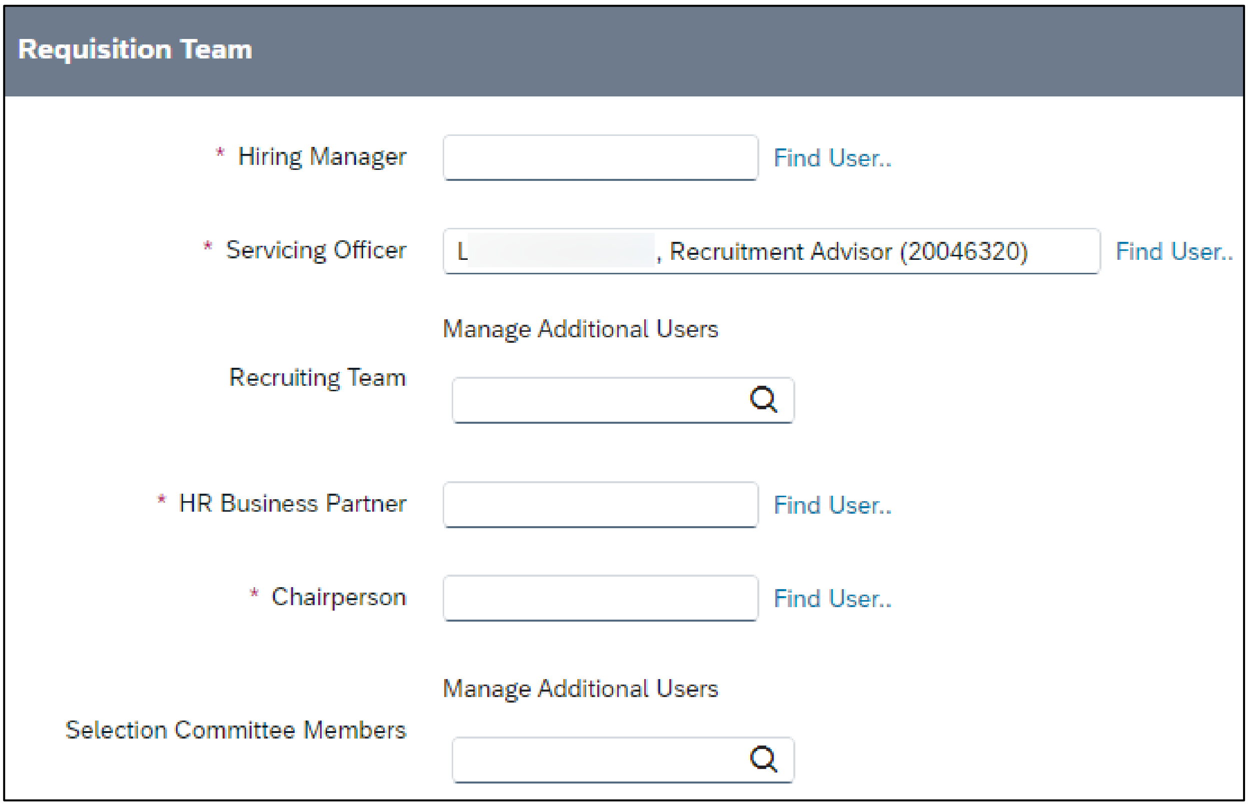
Creating a new job requisition

EE Mandate section:



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

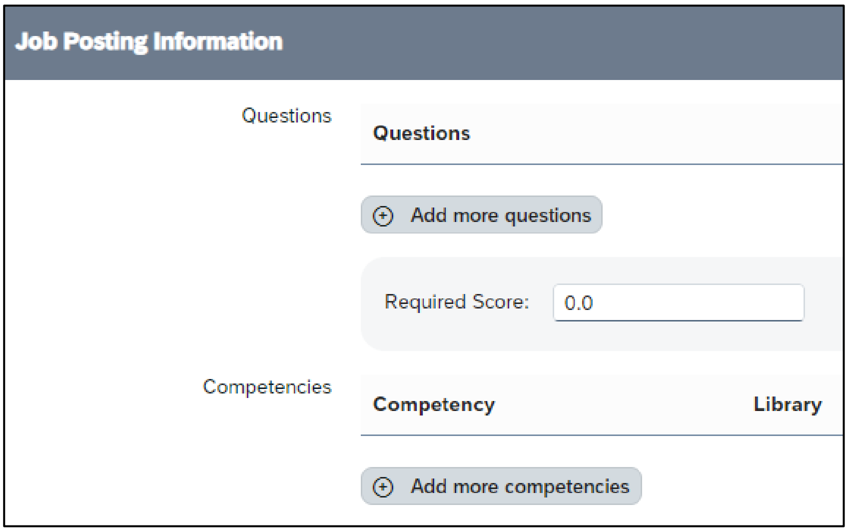
***Requisition Team* section**:



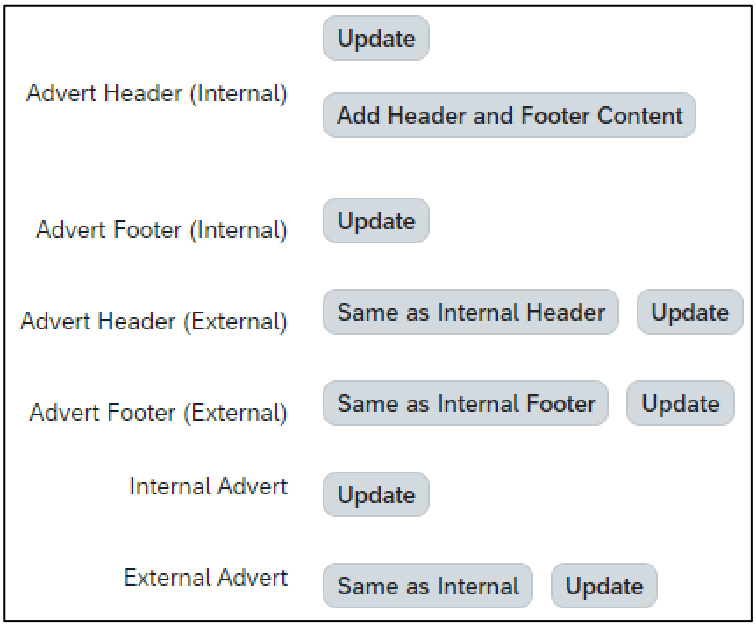
- In the *Hiring Manager* field, enter part or all of the manager's name and select the person from the dropdown list.
- The *Servicing Officer* field shows the previously selected Recruitment Advisor.
- In the *Recruiting Team* field, add yourself and any other members of the recruitment team that would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

Creating a new job requisition

***Job Posting Information* section**:



- Skip the *Questions* section, this will be completed by the Recruitment Advisor.
- Add the *Competencies* from the position description document. See: Adding Competencies.



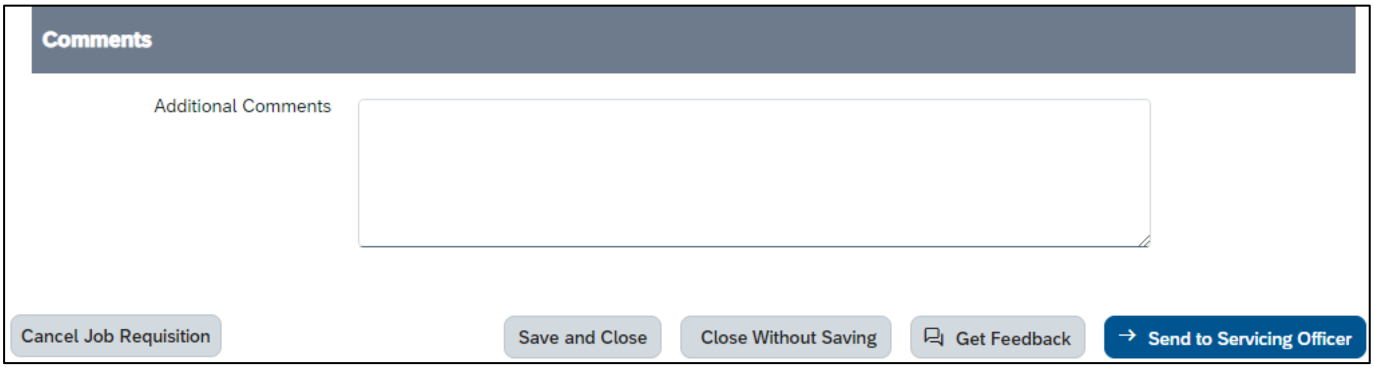
- Add the internal and external advert, see Adding advert content.

- 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.

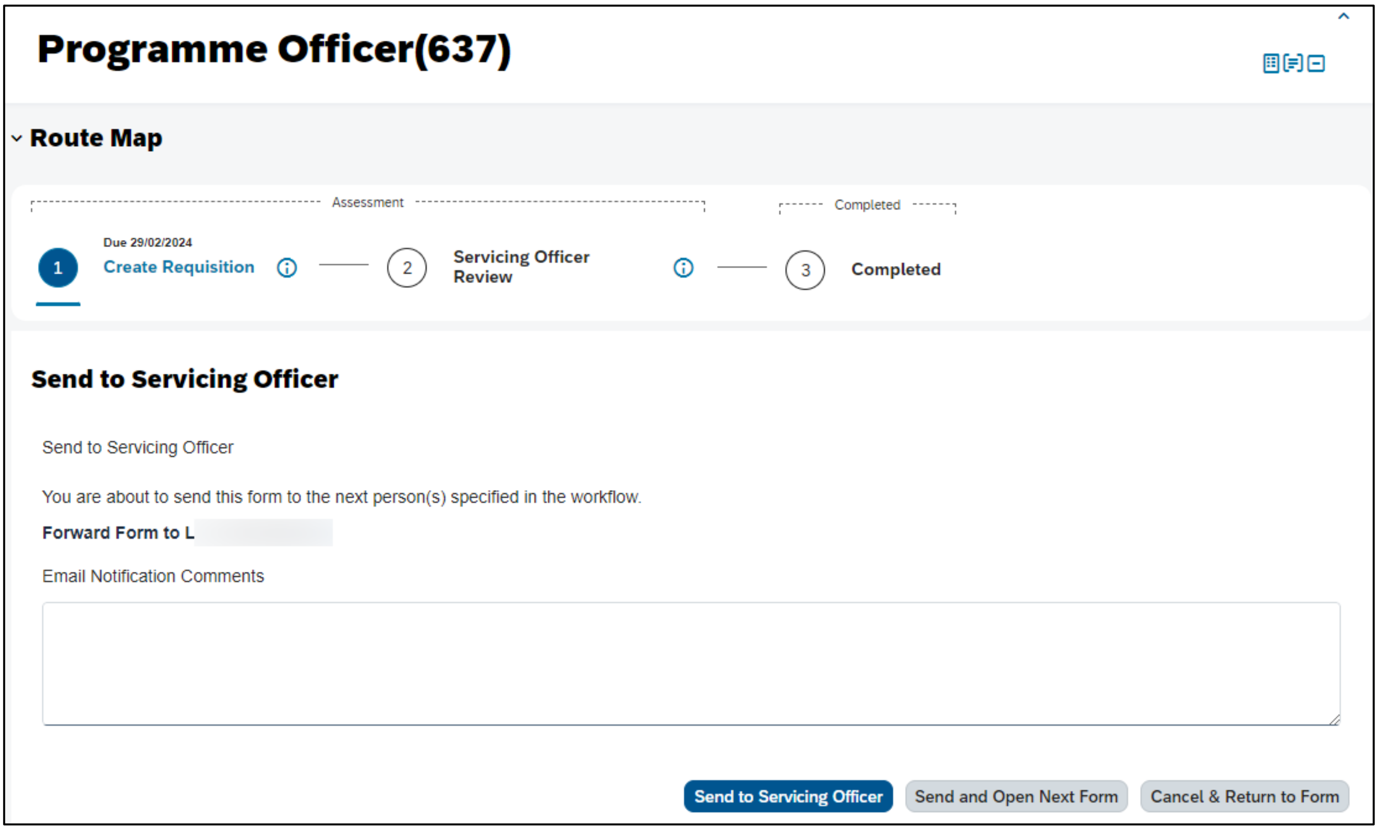
Creating a new job requisition

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

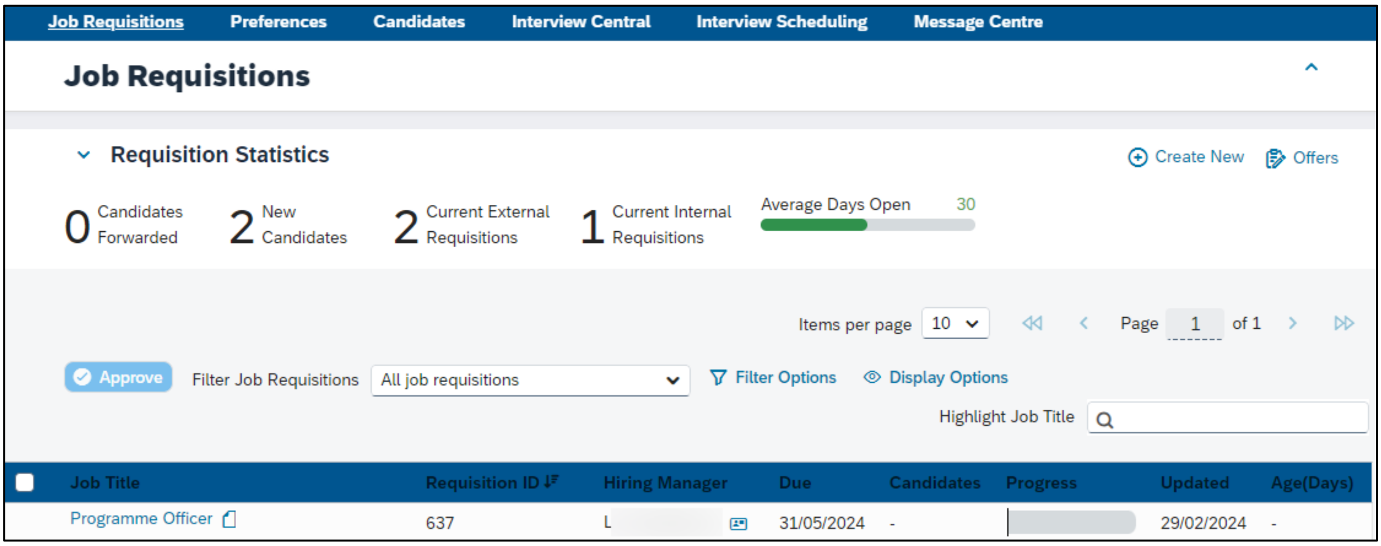
7. The *Send to Servicing Officer* page appears.



- If applicable, enter a comment in the *Email Notification Comments* section.
  Note: This comment will only be sent with the email notification to the Servicing Officer. It will not be saved in the job requisition on SuccessFactors Recruiting.
- Click **Send to Servicing Officer**.

Creating a new job requisition

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.



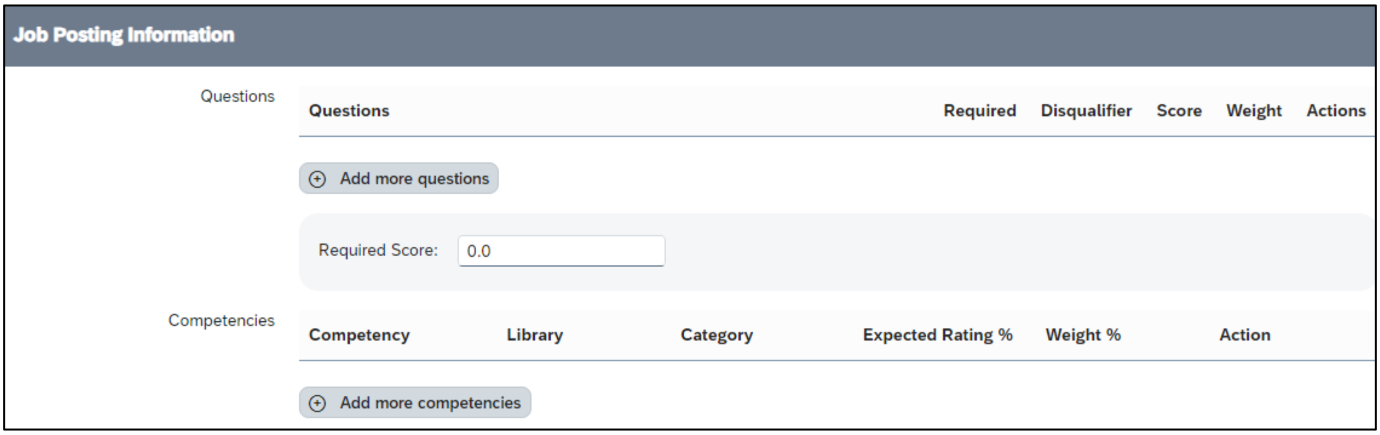
Adding competencies

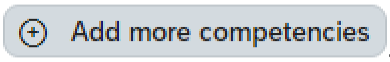
Background

Competencies must be added for each job so they can be rated by the selection committee after the interview.

Procedure

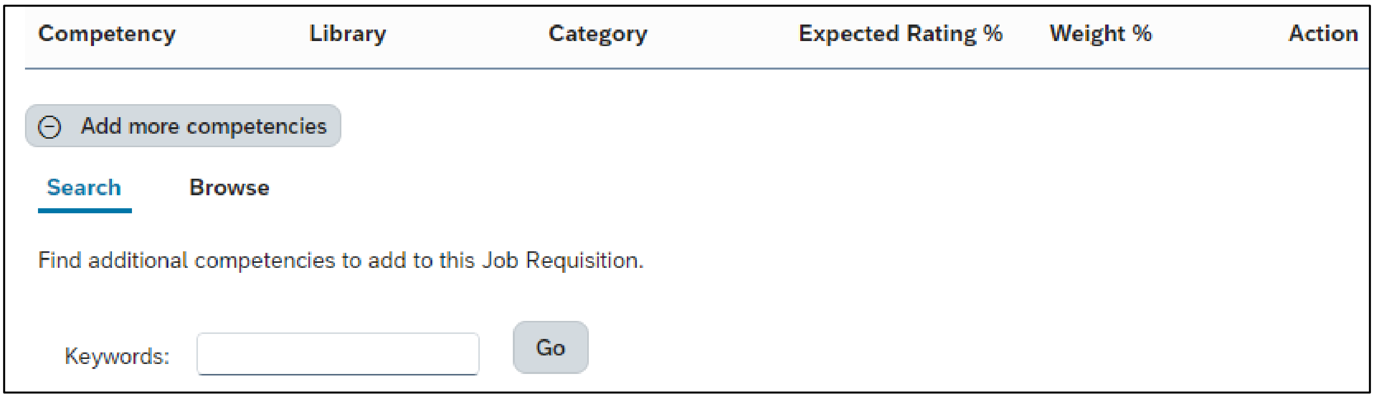
1. In the job requisition page, scroll down to the *Job Posting Information* section.



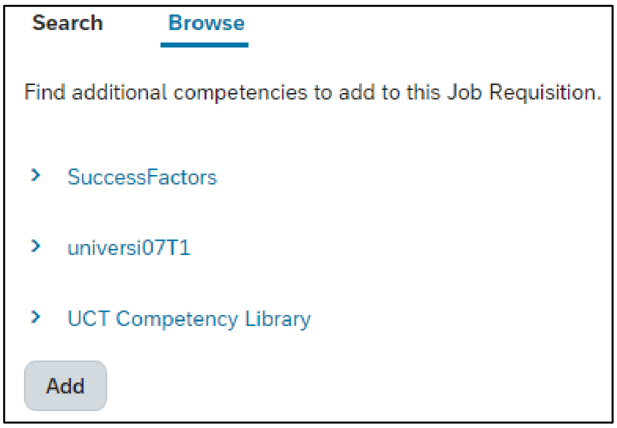
– Click 

.

2. The *Search* tab appears.



3. Select the *Browse* tab.



– Expand *UCT Competency Library* and then the relevant section e.g. *Core*, *Managerial*.

Adding competencies

- UCT Competency Library
  - Core
    - [ ] Analytical thinking / Problem solving
    - [ ] Building interpersonal relationships
    - [ ] Client/student service and support
    - [ ] Communication
    - [ ] Planning and organizing / work management
    - [ ] Teamwork / collaboration
    - [ ] University awareness
  - Enabling
    - [ ] Adaptability / flexibility
    - [ ] Conceptual thinking

– Select one or more competencies using the appropriate checkbox(es).

– Click Add.

– The selected competencies appear in the *Competencies* section.

Competency	Library	Category	Expected Rating %	Weight %	Action
Communication	UCT Competency Library	Core	0	0	Select
Planning and organizing / work management	UCT Competency Library	Core	0	0	Select
Adaptability / flexibility	UCT Competency Library	Enabling	0	0	Select
Quality commitment/ work standards	UCT Competency Library	Enabling	0	0	Select

⊕ Add more competencies

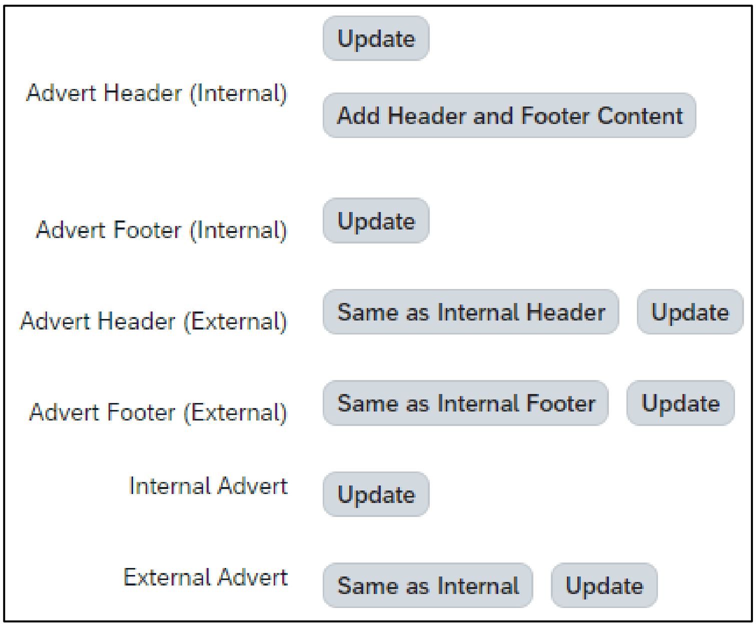
– If required, use the *Action* dropdown list on the right to remove a competency.

– Return to Creating a new job requisition.

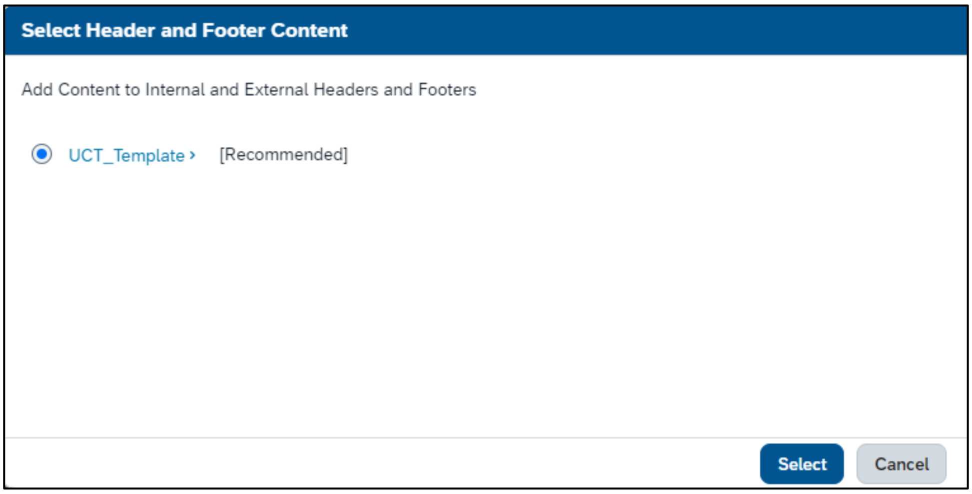
Adding advert content

Procedure

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



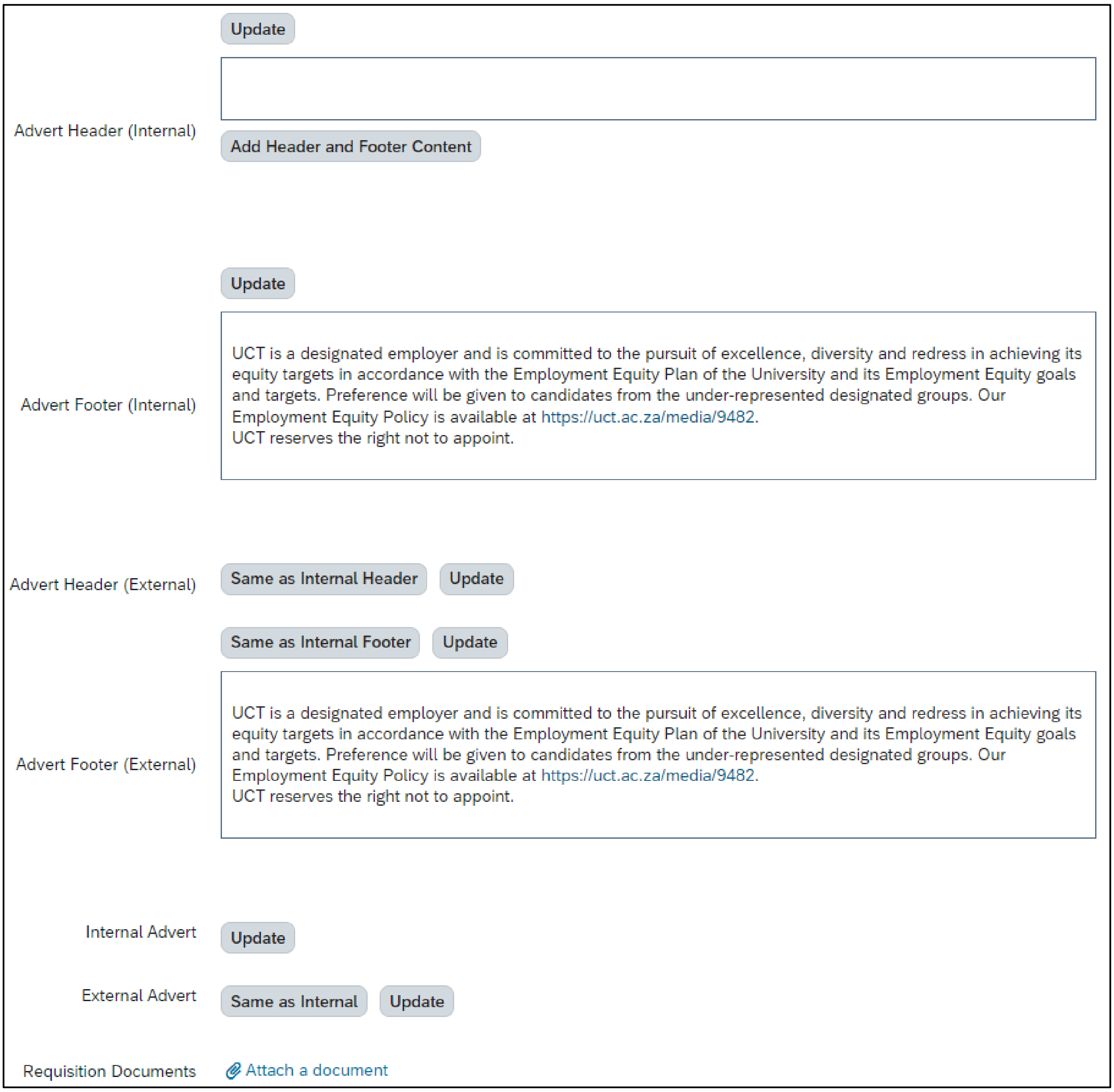
- In the advert section, click Add Header and Footer Content next to *Advert Header (internal)*.
- The *Select Header and Footer Content* dialogue box appears.



- Ensure *UCT_Template* is selected.
- Click Select.

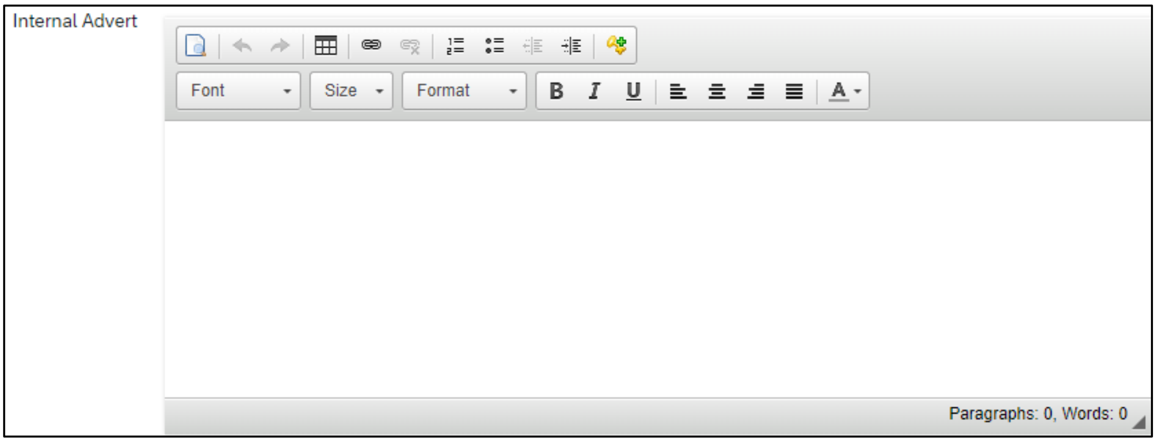
Adding advert content

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



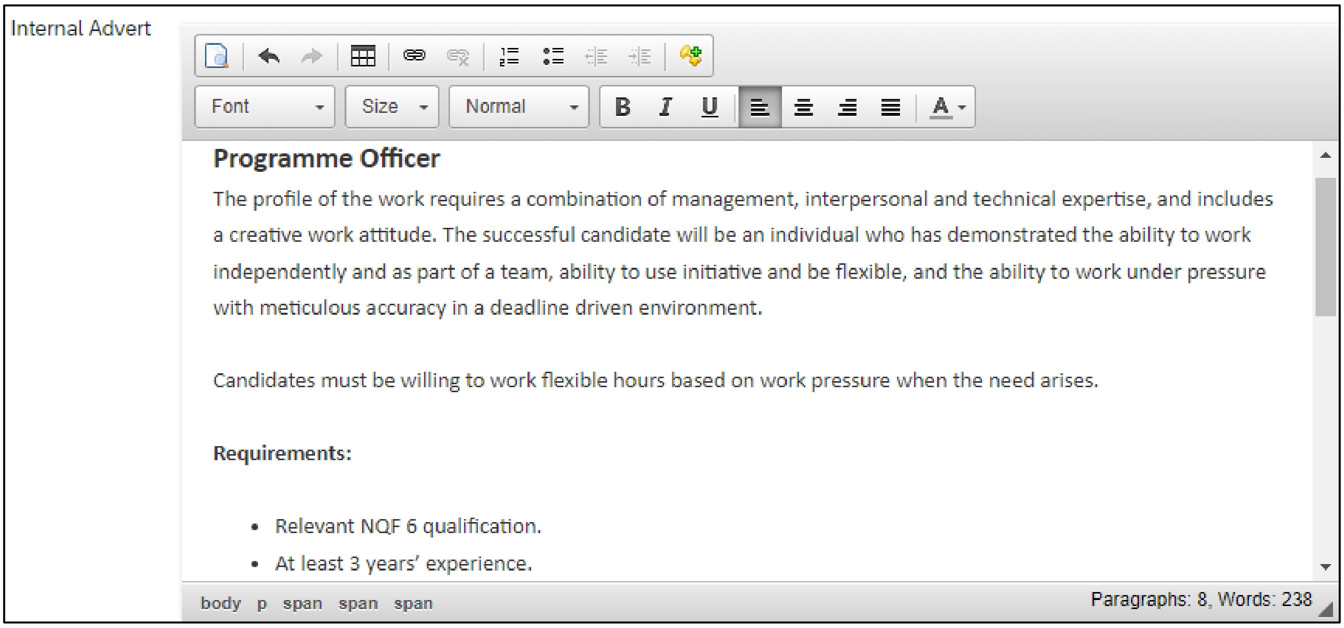
– Click Update next to *Internal Advert* at the bottom of the section.

– An editable space appears next to *Internal Advert*.

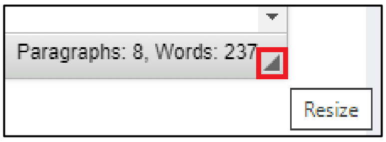


Adding advert content

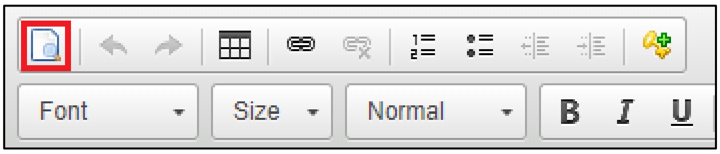
- Paste the advert content and use the formatting buttons as required.
  Note: Pasting from Microsoft Word reduces the need for formatting after pasting. If there are any issues with formatting, delete any pasted content and right-click to choose *Paste as plain text*. Formatting (e.g. bold text, bulleted 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.

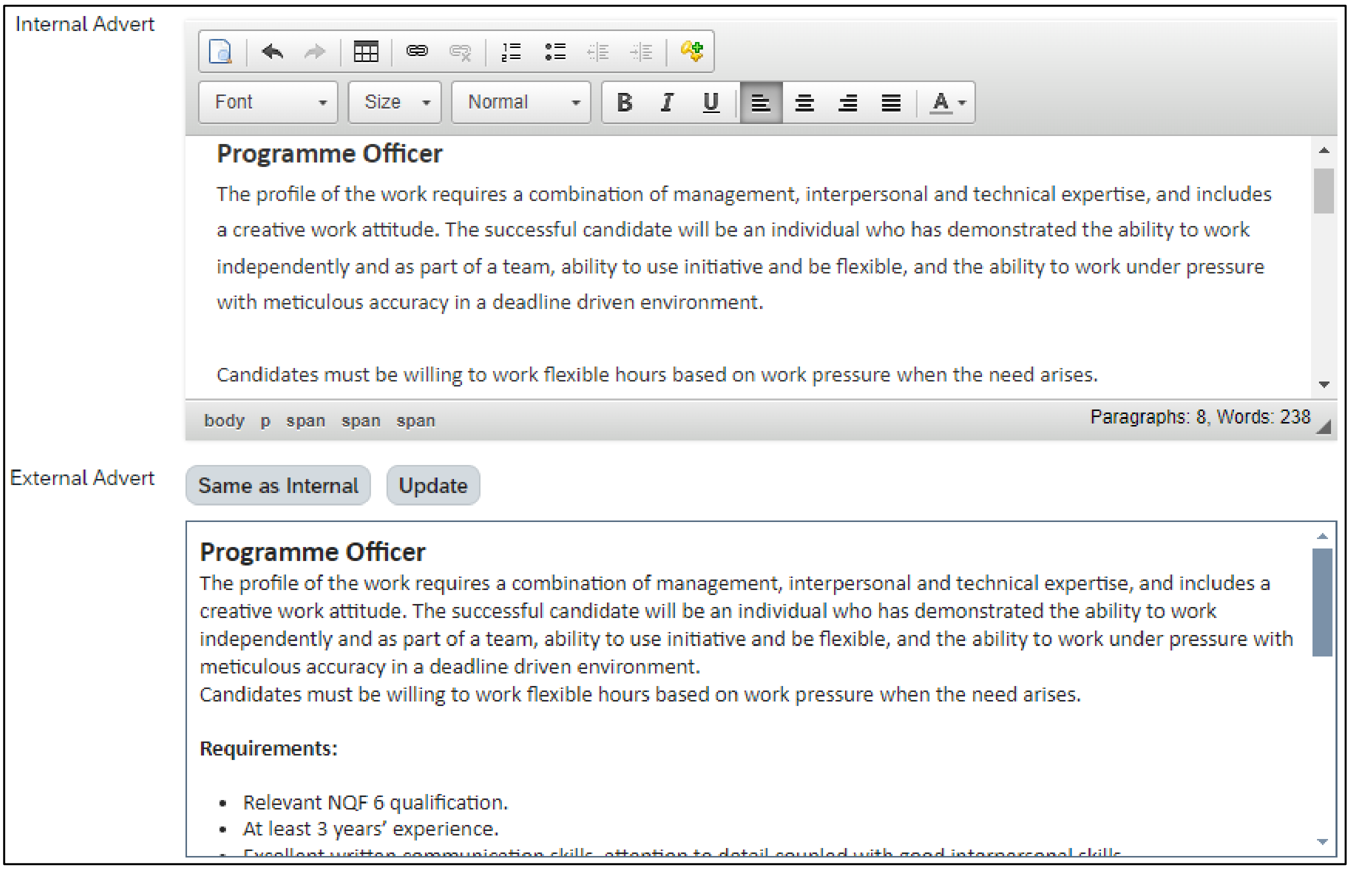


- Click *Preview* to review the advert in a separate browser tab.



Adding advert content

- 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.

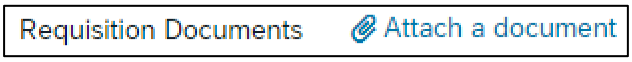


- Return to [Creating a new job requisition](#).

Adding requisition documents (attachments)

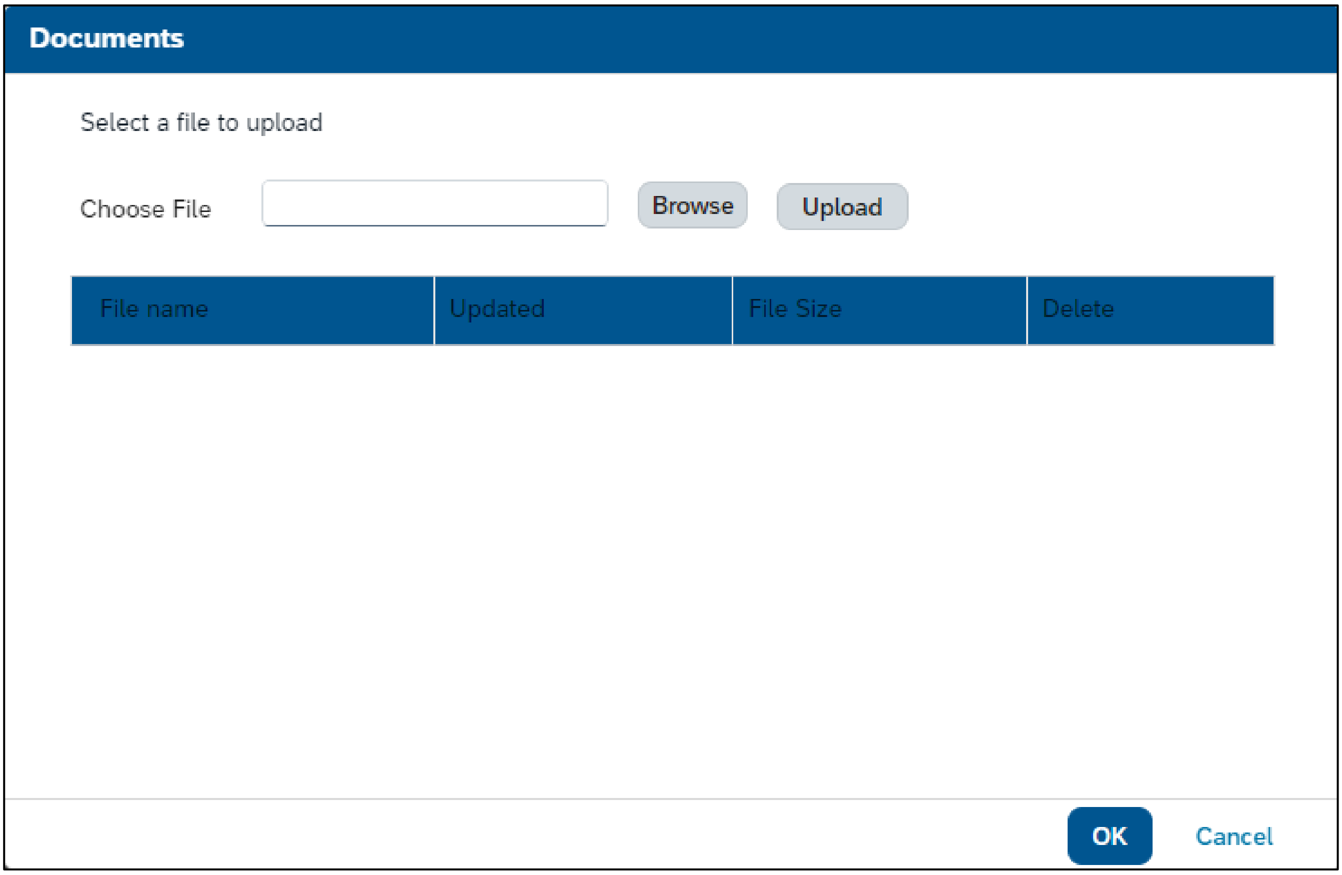
Procedure

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



   – Click Attach a document.

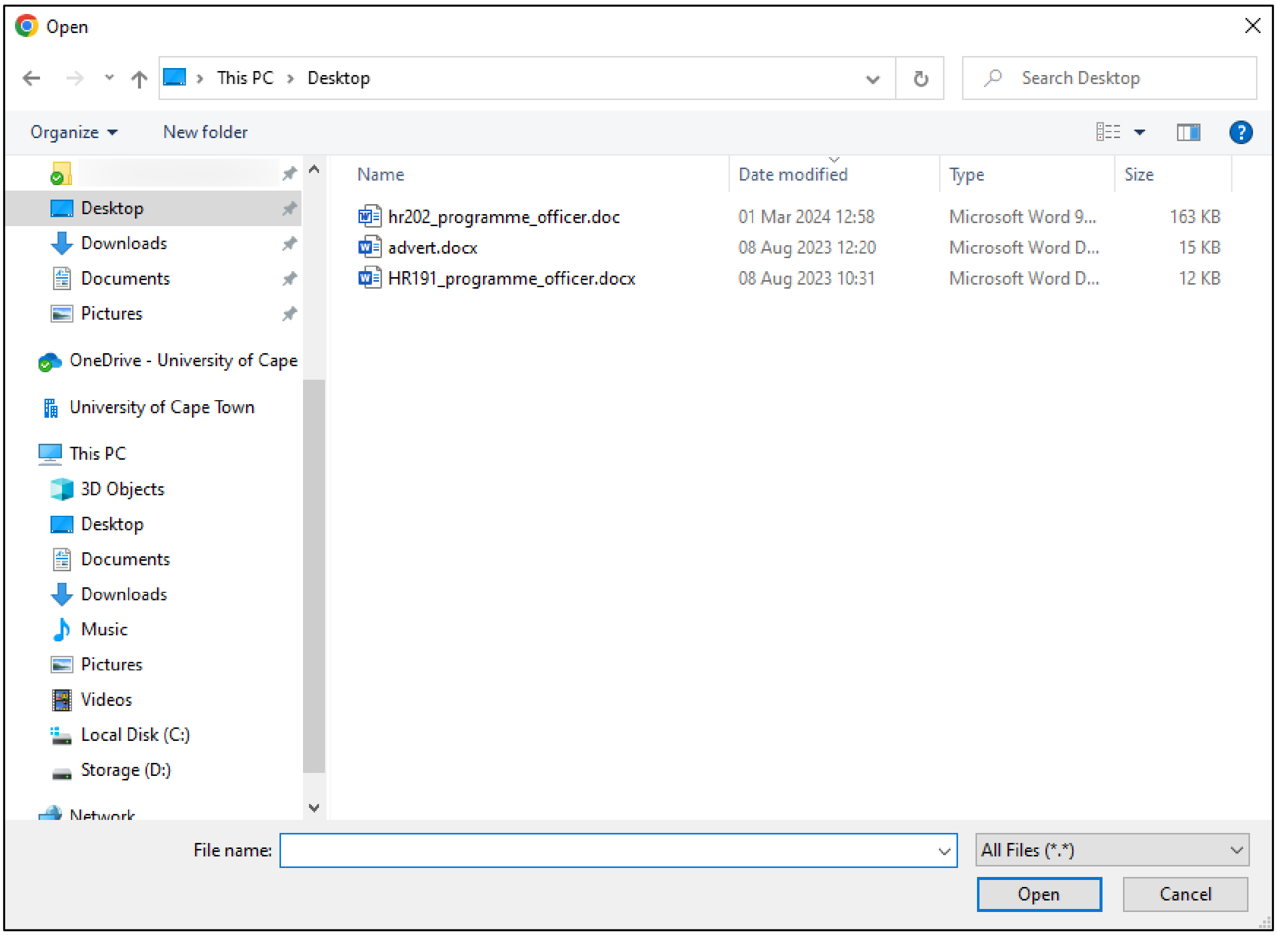
2. The *Documents* dialogue box appears.



   – Click Browse.

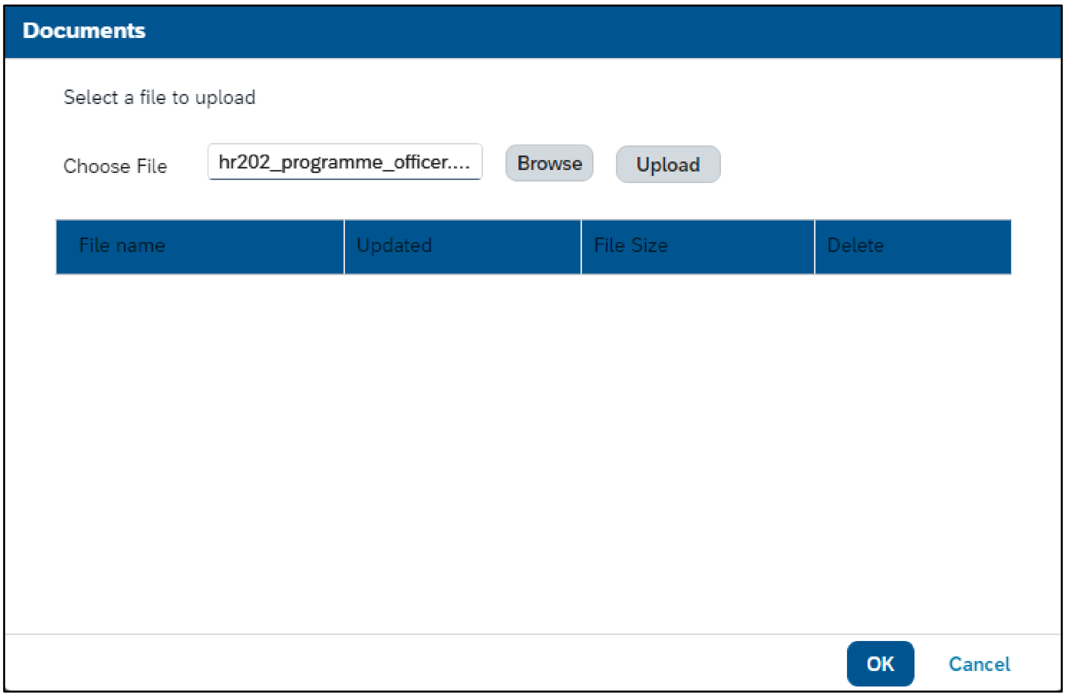
Adding requisition documents (attachments)

3. The *Open* dialogue box appears.



- Select the first document e.g. HR202 form.
- Click Open.

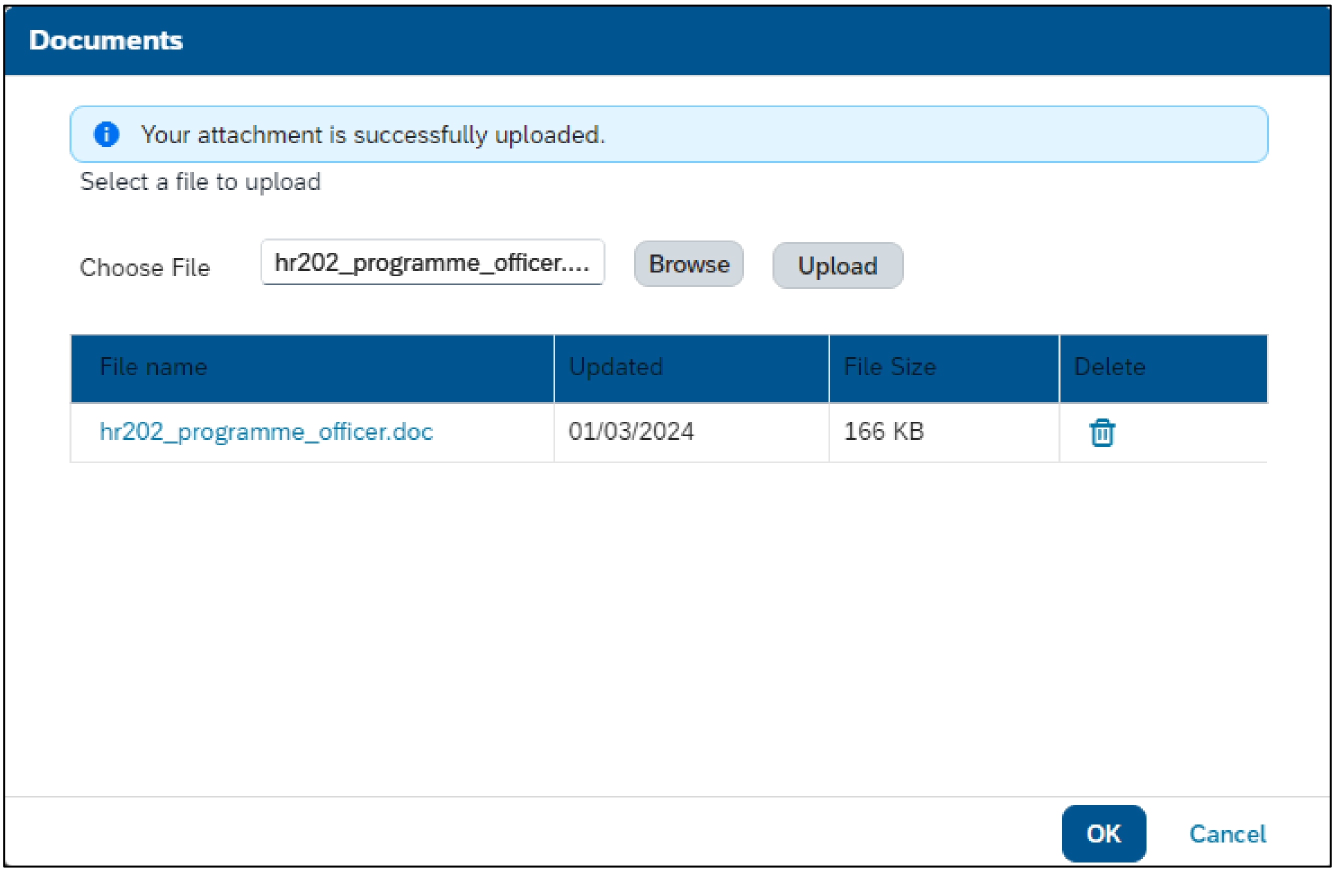
4. The *Documents* dialogue box reappears with the selected file appearing in the *Choose File* field.



- 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 OK.

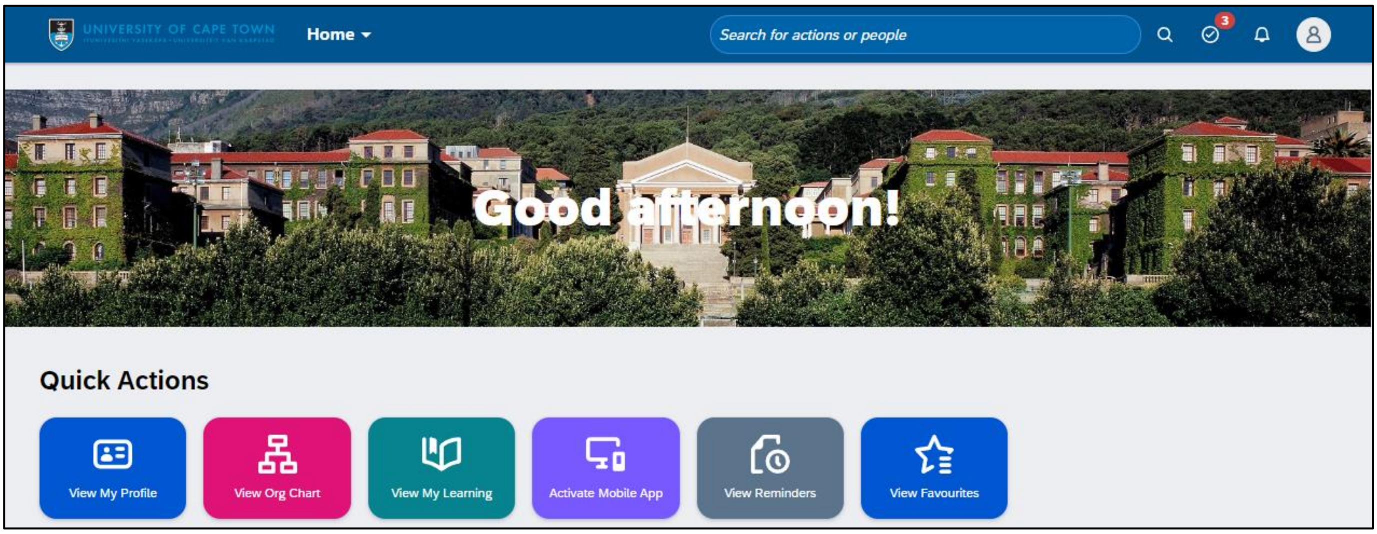
5. The job requisition reappears with the *Requisition Documents* field indicating the number of attached documents.

- Return to Creating a new job requisition.

Attaching a referee report for a shortlisted candidate

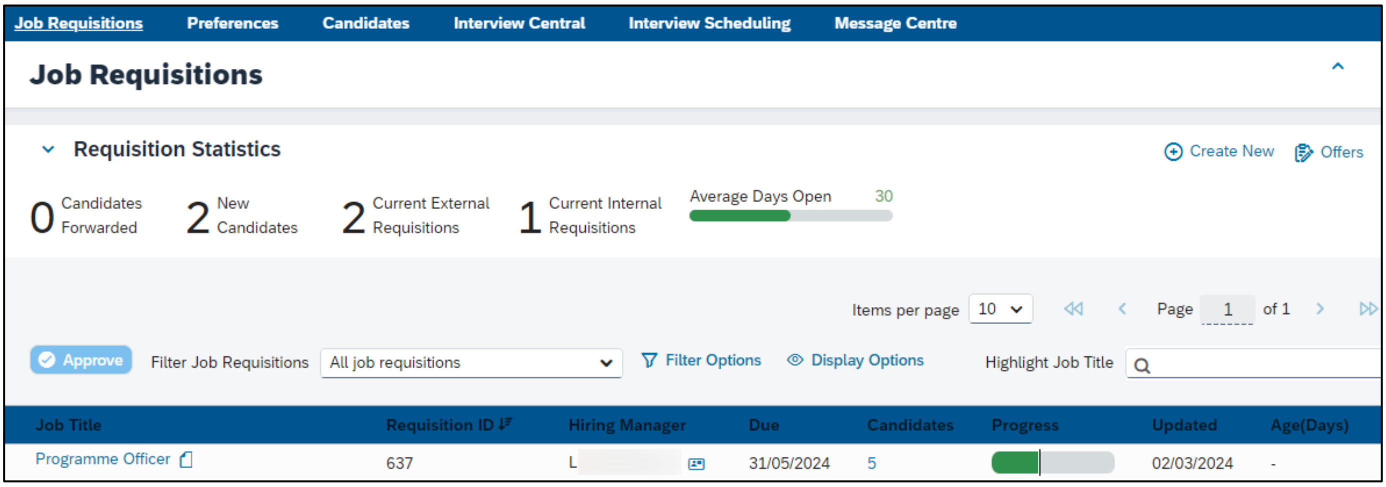
Procedure

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



– Choose *Home* > *Recruiting*.

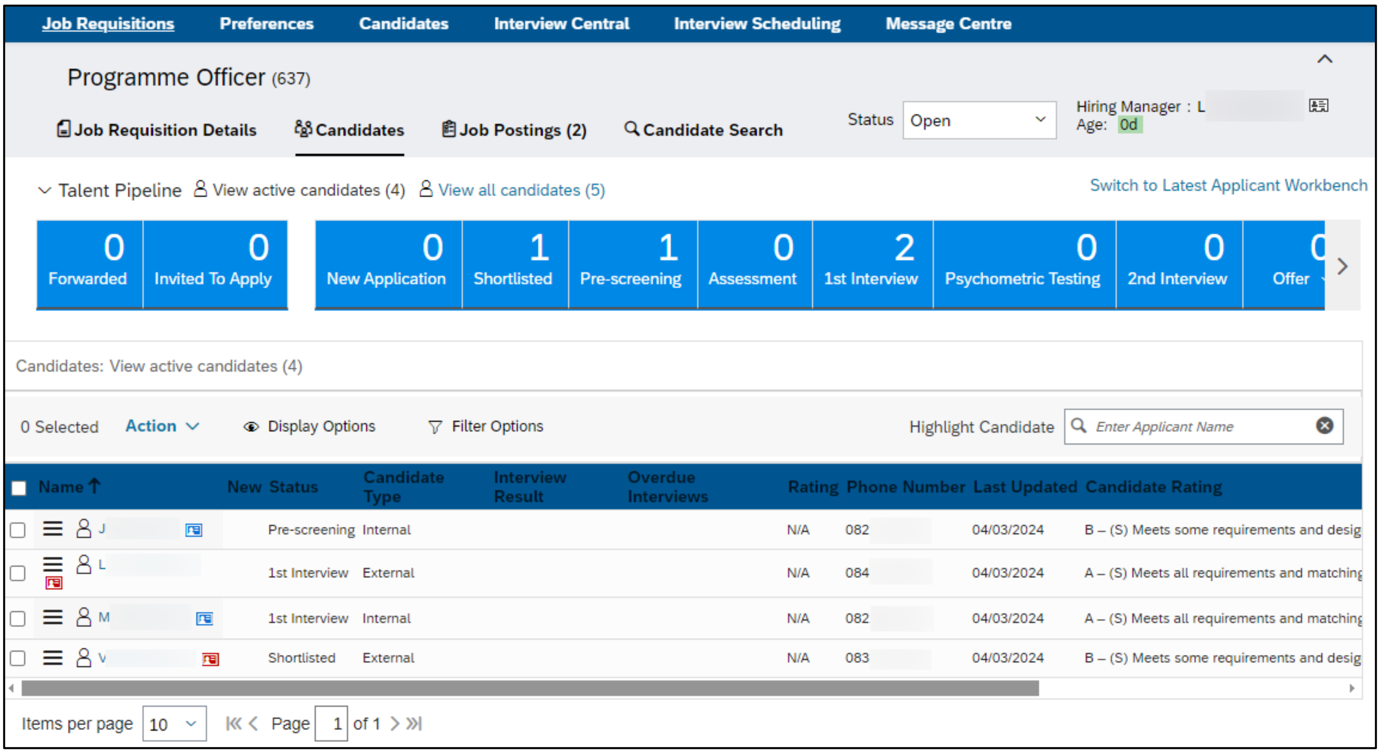
3. The *Job Requisitions* page appears.



– Click the number in the *Candidates* column (e.g. 5 above) or click *View Menu Options* to the right of the job title and choose Candidate Summary.

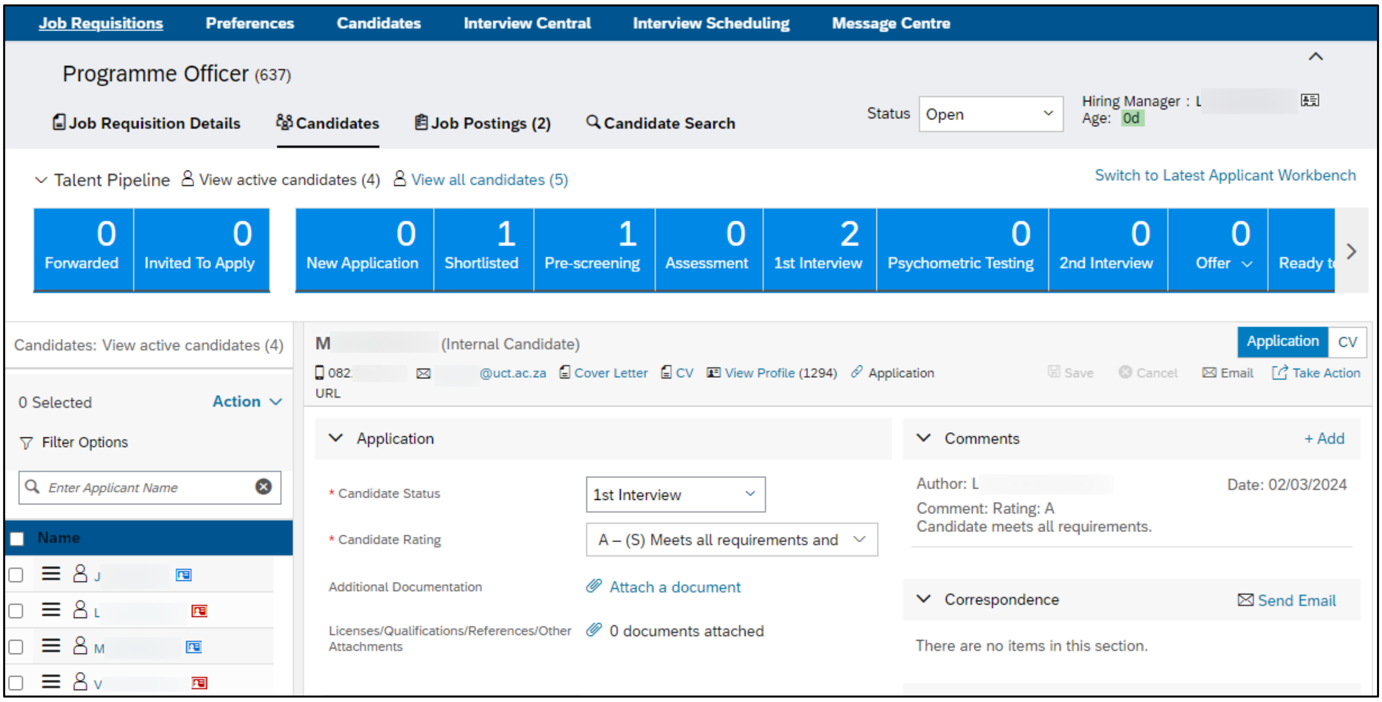
Attaching a referee report for a shortlisted candidate

4. The *Candidate Workbench* page appears.



– Select a candidate to view by clicking their name in the *Name* column.

5. The selected candidate application appears.

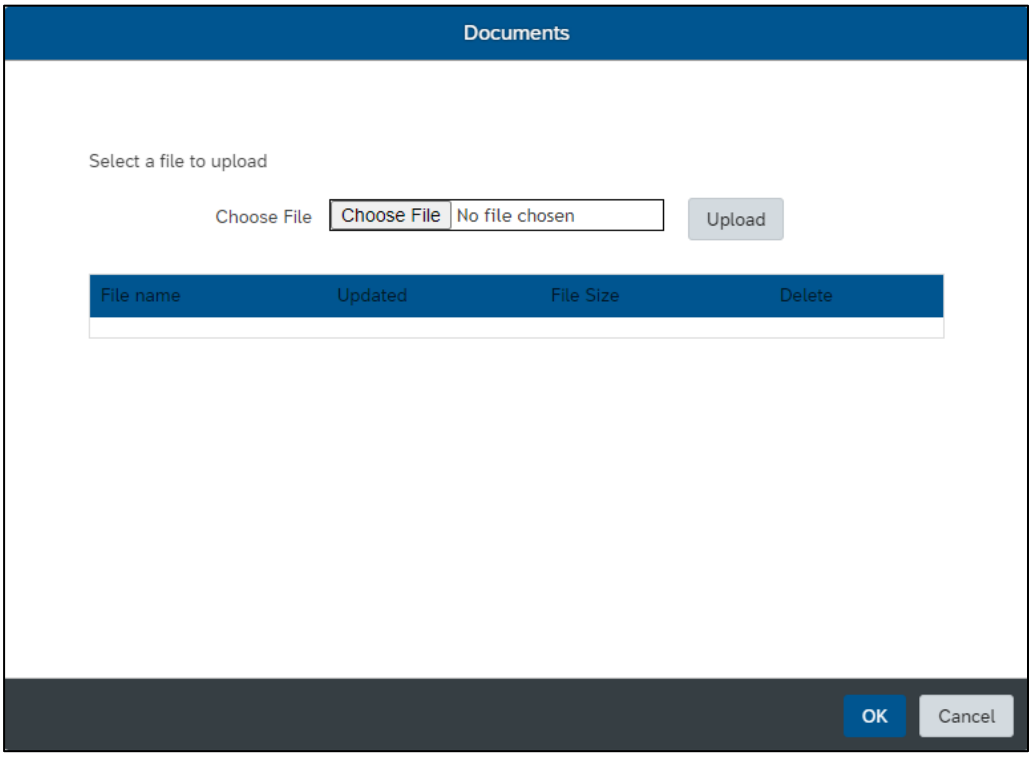


Application **section**:

– In the *Additional Documentation* field, click Attach a document.

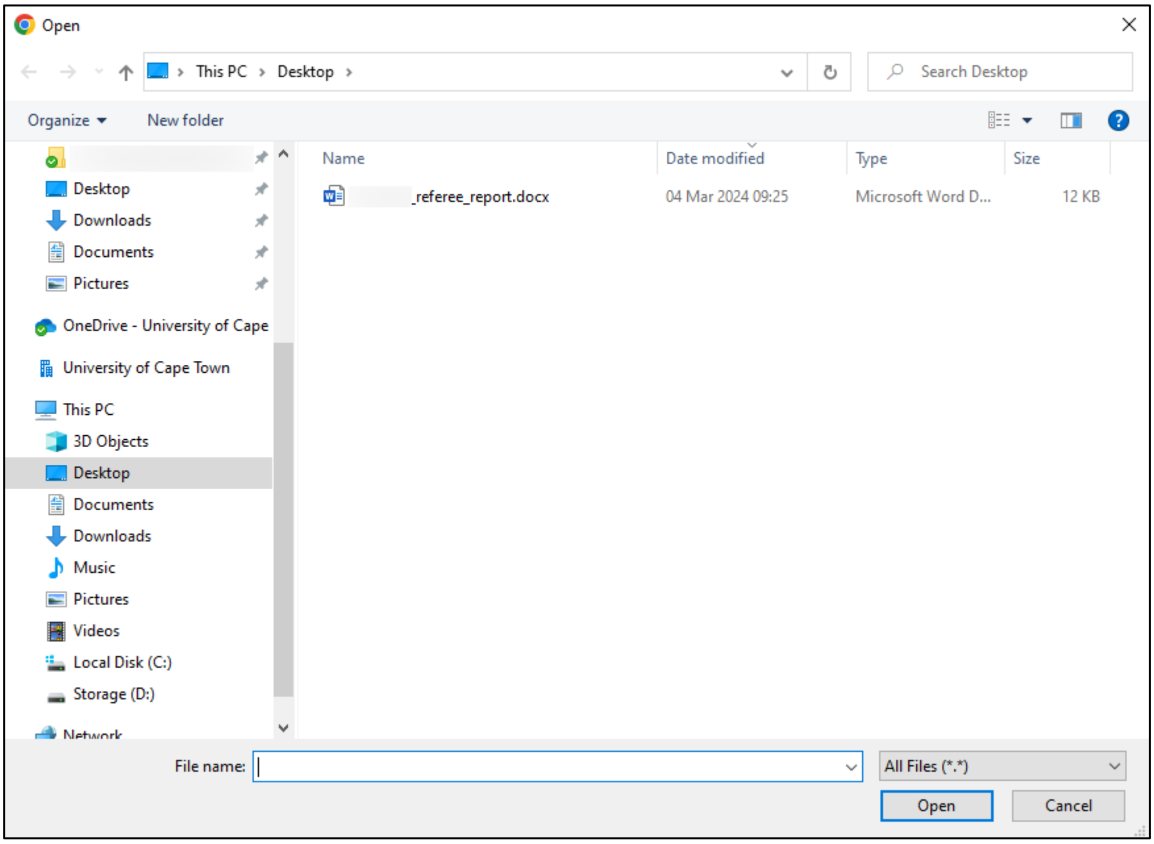
Attaching a referee report for a shortlisted candidate

6. The *Documents* dialogue box appears.



– Click Choose File.

7. The *Open* dialogue box appears.

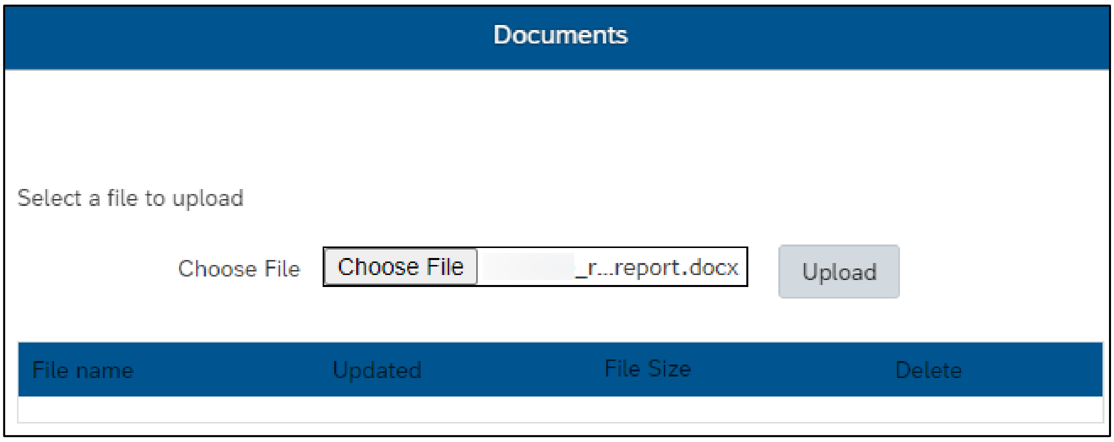


– Select the referee report document from your computer.

– Click Open.

Attaching a referee report for a shortlisted candidate

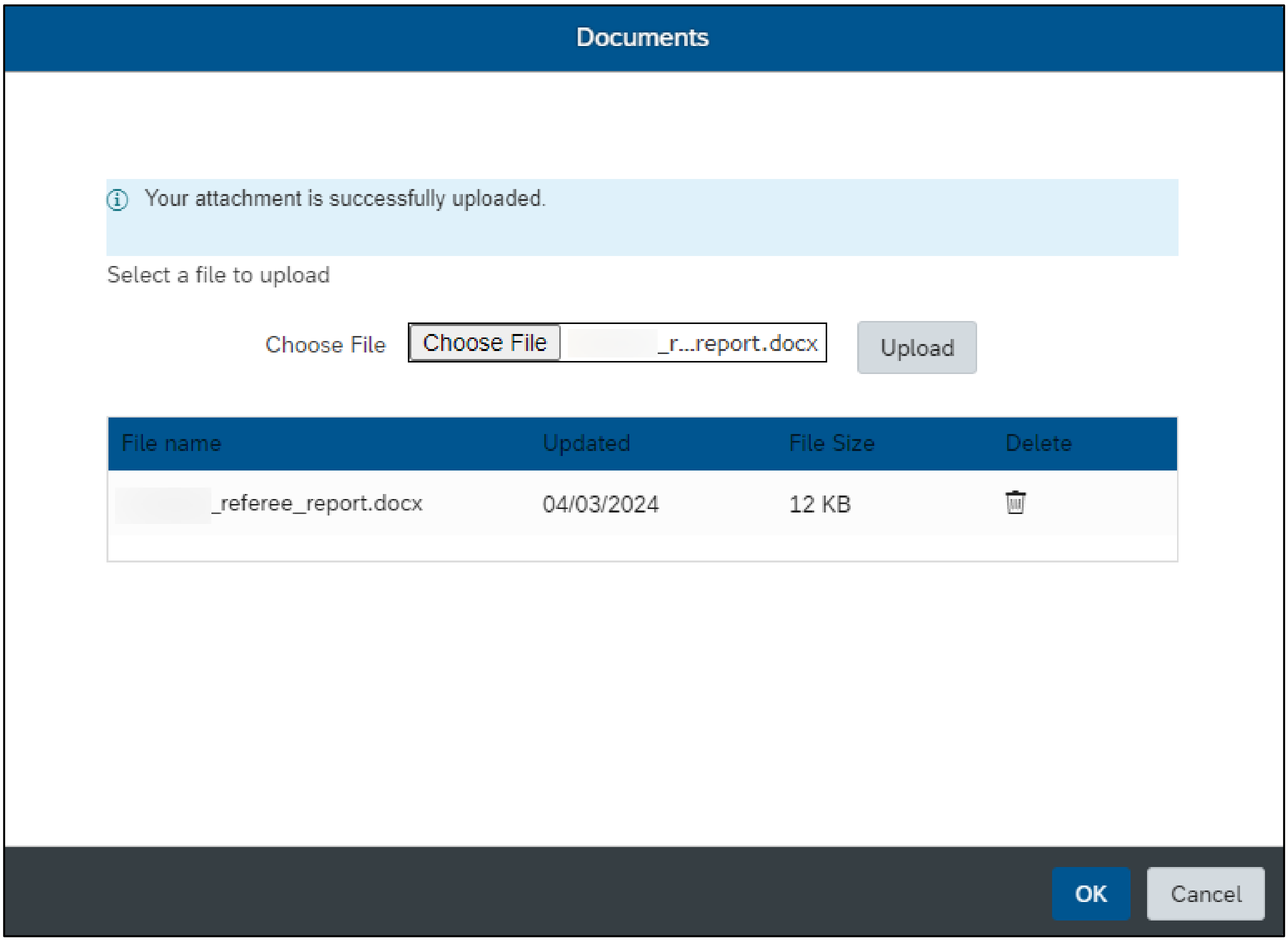
8. The *Documents* dialogue box reappears with the referee report file name shown in the *Choose File* field.



   - Click 

.

9. The referee report file details appear in the table below the *Choose File* field.



   - Click 

.

10. The candidate application reappears with the *Additional Documentation* field indicating 1 document is attached.
    - Inform the selection committee that the referee report(s) is/are available.

Scheduling a candidate for a face-to-face interview

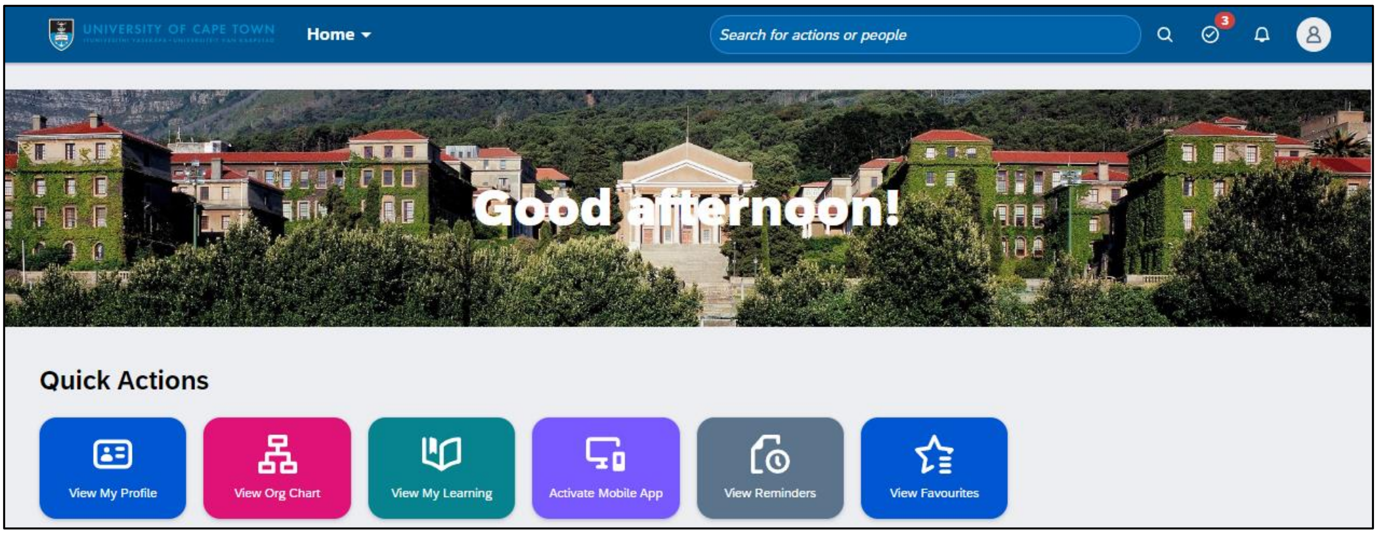
Before you begin

Candidates must be moved into the 1st Interview or 2nd Interview section of the talent pipeline to be available for interview scheduling.

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

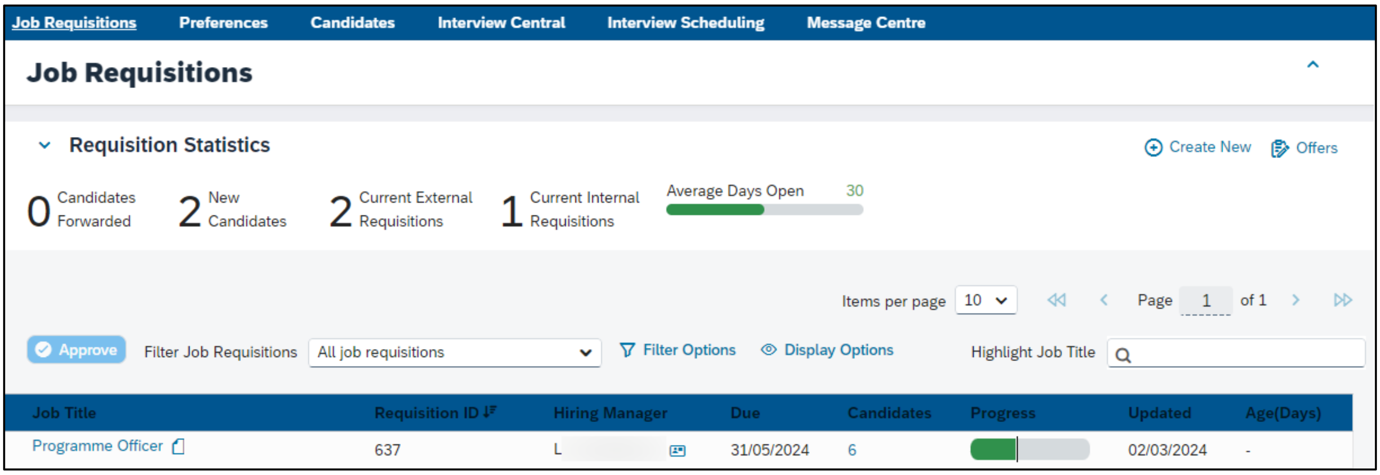
Procedure

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*.

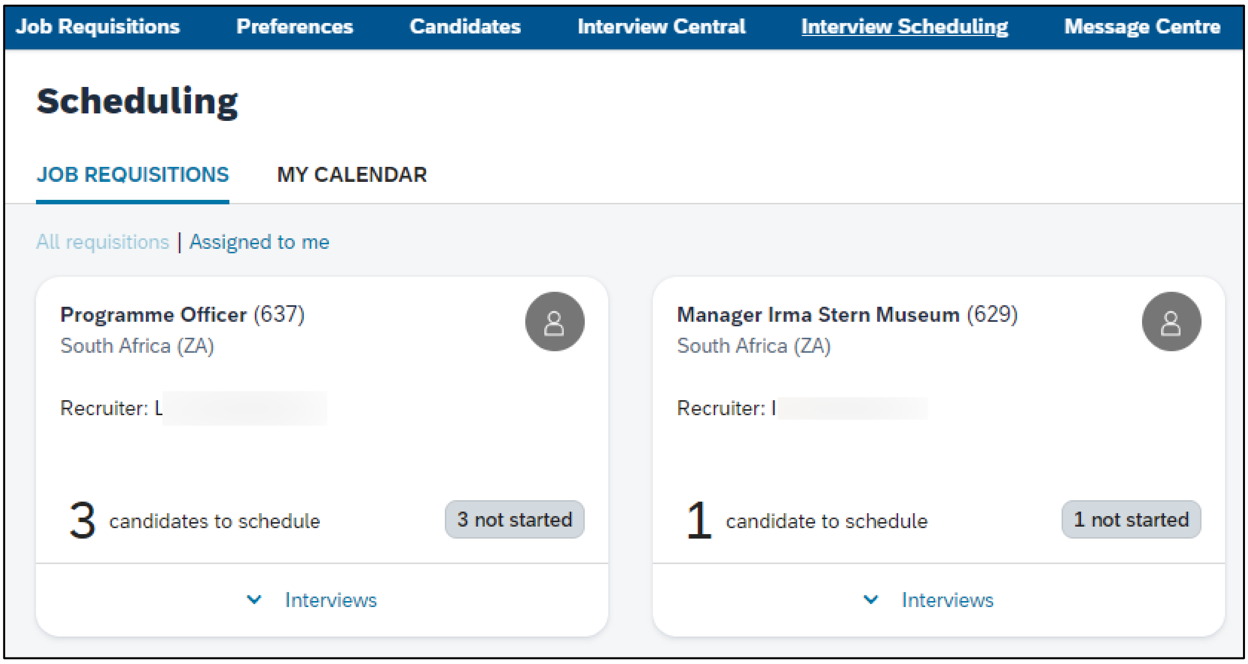
4. The *Job Requisitions* page appears.

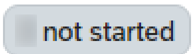


   – Click *Interview Scheduling* in the top menu.

Scheduling a candidate for a face-to-face interview

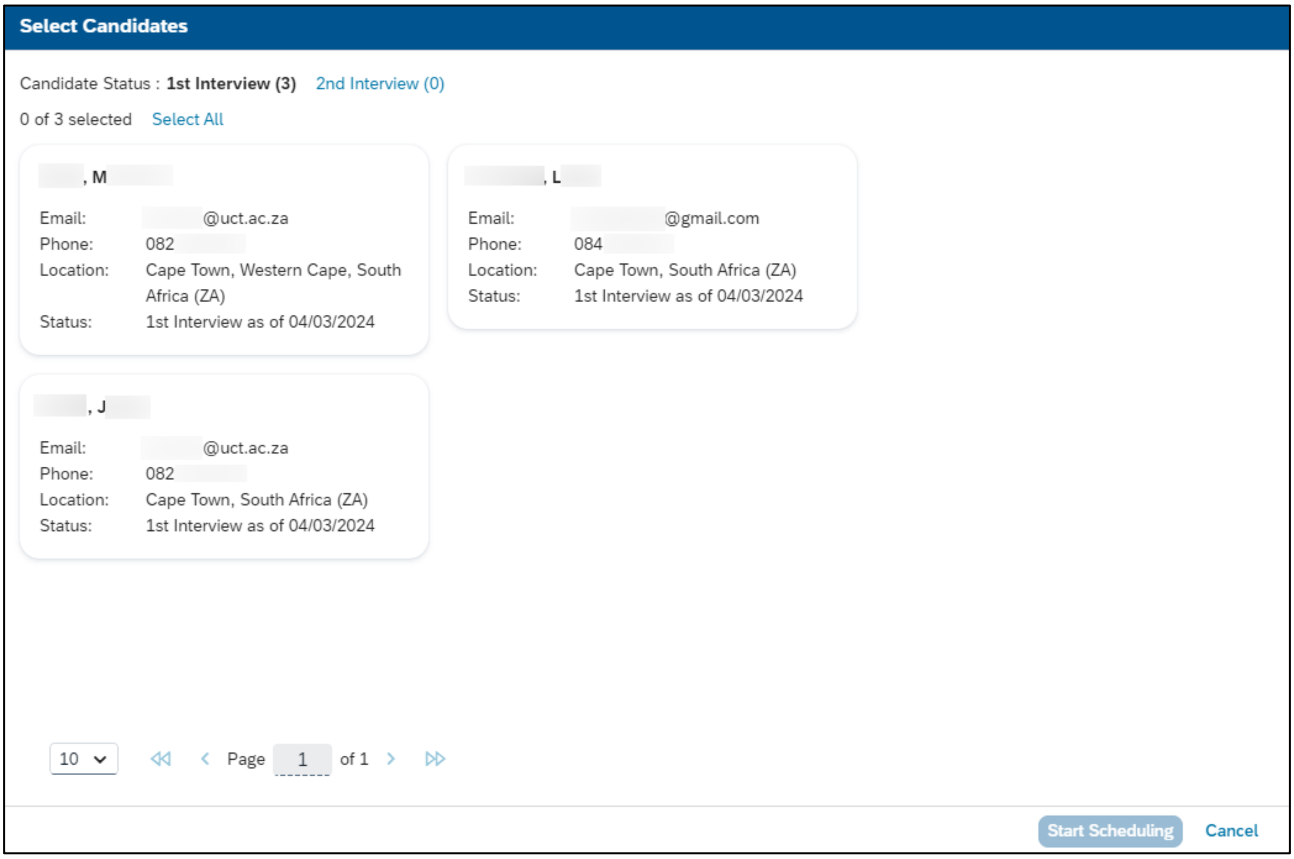
5. The *Interview Scheduling* page appears, listing any job requisitions that have candidates in the 1st Interview or 2nd Interview sections of the talent pipeline.



– Click 

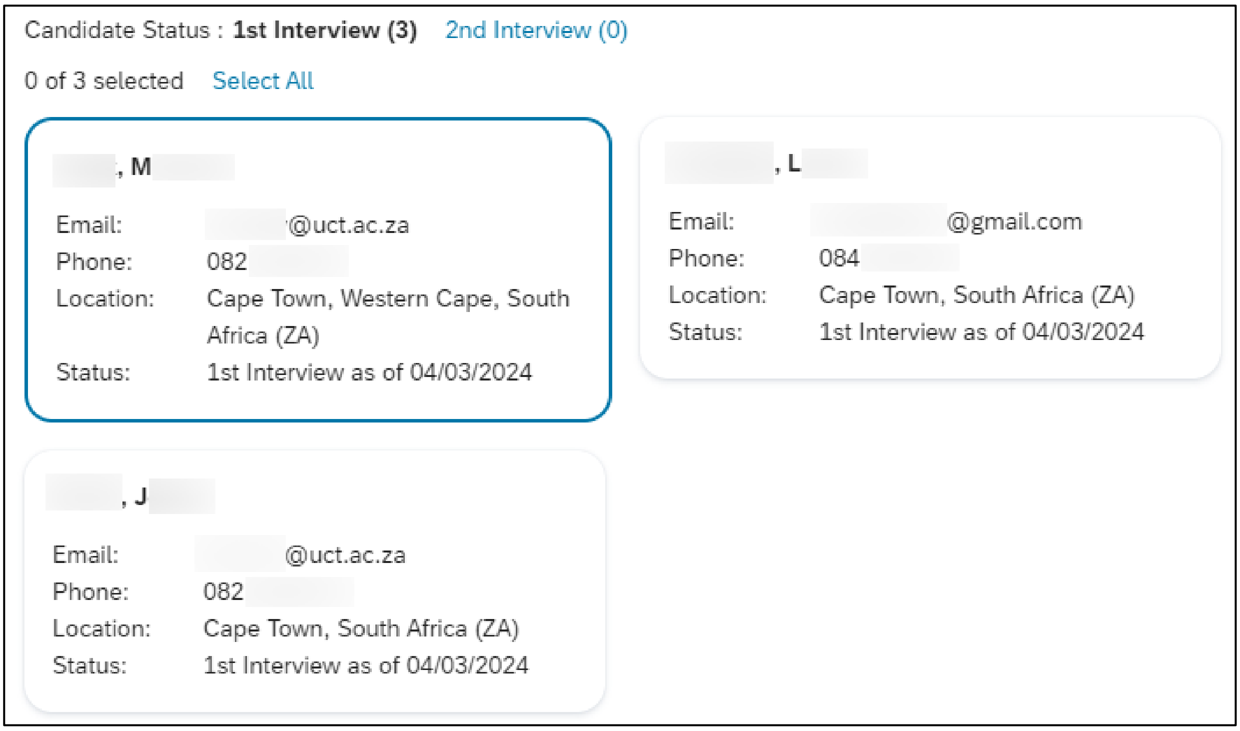
to select a candidate to schedule for an interview.

6. The *Select Candidates* dialogue box appears, defaulting to the *1st Interview* group. If you are scheduling a 2nd interview for a candidate, click *2nd Interview*.



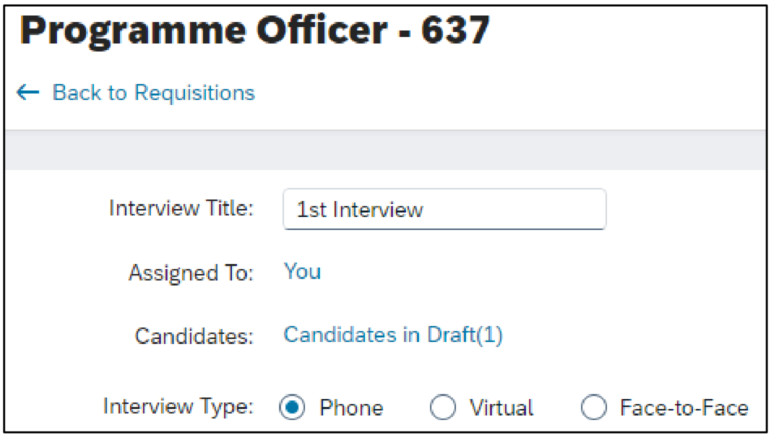
Scheduling a candidate for a face-to-face interview

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



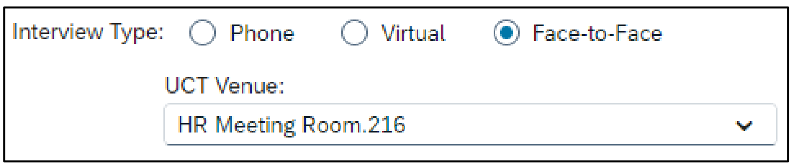
- Click **Start Scheduling**.

7. The *Interview Scheduling* page appears.

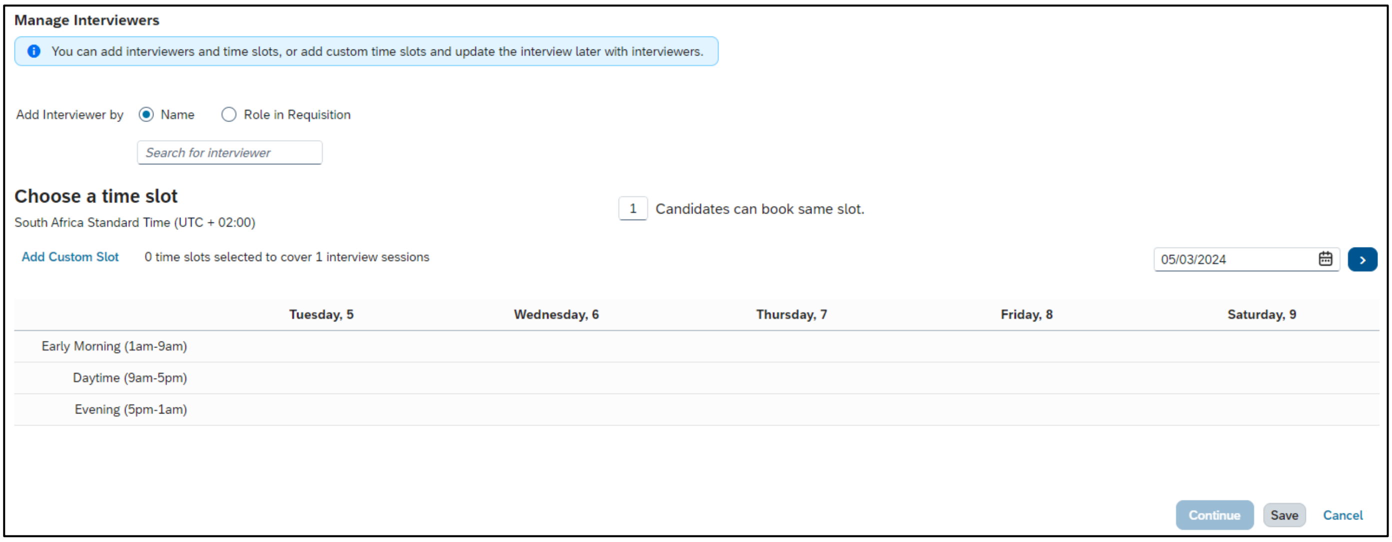


- In the *Interview Title* field, enter the candidate's full name after the existing text.
  Note: If required, check the selected candidate's name by clicking *Candidates in Draft*.

- 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.



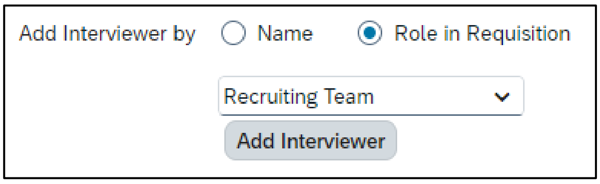
Scheduling a candidate for a face-to-face interview



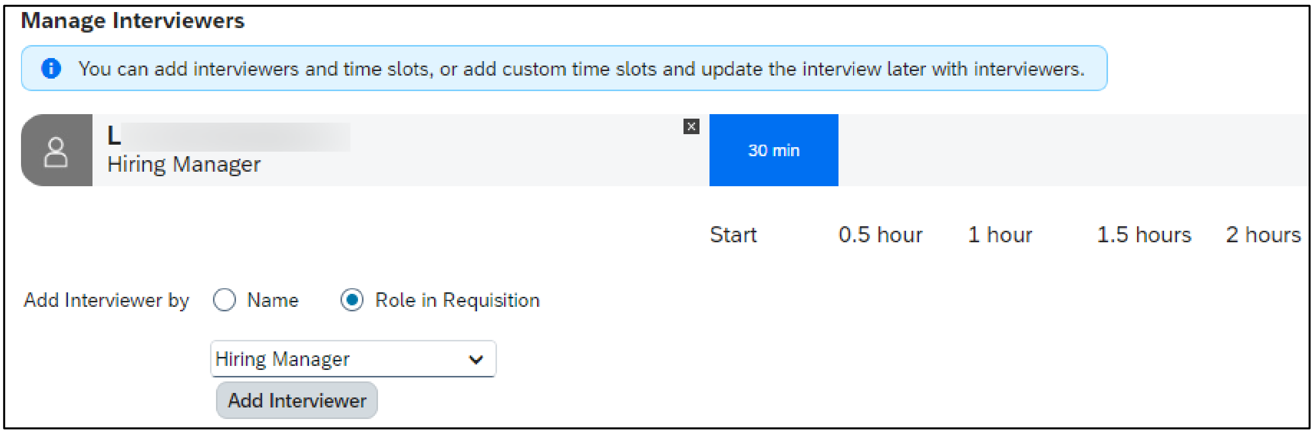
***Manage Interviewers* section**:

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

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

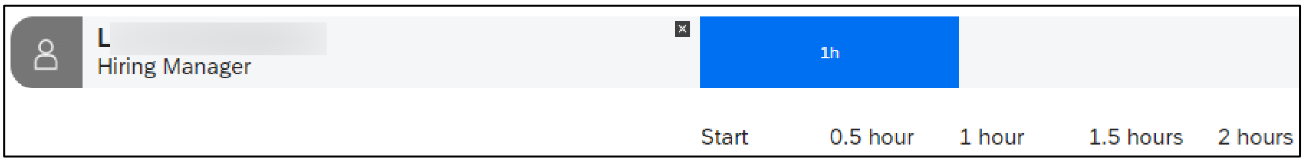


- Select *Hiring Manager* from the dropdown list.
- Click **Add Interviewer**.
- The *Hiring Manager* is added, defaulting to a 30-minute meeting.

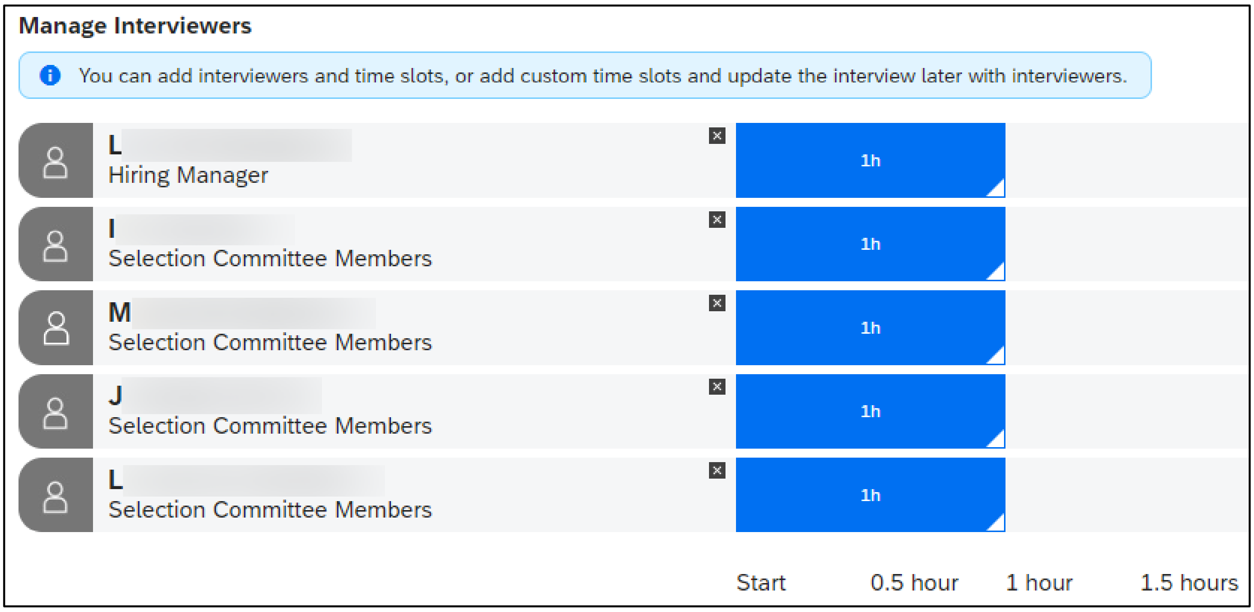


Scheduling a candidate for a face-to-face interview

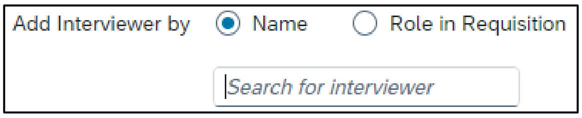
- If applicable, change the length of the interview by dragging the end of the time slot to the appropriate length e.g. 1 hour. **Note**: The interview time is set for the first interviewer and will then default for interviewers that are added afterwards.



- 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 may ask to be added so they can see the selection committee view of the competencies.

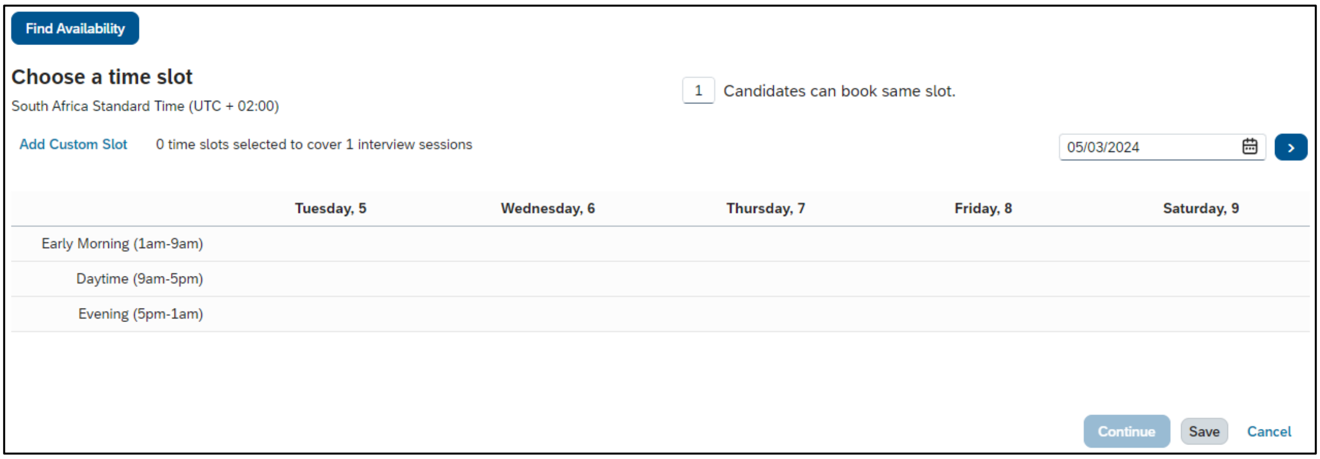


- If a person was added accidentally, remove them by clicking ☒ in the top right of the box containing their name.
- If there are other UCT staff members to add to the interview, select *Name* in the *Add Interview by* section and use the *Search for interviewer* field to select the appropriate person.

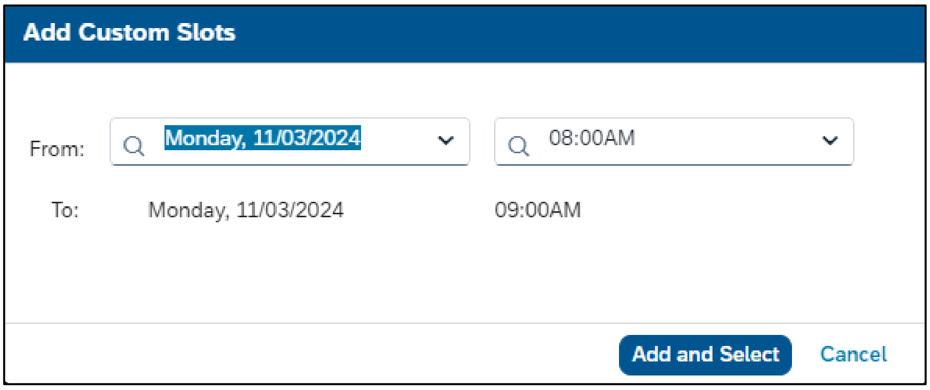


Scheduling a candidate for a face-to-face interview

***Choose a time slot / Available Time Slots* section**:

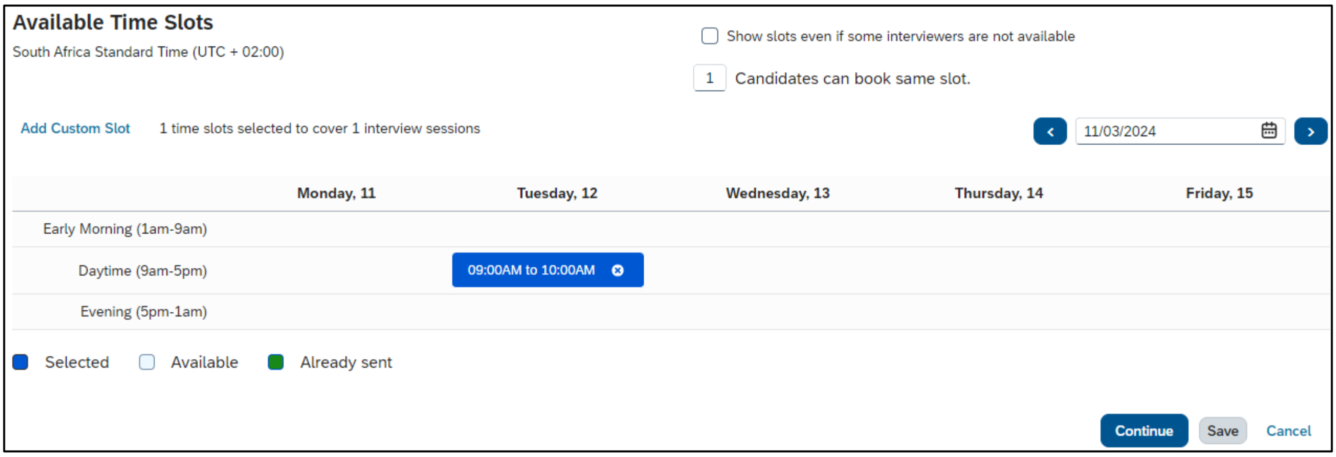


- If not scheduling the interview for the current week, select the appropriate week using the calendar or the arrow buttons.
- Click *Add Custom Slot*.
- The *Add Custom Slots* dialogue box appears.



  - 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 .

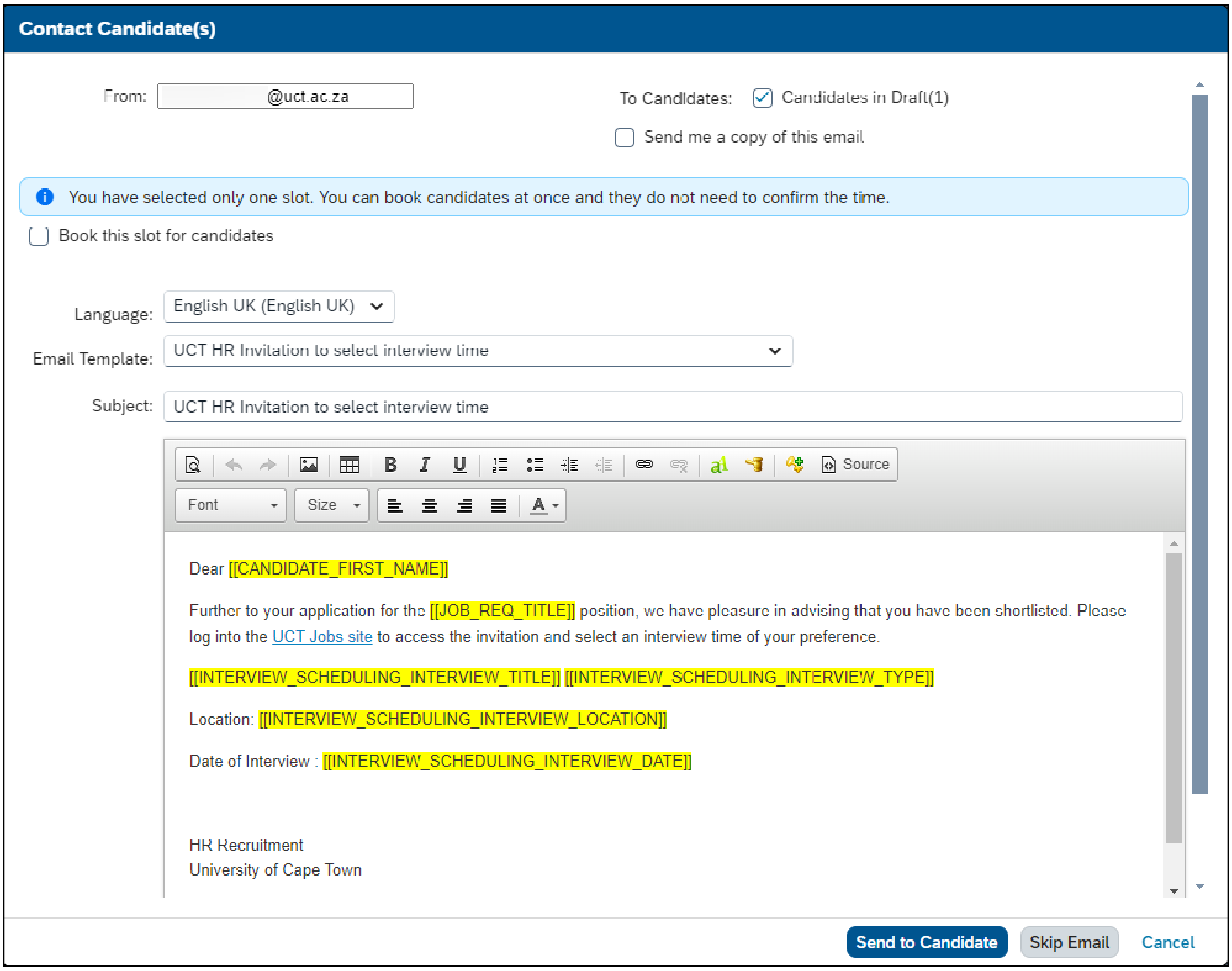
- The selected interview slot appears in the calendar.



- Click .

Scheduling a candidate for a face-to-face interview

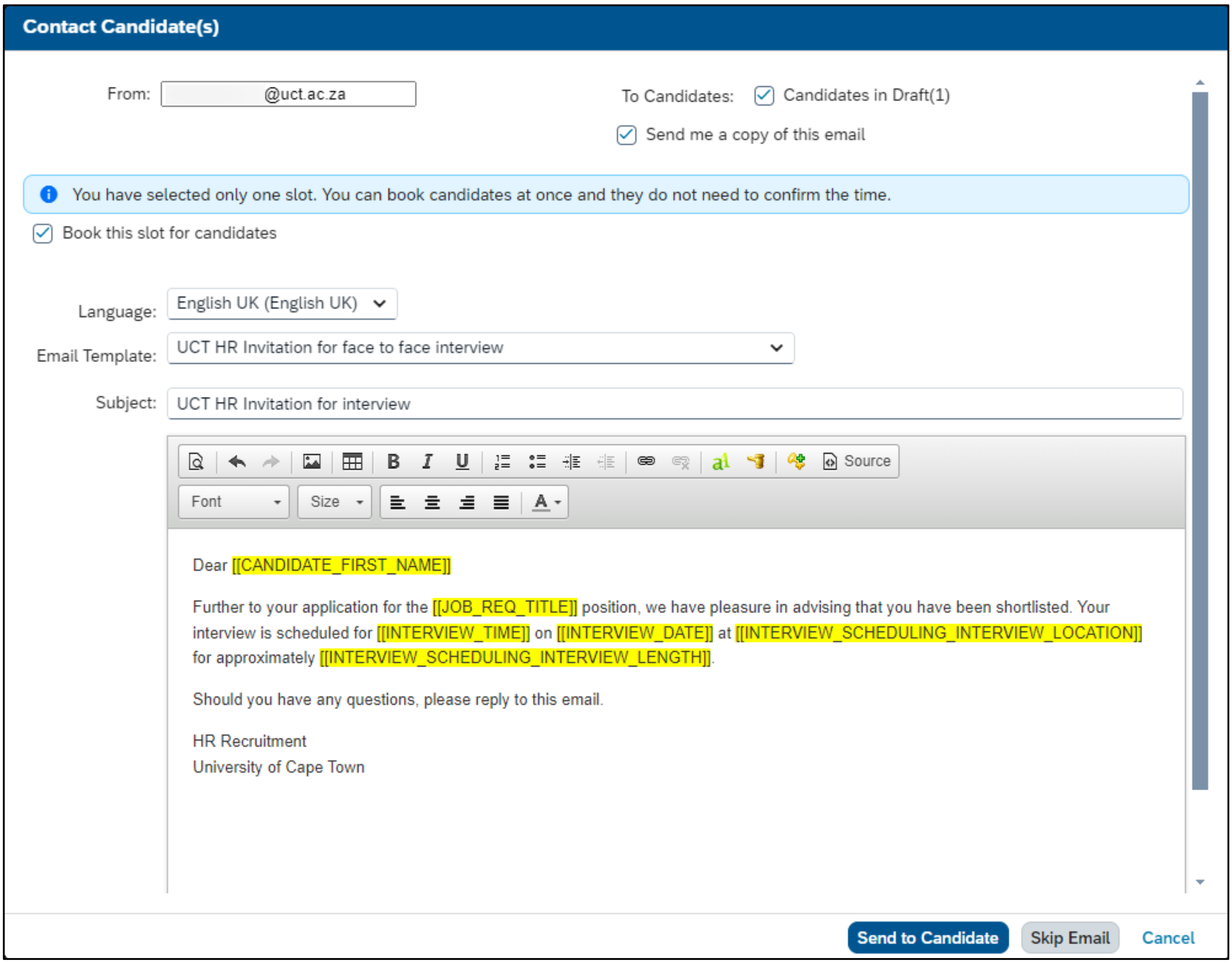
8. The *Contact Candidates(s)* dialogue box appears.



- 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.

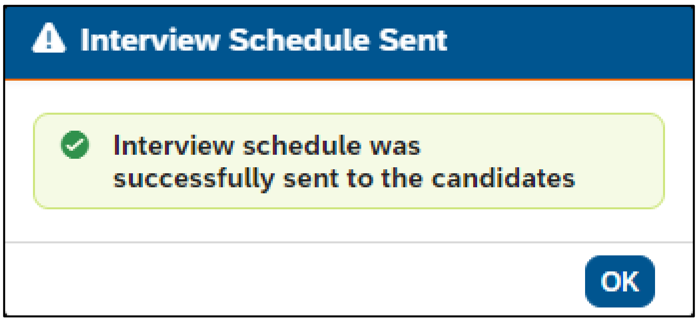
Scheduling a candidate for a face-to-face interview

- 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**.

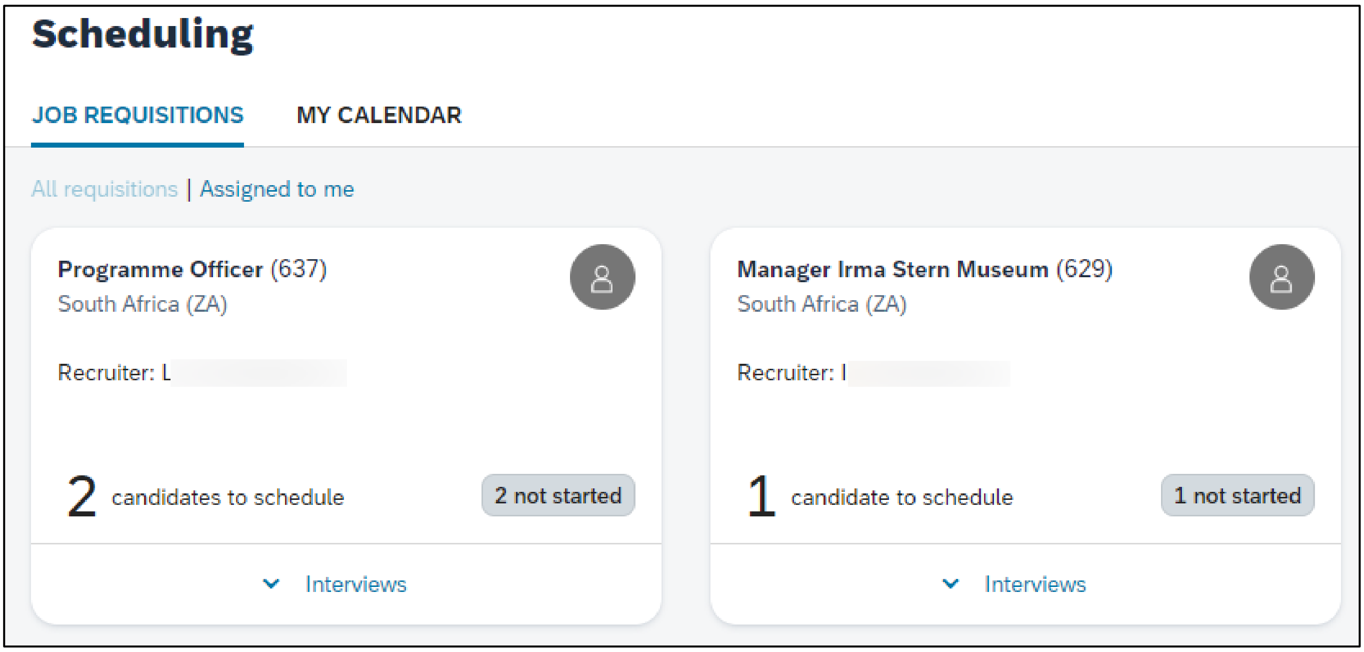
9. The *Interview Schedule Sent* dialogue box appears.



- Click **OK**.

Scheduling a candidate for a face-to-face interview

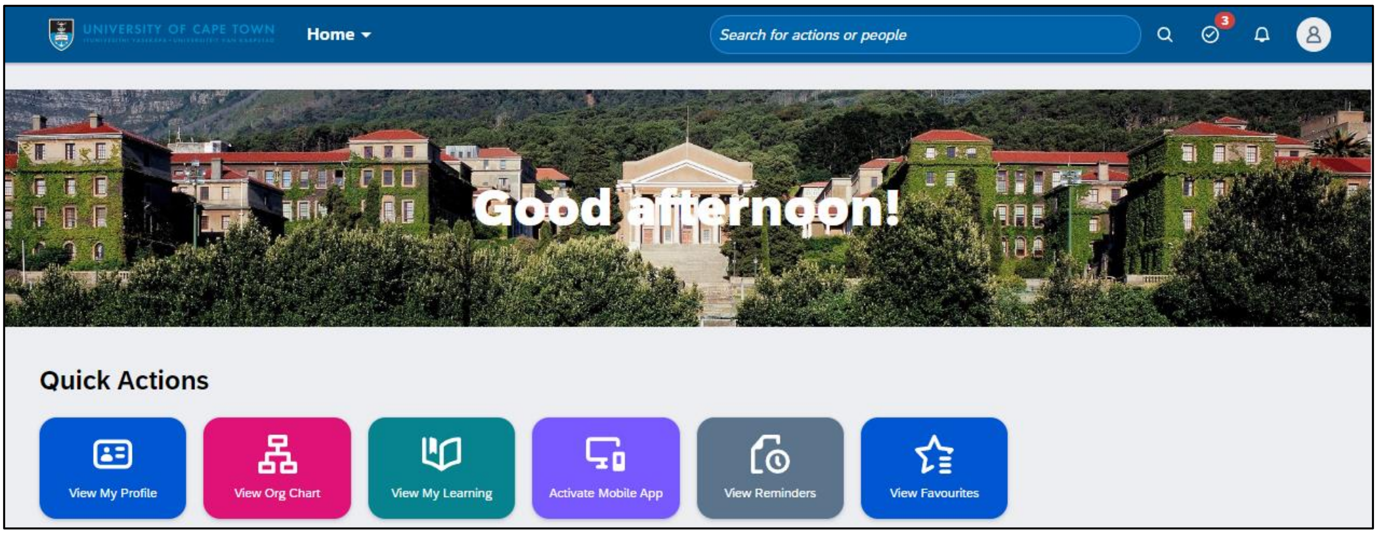
10. The *Interview Scheduling* page reappears, listing any remaining job requisitions that have candidates in the 1st Interview or 2nd Interview sections of the talent pipeline. To schedule additional candidate interviews, repeat from step 5 above.



Displaying interview details

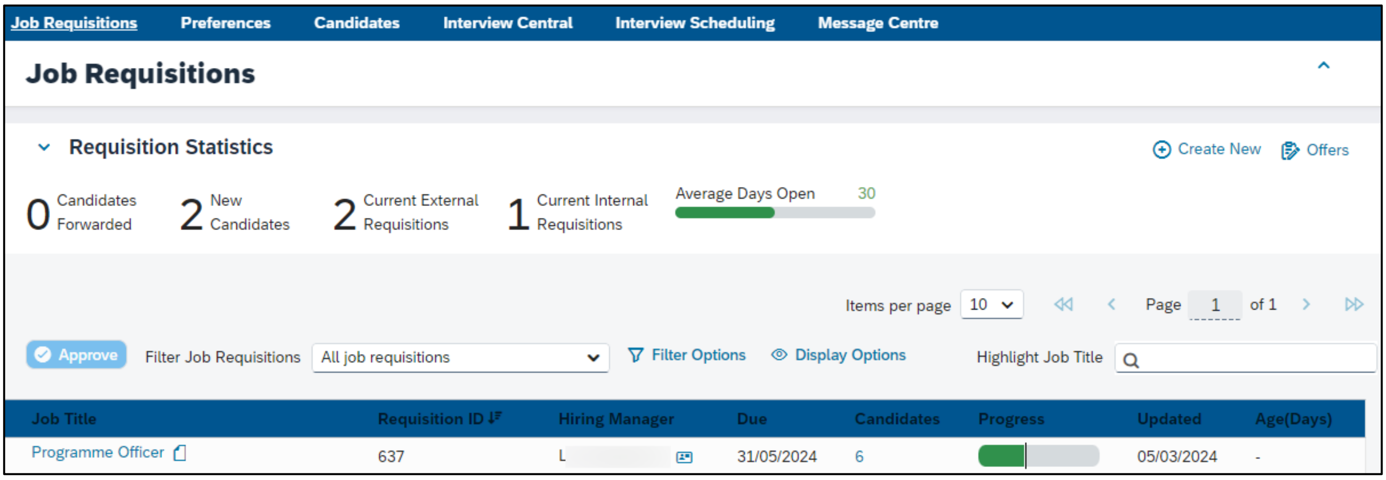
Procedure

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



   – Choose *Home* > *Recruiting*.

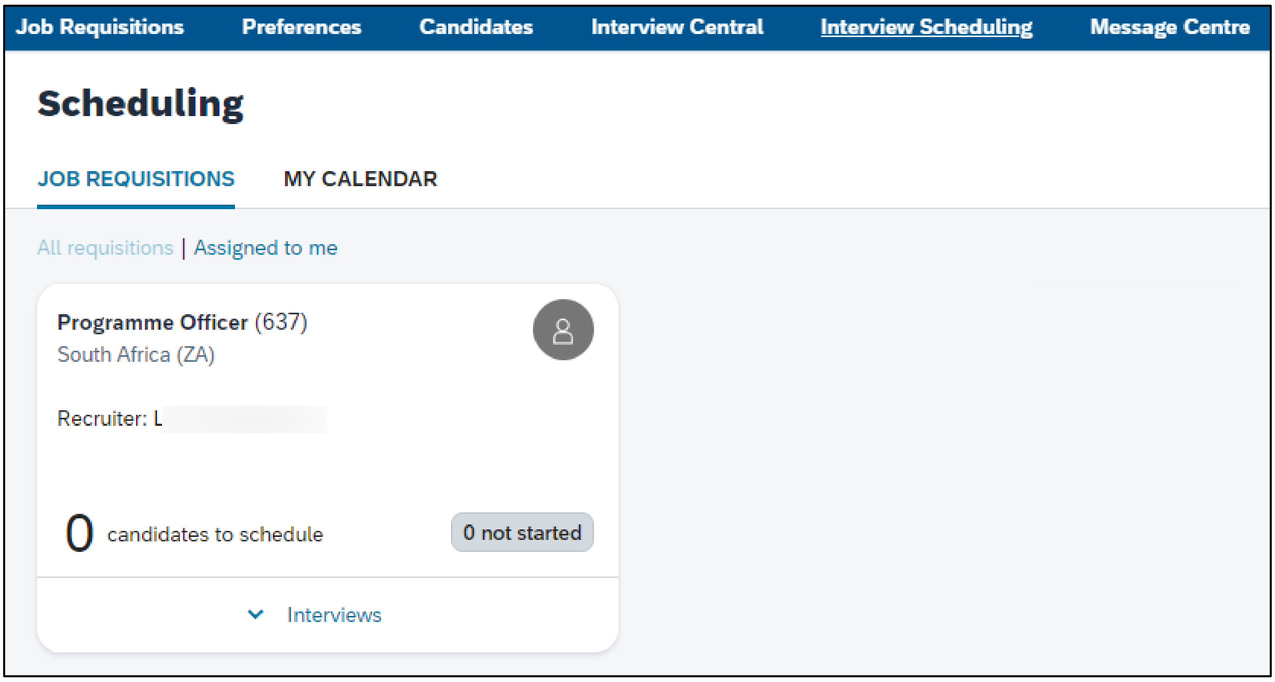
3. The *Job Requisitions* page appears.



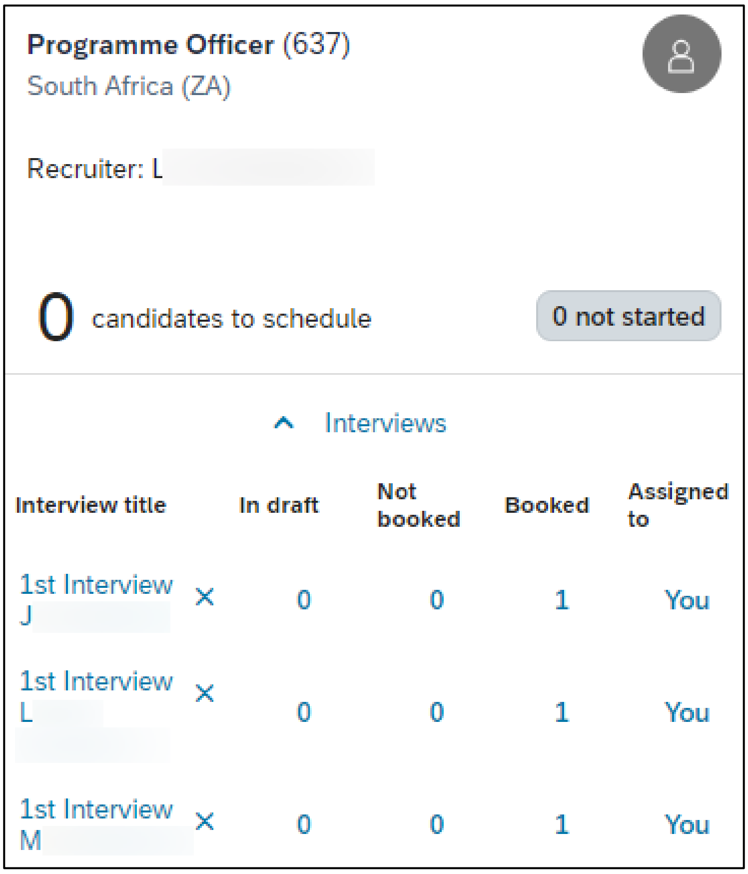
   – Click *Interview Scheduling* in the top menu.

Displaying interview details

4. The *Interview Scheduling* page appears, listing any job requisitions that have candidates in the 1st Interview or 2nd Interview sections of the talent pipeline.



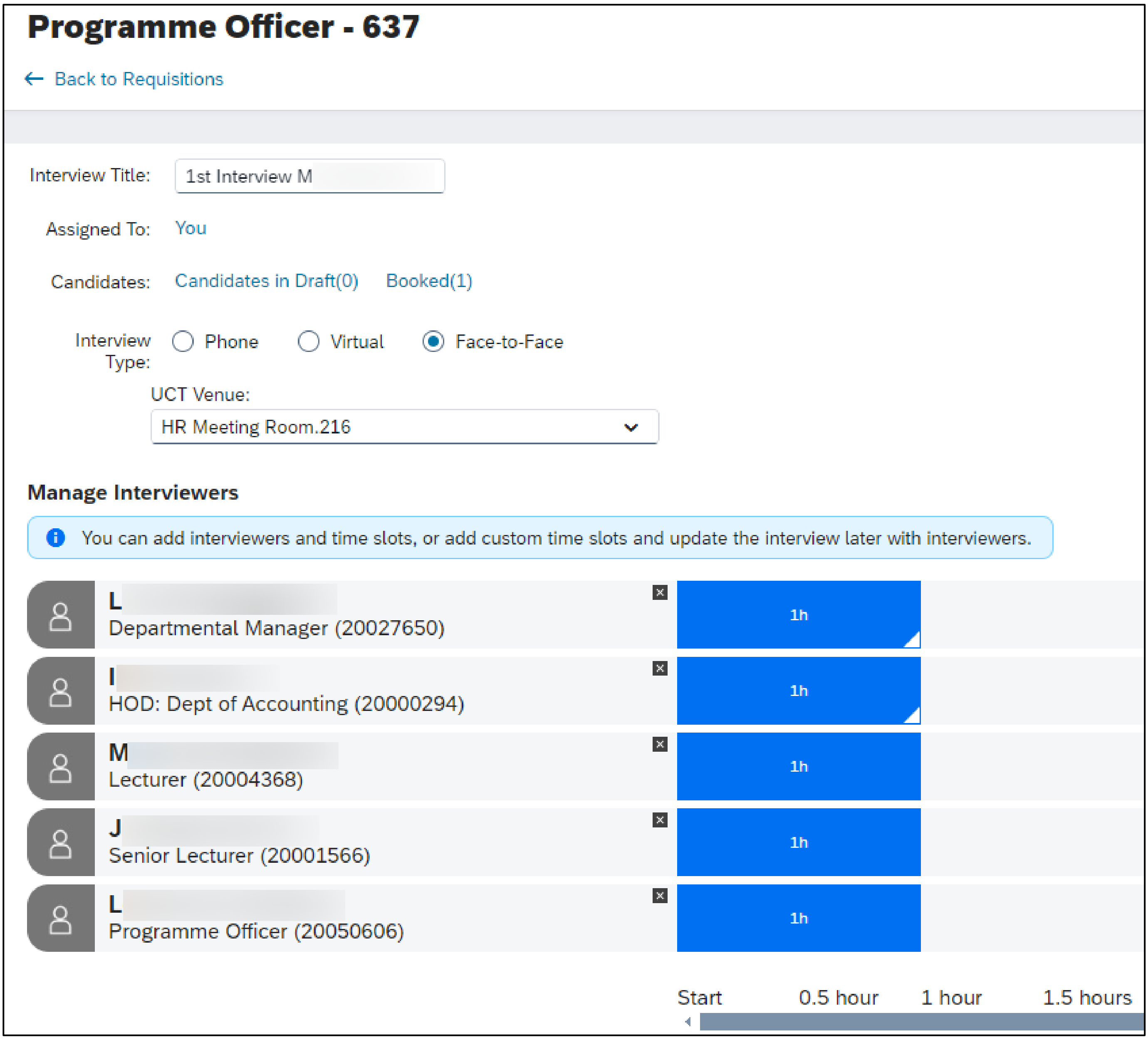
- Click ⌄ Interviews.
- The candidate interview details are displayed. *Candidates in draft* have interview details saved but not yet sent.



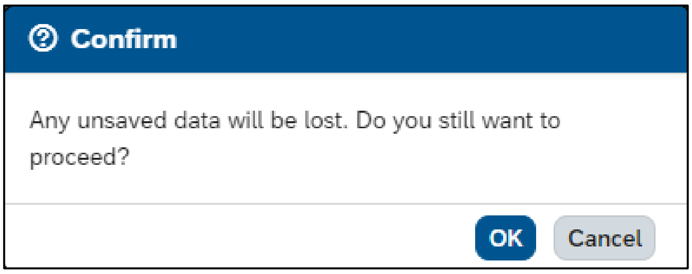
- Click an entry in the *Interview title* column to view the interview details.

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.

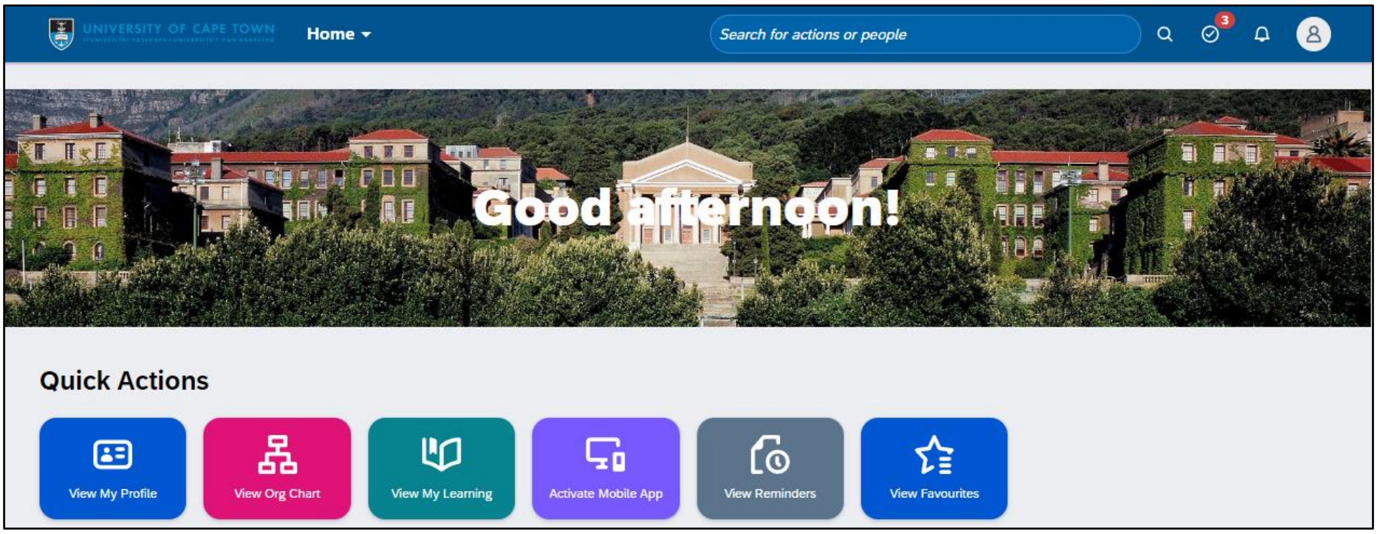
Changing a scheduled face-to-face interview

Background

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

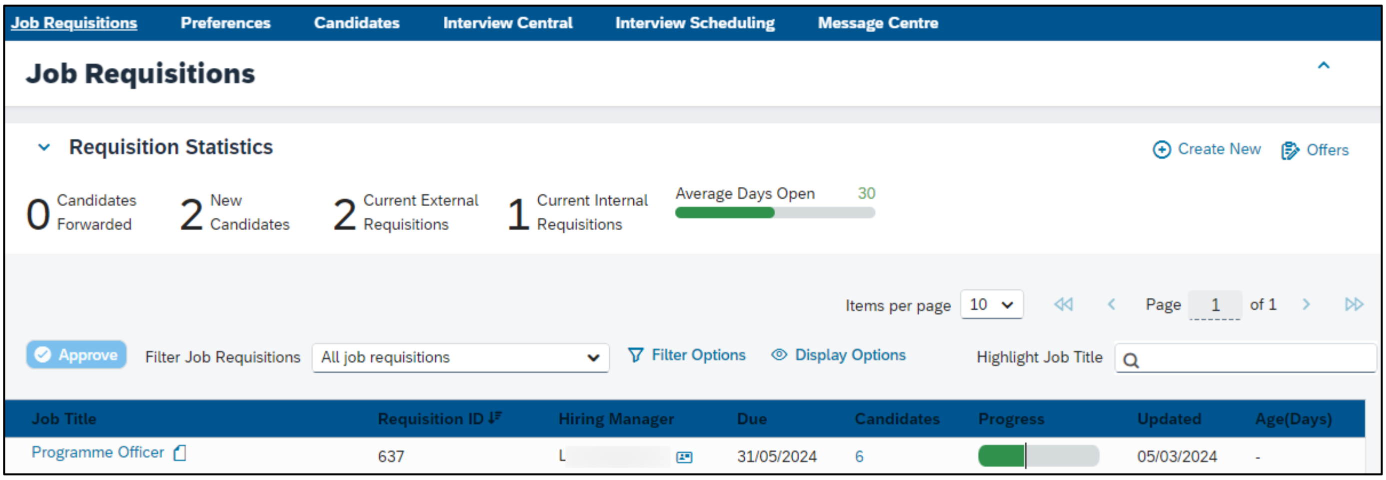
Procedure

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



– Choose *Home* > *Recruiting*.

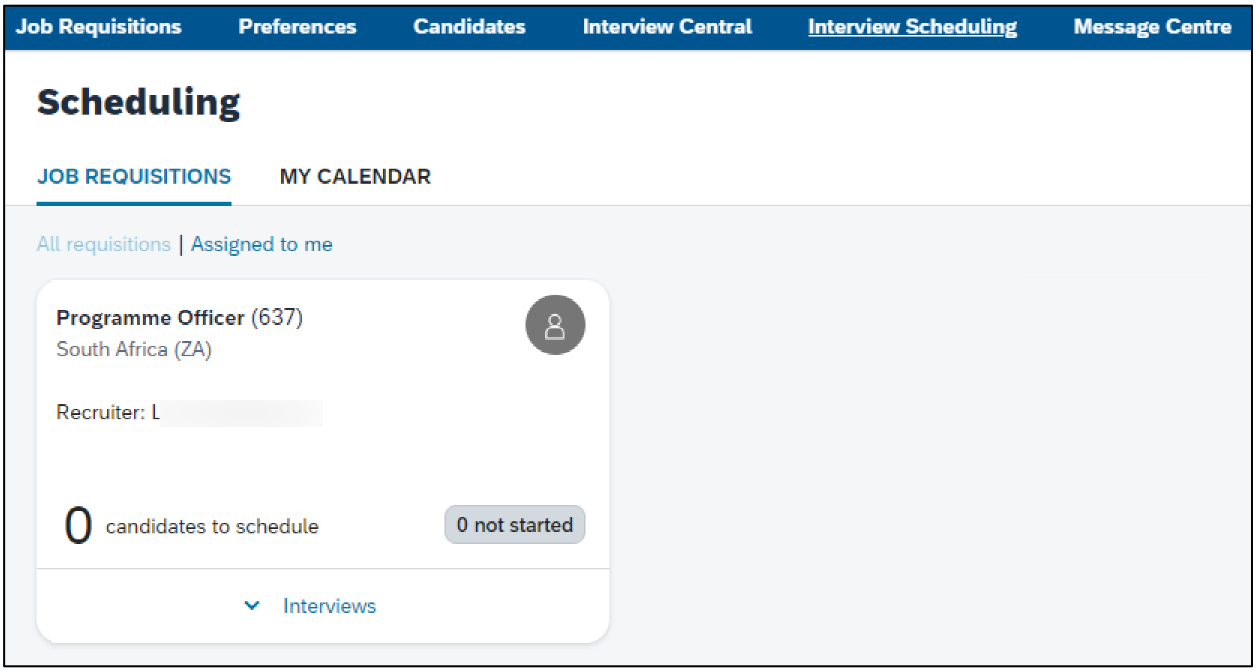
3. The *Job Requisitions* page appears.



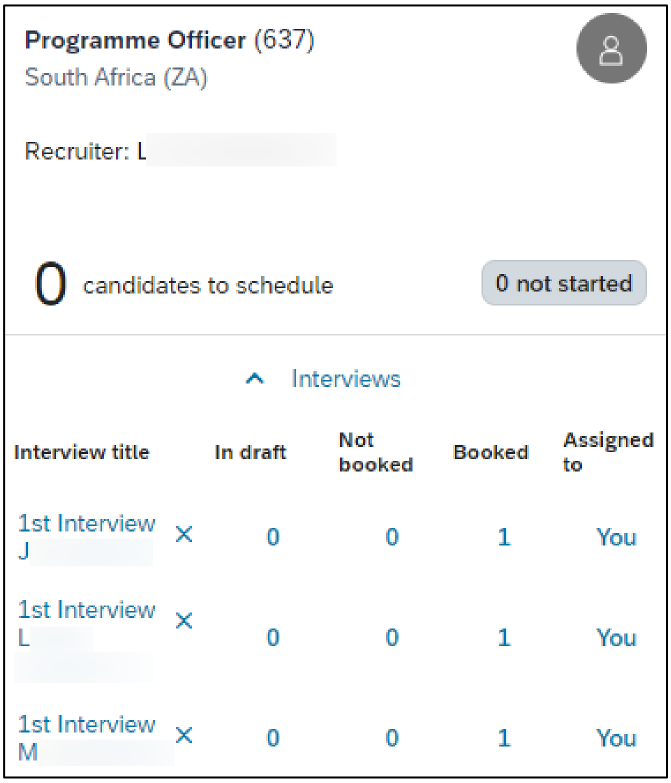
– Click *Interview Scheduling* in the top menu.

Changing a scheduled face-to-face interview

4. The *Interview Scheduling* page appears, listing any job requisitions that have candidates in the 1st Interview or 2nd Interview sections of the talent pipeline.



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

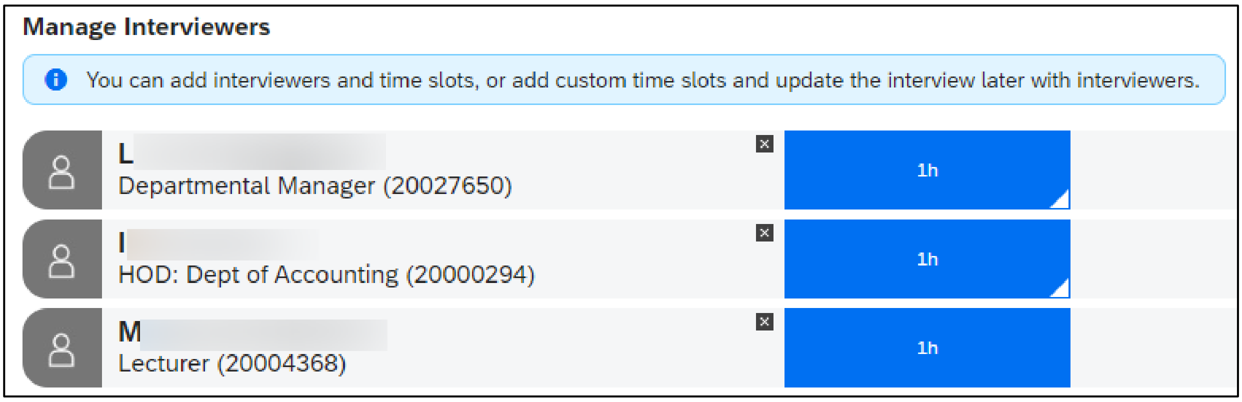


- In the *Interview title* column, click the interview to be changed.

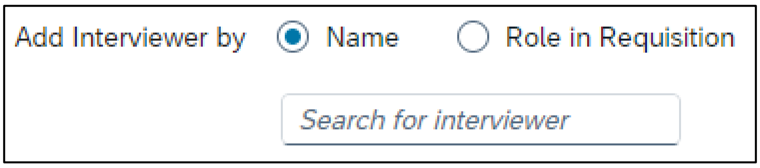
Changing a scheduled face-to-face interview

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.

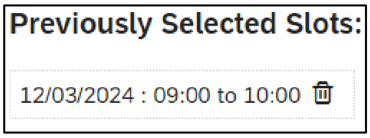


- To add a committee member: In the *Add Interviewer by* section, either add via *Role in Requisition* and click Add Interviewer or select *Name* and use the search field to select the appropriate person.

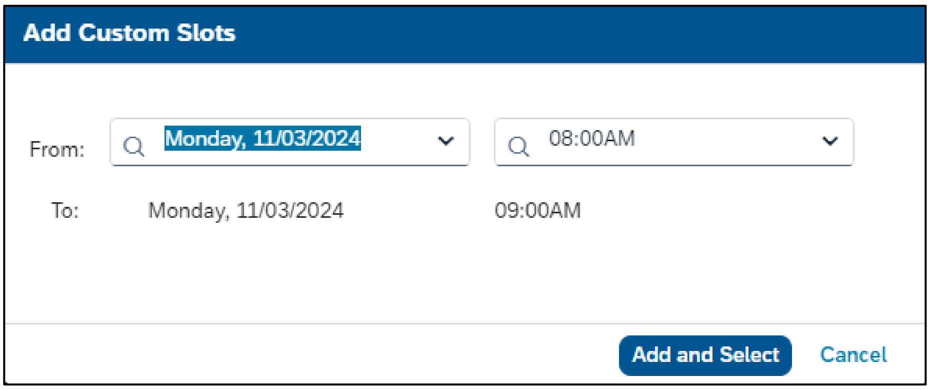


Changing a scheduled face-to-face interview

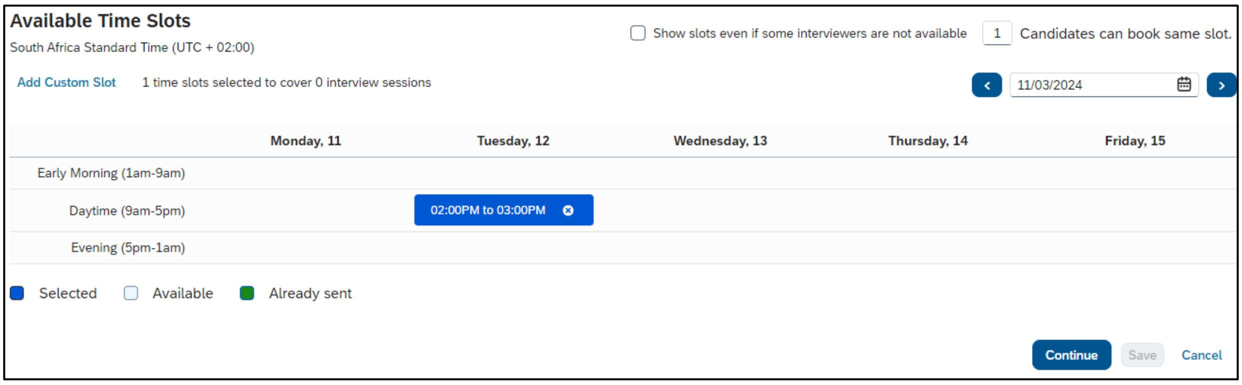
- To change the interview date/time:
  - In the *Previously Selected Slots* section, delete the existing slot by clicking 🗑 *Delete the slot*.



  - 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.



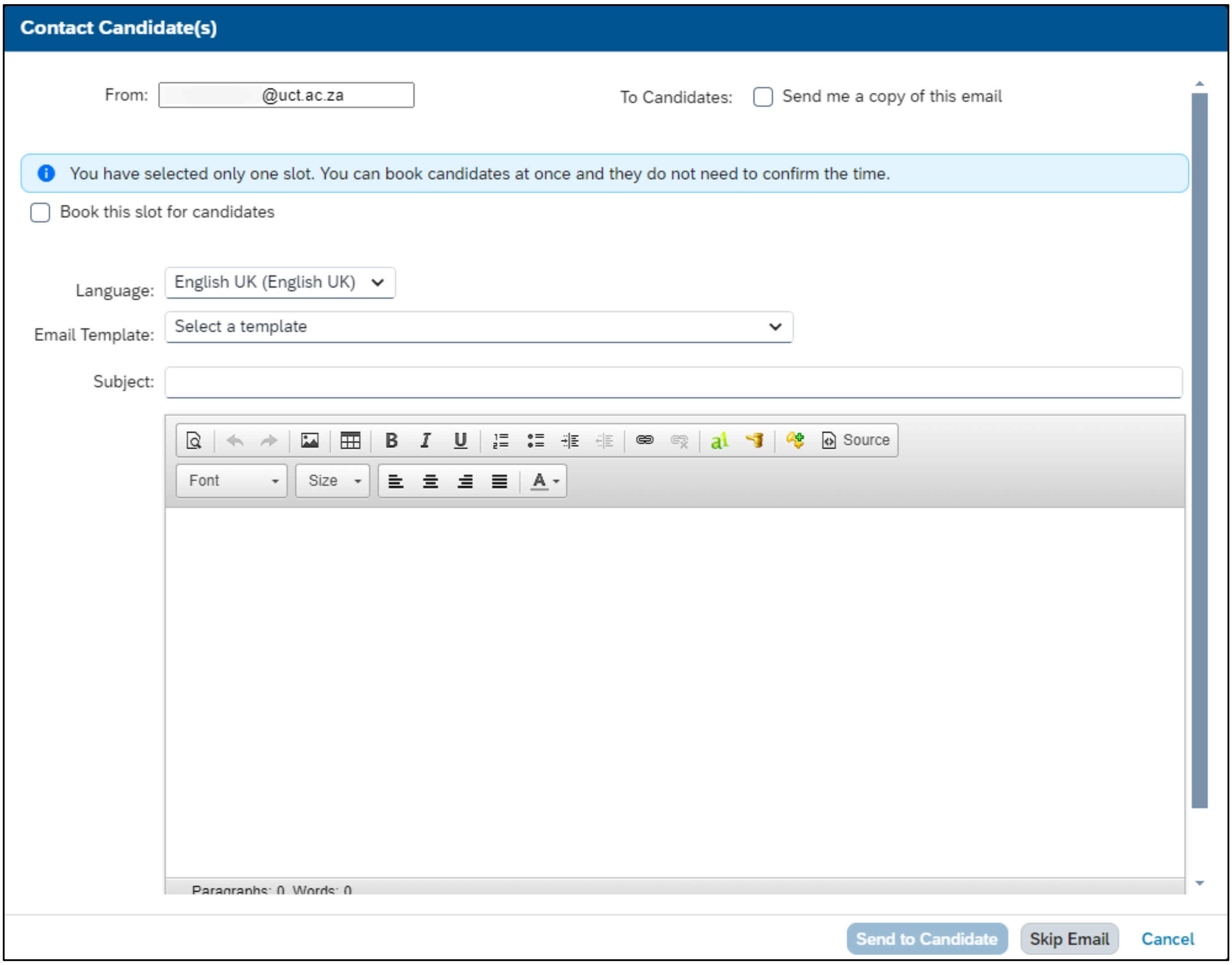
  - In the *From* field, select the appropriate day and then select the appropriate start time alongside the day. The end time of the interview will adjust after selecting the start time.
  - Click Add and Select.
  - The selected interview slot appears in the calendar.



- Click Continue.

Changing a scheduled face-to-face interview

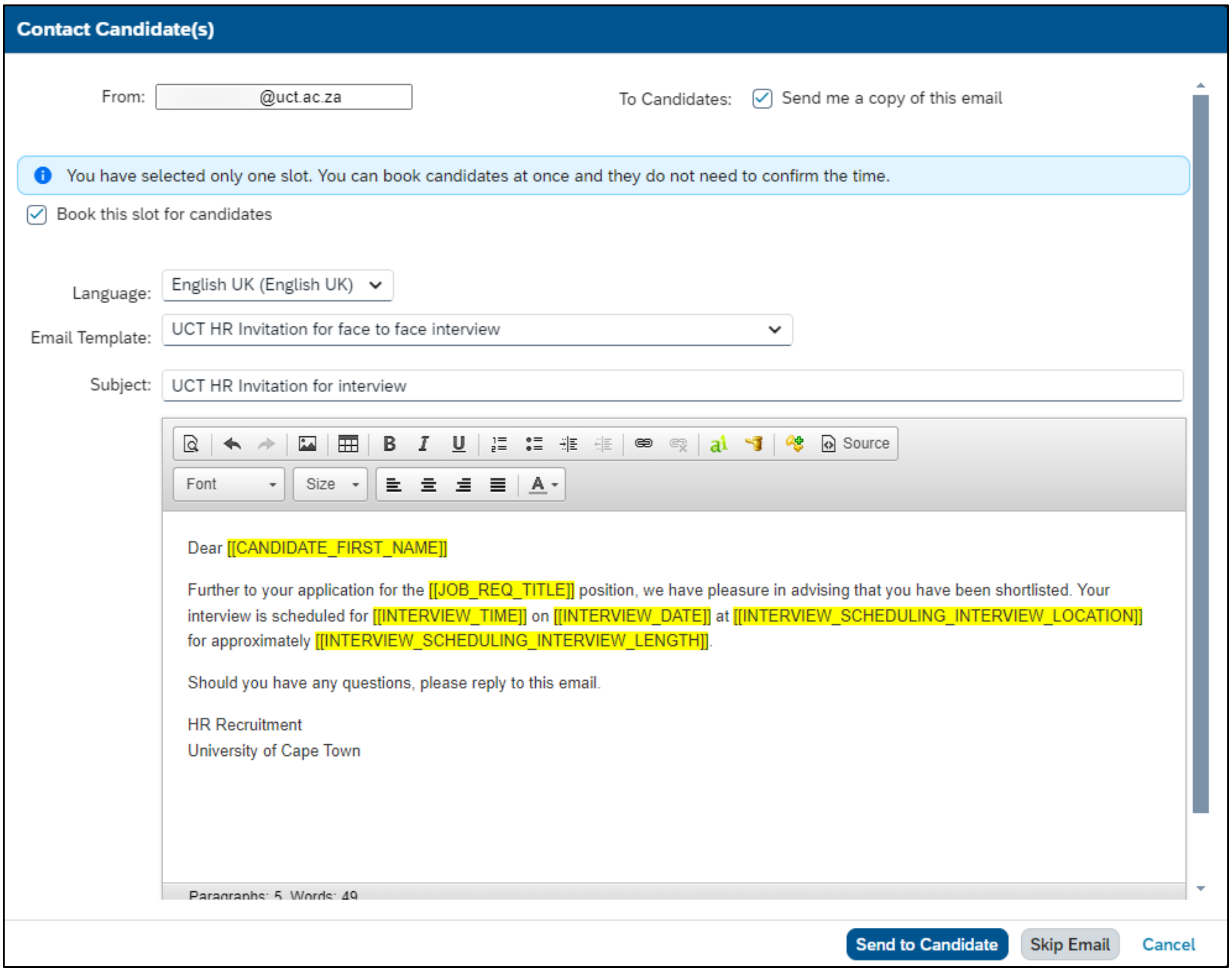
6. The *Contact Candidates(s)* dialogue box appears.



- 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.

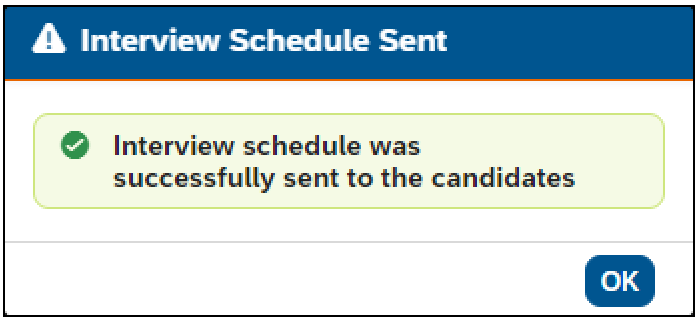
Changing a scheduled face-to-face interview

- 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**.

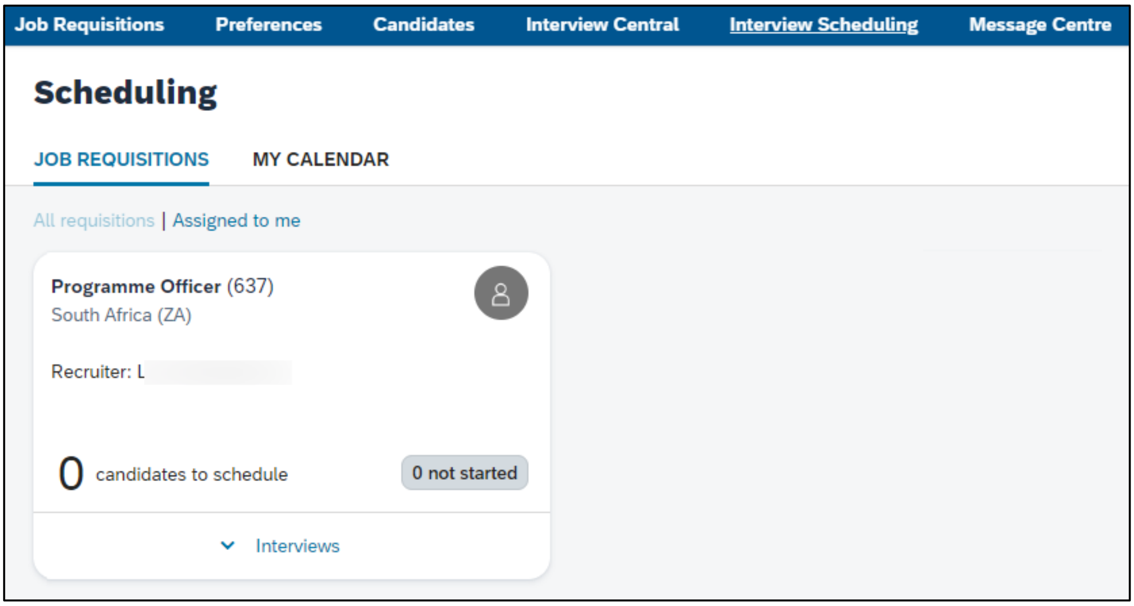
7. The *Interview Schedule Sent* dialogue box appears.



- Click **OK**.

Changing a scheduled face-to-face interview

8. The *Interview Scheduling* page reappears.



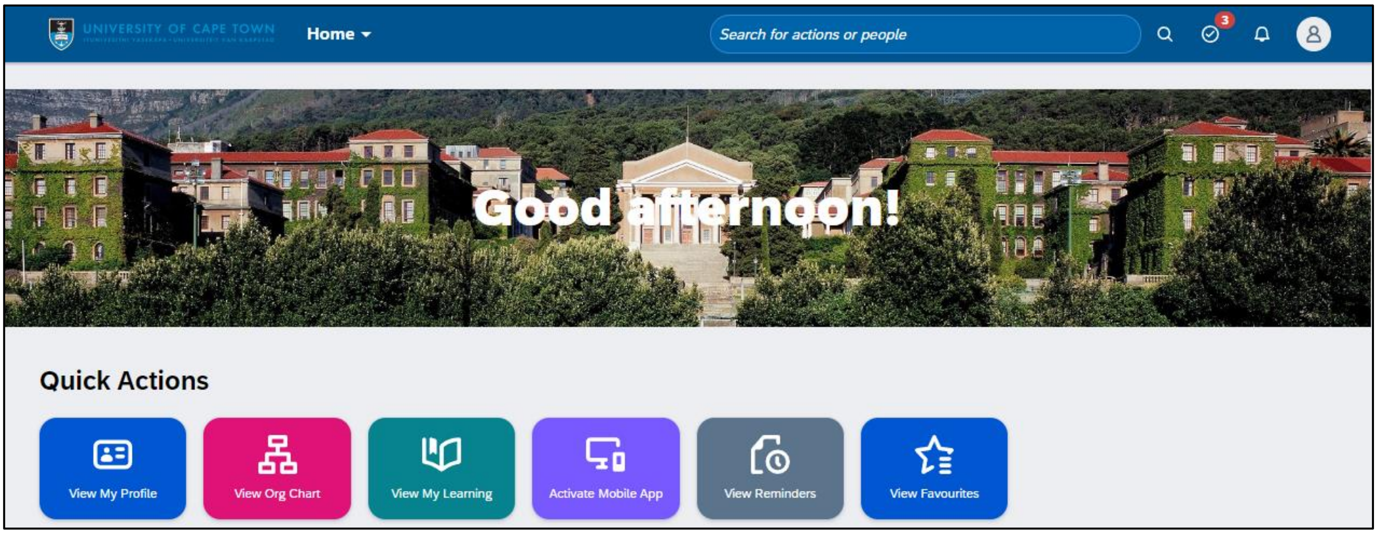
Deleting a scheduled interview

Background

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

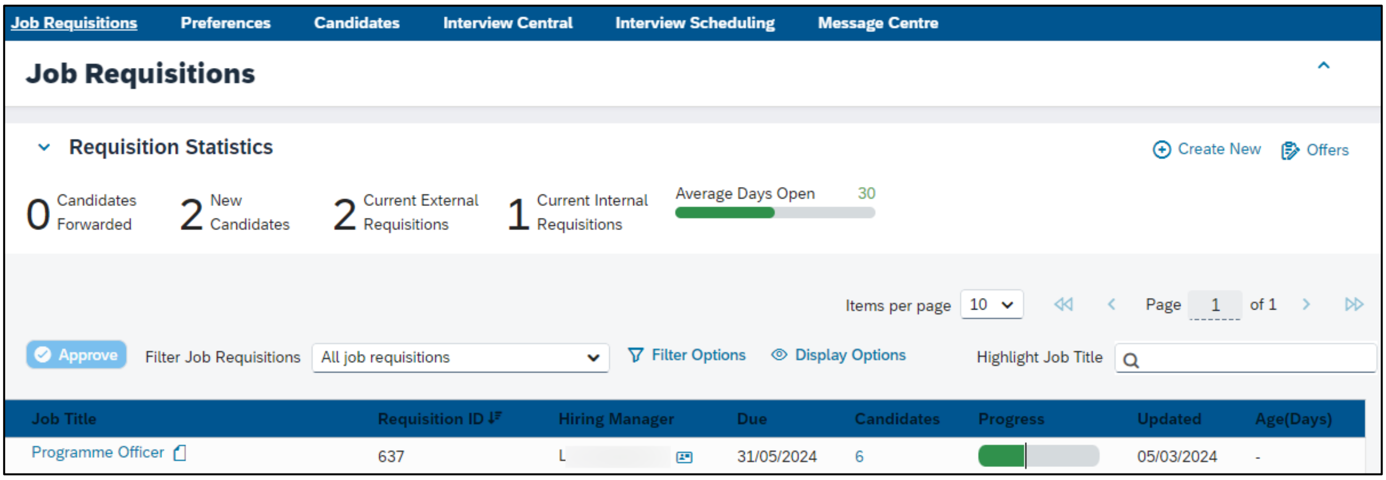
Procedure

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



– Choose *Home* > *Recruiting*.

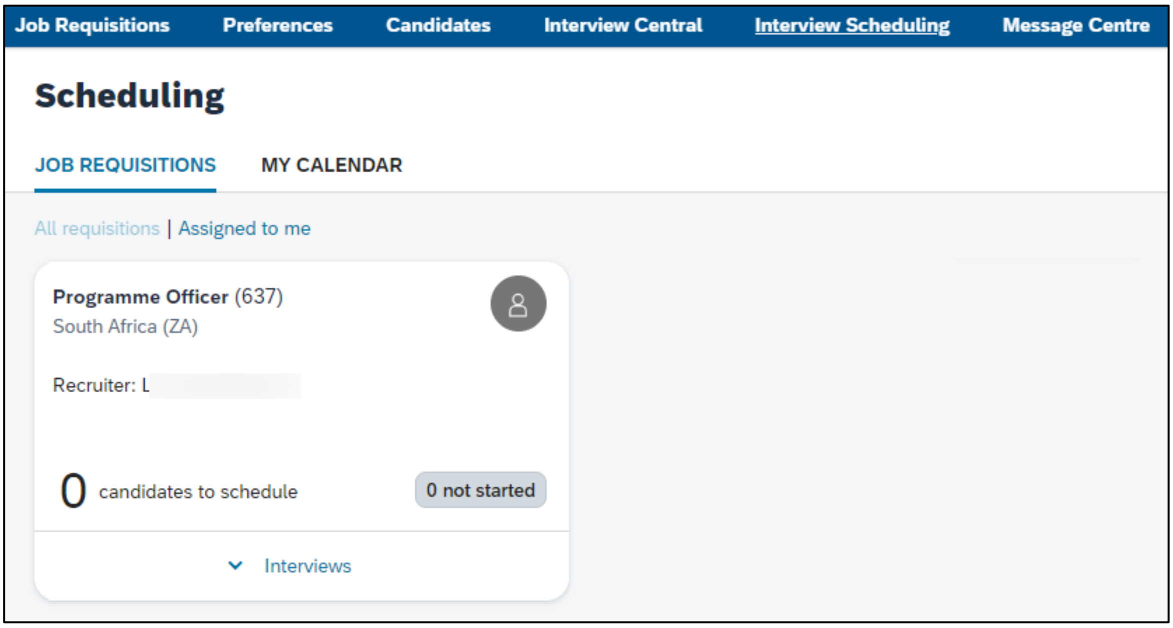
3. The *Job Requisitions* page appears.



– Click *Interview Scheduling* in the top menu.

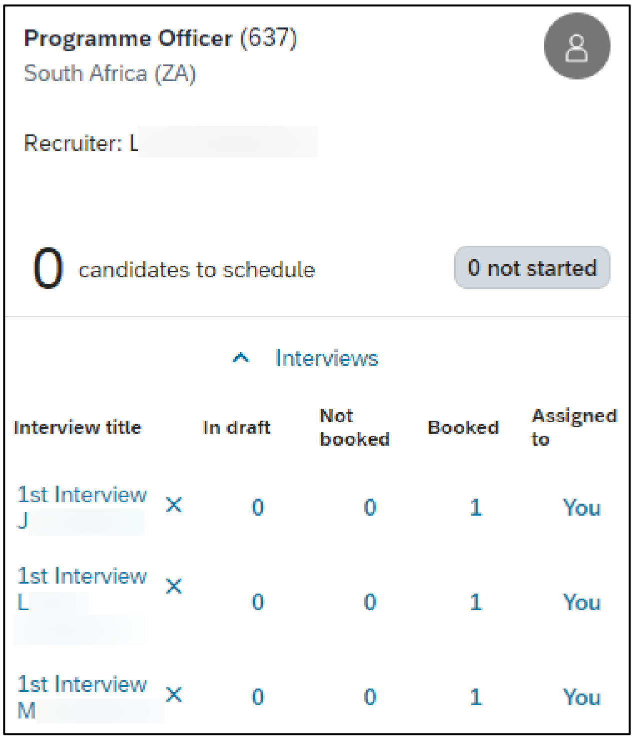
Deleting a scheduled interview

4. The *Interview Scheduling* page appears, listing any job requisitions that have candidates in the 1st Interview or 2nd Interview sections of the talent pipeline.



– Click Interviews.

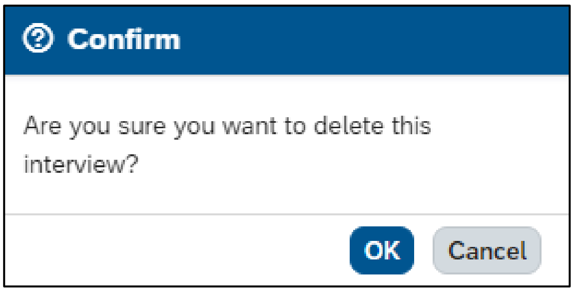
– The candidate interview details are displayed.



– In the *Interview title* column, click ✕ *Delete* alongside the interview to be deleted.

Deleting a scheduled interview

5. The *Confirm* dialogue box appears.



- Click 

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