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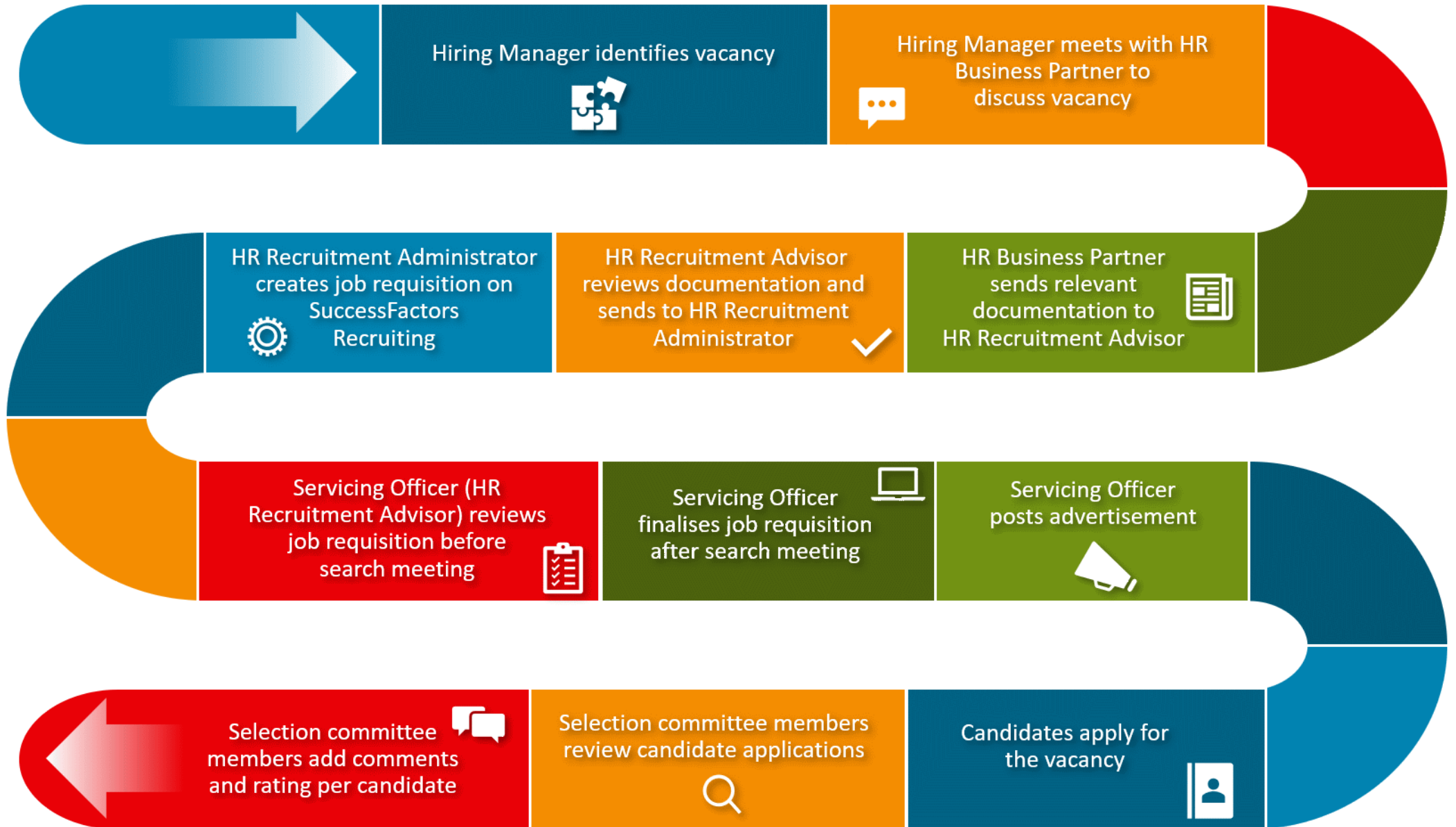
UCT SuccessFactors Recruiting guide for Recruitment Advisors

**Issued by UCT Human Resources
July 2024**

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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.

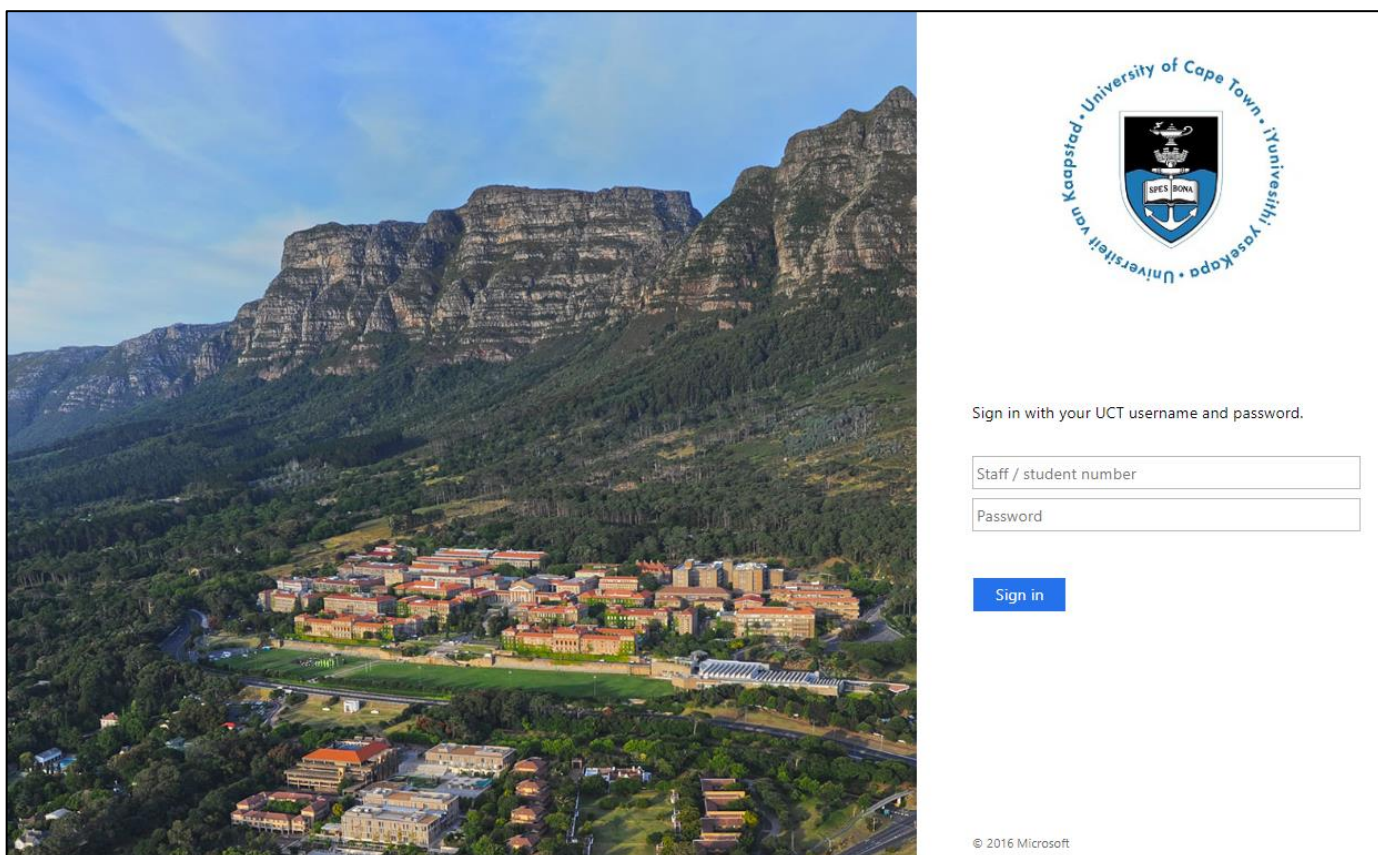
Staff members can access the platform using their existing UCT login details.

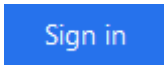
Support

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

Procedure

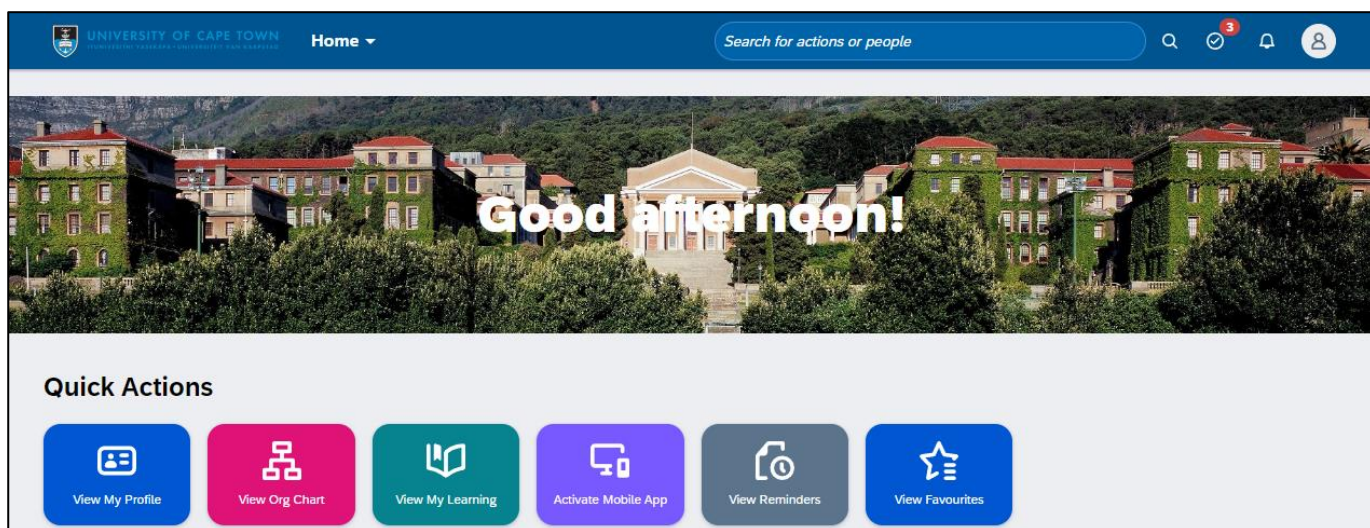
1. Open a web browser (e.g. Google Chrome, Mozilla Firefox, Microsoft Edge).
2. Log in to SuccessFactors via www.successfactors.uct.ac.za.
3. If not already logged on to single sign-on, the UCT sign in page appears.
If already logged in to single sign-on, SuccessFactors will open.



- 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 .

Logging in to SuccessFactors

4. The *Home* page appears.



Reviewing a job requisition before the search meeting

Overview

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).

The Recruitment Advisor (Servicing Officer) reviews the job requisition before the search meeting but only approves it after the search meeting, to allow for updates coming out of the meeting. The Recruitment Advisor then posts the advert(s).

Procedure

1. [Log in to SuccessFactors and access the Home page.](#)

Note: If accessing the job requisition via a direct link from the notification email, skip to [step 3](#).

2. Job requisitions are found in the *Approvals* section on the *Home* page.

The screenshot displays the 'Quick Actions' section with six buttons: 'View My Profile', 'View Org Chart', 'View My Learning', 'Activate Mobile App', 'View Reminders', and 'View Favourites'. Below this is the 'Approvals' section, which contains a 'Job Requisition' card. The card details include: 'Programme Officer', 'Submitted on 29 Feb 2024', 'Req ID 637', 'Hiring Manager L', 'Servicing Officer L', and 'Pending For 0 day'.

- Click the appropriate job requisition.
If there is more than one approval, click *View All*. In the *Job Requisitions* dialogue box, click the appropriate job requisition.

Reviewing a job requisition before the search meeting

3. The selected job requisition opens.

Programme Officer (637)

Route Map

Assessment | Completed

1 Job Requisition Created | 2 Servicing Officer Review (Due 02/03/2024) | 3 Completed

Internal Posting Preview | External Posting Preview

Requisition Information

Requisition ID 637

* Requisition Status Pre-Approved

Requisition Due Date 31/05/2024



Evergreen Job Requisition

Job Information

* Position Title Programme Officer

- The *Route Map* at the top of the page provides an overview of the required approvals process. The Recruitment Administrator has completed step 1 by creating the job requisition and sending it to the Servicing Officer (Recruitment Advisor) for review.
- Review the internal and external adverts by clicking [Internal Posting Preview](#) and [External Posting Preview](#).

Reviewing a job requisition before the search meeting

- Click  *Info about this form* (top right) to review the job requisition’s approval chain and audit trail in a new window. Check for anyone that may have been included via the *Get feedback* option as this person will have ongoing access to the job requisition as well as applicant information and documents. Click  .

Approval Chain

The following checklist illustrates the approval chain for this document. The current owner of the process in the approval chain is highlighted.

Routing Map

Type	Stage	Employee	Step	Status
O	Modify Stage	A	Create Requisition	Completed
R	Modify Stage	L	Servicing Officer Review	Pending

Audit Trail


Currently With	Employee	Action	Comments	Status	Act By
	A	Create		Completed	28/02/2024
	A	Modify		Completed	29/02/2024
>>	L			Pending	
		Final Form			31/05/2024

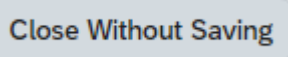
Change History

The following table displays all changes made to this job requisition.

Show edits Show job postings

Field Label	Old Value	New Value	User	Date/Time ▼	Source
-------------	-----------	-----------	------	-------------	--------



- Carefully review each section of the job requisition. Note anything that should be discussed at the search meeting.
- At the bottom of the job requisition page, click  .

4. The *Job Requisitions* page appears.

Approving a job requisition after the search meeting

Procedure

1. [Log in to SuccessFactors and access the Home page.](#)
2. Job requisitions are found in the *Approvals* section on the *Home* page.

The screenshot displays the SuccessFactors Home page interface. At the top, there is a 'Quick Actions' section with six buttons: 'View My Profile' (blue), 'View Org Chart' (pink), 'View My Learning' (teal), 'Activate Mobile App' (purple), 'View Reminders' (grey), and 'View Favourites' (blue). Below this is the 'Approvals' section, which contains a 'Job Requisition' card. The card details include: 'Programme Officer', 'Submitted on 29 Feb 2024', 'Req ID 637', 'Hiring Manager L', 'Servicing Officer L', and 'Pending For 0 day'. A three-dot menu icon is visible in the top right corner of the card.

- Click the appropriate job requisition.
If there is more than one approval, click *View All*. In the *Job Requisitions* dialogue box, click the appropriate job requisition.

Approving a job requisition after the search meeting

3. The selected job requisition opens.

Programme Officer (637)

Route Map

Assessment | Completed

1 Job Requisition Created | 2 **Servicing Officer Review** (Due 02/03/2024) | 3 Completed

Internal Posting Preview | External Posting Preview

Requisition Information

Requisition ID 637

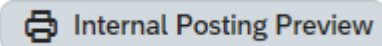
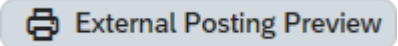
* Requisition Status Pre-Approved

Requisition Due Date 31/05/2024

Evergreen Job Requisition

Job Information

* Position Title Programme Officer

- View the internal and external adverts by clicking  and . The advert content can be edited later in this procedure.
- Carefully review each section of the job requisition. If there are any changes to make to the job requisition, ensure that the relevant people are consulted and / or informed.
Note: Ensure the *Org Unit Name* field is correct as this shows on the jobs listing when advertising and can't be changed after this requisition is approved.

Approving a job requisition after the search meeting

Requisition Team section:

Requisition Team

* Hiring Manager , Departmental Manager (20027650) [Find User..](#)

* Servicing Officer , Recruitment Advisor (20046320) [Find User..](#)

Manage Additional Users

Recruiting Team

* HR Business Partner , HR Business Partner (20027266) [Find User..](#)

* Chairperson , HOD: Dept of Accounting (20000294) [Find User..](#)

Manage Additional Users

Selection Committee Members

- Check all roles in the *Requisition Team* are completed correctly.
- Ensure the appropriate Recruitment Administrator appears in the *Recruiting Team* field.
Note: If the Recruitment Administrator is not added to the requisition, they will not be able to schedule candidate interviews. Consider also adding a second or back up Recruitment Advisor.
- If the HR Business Partner and Chairperson are voting members of the committee, they should also appear in the *Selection Committee Members* field.
- If there is an Employment Equity Representative on the committee, they should be listed in the *Comments* section at the end of the job requisition.

Approving a job requisition after the search meeting

Job Posting Information section:

Job Posting Information

Questions

Required Disqualifier Score Weight Actions

⊕ Add more questions

Required Score:

- In the *Questions* section, add screening questions to gather additional applicant information or to disqualify applicants who do not meet requirements (e.g. driver’s licence). See: [Working with screening questions](#).

Questions	Required	Disqualifier
Are there any circumstances relevant to your application of which, in the interests of fair and frank disclosure, you should make the selection committee aware? (If so, salient particulars are required in a separate document) Multiple Choices	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Do you have a valid RSA Drivers Licence Multiple Choices	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Rate your MS Teams skill level Multiple Choices	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Knowledge of Adobe PhotoShop, InDesign, and Illustrator? Multiple Choices	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Describe your management experience. Free Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- Review the *Competencies* from the position description. The selection committee members will rate each candidate on the competencies after the interview.

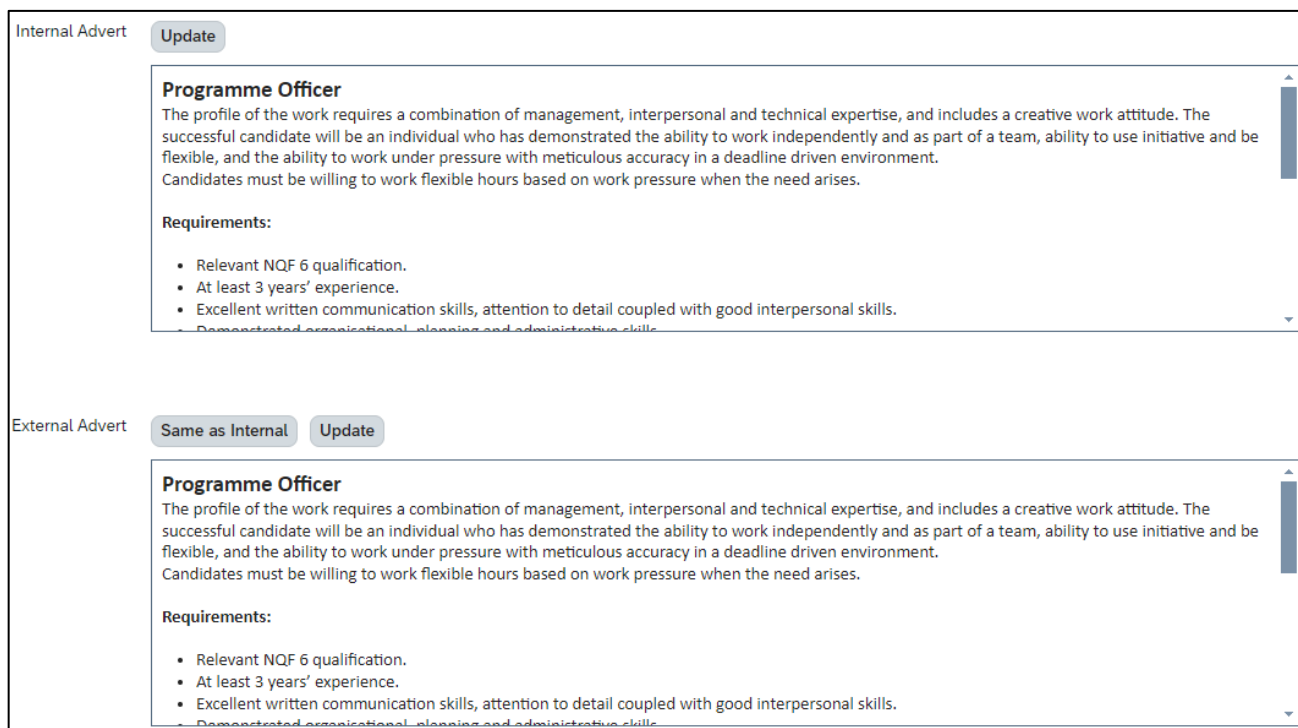
Competency	Library	Category	Expected Rating %	Weight %	Action
Communication	UCT Competency Library	Core	<input style="width: 40px;" type="text" value="0.0"/>	<input style="width: 40px;" type="text" value="0"/>	Select ▼
Planning and organizing / work management	UCT Competency Library	Core	<input style="width: 40px;" type="text" value="0.0"/>	<input style="width: 40px;" type="text" value="0"/>	Select ▼
Adaptability / flexibility	UCT Competency Library	Enabling	<input style="width: 40px;" type="text" value="0.0"/>	<input style="width: 40px;" type="text" value="0"/>	Select ▼
Quality commitment/ work standards	UCT Competency Library	Enabling	<input style="width: 40px;" type="text" value="0.0"/>	<input style="width: 40px;" type="text" value="0"/>	Select ▼

⊕ Add more competencies

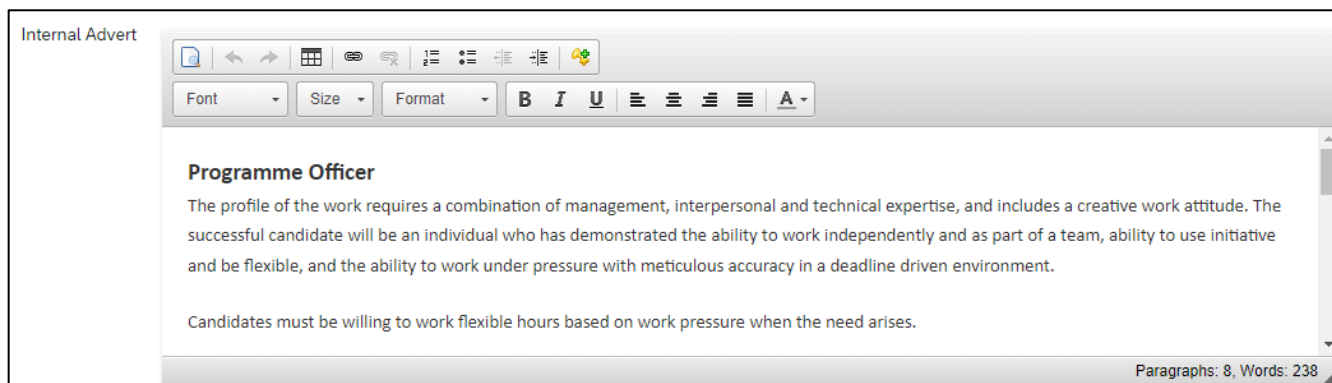
Approving a job requisition after the search meeting

Editing the internal and external advert content

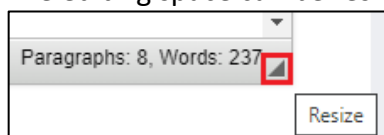
- If required, in the *Requisition Documents* section, open the draft advert document.
- Click **Update** next to either *Internal Advert* or *External Advert*.




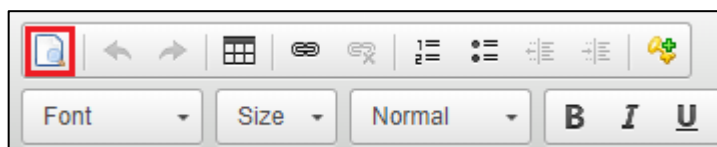
- The selected advert appears in an editable space. Make any required changes.



- 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.

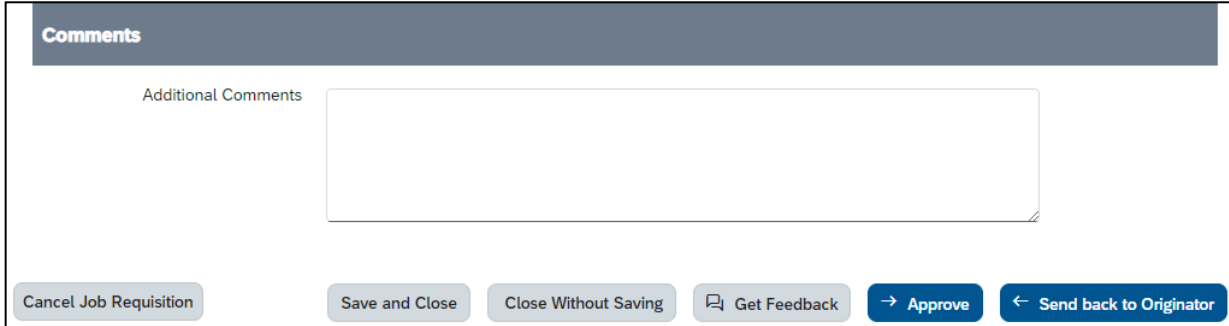


Approving a job requisition after the search meeting

- Review the attachments in the *Requisition Documents* section.



Comments section:

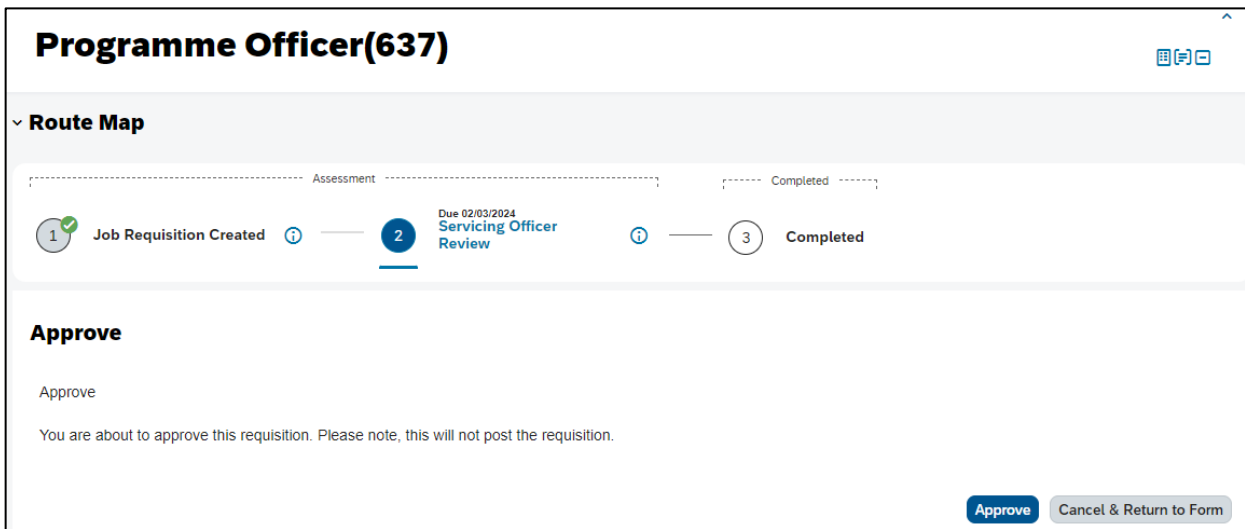


- If appropriate, enter *Additional Comments* ensuring you add your name before the comment.

- Click .

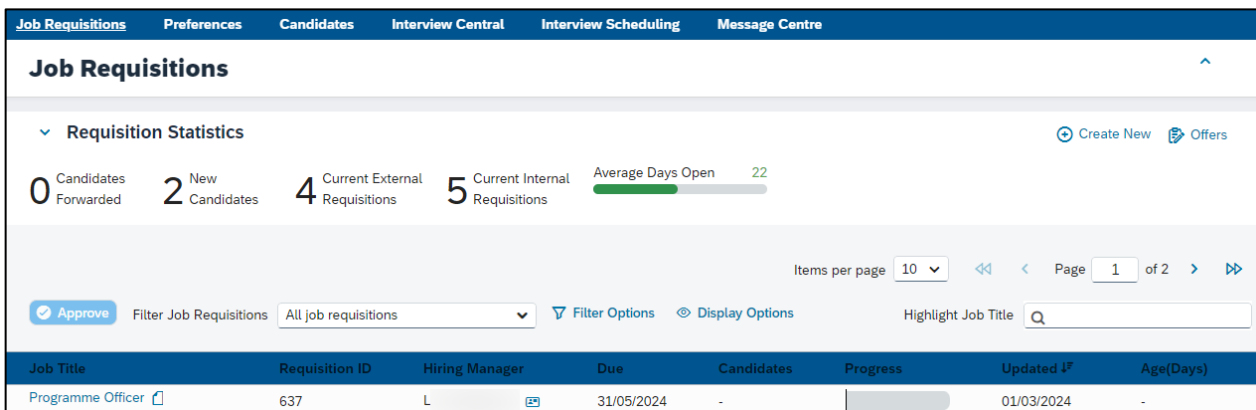
Note: The *Save and Close* option will not move the job requisition within the approval workflow, it will remain with you until you use *Approve*. The *Get Feedback* option is not currently in use at UCT.

- The *Approve* page appears. This step will complete the requisition approval but will not post the advert.



- Click .

- The *Job Requisitions* page appears. This page provides an overview of all the job requisitions you are involved in as a Recruitment Advisor or as a selection committee member.



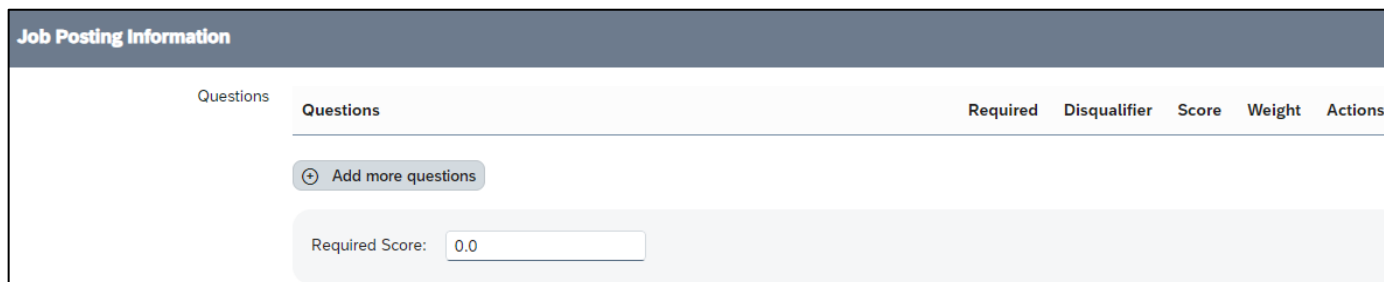
Working with screening questions

Overview

Screening questions can be used to gather applicant information and/or to reduce the high volumes of applications by disqualifying applicants who don't meet the job requirements. The Recruitment Advisor guides the selection committee to design questions based on the job requirements and any advantageous skills or experience.

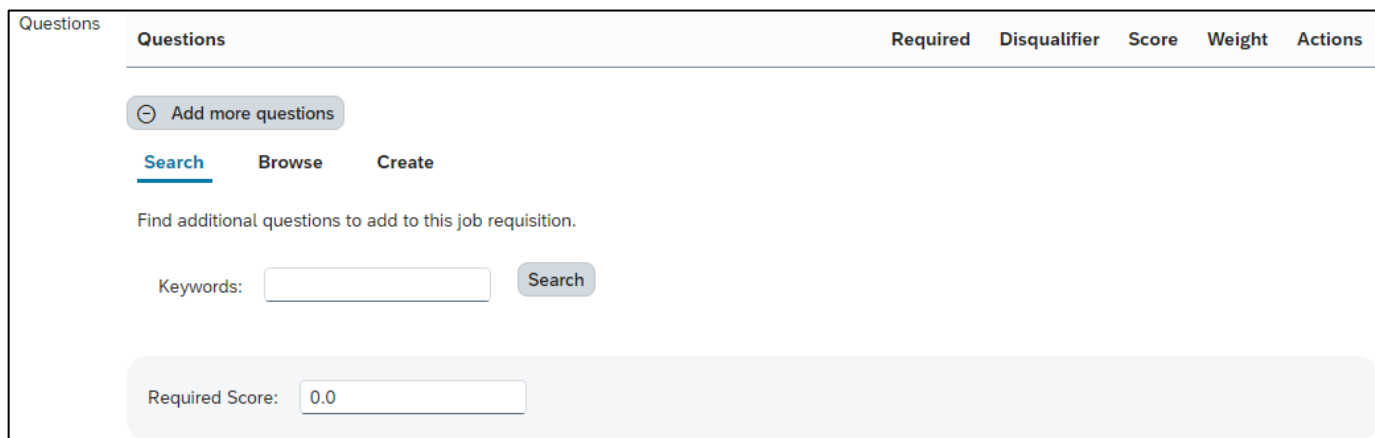
Procedure

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



- Click **+ Add more questions**.

2. The *Search* tab appears.



- Follow the instructions to [select existing UCT questions](#) and/or [create new questions](#).

Working with screening questions

- The selected question(s) appear in the *Screening Questions* section.

Questions	Required	Disqualifier	Score	Weight	Actions
Are there any circumstances relevant to your application of which, in the interests of fair and frank disclosure, you should make the selection committee aware? (If so, salient particulars are required in a separate document) Multiple Choices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	Select ▼
Do you have a valid RSA Drivers Licence Multiple Choices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	Select ▼
Rate your MS Teams skill level Multiple Choices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	Select ▼
Knowledge of Adobe Photoshop, InDesign, and Illustrator? Multiple Choices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	Select ▼
Describe your management experience. Free Text	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	Select ▼

- Review each question's answers by clicking the answer type (e.g. *Multiple Choices*) underneath each question. Click **Close** after reviewing.

Questions

Do you have a valid RSA Drivers Licence
[Multiple Choices](#)

Do you have a valid RSA Drivers Licence
[Multiple Choices](#)

Answer Format: ▼

Answer Range: [Remove](#)

[Remove](#)

[Add another answer](#)

Correct answer: ▼

Close

Working with screening questions

- If applicable, select *Required* or *Disqualifier* for each question.

Questions	Required	Disqualifier
Are there any circumstances relevant to your application of which, in the interests of fair and frank disclosure, you should make the selection committee aware? (If so, salient particulars are required in a separate document) Multiple Choices	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Do you have a valid RSA Drivers Licence Multiple Choices	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Rate your MS Teams skill level Multiple Choices	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Knowledge of Adobe PhotoShop, InDesign, and Illustrator? Multiple Choices	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Describe your management experience. Free Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Required	Applicants are required to answer the question when applying.
Disqualifier	Applicants who don't provide a correct answer are automatically disqualified. Note: <ul style="list-style-type: none"> - Only questions with specific answers can be set as disqualifiers, the system can't identify a correct free text answer. - For a question to work as a disqualifier it must also be a required question.

- If scoring questions:

- Select the appropriate *Weight* for each question out of a total of 100.
- At the bottom of the *Questions* section, enter the required percentage for an applicant to pass. An applicant with a score below the required score is automatically disqualified.

Questions	Required	Disqualifier	Score	Weight	Actions
Do you have a valid RSA Drivers Licence Multiple Choices	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="25"/>	Select ▼
Rate your MS Teams skill level Multiple Choices	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="25"/>	Select ▼
Knowledge of Adobe PhotoShop, InDesign, and Illustrator? Multiple Choices	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="25"/>	Select ▼
Do you have knowledge of the higher education sector? Multiple Choices	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="25"/>	Select ▼
+ Add more questions					
Required Score: <input type="text" value="50"/>					

- Use the *Actions* dropdown list on the right to edit or remove questions.
Note: Question descriptions don't appear for external candidates. Ensure questions are clear enough that an additional description is not required.
- Return to [Approving a job requisition after the search meeting](#).

Working with screening questions

Selecting existing UCT questions

1. This procedure continues after [step 2 in Working with screening questions](#).
2. Select the *Browse* tab.

- Expand *Requisition Questions > UCT*.

- Select one or more of the UCT questions using the appropriate checkbox(es).
Note: The applicants will see the questions in the same order as selected here.

- Click .

- Return to [Working with screening questions](#) or if there are questions to add that are specific to the current job requisition, see: [Creating a new question](#) on the next page.

Working with screening questions

Creating a new question

1. This procedure continues after [step 2 in Working with screening questions](#).
2. Select the *Create* tab.

- Enter the question text in the space provided.
- Click *Edit Answer*.

- Select the appropriate *Answer Format* from the dropdown list. Use the instructions on the next page to create the answers for your question.

Note: Questions with free text answers can't be used as disqualifying questions.

Working with screening questions

Creating a new question

Answer Format	Options
<p><i>Multiple Choices</i></p>	<div data-bbox="359 353 812 651"> <p>Answer Format: <input type="text" value="Multiple Choices"/></p> <p>Answer Range: Add another answer</p> <p>Correct answer: <input type="text"/></p> <p><input type="button" value="Close"/></p> </div> <ul style="list-style-type: none"> - Click <i>Add another answer</i>. <div data-bbox="359 725 979 1010"> <p>Answer Format: <input type="text" value="Multiple Choices"/></p> <p>Answer Range: <input type="text"/> Remove</p> <p>Add another answer</p> <p>Correct answer: <input type="text"/></p> <p><input type="button" value="Close"/></p> </div> <ul style="list-style-type: none"> - Enter the first answer in the <i>Answer Range</i> field e.g. Yes. - Click <i>Add another answer</i>. <div data-bbox="359 1128 995 1485"> <p>Answer Format: <input type="text" value="Multiple Choices"/></p> <p>Answer Range: <input type="text"/> Remove</p> <p><input type="text"/> Remove</p> <p>Add another answer</p> <p>Correct answer: <input type="text"/></p> <p><input type="button" value="Close"/></p> </div> <ul style="list-style-type: none"> - Enter the second answer below the first answer e.g. No. - Enter any remaining answers by clicking <i>Add another answer</i> and using the field provided. - Use the <i>Remove</i> option to delete any unwanted answers. - Select the <i>Correct answer</i> for the question using the dropdown list. - Click <input type="button" value="Close"/>. - Click <input type="button" value="Create"/>.

Working with screening questions

Creating a new question

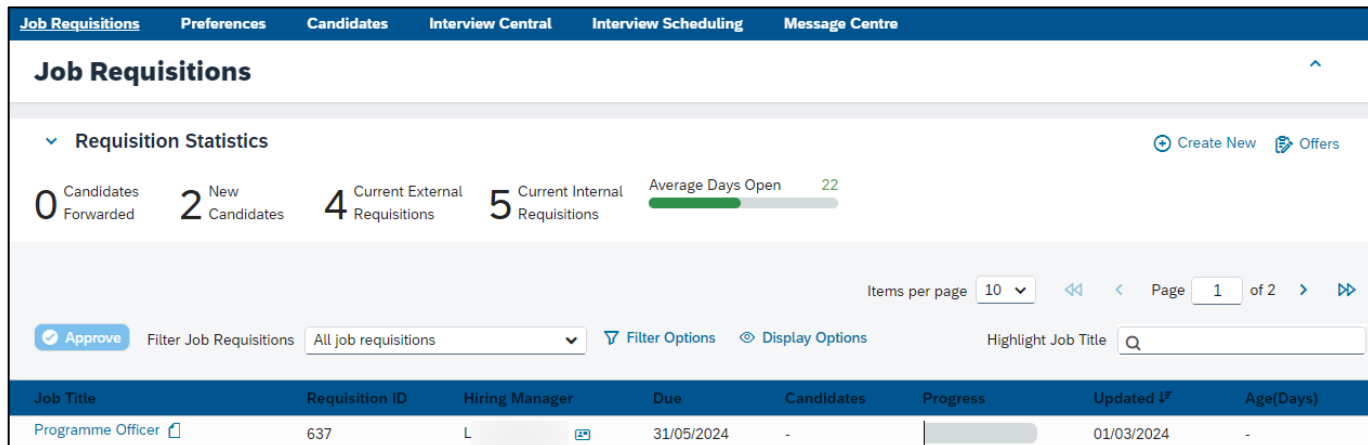
Answer Format	Options
<i>Numeric</i>	<div data-bbox="357 353 1235 667" style="border: 1px solid black; padding: 5px;"> <p>Answer Format: <input type="text" value="Numeric"/></p> <p>Answer Range: <input type="text" value="Any Positive Number"/></p> <p>Desired answer: <input type="text" value="0.0"/> <input type="radio"/> higher <input type="radio"/> lower</p> <p style="text-align: center;"><input type="button" value="Close"/></p> </div> <ul style="list-style-type: none"> - Enter the <i>Desired answer</i>. If applicable, use the <i>higher</i> or <i>lower</i> options to expand the desired answer range e.g. for number of years management experience the desired answer could be 2 or higher. - Click <input type="button" value="Close"/>. - Click <input type="button" value="Create"/>.
<i>Free Text</i>	<div data-bbox="357 954 925 1249" style="border: 1px solid black; padding: 5px;"> <p>Answer Format: <input type="text" value="Free Text"/></p> <p>Answer Range: <input type="text" value="200"/></p> <p style="text-align: center;"><input type="button" value="Close"/></p> </div> <ul style="list-style-type: none"> - If applicable, change the maximum number of characters allowed in the <i>Answer Range</i> field. - Click <input type="button" value="Close"/>. - Click <input type="button" value="Create"/>.

Return to [Working with screening questions](#) or create more questions by repeating from [step 2 above](#).

Creating a job posting (advert)

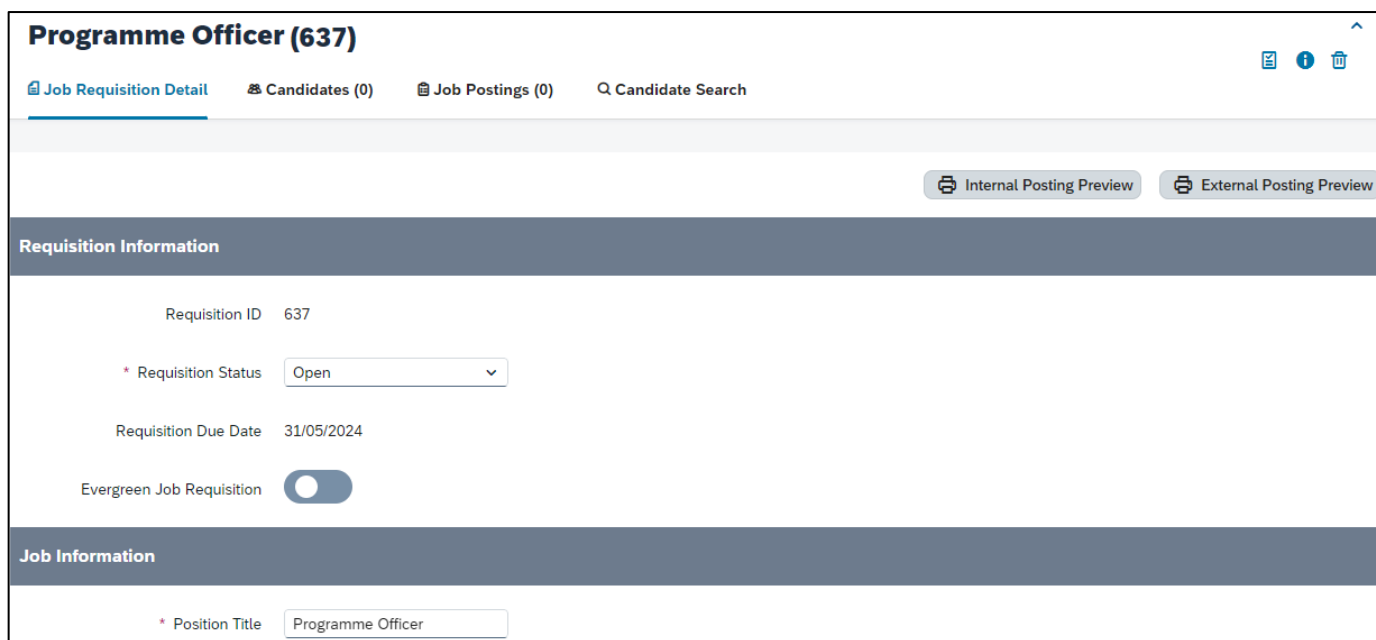
Procedure

1. [Log in to SuccessFactors and access the Home page.](#)
 - Choose *Home > Recruiting*.
2. 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 4 below.

3. The selected job requisition opens.



- Click [Job Postings \(0\)](#).

Creating a job posting (advert)

- The *Job postings* page appears, displaying details of intranet (internal) and corporate (external) postings. The job board posting is not currently in use at UCT.

Programme Officer (690)

Job Requisition Details Candidates (0) **Job Postings (0)** Candidate Search

Job postings

Posting Type	Posting Status	Posting Start Date*	Posting Start Time	Posting End Date	Posting End Time	Last Modified Date	Last Modified By	Action
Intranet Posting	Not Posted	DD/MM/YYYY		DD/MM/YYYY		-- --	-- --	Post Job
Corporate Posting	Not Posted	DD/MM/YYYY		DD/MM/YYYY		-- --	-- --	Post Job

Note: Postings expire at 11:59 pm at the end of the selected expiry date. Please note, new postings can take several minutes before they are returned in search results on the career sites.

Job Board Posting - Recruiting Posting

To post a job to the job boards, ensure you first post it to the external career site.

Internal advert (every job **must** be advertised internally so current UCT staff members are able to apply)

- In the *Intranet Posting* line, select the *Posting Start Date* and *Posting End Date*. The posting end time is always 23:59 on the *Posting End Date*.
- Note:** SuccessFactors Recruiting doesn't allow completion of the intranet and corporate posting lines at the same time, each line must be completed and posted separately.
- Click **Post Job**.
- A message in green shading indicates that the changes have been saved.

Your changes have been saved.

Job postings

Posting Type	Posting Status	Posting Start Date*	Posting Start Time	Posting End Date	Posting End Time	Last Modified Date	Last Modified By	Action
Intranet Posting	Posted	23/05/2024	10:29 SAST	05/06/2024	23:59 SAST	23/05/2024	L	Remove Post
Corporate Posting	Not Posted	DD/MM/YYYY		DD/MM/YYYY		-- --	-- --	Post Job

Note: Postings expire at 11:59 pm at the end of the selected expiry date. Please note, new postings can take several minutes before they are returned in search results on the career sites.

- The job advert will be available on the internal careers site within SuccessFactors on the selected posting date. To view the internal advert, choose *Careers* from the main dropdown menu at the top of the page.

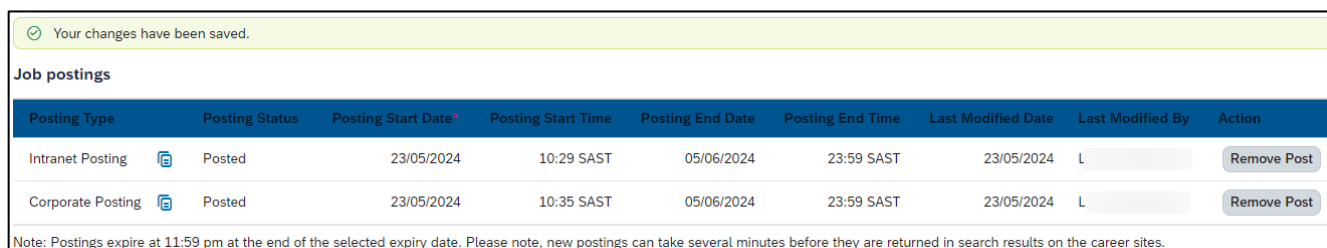
Note: If the direct link to the internal advert is required, click **Copy URL** alongside *Intranet Posting* to copy the advert web link to your clipboard for use elsewhere.

Creating a job posting (advert)

External advert

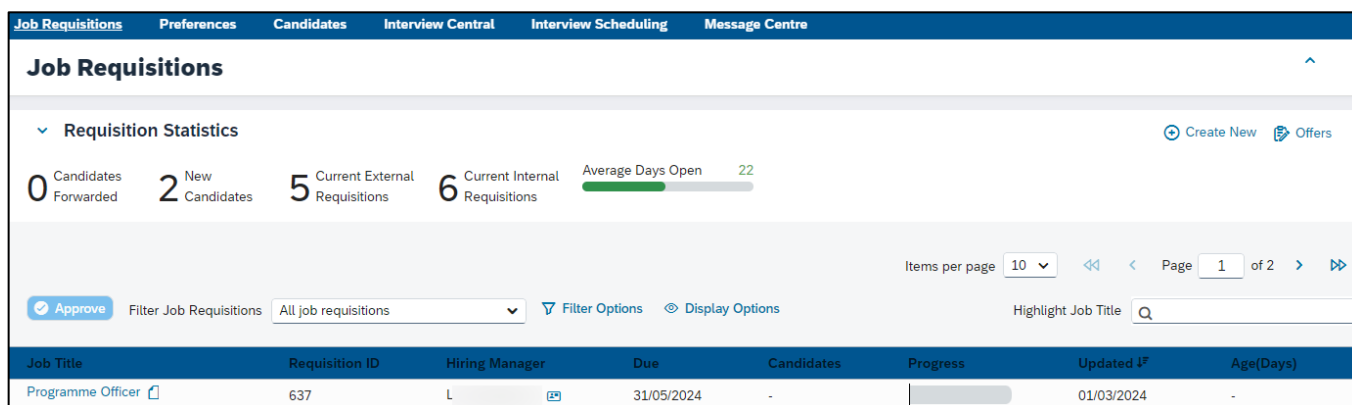
Note:

- A matching internal advert **must** be posted at the same time as the external advert to ensure internal UCT staff members can apply via the internal SuccessFactors Careers site during the external advertising phase.
 - If an earlier internal advert was posted, the advert content (e.g. appointment date, advert closing date) must be reviewed and updated on the *Job Requisition Detail* page before posting the advert. Scroll down the page and edit the *Internal Advert* and *External Advert* fields as required.
- In the *Corporate 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 text indicates that the changes have been saved.



- The job advert will be available on the external careers site (www.jobs.uct.ac.za) on the selected posting date. If today was selected, it takes approximately 15 mins for the advert to appear.
- Note:** If the direct link to the external advert is required, click Copy URL alongside *Corporate Posting* to copy the advert web link to your clipboard for use elsewhere.
- Click **Job Requisitions** in the top menu to return to the overview of all the job requisitions you are involved in as a Recruitment Advisor or as a selection committee member.

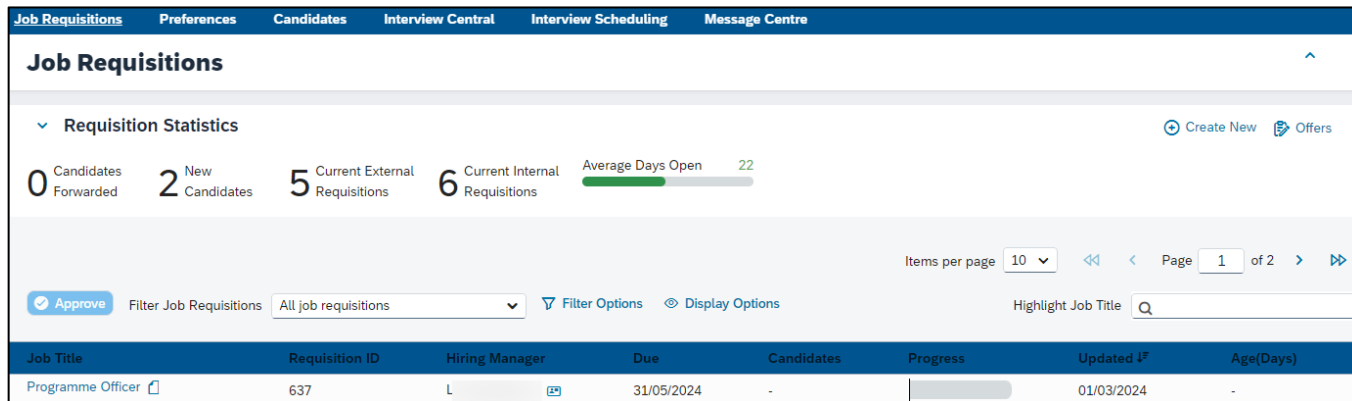
5. The *Job Requisitions* page appears. The *Current External Requisitions* and *Current Internal Requisitions* reflect the number of posted external and internal adverts for job requisitions you are involved in. As applicants apply for a job, the number will increase in the *Candidates* column.



Removing a job posting (advert)

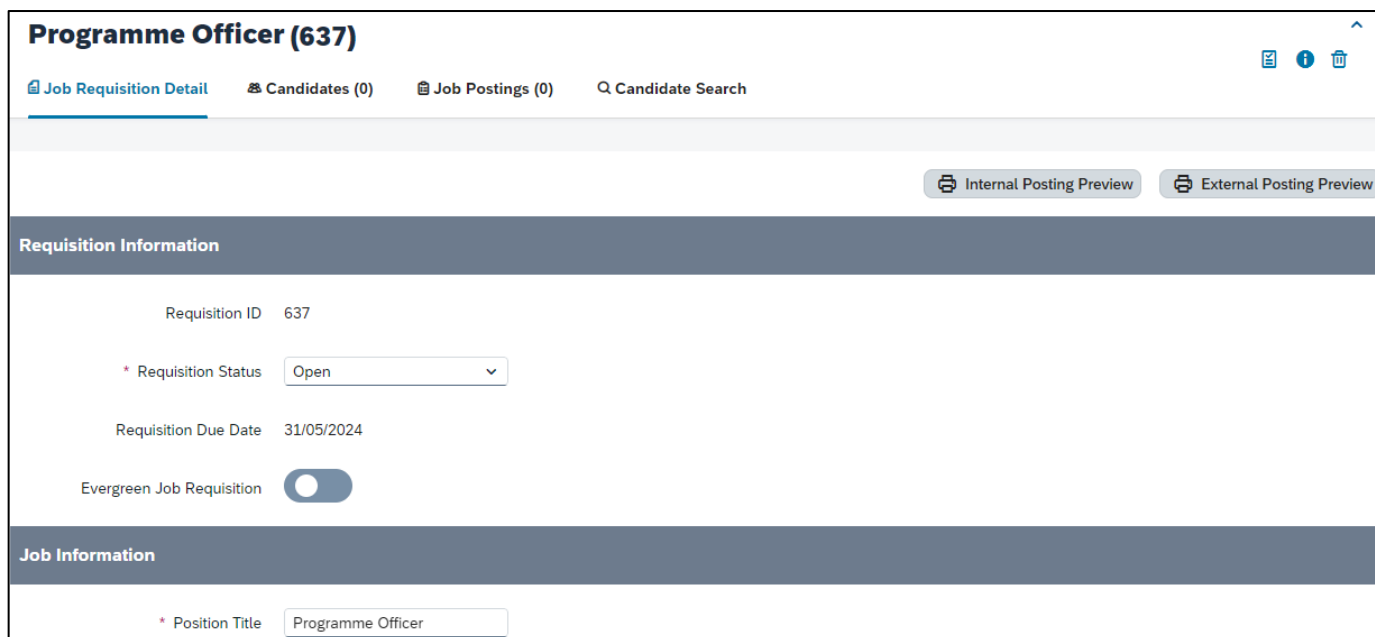
Procedure

1. [Log in to SuccessFactors and access the Home page.](#)
 - Choose *Home > Recruiting*.
2. 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 4 below.

3. The selected job requisition opens.



- Click *Job Postings*.

Removing a job posting (advert)

- The *Job postings* page appears, displaying details of intranet (internal) and corporate (external) postings. The job board posting is not currently in use at UCT.

Posting Type	Posting Status	Posting Start Date	Posting Start Time	Posting End Date	Posting End Time	Last Modified Date	Last Modified By	Action
Intranet Posting	Posted	23/05/2024	10:29 SAST	05/06/2024	23:59 SAST	23/05/2024	L	Remove Post
Corporate Posting	Posted	23/05/2024	10:42 SAST	05/06/2024	23:59 SAST	23/05/2024	L	Remove Post

Note: Postings expire at 11:59 pm at the end of the selected expiry date. Please note, new postings can take several minutes before they are returned in search results on the career sites.

- Click **Remove Post** in the appropriate job posting line. To repost an advert with new dates, see [step 4 of Creating a job posting \(advert\)](#).
- Click *Job Requisitions* in the top menu to return to the overview of all the job requisitions you are involved in as a Recruitment Advisor or as a selection committee member.

- The *Job Requisitions* page appears.

Job Title	Requisition ID	Hiring Manager	Due	Candidates	Progress	Updated	Age(Days)
Programme Officer	637	L	31/05/2024	-		01/03/2024	-

Running the Candidate list report

Background

This report can only be run by the Servicing Officer (Recruitment Advisor) for the job requisition.

Before you begin

You will need the job requisition number to run the report.

Procedure

1. [Log in to SuccessFactors and access the Home page.](#)

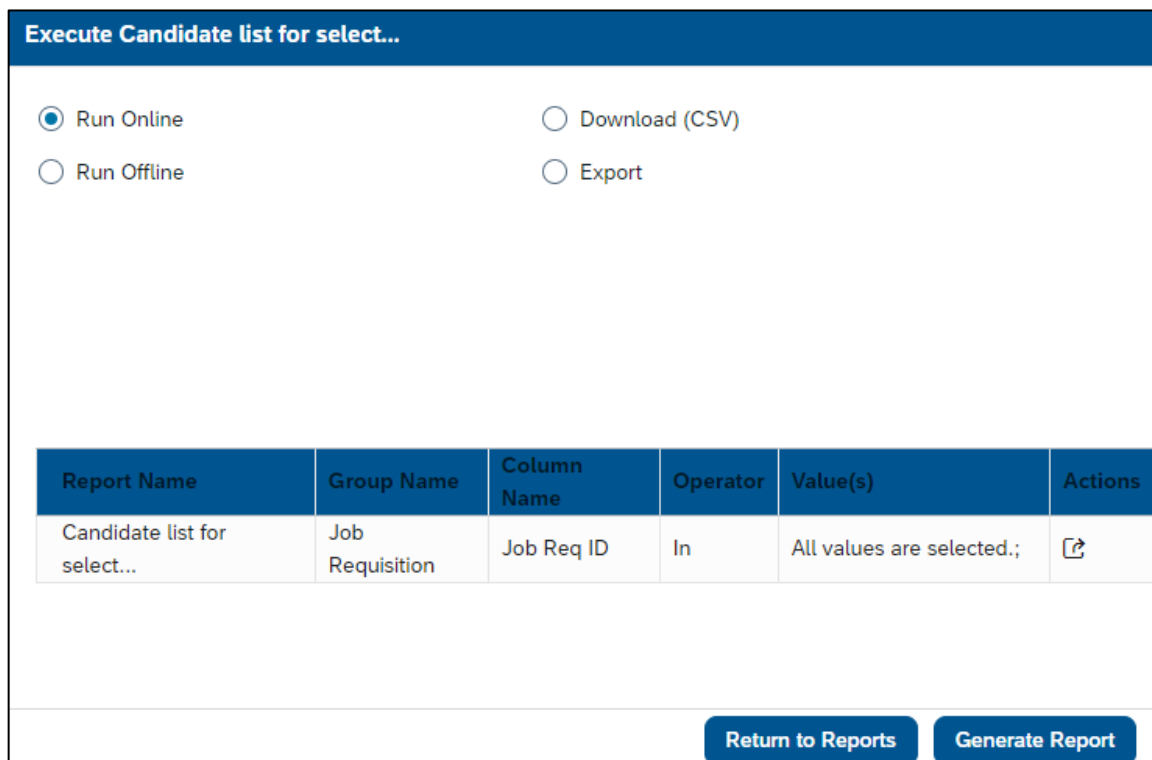
- Choose *Home > Reporting*.

2. The *Report Centre* page appears.

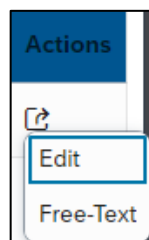


- Click the *Candidate list for selection committee (Servicing Officer)* report name.

3. The *Execute Candidate list for select...* dialogue box appears.




- In the *Actions* column, click and choose *Edit*.



Running the Candidate list report

4. The *Define "Job Req ID" Filter* dialogue box appears.

- Select *By My Selection*.
- The *Filter Values* section appears.

- Select the appropriate job requisition number from the list on the left. If the correct job requisition number is not visible on screen, use the arrow buttons to move through the list.
- Click  .

Running the Candidate list report

- The *Execute Candidate list for select...* dialogue box reappears, the selected job requisition number appears in the *Value(s)* column.

Execute Candidate list for select...

Run Online

Download (CSV)

Run Offline

Export

Report Name	Group Name	Column Name	Operator	Value(s)	Actions
Candidate list for select...	Job Requisition	Job Req ID	In	690;	

Return to Reports

Generate Report

- Click .

- The *Candidate List for selection committee (Servicing Officer)* dialogue box appears.

Candidate list for selection committee (Servicing Officer)

Download
 CSV
 Excel
 PDF
 PPT

Showing page 1 of 1

Job Req ID	External Title	First Name	Last Name	Ethnicity	Gender	City	Candidate Country/Region	Application Date (Timestamp)	Source Details	Application Status	Comment
690	Programme Officer		D	White	Female	Cape Town	ZA	18/06/2024 16:18:39	Internal Site	Default	D rating: Doesn't meet requirements
690	Programme Officer		D	White	Female	Cape Town	ZA	18/06/2024 16:18:39	Internal Site	Default	D - no evidence of requirements in CV or cover letter.
690	Programme Officer		D	White	Female	Cape Town	ZA	18/06/2024 16:18:39	Internal Site	Default	B candidate: Meets some of the requirements but used abridged CV.
690	Programme Officer		C	Not Declared	Other	Cape Town	ZA	18/06/2024 16:16:57	Internal Site	Default	A rating: Meets all requirements and has good experience.
690	Programme Officer		W	African	Female	Cape Town	ZA	18/06/2024 16:25:18	Recruiting Marketing: Direct	Default	A rating: Meets all requirements and some of the advantageous ones as well.
690	Programme Officer		H	Not Declared	Male	Cape Town	ZA	18/06/2024 16:24:10	Recruiting Marketing: RCM Redirect	Default	B rating: Only meets some of the requirements.
690	Programme Officer		W	White	Female	Cape Town	ZA	18/06/2024 16:22:27	Internal Site	Default	D rating: Doesn't meet any of the requirements and no relevant experience.
690	Programme Officer		C	Not Declared	Other	Cape Town	ZA	18/06/2024 16:16:57	Internal Site	Default	B candidate: Good experience but doesn't meet all requirements.
690	Programme Officer		W	African	Female	Cape Town	ZA	18/06/2024 16:25:18	Recruiting Marketing: Direct	Default	A candidate: Excellent experience, meets all requirements with some extras.
690	Programme Officer		H	Not Declared	Male	Cape Town	ZA	18/06/2024 16:24:10	Recruiting Marketing: RCM Redirect	Default	B candidate: Doesn't seem to meet all requirements and only has some relevant experience.
690	Programme Officer		W	White	Female	Cape Town	ZA	18/06/2024 16:22:27	Internal Site	Default	D candidate: Missing all requirements, no experience.
690	Programme Officer		W	White	Female	Cape Town	ZA	18/06/2024 16:22:27	Internal Site	Default	D - doesn't meet requirements.
690	Programme Officer		H	Not Declared	Male	Cape Town	ZA	18/06/2024 16:24:10	Recruiting Marketing: RCM Redirect	Default	B - Meets part of the requirements.
690	Programme Officer		C	Not Declared	Other	Cape Town	ZA	18/06/2024 16:16:57	Internal Site	Default	A - excellent experience and seems to meet all requirements.
690	Programme Officer		W	African	Female	Cape Town	ZA	18/06/2024 16:25:18	Recruiting Marketing: Direct	Default	A - Meets requirements with good experience.
690	Programme Officer		E	Not Declared	Female	Cape Town	ZA	21/06/2024 14:46:28	Internal Site	Auto	

Return to Reports

- Choose the applicable *Download* option (CSV, Excel, PDF, PPT) at the top.

- When finished download, click to return to the *Report Centre* page.

Adding candidate ratings and changing candidate status

Background

After the selection committee members have entered their ratings in the comments for each candidate, this procedure is used to add a final rating to a candidate (A, B, O, D if standard mandate or A, B, C if open mandate) and to change their status (e.g. shortlisted, 1st Interview, rejected).

Note: The Recruitment Advisor can request an Excel report from the Systems Office, showing an overview of all the selection committee comments/ratings per candidate. This report can be useful during the discussion and finalisation of candidate gradings.

Procedure

1. [Log in to SuccessFactors and access the Home page.](#)
 - Choose *Home > Recruiting*.
2. 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](#). **Note:** The number of new applications will change as soon as one person starts viewing candidate profiles or CVs.

Adding candidate ratings and change candidate status

3. The *Candidate Workbench* page appears.

- Change the number of candidates viewed using the available options e.g. *View active candidates* or *View all candidates*.

- The *Talent Pipeline* shows the status of all candidates in the current job requisition. Candidate status can only be changed by the Recruitment Advisor. In the example below there are 5 candidates in total but only 4 are active as 1 was automatically disqualified based on their answers to the application screening questions. Scroll through the *Talent Pipeline* using the arrows on either side.

Adding candidate ratings and change candidate status

- The *Candidates* section lists candidates based on the selection made in the *Talent Pipeline* above (*View active candidates vs View all candidates*).

Candidates: View active candidates (4)

0 Selected **Action** Display Options Filter Options Highlight Candidate

<input type="checkbox"/>	Name ↑	New Status	Forwarded By	Forwarded from Requisition	Date Forwarded	Candidate Type	Interview Result	Overdue Interviews	Rating	Source
<input type="checkbox"/>	J	New New Application				Internal			N/A	Internal Site
<input type="checkbox"/>	L	New New Application				External			N/A	Recruiting Marketing
<input type="checkbox"/>	M	New New Application				Internal			N/A	Internal Site
<input type="checkbox"/>	V	New New Application				External			N/A	Recruiting Marketing

Items per page 10 Page 1 of 1

- Use **Display Options** to hide columns that may not be relevant e.g. *Forwarded By*, *Forwarded from Requisition*, *Date Forwarded*, *Source*, *Candidate Source*. The *Freeze Options* can be used to freeze the first column or freeze the table header. **Note:** These settings will be applied to all your job requisitions.

0 Selected **Action** Display Options Filter Options

<input type="checkbox"/>	Name ↑	New Status	Candidate Type	Interview Result	Overdue Interviews	Rating	Phone Number	Last Updated
<input type="checkbox"/>	J	New New Application	Internal			N/A	082	01/03/2024
<input type="checkbox"/>	L	New New Application	External			N/A	084	01/03/2024
<input type="checkbox"/>	M	New New Application	Internal			N/A	082	01/03/2024
<input type="checkbox"/>	V	New New Application	External			N/A	083	01/03/2024

Items per page 10 Page 1 of 1

- The *Candidate Type* column shows external vs internal to identify which candidates applied via the external careers site vs the internal SuccessFactors careers site (only accessible to current UCT staff members). **Note:** If you have the *Source* and *Candidate Source* columns visible, the Recruiting Marketing site refers to the external Careers site.
- Select a candidate to view by clicking their name in the *Name* column.

Adding candidate ratings and change candidate status

4. The selected candidate application appears.

The screenshot displays the 'Application' form for an internal candidate. The form is divided into several sections:

- Application Section:**
 - Candidate Status:** A dropdown menu set to 'New Application'.
 - Candidate Rating:** A dropdown menu set to 'No Selection'.
 - Additional Documentation:** A link to 'Attach a document'.
 - Licenses/Qualifications/References/Other Attachments:** A link to '0 documents attached'.
- Comments Section:**
 - Author:** L
 - Date:** 02/03/2024
 - Comment:** Rating: A
Candidate meets all requirements.
- Correspondence Section:**
 - Send Email:** A button to send an email.
 - Content:** 'There are no items in this section.'
- Offer Letter Section:**
 - Content:** 'There are no items in this section.'
- Application Status Audit Trail Section:**
 - Date:** 01/03/2024
 - User:** O
 - Status:** New Application
- Screening Questions Section:**
 - Screening Details:**
 - Are there any circumstances relevant to your application of which, in the interests of fair and frank disclosure, you should make the selection committee aware? (If so, salient particulars are required in a separate document):** No
 - Do you have a valid RSA Drivers Licence:** Yes
 - Rate your MS Teams skill level:** Intermediate

Application section:

- Select the appropriate *Candidate Rating* (e.g. A, B, O, D for standard mandate or A, B, C for open mandate).
- Select the appropriate *Candidate Status* to move the candidate within the talent pipeline i.e. 1st Interview, Shortlisted (if not going immediately to 1st Interview), Reject Pre-Interview, Reject – No Email.
- Note:** If a candidate would be shortlisted but is missing information, the pre-screening status can be assigned while additional information is requested.
- If applicable or required, add a comment to justify the status change in the field below.
- Click [Save](#) (top right).

5. The page refreshes and the candidate is moved to the appropriate section of the talent pipeline e.g. 1st Interview, Shortlisted.

- For each candidate, repeat the process from step 5 above.
- When all candidates have been rated and their status changed, scroll down and click [Return to List](#).

Adding candidate ratings and change candidate status

6. The *Candidate Workbench* page reappears, displaying all active candidates. The *Status* column reflects each active candidate’s current status, and their *Candidate Rating* appears in a column on the right.

The screenshot shows the 'Candidate Workbench' for 'Programme Officer (637)'. At the top, there are navigation tabs: Job Requisitions, Preferences, Candidates, Interview Central, Interview Scheduling, and Message Centre. Below this, there's a search bar and a status dropdown set to 'Open'. A talent pipeline is visible with stages: Forwarded (0), Invited To Apply (0), New Application (0), Shortlisted (1), Pre-screening (1), Assessment (0), 1st Interview (2), Psychometric Testing (0), 2nd Interview (0), Offer (0), and Reject (0). Below the pipeline, there are 4 active candidates listed in a table. The 'Status' and 'Candidate Rating' columns are highlighted with red boxes.

Name	Status	Candidate Type	Interview Result	Overdue Interviews	Rating	Phone Number	Last Updated	Candidate Rating
J	Pre-screening	Internal			N/A	082	04/03/2024	B – (S) Meets some requirements and designated
L	1st Interview	External			N/A	084	04/03/2024	A – (S) Meets all requirements and matching EE t
M	1st Interview	Internal			N/A	082	04/03/2024	A – (S) Meets all requirements and matching EE t
V	Shortlisted	External			N/A	083	04/03/2024	B – (S) Meets some requirements and designated

– If required, use the talent pipeline to view any candidates with statuses that removed them from the active candidates group e.g. Reject – No Email, Automatic Disqualified

Four blue buttons representing candidate statuses:

- Reject Pre-Interview - Email (0)
- Reject Post-Interview - Email (0)
- Reject - No Email (1)
- Automatic Disqualified (1)

Changing candidate status after shortlisting

Background

This procedure is used to move candidates to the applicable section of the talent pipeline after the initial [rating and status change](#). This procedure is also used for any other talent pipeline moves later in the recruitment process e.g. 2nd interview, reject pre-interview, reject post-interview.

Procedure

1. [Log in to SuccessFactors and access the Home page](#).

- Choose *Home > Recruiting*.

2. 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](#).

3. The *Candidate Workbench* page appears.

- In the talent pipeline, click the relevant section (e.g. *Shortlisted, Pre-screening*) to view the list of candidates.

Note: Any previously selected *Display Options* will affect the visible columns in the candidate list.

- See: [Changing status for multiple candidates](#) or [changing status for one candidate](#).

Changing candidate status after shortlisting

Changing status for multiple candidates

- Either click the checkbox at the top of the *Name* column to select all candidates or select each candidate using the checkbox to the left of their name.

2 Selected		Action ▾	Display Options	
<input checked="" type="checkbox"/>	Name ↑		New Status	Candidate Type
<input checked="" type="checkbox"/>	☰ J	📧	Shortlisted	Internal
<input checked="" type="checkbox"/>	☰ V	📧	Shortlisted	External

- In the *Action* menu, choose *Move Candidate*.

<input checked="" type="checkbox"/> Advance Candidate
<input type="checkbox"/> Disqualify Candidate
<input checked="" type="checkbox"/> Move Candidate
<input type="checkbox"/> Email Candidate
<input type="checkbox"/> Add Comment

- The *Move Candidate* dialogue box appears, listing all selected candidates on the left.

Move Candidate

Candidates	Action Required
J	Select status to move candidate(s) to: <input style="width: 100%; height: 20px;" type="text" value="- Select -"/>
V	

- Select the appropriate status using the dropdown arrow, e.g. 1st Interview.

Note: If the candidates are skipping a step in the talent pipeline you will be prompted to enter a justification below the status field e.g. no assessment required, no pre-screening required.

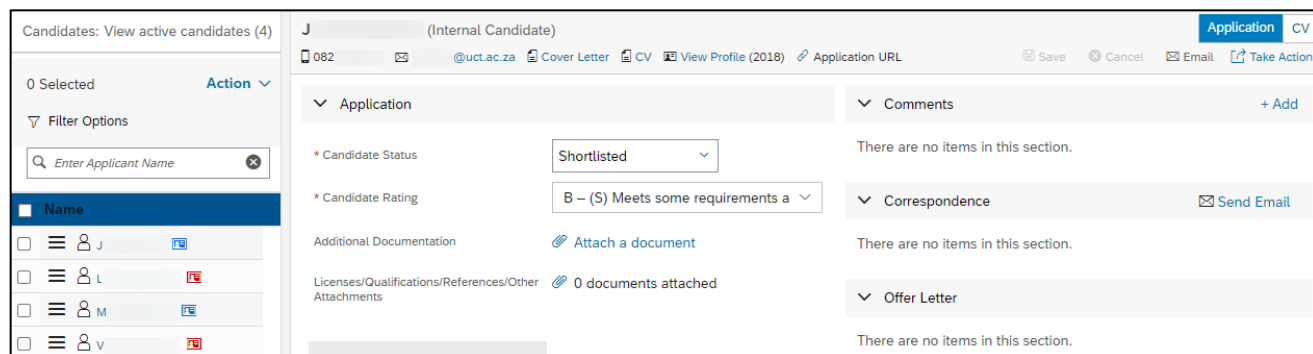
- Click .

The *Candidate Workbench* page is refreshed, and the selected candidates appear in the appropriate section of the talent pipeline.

Changing candidate status after shortlisting

Changing status for one candidate

- Select a candidate to view by clicking their name in the *Name* column.
- The selected candidate application appears.



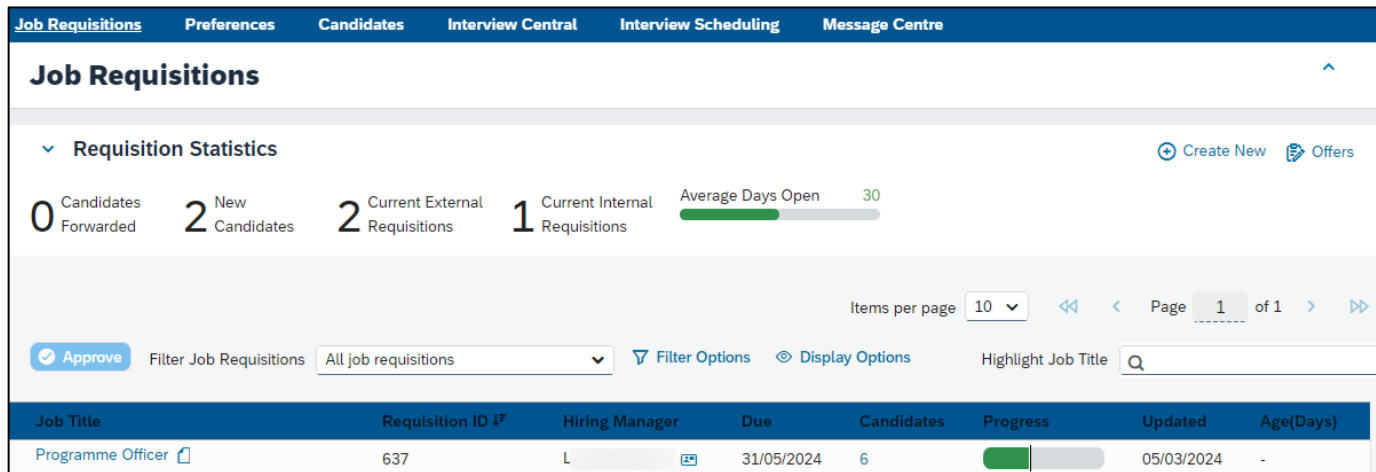
Application section:

- Select the appropriate *Candidate Status* to move the candidate within the talent pipeline e.g. 1st Interview. If applicable, add a comment on the status change in the field below.
Note: If the candidate is skipping a step in the talent pipeline you will be prompted to enter a justification below the status field.
- Click **Save** (top right). The candidate is moved to the appropriate section of the talent pipeline.
- Repeat the steps above for any additional status changes for a single candidate.

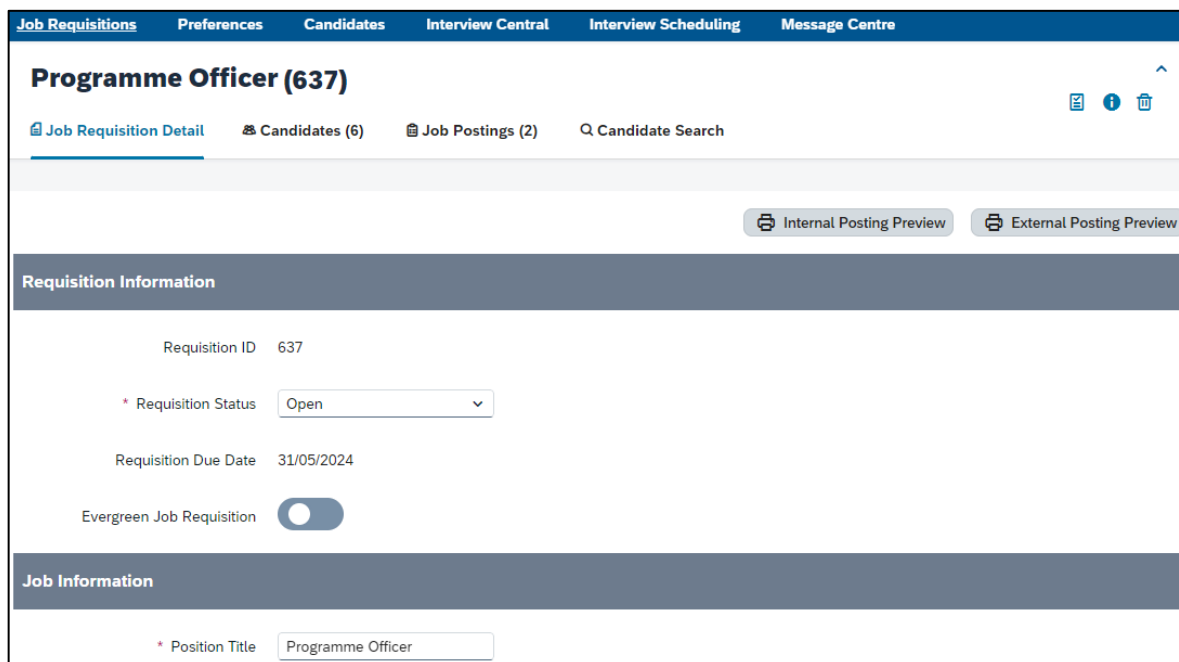
Adding a selection committee member to a job requisition

Procedure

1. [Log in to SuccessFactors and access the Home page.](#)
 - Choose Home > Recruiting.
2. The *Job Requisitions* page appears.



- Select the appropriate job requisition by clicking the *Job Title* e.g. Programme Officer.
3. The selected job requisition opens.



- Scroll down to the *Requisition Team* section.

Adding a selection committee member to a job requisition

Requisition Team section:

Requisition Team

* Hiring Manager , Departmental Manager (20027650) [Find User..](#)

* Servicing Officer , Recruitment Advisor (20046320) [Find User..](#)

Manage Additional Users

Recruiting Team

* HR Business Partner , HR Business Partner (20027266) [Find User..](#)

* Chairperson , HOD: Dept of Accounting (20000294) [Find User..](#)

Manage Additional Users

Selection Committee Members

- In the *Selection Committee Members* field, click in the search field next to the existing committee members. Enter part or all of the name and select the person from the dropdown list. Repeat for any additional selection committee members.
- Click Save Changes at the bottom of the page.
- Click *Job Requisitions* to return to the Job Requisitions overview page.

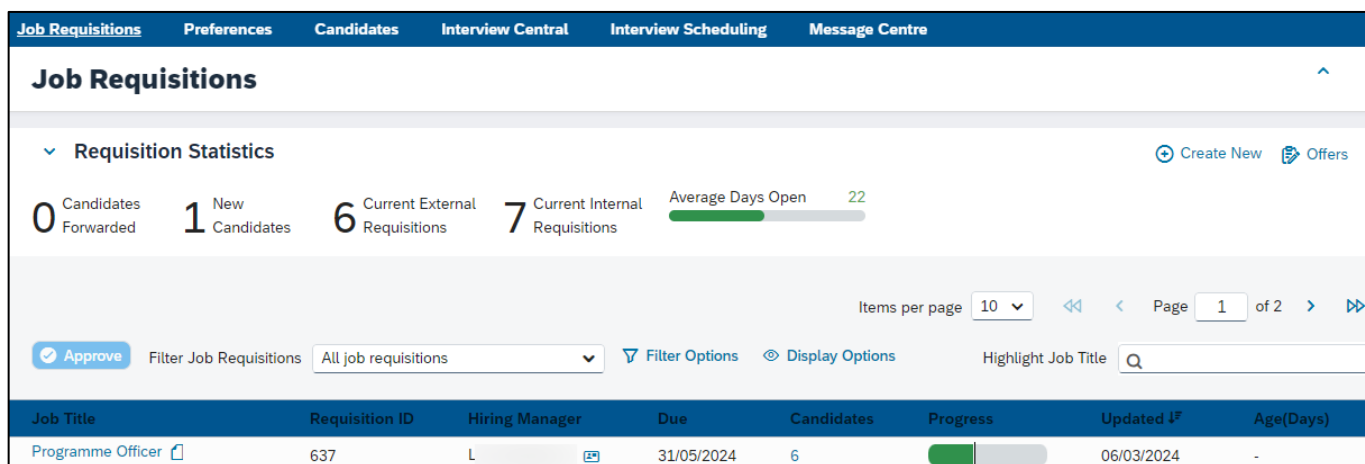
Reviewing candidate competency ratings and recommended candidates after interview

Background

Selection committee members enter competency ratings for each candidate after the interview and can optionally upload their interview notes. Finally, they select whether a candidate is recommended or not. The Recruitment Advisor can review all entries submitted by the selection committee members.

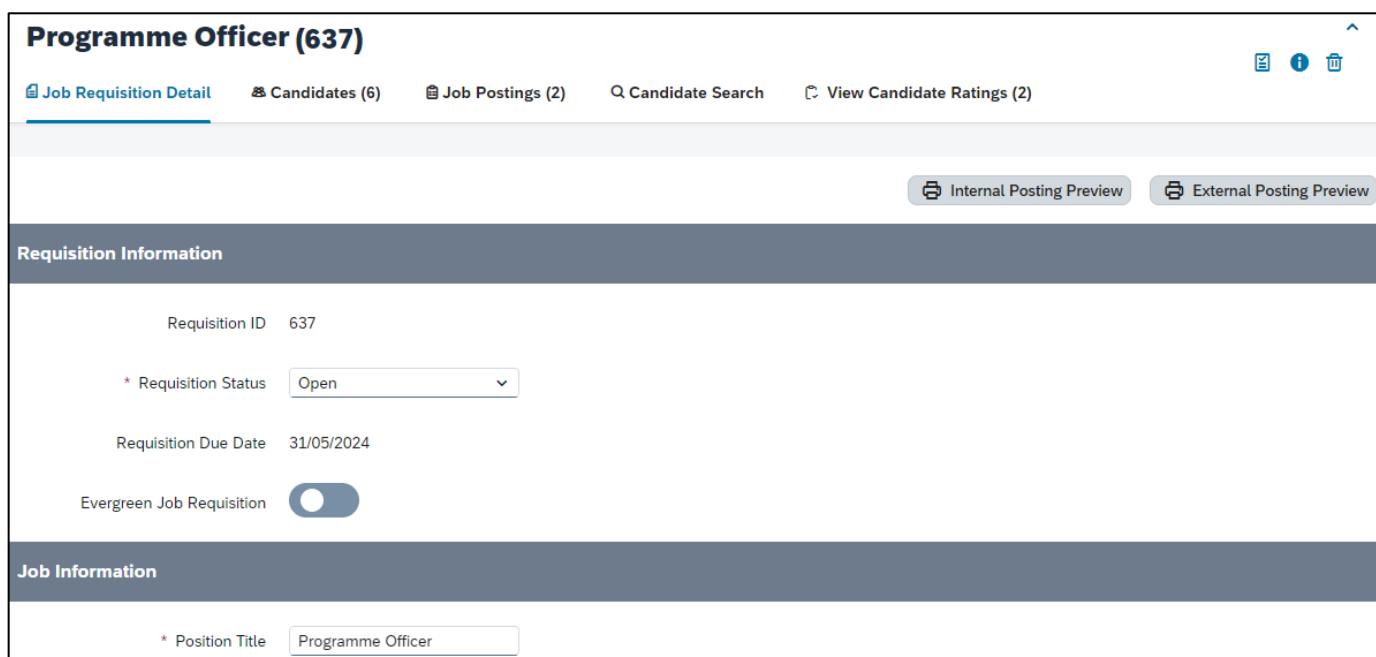
Procedure

1. [Log in to SuccessFactors and access the Home page.](#)
 - Choose *Home > Recruiting*.
2. The *Job Requisitions* page appears.



- Select the relevant job by clicking the *Job Title* (e.g. Programme Officer).

3. The *Job Requisition Detail* page appears.



- Click *View Candidate Ratings*.

Reviewing candidate competency ratings and recommended candidates after interview

4. The *View Candidate Ratings* page appears.

Programme Officer (637)

Job Requisition Details Candidates (6) Job Postings (0) Candidate Search [View Candidate Ratings \(2\)](#)

Include Disqualified Candidates

Items per page 10 Page 1 of 1 Print Preview

Competency	L	M
Communication	5.00	3.33
Planning and organizing / work management	5.00	2.00
Adaptability / flexibility	4.67	4.00
Quality commitment/ work standards	4.00	3.33
Summary	4.67	3.17
Notes	1 Notes	0 Notes

Stack Ranking

Competency: Summary

1 L 4.67

2 M 3.17

– Hover over a competency rating to view the rating per interviewer and any comments.

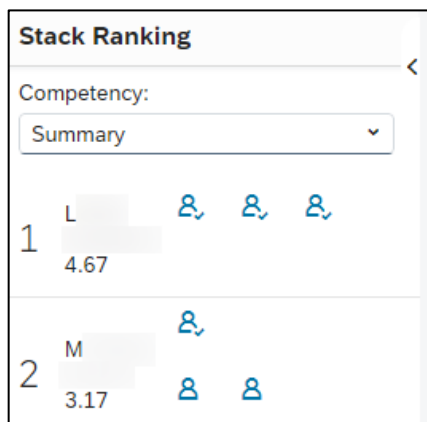
Competency	Rating
Planning and organizing / work management	5.00
Adaptability / flexibility	4.67
Quality commitment/ work standards	4.00
Summary	4.67
Notes	1 Notes

Interviewers	Ratings	Comments
M	1 2 3 4 5	
J	1 2 3 4 5	
L	1 2 3 4 5	Responses to interview questions demonstrated excellent planning and organising skills.

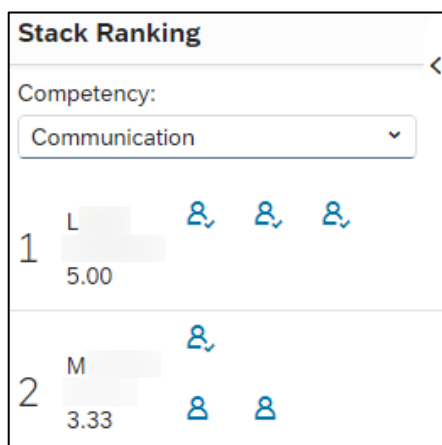
– If selection committee members attached their interview notes, they will appear in the *Notes* section. Click the *Notes* link to access the attached notes.

Reviewing candidate competency ratings and recommended candidates after interview

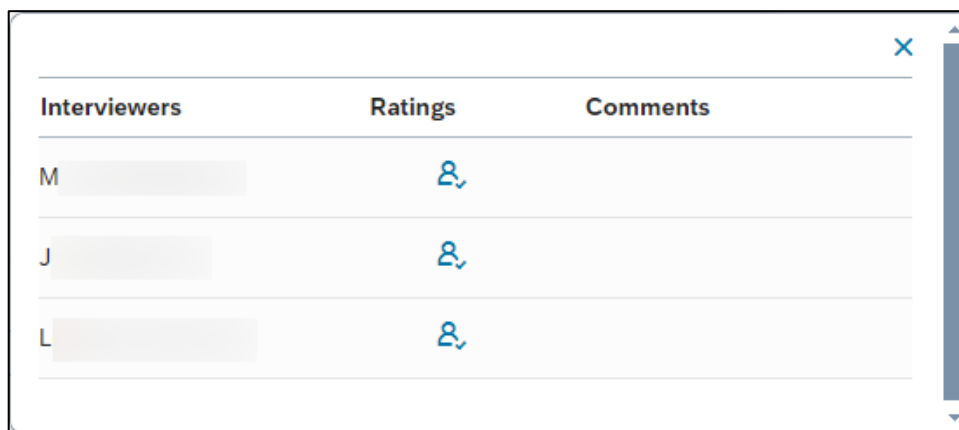
- The *Stack Ranking* section on the right, sorts the candidates based on a summary of all competencies or on a single competency.



- Use the dropdown list to change the selected competency (e.g. Communication below). The candidate list in the *Stack Ranking* section will re-order so the candidate with the highest score for the selected competency appears at the top of the list.



- In the *Stack Ranking*, the overall ratings for each candidate are reflected alongside their name and competency score. indicates a recommended candidate. Hover over the recommendation icons to view the rating for each interviewer, including any comments.



- Click [Print Preview](#) to print or download (via print to PDF) a full report of all ratings per candidate. **Note:** As the selection committee members can edit their ratings and candidate recommendations, the Recruitment Advisor should download the full report to ensure the committee has a final view of the competency ratings and candidate recommendations.

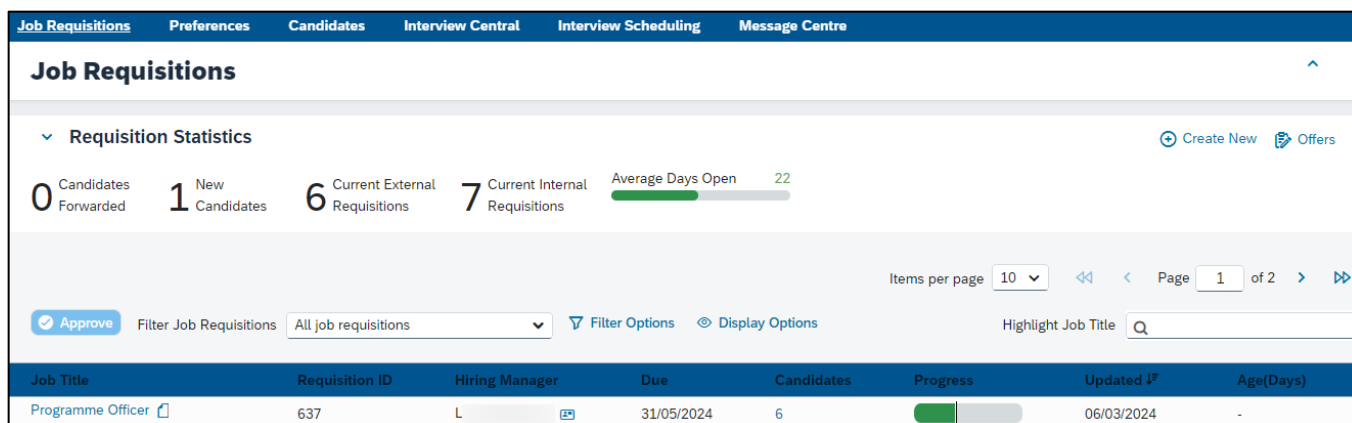
Starting the offer approval process

Before you begin

If there is more than one candidate to appoint, repeat this procedure for each candidate.

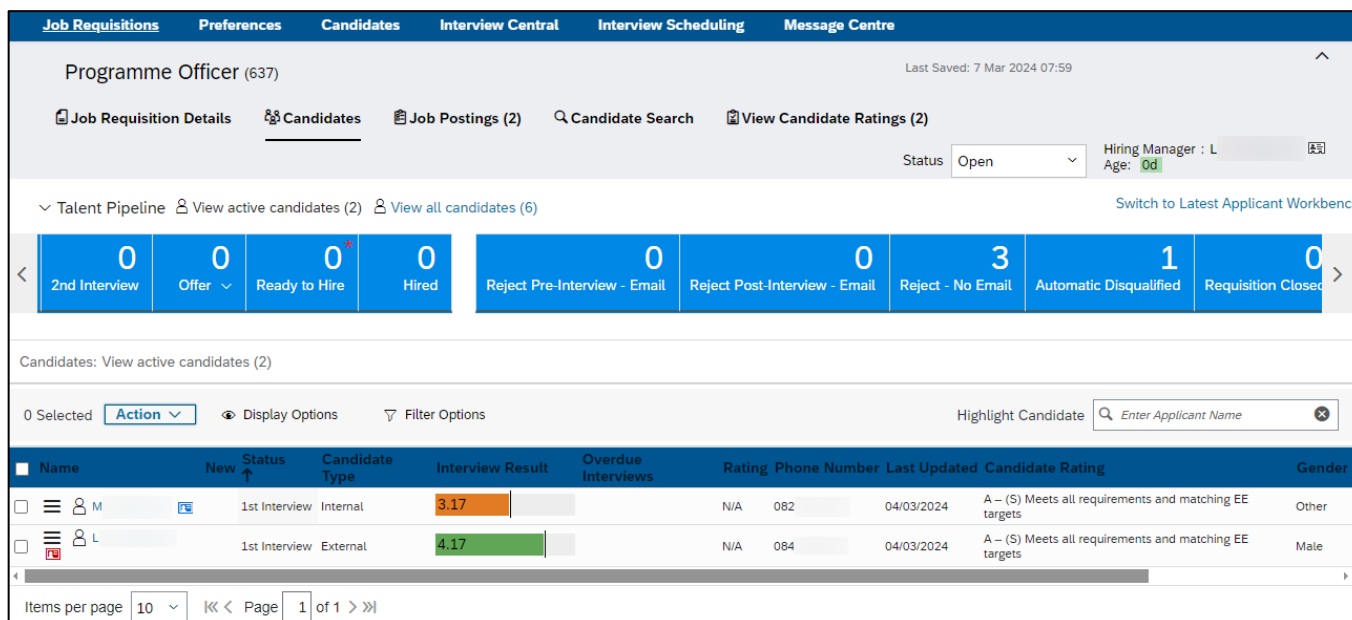
Procedure

1. [Log in to SuccessFactors and access the Home page.](#)
 - Choose *Home > Recruiting*.
2. 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](#).

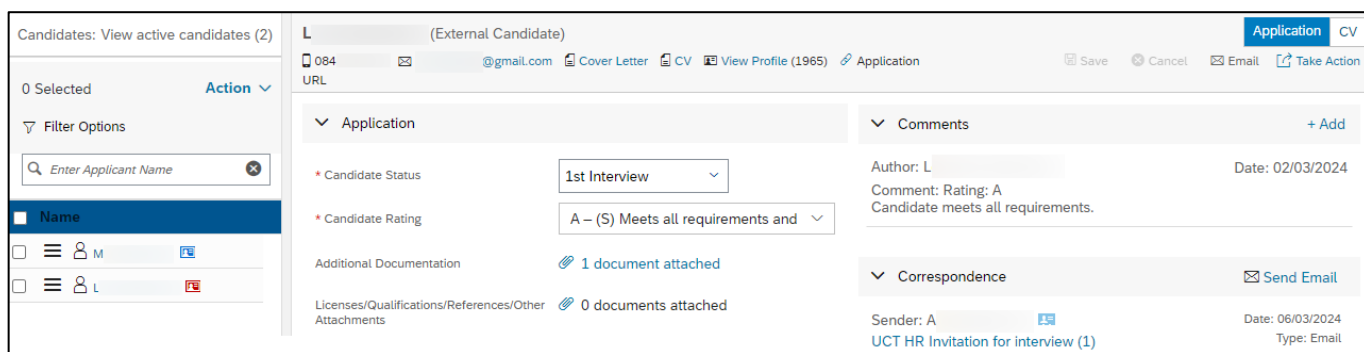
3. The *Candidate Workbench* page appears.



- Ensure that *View active candidates* is selected.
- Select the candidate by clicking their name in the *Name* column.

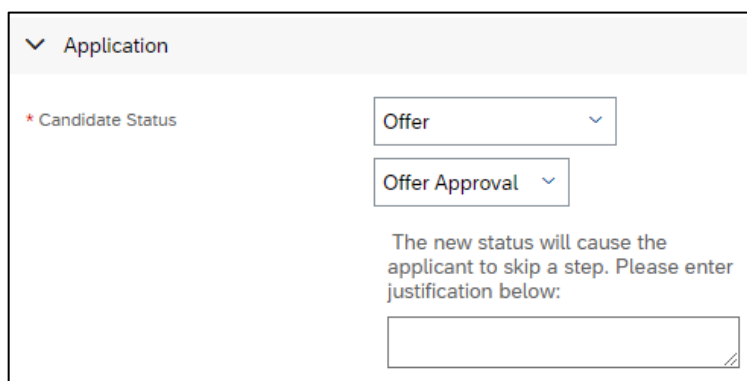
Starting the offer approval process

4. The selected candidate profile appears.

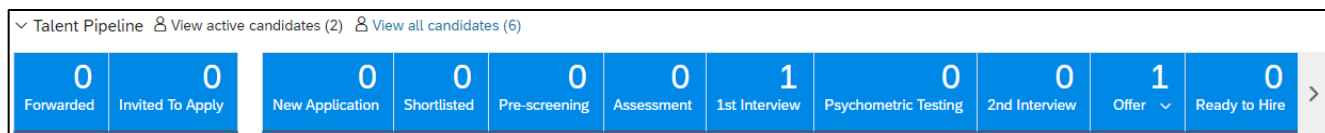


Application section:

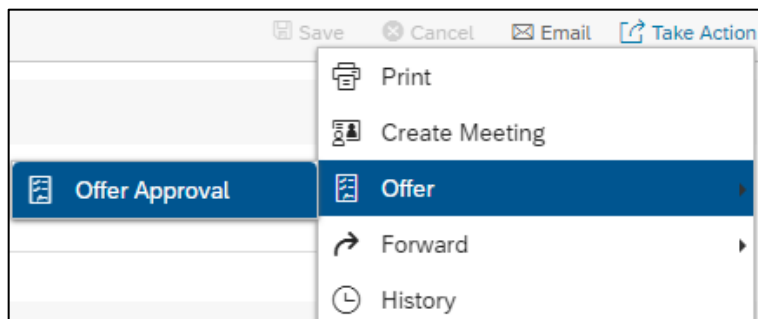
- In the *Candidate Status* field, select *Offer*.
- Ensure the field below reflects *Offer Approval*.



- Enter a justification for the change in the field provided.
- Click **Save** (top right).
- The candidate is moved to the *Offer* section of the talent pipeline.



- Click **Take Action** (top right, below *Application* button) and choose *Offer > Offer Approval*.



Starting the offer approval process

5. The *Offer Approval* page appears.

Offer Approval: **L** for Programme Officer

Offer Details

Language	English UK (English UK) ▼
* Select Offer Template	Offer Details 1.0 ▼
Requisition ID	637
Job Title	Programme Officer
* Position Name	<input style="width: 100%;" type="text"/>
EE Subgroup	Permanent
Personnel Area	Faculty of Commerce (2002) 🔗
Personnel Subarea	PASS 5 - 12 (1003) 🔗
Org Unit	<input style="width: 100%;" type="text" value="Coll of Accounting: Operations & Admin"/>
Cost Center	COM
Hiring Manager	L

- The position requisition details appear in the *Offer Details* section.
- Enter the *Position Name*.

Starting the offer approval process

* First Name	<input type="text" value="L"/>
* Last Name	<input type="text"/>
Pay Scale Group	PC09 (PC09)
* Annual COE to be offered (e.g. R300,000.00)	<input type="text"/>
* Proposed Start Date	<input type="text" value="DD/MM/YYYY"/>
Contract Duration	<input type="text" value="No Selection"/>
Candidate CV	CV
Cover Letter	Cover Letter
Other Supporting Documents	Attach a document

- Enter the *Annual COE to be offered*.
- Select the *Proposed Start Date*.
- If a contract position, select the *Contract Duration*.
- In the *Other Supporting Documents* field, click [Attach a document](#) to attach the selection committee report and any other relevant documents.
 - The *Documents* dialogue box appears.

Documents

Select a file to upload

Choose File

Use Selected	File name	Updated	File Size	Delete


- In the *Choose File* field, click to select the file to attach.
- Click .

Starting the offer approval process

- A message at the top of the dialogue box confirms the attachment was uploaded and the file name appears in the table. If there are additional documents to upload, repeat the steps above.

The screenshot shows a 'Documents' dialog box with a blue header. A light blue message box at the top says 'Your attachment is uploaded.' Below this, it says 'Select a file to upload'. There is a 'Choose File' button, a text input field containing 'Selection committee report...', and 'Browse' and 'Upload' buttons. Below the input field is a table with columns: 'Use Selected', 'File name', 'Updated', 'File Size', and 'Delete'. The table contains one row with a checked checkbox, the file name 'Selection committee report.docx', the date '07/03/2024', and the size '12 KB'. At the bottom right, there are 'OK' and 'Cancel' buttons.

Use Selected	File name	Updated	File Size	Delete
<input checked="" type="checkbox"/>	Selection committee report.docx	07/03/2024	12 KB	

- Select the *Use Selected* checkbox for each file.
Note: This checkbox must be selected, for the file(s) to be successfully attached.
- Click .
- Ensure the *Other Supporting Documents* field reflects the correct number of attached documents.

The screenshot shows a text input field with the text 'Other Supporting Documents' and a blue link icon followed by '1 document attached'.

Approvers: Version 1 section:

The screenshot shows the 'Approvers: Version 1' section. It has a dropdown arrow and the text 'Approvers: Version 1'. Below this, it says 'Status Draft'. There is a search field for 'Offer Approval' with a 'Find User..' button and a plus sign. Below the search field is a 'Comment' text area. At the bottom, there are buttons for 'Send For Approval', 'Save', 'Back to Candidate List', and 'Back to Candidate'.

- Enter the first approver’s name in the search field alongside *Offer Approval*.

Starting the offer approval process

- Click **+** to add an additional approver line below the first approver.
- Enter the approver’s name in the search field alongside *Ad hoc approver 1*.

The screenshot shows a form titled 'Offer Approval' with a status of 'Draft'. It contains two rows for adding approvers. The first row is labeled '* Offer Approval' and the second is 'Ad hoc approver 1'. Each row has a search input field, a 'Find User..' button, and icons for up/down arrows, adding a new approver, and deleting an existing one. Below these rows is a 'Comment' text area.

- Click **+** to add any further approvers. The number of approvers for the offer depends on the required approvals for the department or faculty and the type of position being filled.

- Click **Send For Approval**.

6. The *Confirmation* dialogue box appears.

The screenshot shows a 'Confirmation' dialog box with a blue header. The main content area contains a green checkmark icon followed by the text: 'This offer detail is being sent for approval. Do you want to continue?'. At the bottom right, there are two buttons: 'Yes' (highlighted in blue) and 'No' (greyed out).

- Click **Yes**.

7. The *Offer Approval* page reappears with the last saved date and time at the top of the page.

- Click **Job Requisitions**.

8. The Recruitment Advisor must manage the offer approval process by informing each approver that they should access SuccessFactors to complete the approval. See [Monitoring offer approvals](#) for identifying where the offer is in the approval process.

Monitoring offer approvals

Background

There are no notifications for offer approvals, the Recruitment Advisor must monitor the process and inform each approver that their approval is required on SuccessFactors.

Procedure

1. [Log in to SuccessFactors and access the Home page.](#)

- Choose *Home > Recruiting*.

2. 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*.

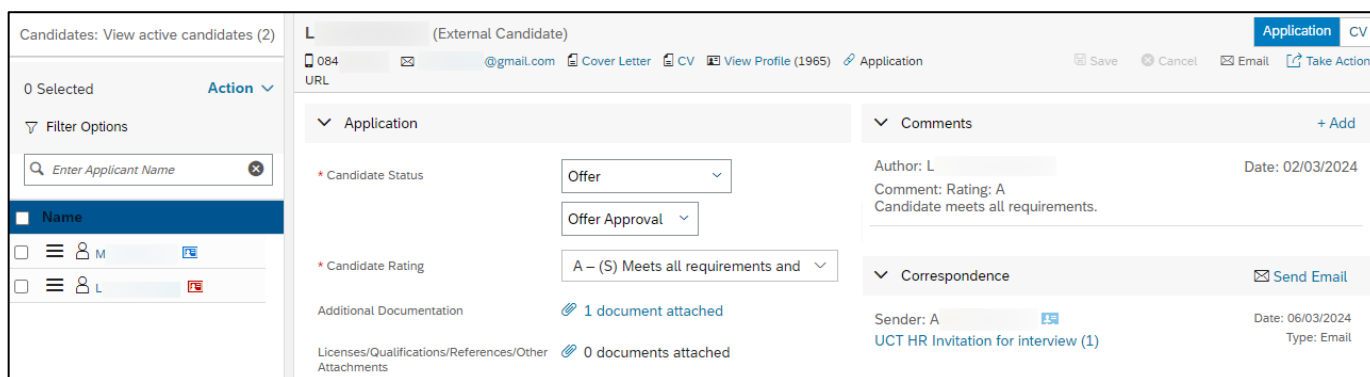
3. The *Candidate Workbench* page appears.

- Ensure that *View active candidates* is selected.

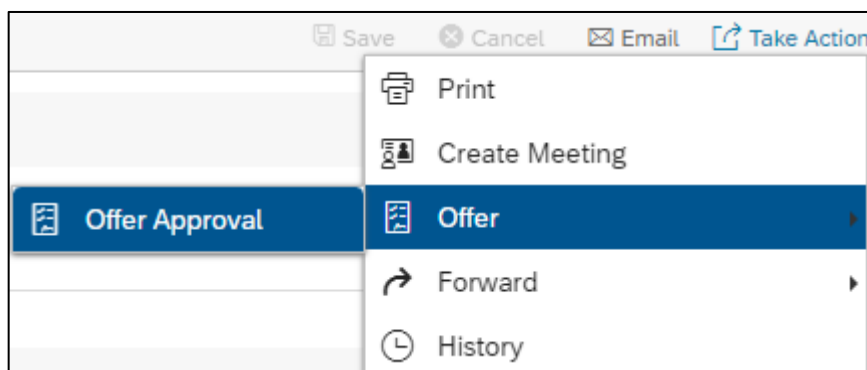
- Select the candidate with the *Offer Approval* status by clicking their name in the *Name* column.

Monitoring offer approvals

4. The selected candidate profile appears.

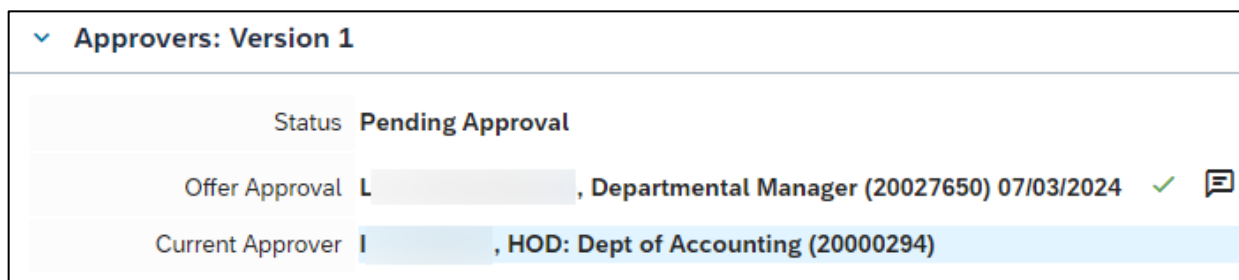


– Click [Take Action](#) and choose *Offer > Offer Approval*.

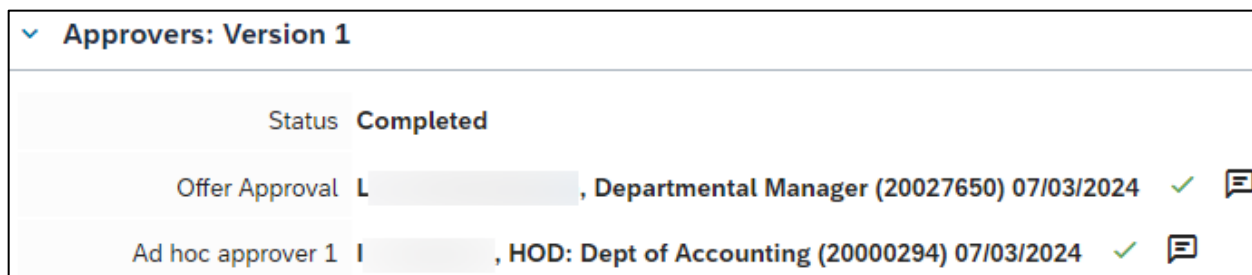


5. The *Offer Approval* page appears.

– Scroll down to the *Approvers: Version 1* section to view the current approval status and workflow. Green ticks indicate complete approvals, blue shading indicates the current approver.



– When all approvals are complete, the *Status* changes to *Completed* and there are green ticks for each approver’s line.



– Click [Job Requisitions](#) to exit the offer approval

– If all approvals are complete, continue from [step 2 of Sending an offer letter to a candidate](#).

Sending an offer letter to a candidate

Before you begin

This procedure will result in the candidate receiving an email from SuccessFactors but also from the line manager. Ensure you check with the line manager before sending this email as the manager may prefer a more personal way of informing the candidate that they were successful.

Procedure

1. [Log in to SuccessFactors and access the Home page.](#)

- Choose *Home > Recruiting*.

2. The *Job Requisitions* page appears.

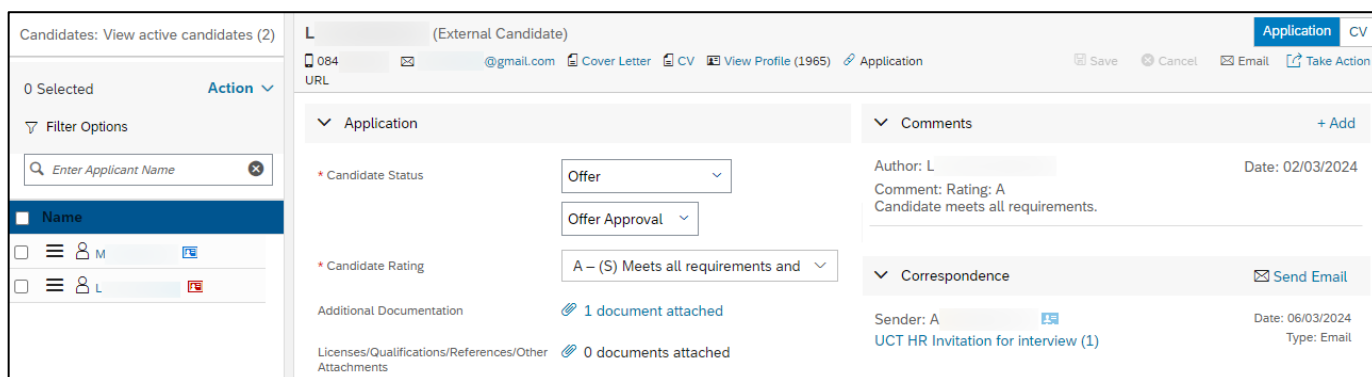
- Click the number in the *Candidates* column (e.g. 6 above) or click *View Menu Options* to the right of the job title and choose *Candidate Summary*.

3. The *Candidate Workbench* page appears.

- Ensure that *View active candidates* is selected.
- Select the candidate with the *Offer Approval* status by clicking their name in the *Name* column.

Sending an offer letter to a candidate

4. The selected candidate profile appears.

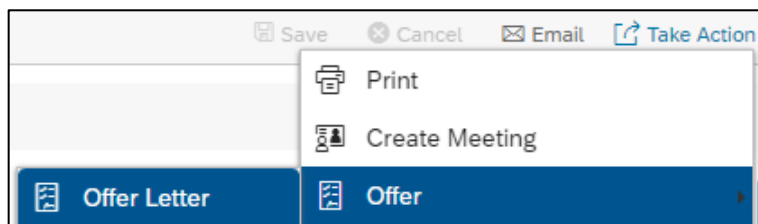


Application section:

- In the *Candidate Status* field, below *Offer*, select *Offer Letter*.



- Click **Save** (top right).
- Click **Take Action** and choose *Offer* > *Offer Letter*.



Sending an offer letter to a candidate

5. The *Offer Letter* page appears.

Offer Letter: L for Programme Officer

L

084

@gmail.com

Country/Region: South Africa

Language: English UK (English UK)

Template: UCT Contract Of Employm...

Subject: Letter of Offer

Note: Use the Alt + F10 command to access the tool bar.

Font Size Bold Italic Underline Bulleted List Numbered List Indent Decrease Indent Increase Link Unlink Text Color Background Color Source

Font Size Paragraph Styles Text Color

[[CANDIDATE_FIRST_NAME]] [[CANDIDATE_LAST_NAME]]
[[CANDIDATE_PROFILE_CONTACT_EMAIL]]

Dear [[CANDIDATE_FIRST_NAME]]

We have pleasure in informing you that the recommendation for your appointment for the position of [[JOB_REQUISITION_CUSTOM2]], pay scale [[JOB_REQUISITION_CUSTOM17]], in [[JOB_REQUISITION_CUSTOM13]] at the University of Cape Town, has been approved.

We are in the process of finalising a contract of employment which will be presented to you in due course by our Appointments Office.

Should you have any additional questions/concerns, please do not hesitate to contact me.

Yours sincerely,

Paragraphs: 7, Words: 78

[Attach a document](#) [Reset Template](#)

Next Step
Preview
Save As Draft
Cancel

– If applicable, change the offer letter wording in the space provided.

Note: Do not change any of the fields in yellow as these are system generated fields that will pull information from SuccessFactors when the letter is sent.

– Click Next Step.

Sending an offer letter to a candidate

6. The second *Offer Letter* page appears.

Job Requisitions **Preferences** **Candidates** **Interview Central** **Interview Scheduling** **Message Centre**

Offer Letter: L [redacted] for Programme Officer

✔ Draft is saved successfully

* Send Offer to: [redacted]@gmail.com

Subject: Letter of Offer

L [redacted]
[redacted]@gmail.com

Dear L [redacted]

We have pleasure in informing you that the recommendation for your appointment for the position of **Programme Officer**, pay scale PC09, in Coll of Accounting: Operations & Admin at the University of Cape Town, has been approved.

We are in the process of finalising a contract of employment which will be presented to you in due course by our Appointments Office.

Should you have any additional questions/concerns, please do not hesitate to contact me.

Yours sincerely,

L [redacted]
test@dummy.com

0 documents attached

Back Cancel Online Offer Save Offer Letter Email as text Email as PDF attachment Print

- Click **Save Offer Letter**. The **Save Offer Letter** button appears in a lighter shade of blue.
- Click **Email as text**.

7. The *Confirm Email as Text* dialogue box appears.

Confirm Email as Text

This will send the offer in the body of an email.

Cancel Send

- Click **Send**.
- A message at the top of the page confirms that the offer letter was successfully sent via email.
- Click **I Have Finished**.

8. The *Candidate Profile* page reappears.

- The Recruitment Advisor must inform Appointments Office to prepare the formal letter of appointment.

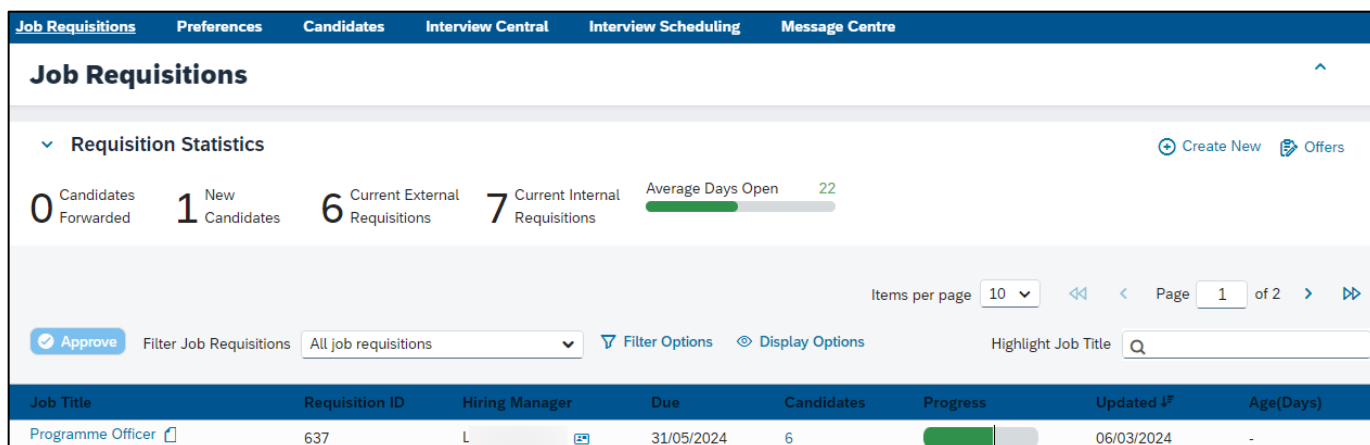
Changing a candidate offer to accepted or declined

Before you begin

The Appointments Office must confirm whether the candidate has accepted or declined the offer.

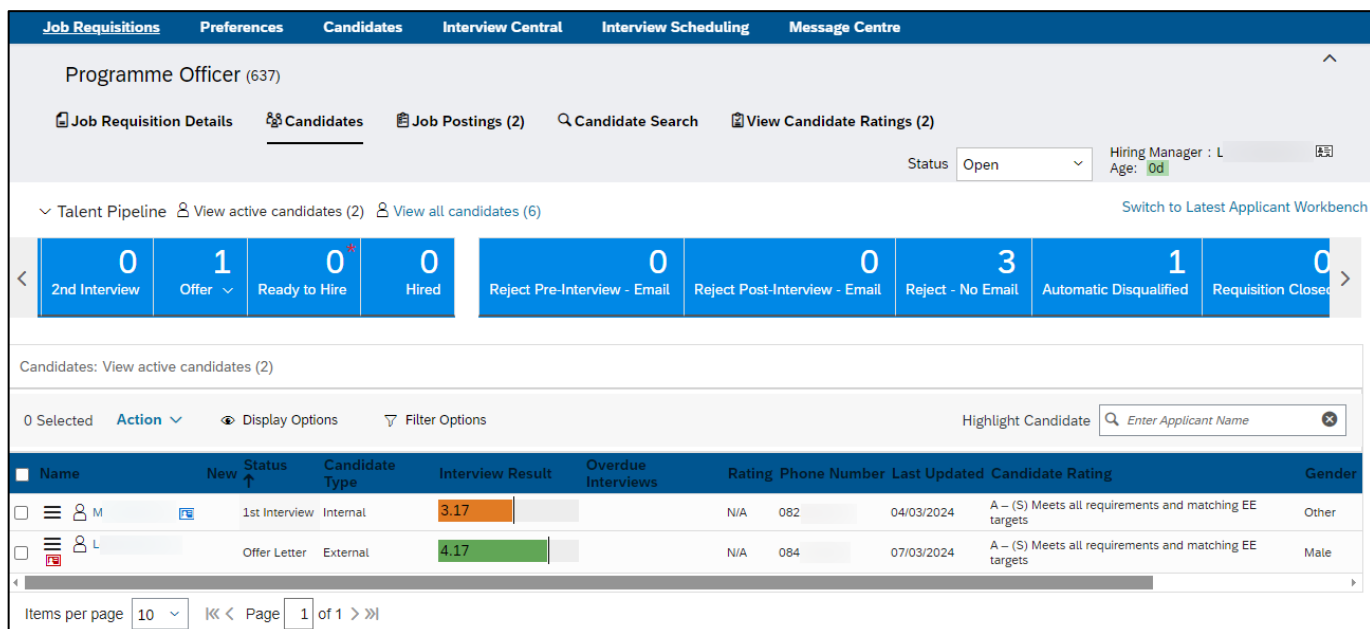
Procedure

1. [Log in to SuccessFactors and access the Home page.](#)
 - Choose *Home > Recruiting.*
2. 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.*

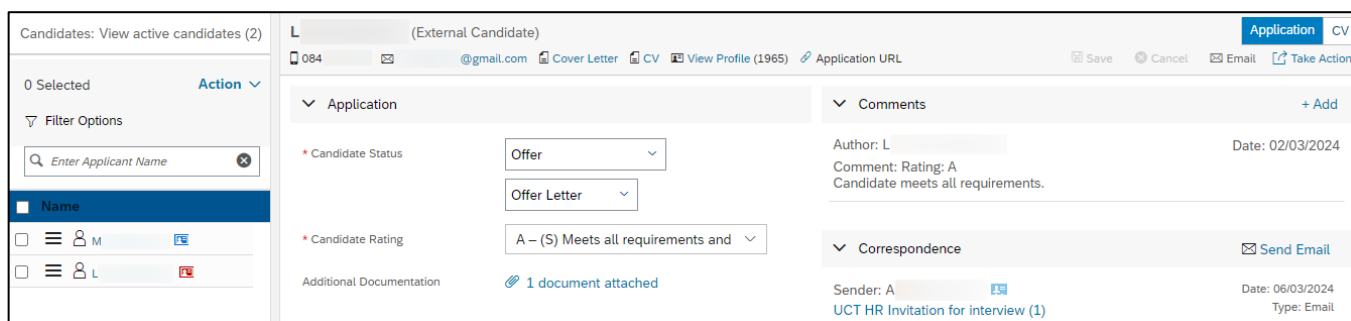
3. The *Candidate Workbench* page appears.



- Ensure that *View active candidates* is selected.
- Select the candidate with the *Offer Letter* status by clicking their name in the *Name* column.

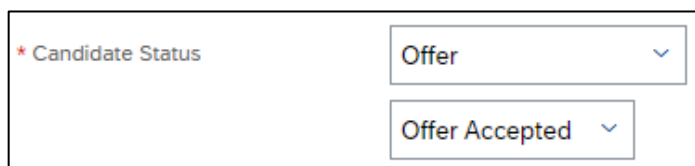
Changing a candidate offer to accepted or declined

4. The selected candidate profile appears.



Application section:

- In the *Candidate Status* field, below *Offer*, select *Offer Accepted* or *Offer Declined*.

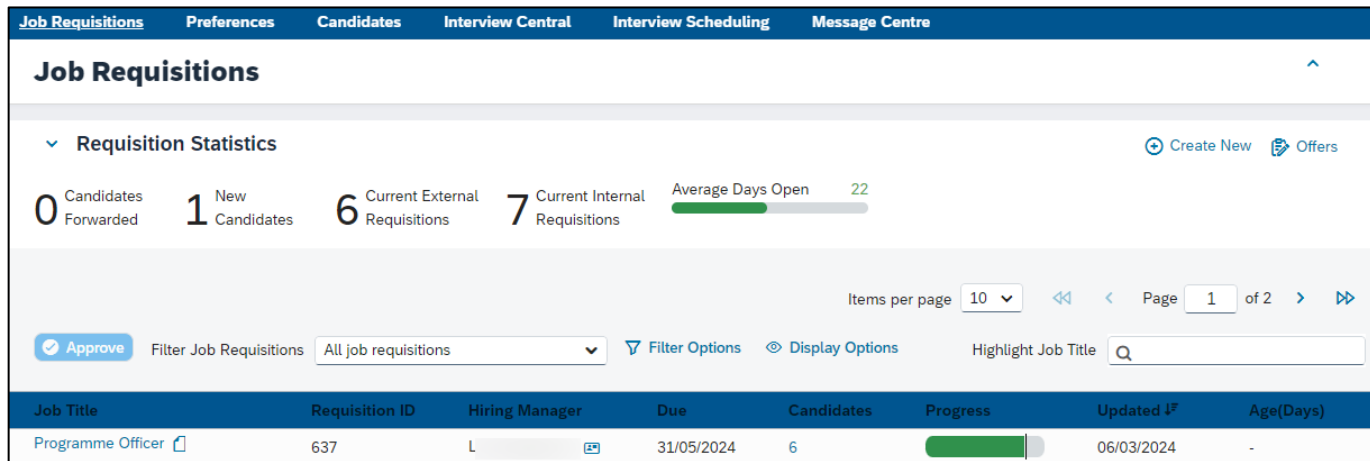


- Click **Save** (top right).
- If ready to change the candidate's status, continue from [step 4 of Changing candidate status after offer acceptance](#) or click **Job Requisitions** to return to the overview of all requisitions.

Changing candidate status after offer acceptance

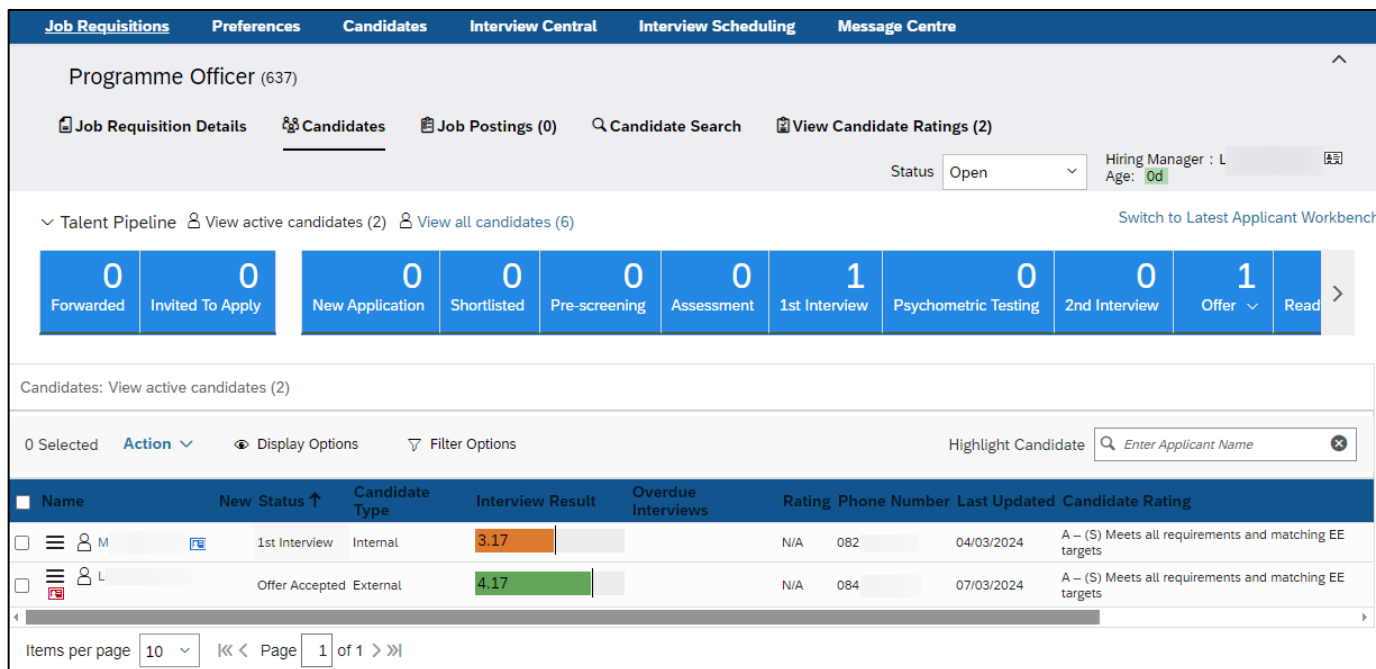
Procedure

1. [Log in to SuccessFactors and access the Home page.](#)
 - Choose *Home > Recruiting.*
2. 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.*

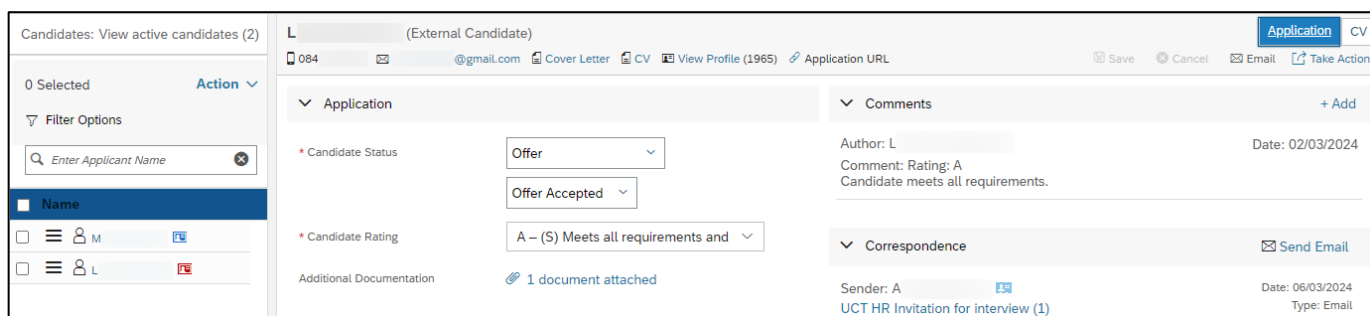
3. The *Candidate Workbench* page appears.



- Ensure that *View active candidates* is selected.
- Select the candidate with the *Offer Accepted* status by clicking their name in the *Name* column.

Changing candidate status after offer acceptance

4. The selected candidate profile appears.

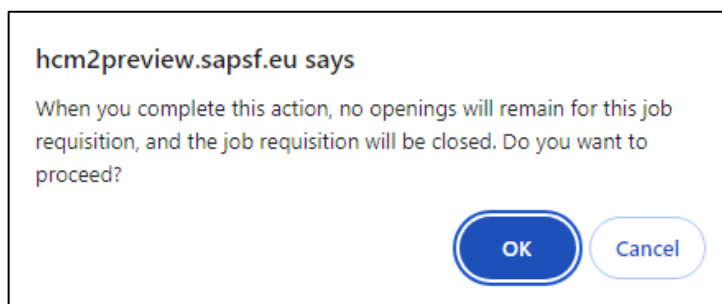


Application section:

- In the *Candidate Status* field, choose *Ready to Hire*.

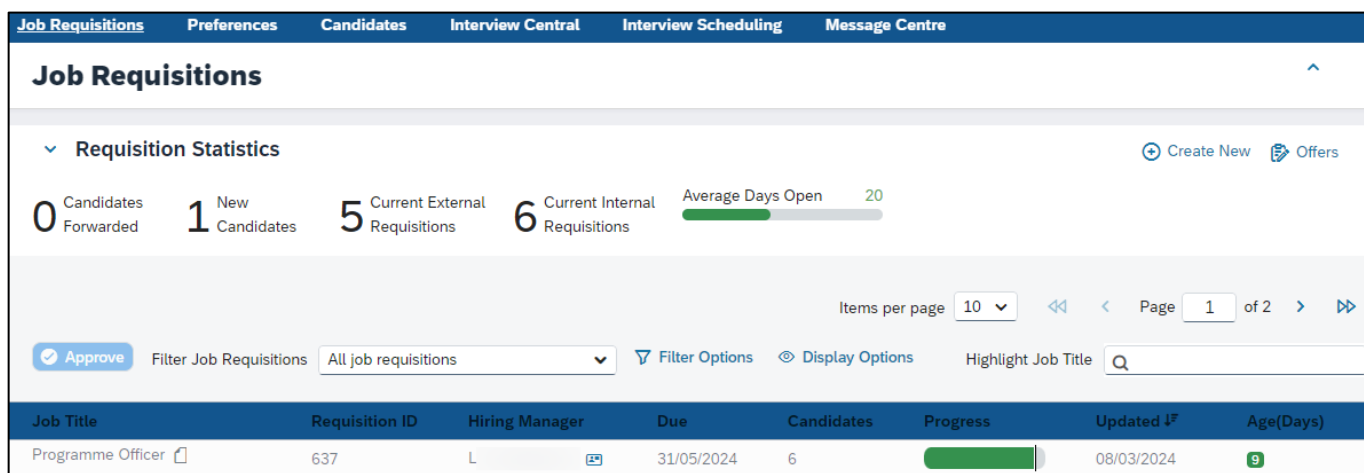
Click Save (top right).

A system dialogue box appears, indicating that when this action is complete no openings will remain for this job and the job requisition will be closed.



- Click .

5. The *Job Requisitions* page reappears. When displaying the job requisition, the status shows as closed.



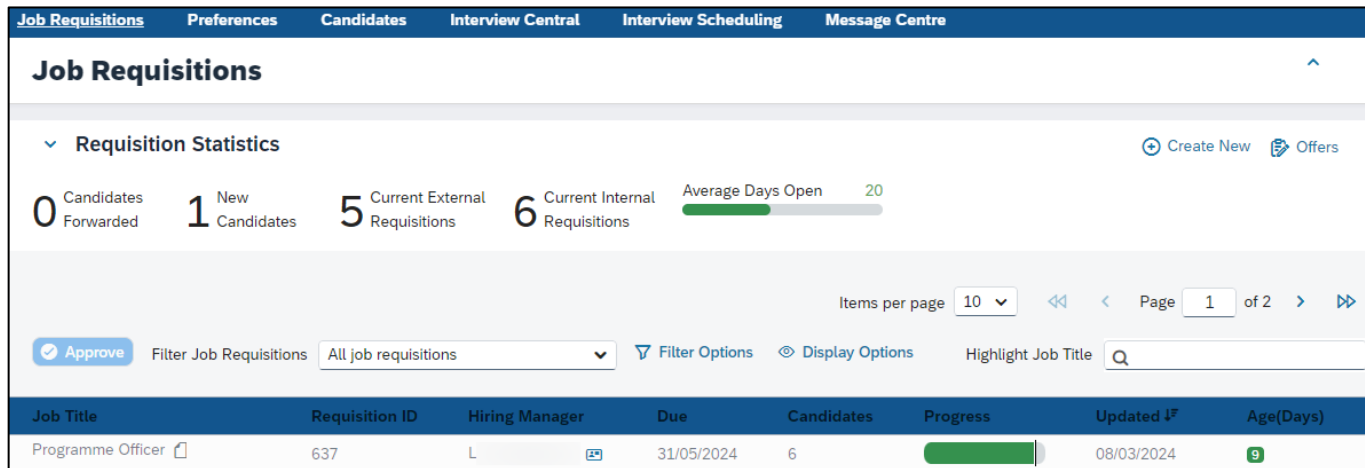
Final change of candidate status to hired

Procedure

1. [Log in to SuccessFactors and access the Home page.](#)

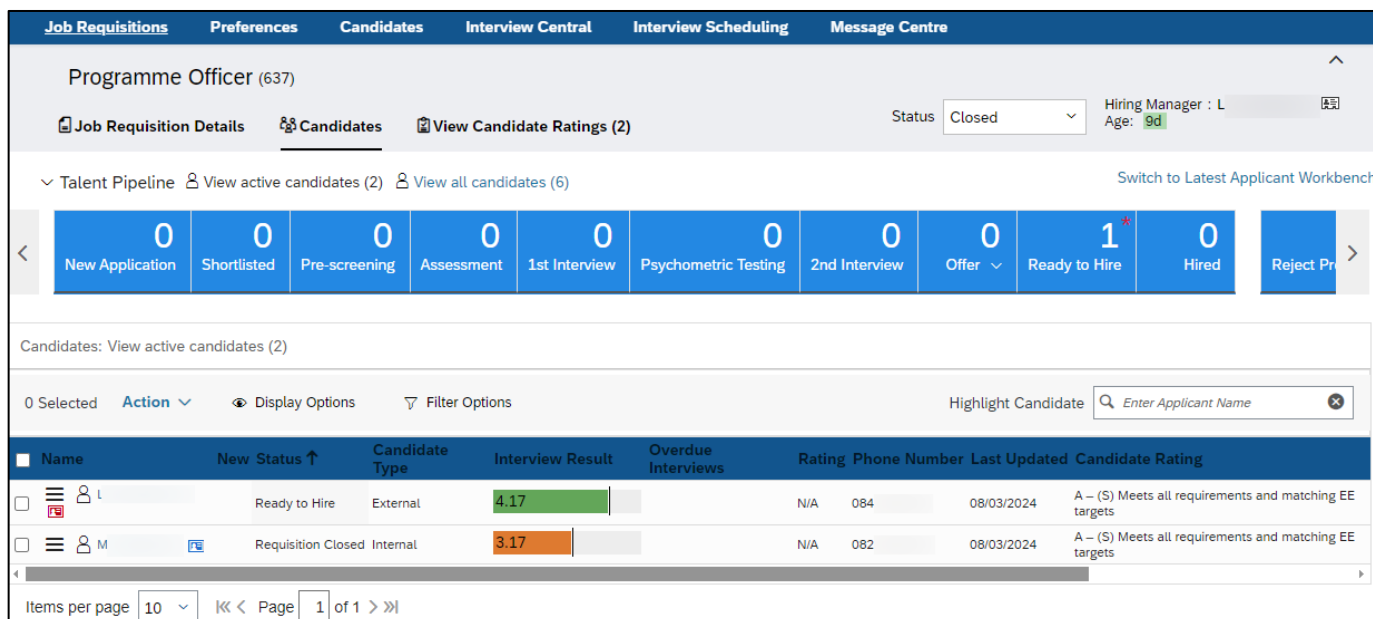
Choose *Home > Recruiting*.

2. 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*.

3. The *Candidate Workbench* page appears.



- Ensure that *View active candidates* is selected.
- Select the candidate with the *Ready to Hire* status by clicking their name in the *Name* column.

Final change of candidate status to hired

4. The selected candidate profile appears.

The screenshot displays the candidate profile for 'L' (External Candidate). The 'Application' section is expanded, showing the following details:

- Candidate Status:** Ready to Hire
- Candidate Rating:** A - (S) Meets all requirements and
- Additional Documentation:** 1 document attached
- Background Check Status:** No Selection
- Licenses/Qualifications/References/Other Attachments:** 0 documents attached

The right sidebar shows the 'Comments' section with a comment from 'L' dated 02/03/2024, stating 'Rating: A' and 'Candidate meets all requirements.' Below this is the 'Correspondence' section, showing two email records: one from 'A' dated 06/03/2024 (UCT HR Invitation for interview (1)) and one from 'O' dated 07/03/2024 (Offer for Programme Officer position at UCT (1)).

Application section:

- In the *Candidate Status* field, select *Hired*.
- Click **Save** (top right).
- Click **Job Requisitions**.