UNIVERSITY OF CAPE TOWN
IYUNIVESITHI YASEKAPA • UNIVERSITEIT VAN KAAPSTAD

UCT SuccessFactors Recruiting guide for Recruitment Advisors

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December 2025

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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

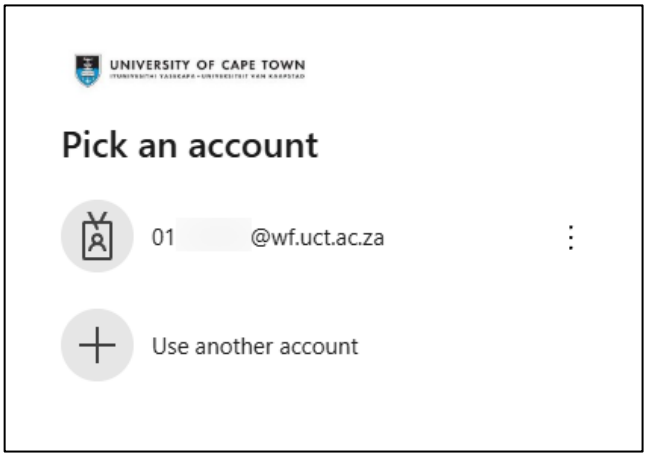
If you are unable to access SuccessFactors or are experiencing other technical difficulties, please contact the IT Service Desk.

Procedure

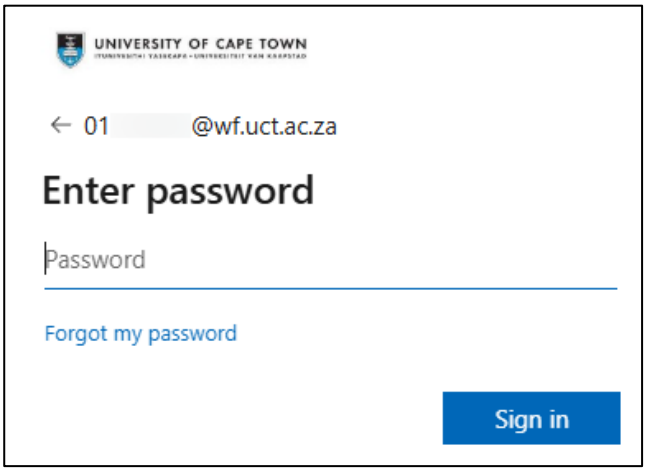
1. Open a web browser (e.g. Google Chrome, Mozilla Firefox, Microsoft Edge).
2. Log in to SuccessFactors via www.successfactors.uct.ac.za.

   Note: You can also access SuccessFactors via the HR website by clicking *SuccessFactors* at the top of the page.
3. If not already logged in to single sign-on, the *Sign in to your account* page appears.
   If already logged in to single sign-on, SuccessFactors will open (see step 4).

   Existing users (new users will see a different page and should follow the instructions on the next page)



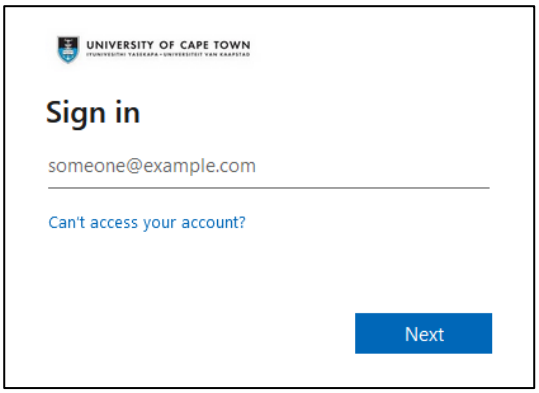
   - Select the appropriate account.



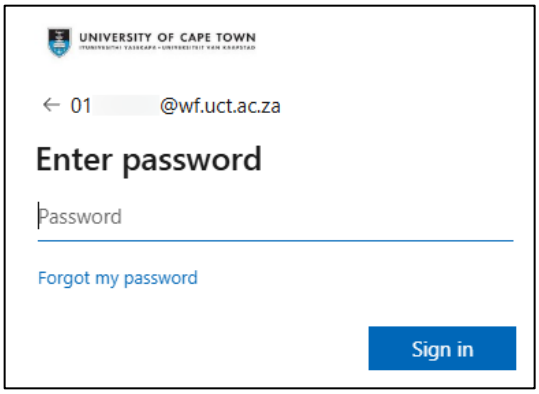
   - Enter your *Password* and click *Sign in*.
   - You will be prompted to verify your login either via Microsoft Authenticator or a code sent to your phone as an SMS. SuccessFactors will open (see step 4).

Logging in to SuccessFactors

New users

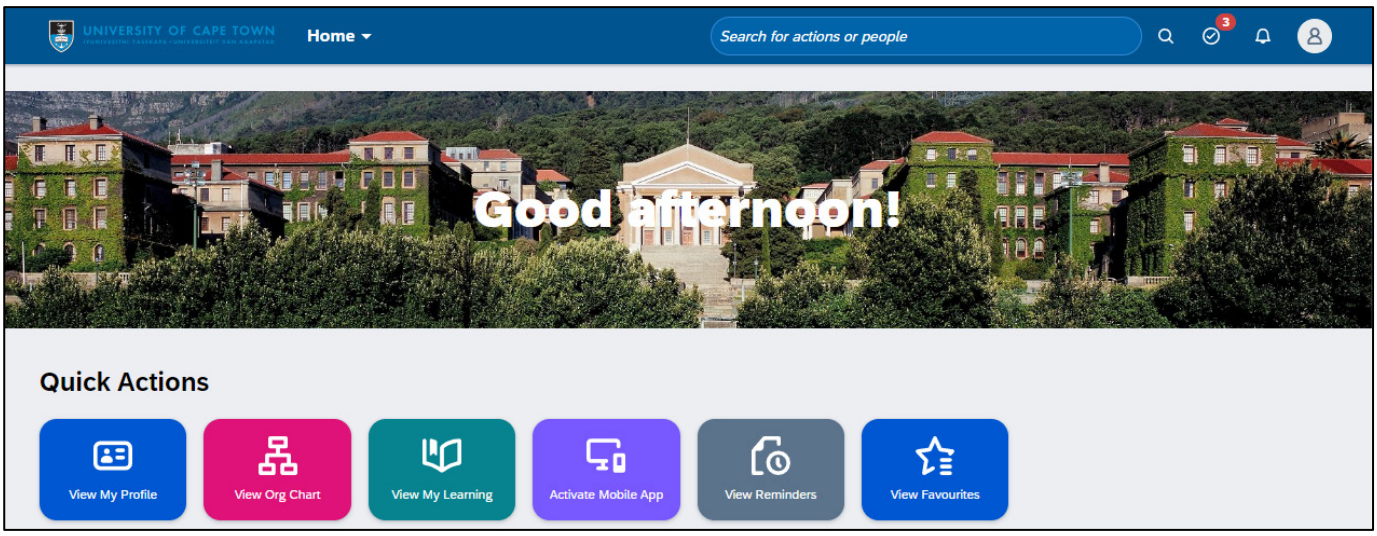


- In the field below *Sign in*, enter your UCT staff number followed by @wf.uct.ac.za. E.g. 01234567@wf.uct.ac.za.
  Note: UCT staff number only, third party "T" accounts do not usually have access to SuccessFactors.
- Click *Next*.



- Enter your *Password* and click *Sign in*.
- You will be prompted to verify your login either via Microsoft Authenticator or a code sent to your phone as an SMS.

4. The *Home* page appears.



Reviewing a job requisition before the search meeting

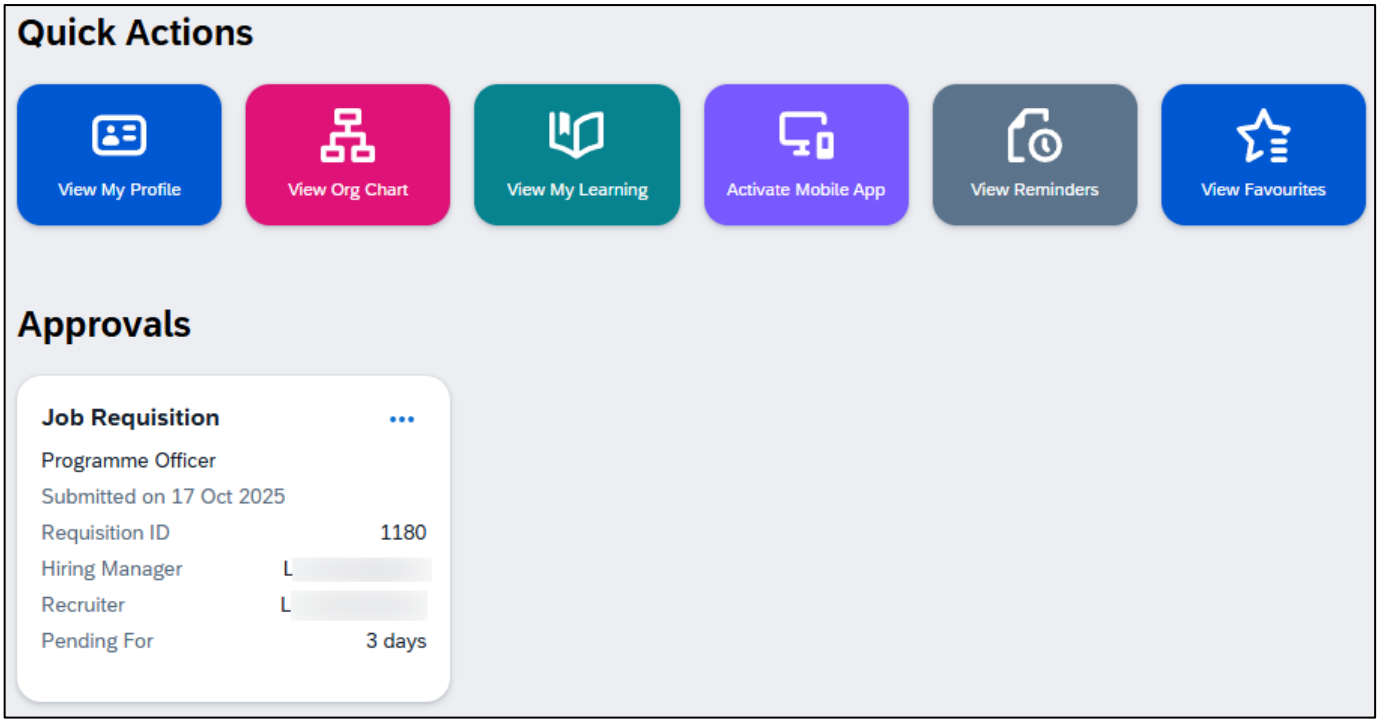
Overview

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 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

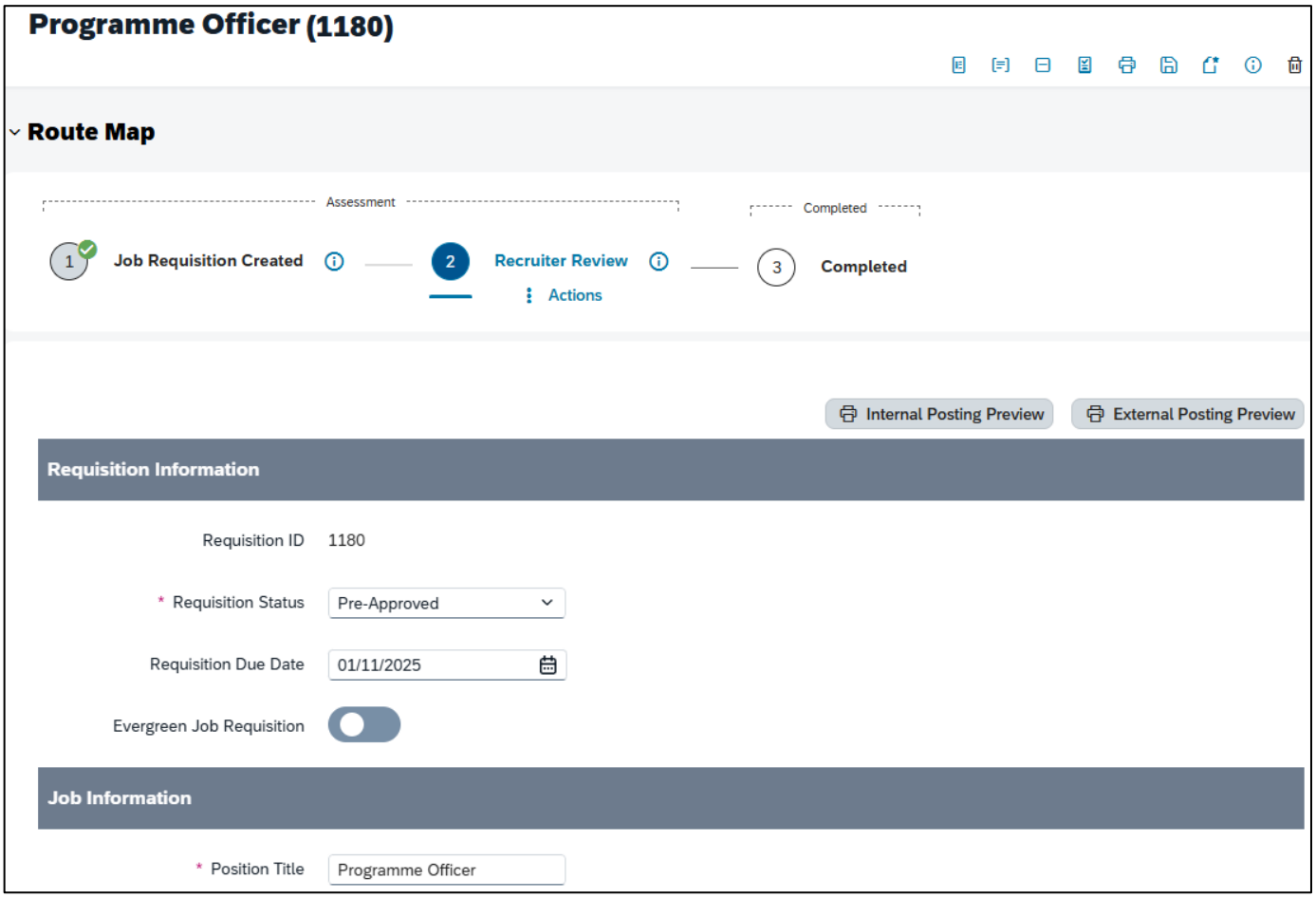
1. Log in to SuccessFactors and access the *Home* page.
   Note: If accessing the job requisition via a direct link from the notification email, skip to step 3.
2. Job requisitions are found in the *Approvals* section on the *Home* page.



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

Reviewing a job requisition before the search meeting

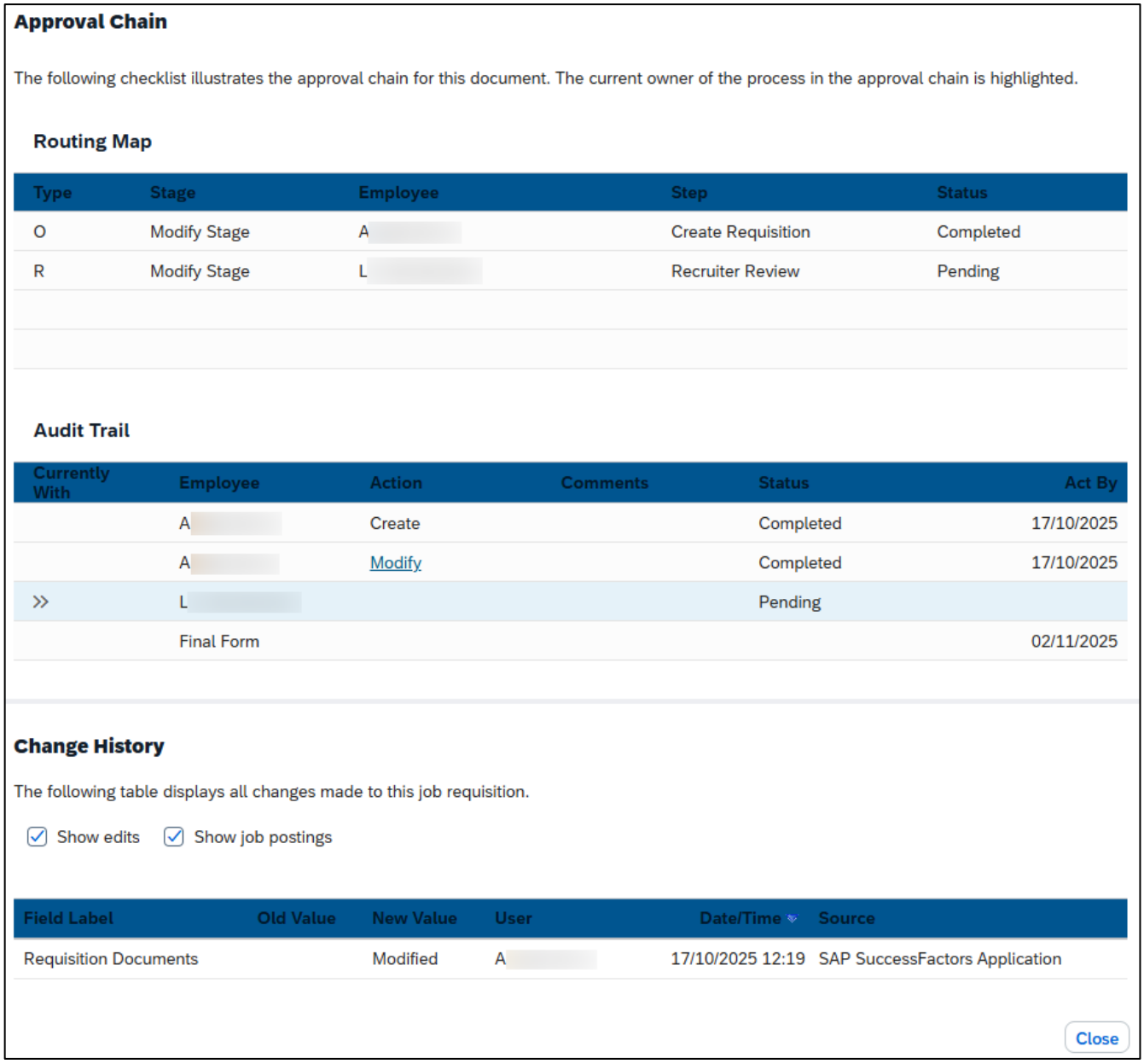
3. The selected job requisition opens.



- 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 Recruiter (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 Close.



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	Recruiter Review	Pending

Audit Trail

Currently With	Employee	Action	Comments	Status	Act By
	A	Create		Completed	17/10/2025
	A	Modify		Completed	17/10/2025
»	L			Pending	
	Final Form				02/11/2025

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
Requisition Documents		Modified	A	17/10/2025 12:19	SAP SuccessFactors Application

Close

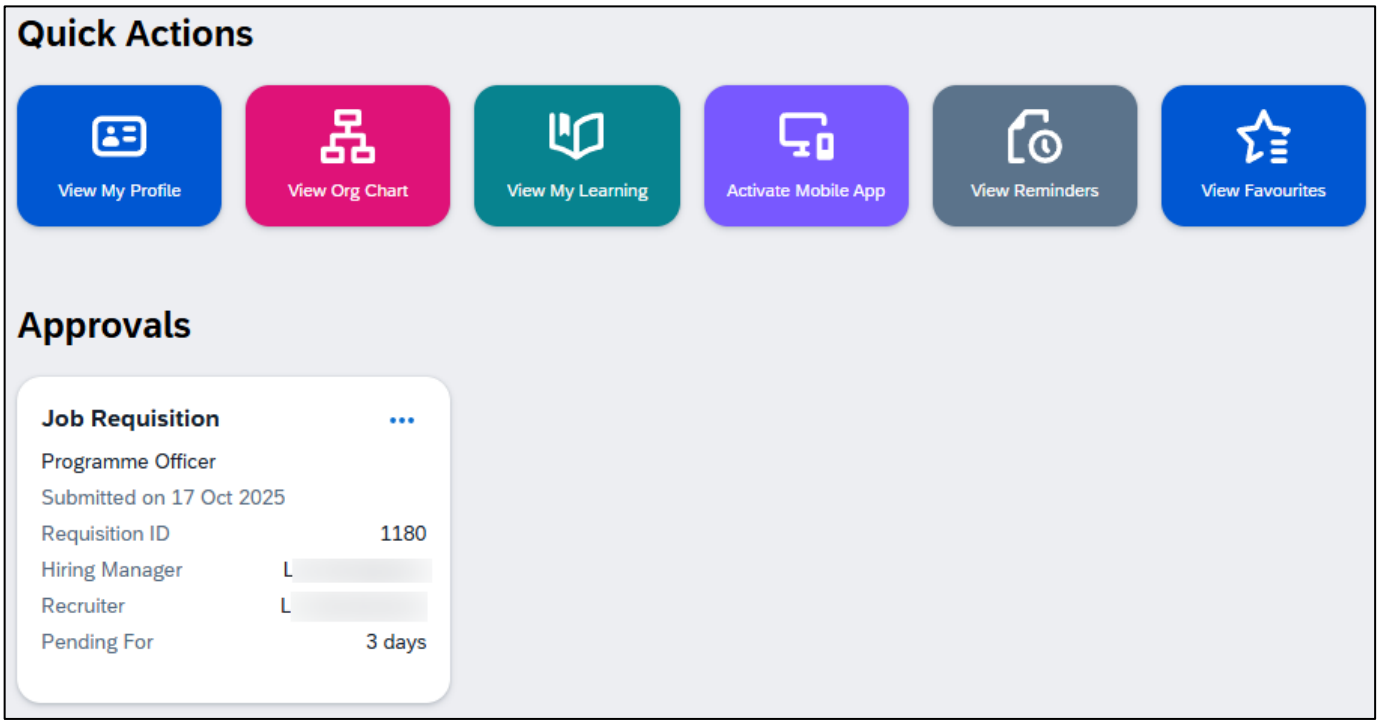
- Carefully review each section of the job requisition. Note anything that should be discussed at the search meeting.
- At the bottom of the job requisition page, click Discard Changes.

4. The *Job Requisitions* page appears.

Approving a job requisition after the search meeting

Procedure

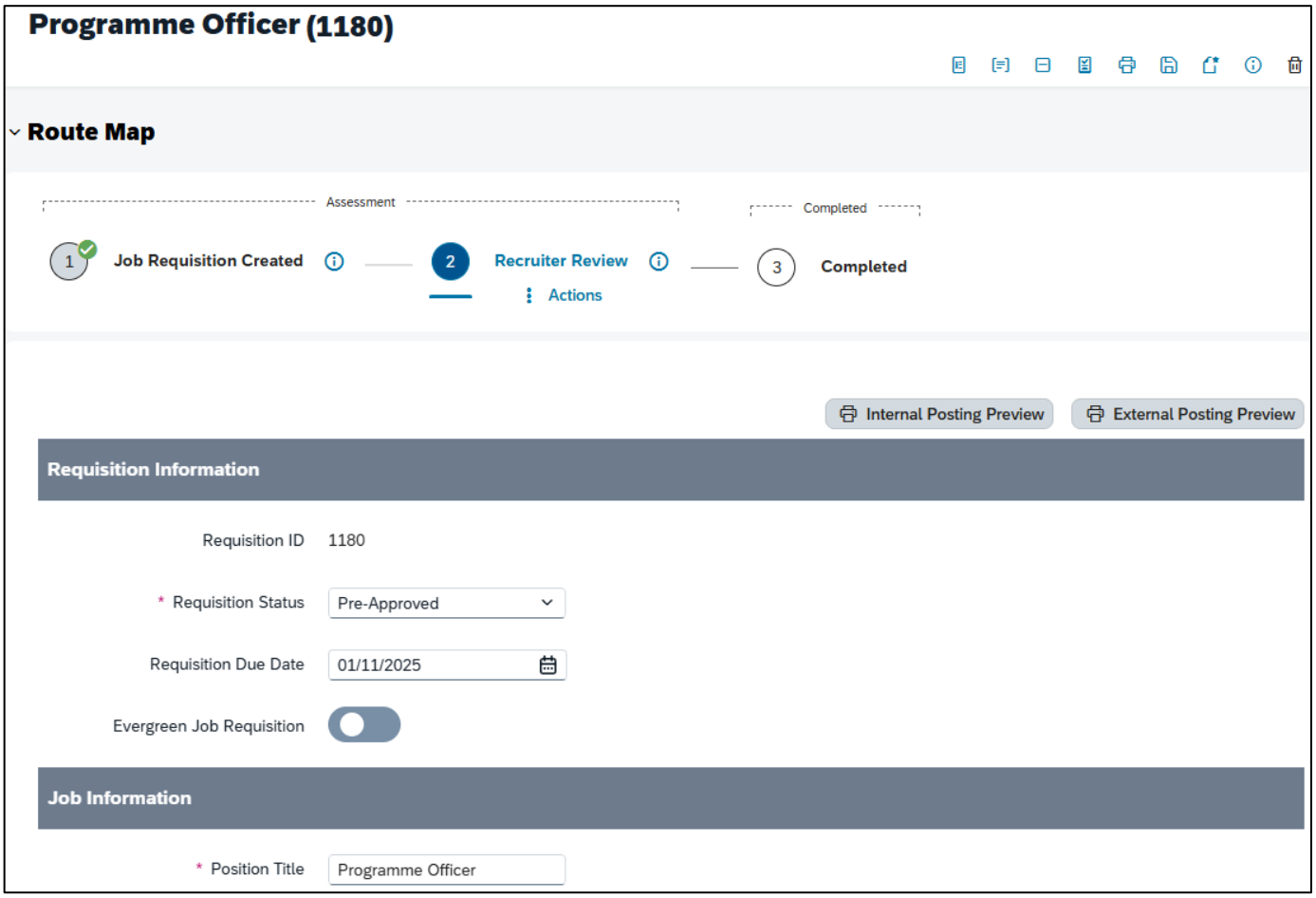
1. Log in to SuccessFactors and access the *Home* page.
2. Job requisitions are found in the *Approvals* section on the *Home* page.



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

Approving a job requisition after the search meeting

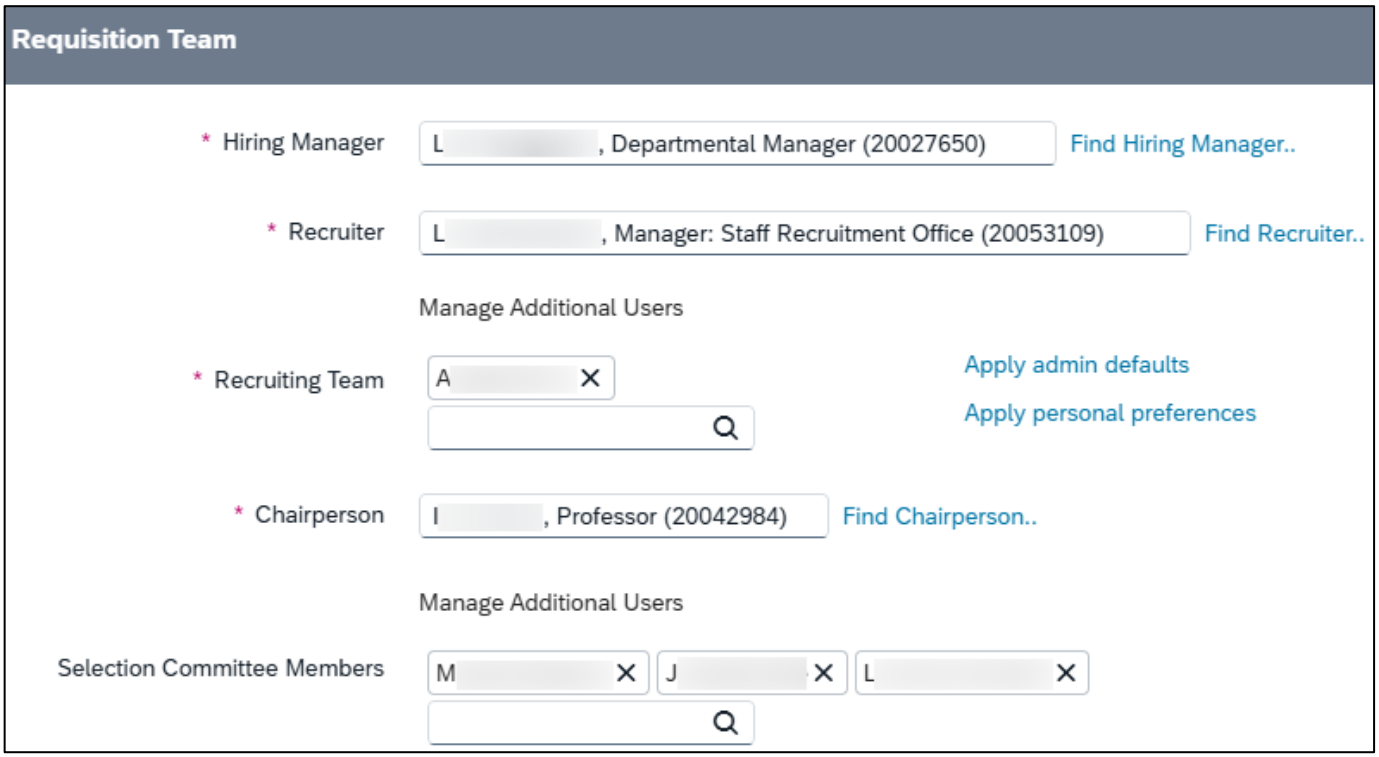
3. The selected job requisition opens.



- View the internal and external adverts by clicking Internal Posting Preview and External Posting Preview. 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

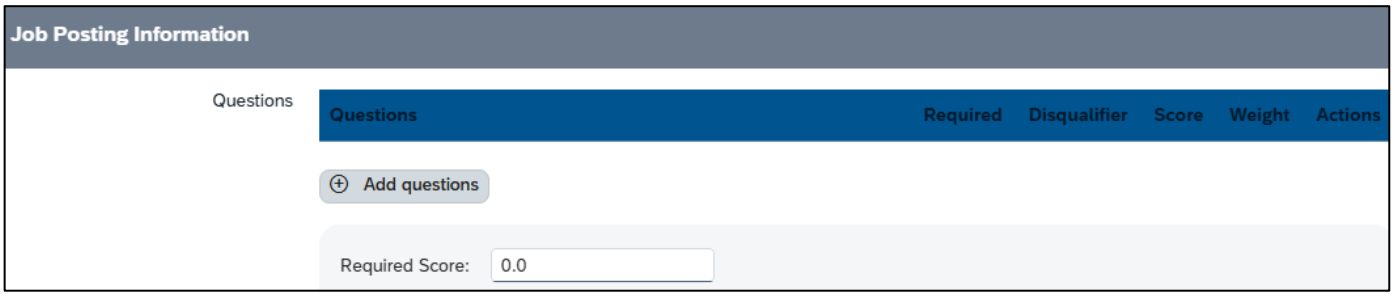
***Requisition Team* section**:



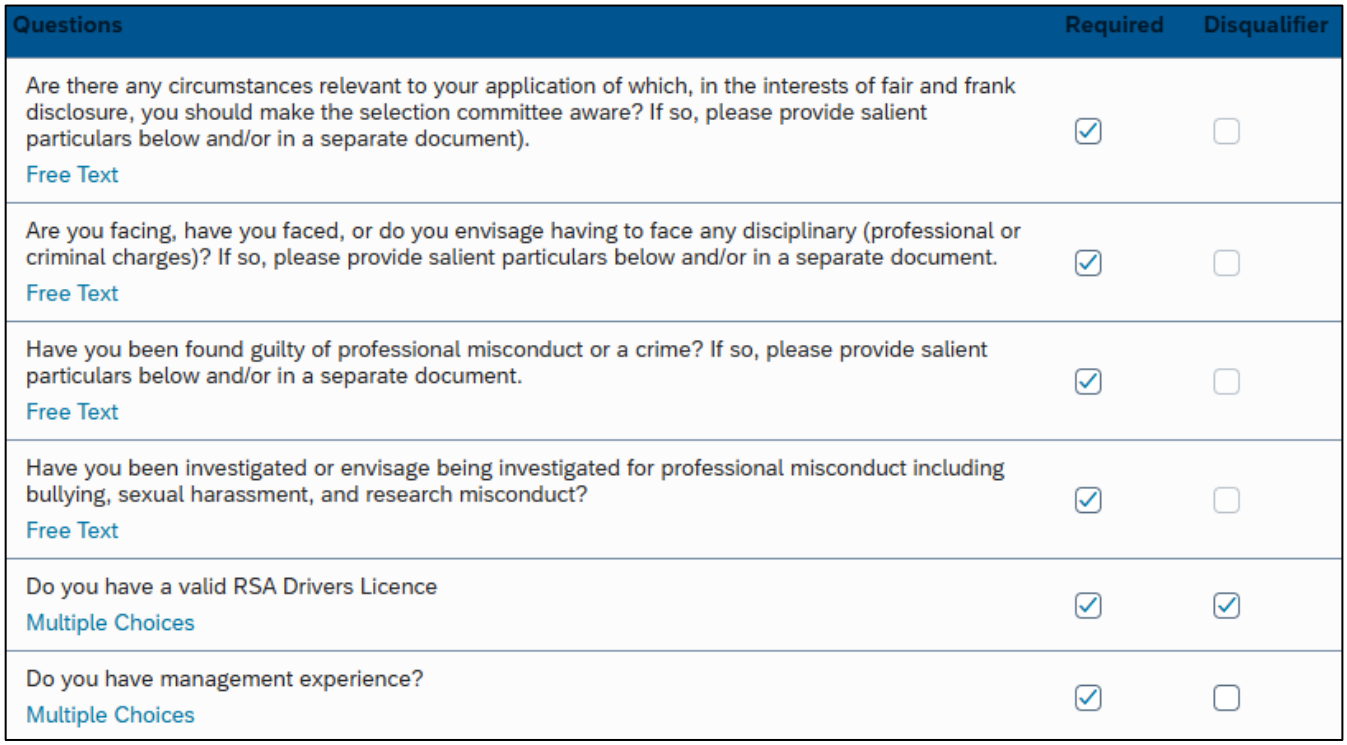
- Check all roles in the *Requisition Team* are completed correctly.
- Ensure the appropriate Recruitment Administrator appears in the *Recruiting Team* field.
  Note: If the Recruitment Administrator is not added to the requisition, they will not be able to schedule candidate interviews. Consider also adding a second or back up Recruitment Advisor.
- If the HR Business Partner and Chairperson are voting members of the committee, they should 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

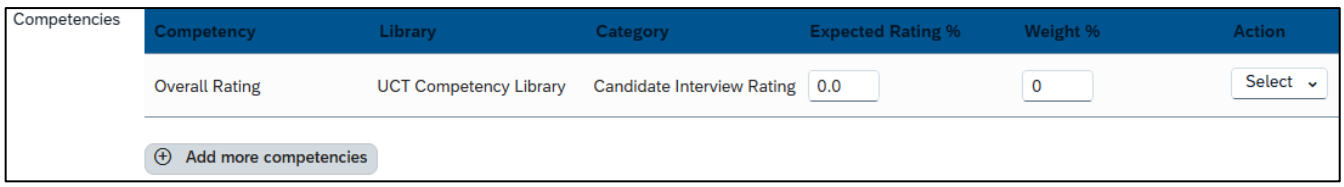
***Job Posting Information* section**:



- 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.



- In the *Competencies* section, the *Overall Rating* competency appears. The selection committee members will rate each candidate after the interview. If this job requisition requires assessment of a set of competencies based on the position description, see Working with Competencies.

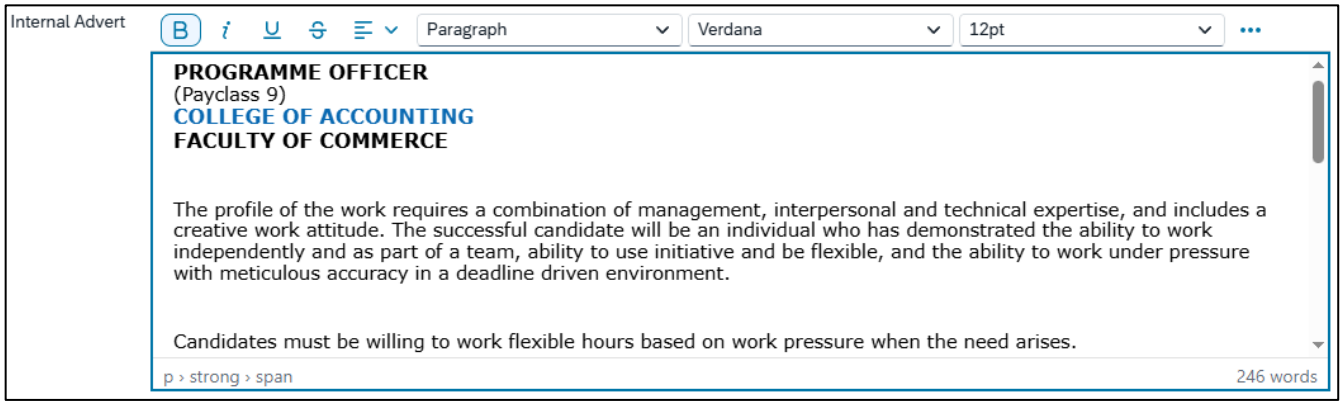


Approving a job requisition after the search meeting

Editing the internal and external advert content

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

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



- Click ••• *Additional Options* to see all formatting options, including *Preview*.

Approving a job requisition after the search meeting

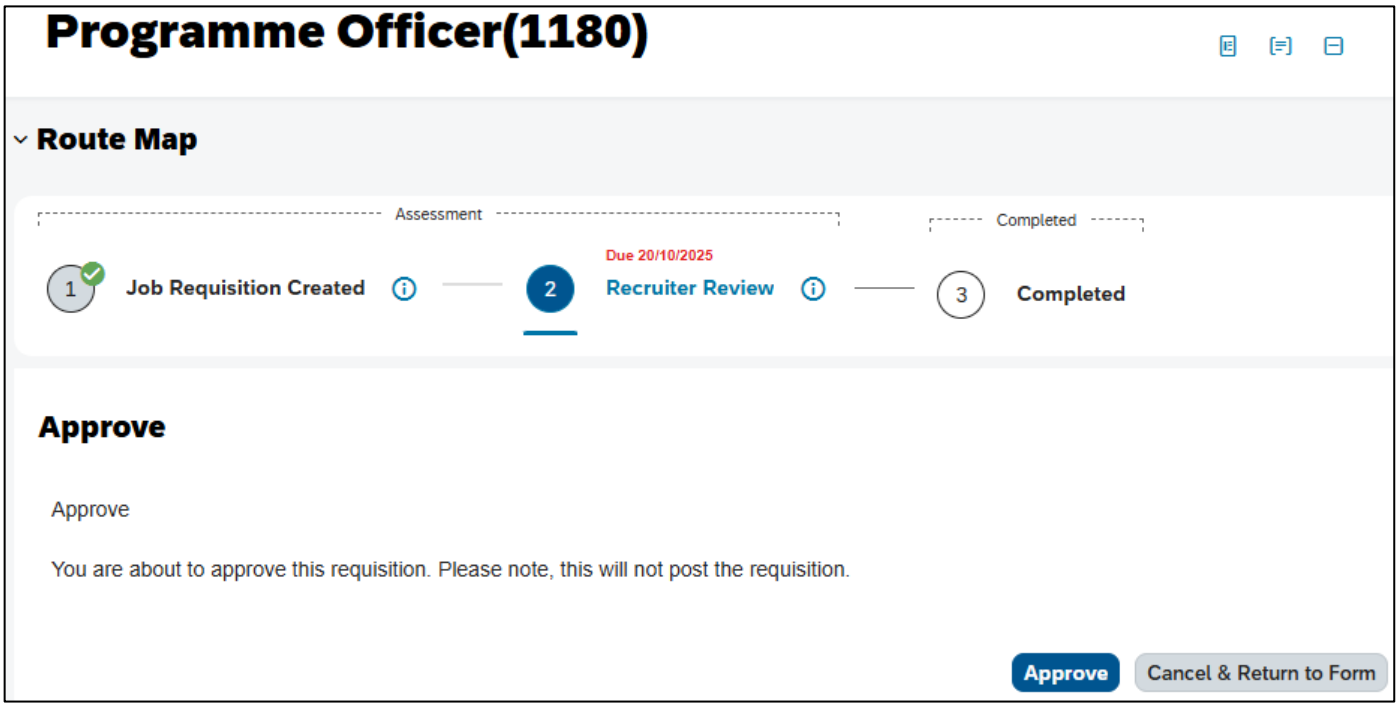
- Review the attachments in the *Requisition Documents* section.

***Comments* section**:

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

.
Note: The *Save and Close Form* 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.

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

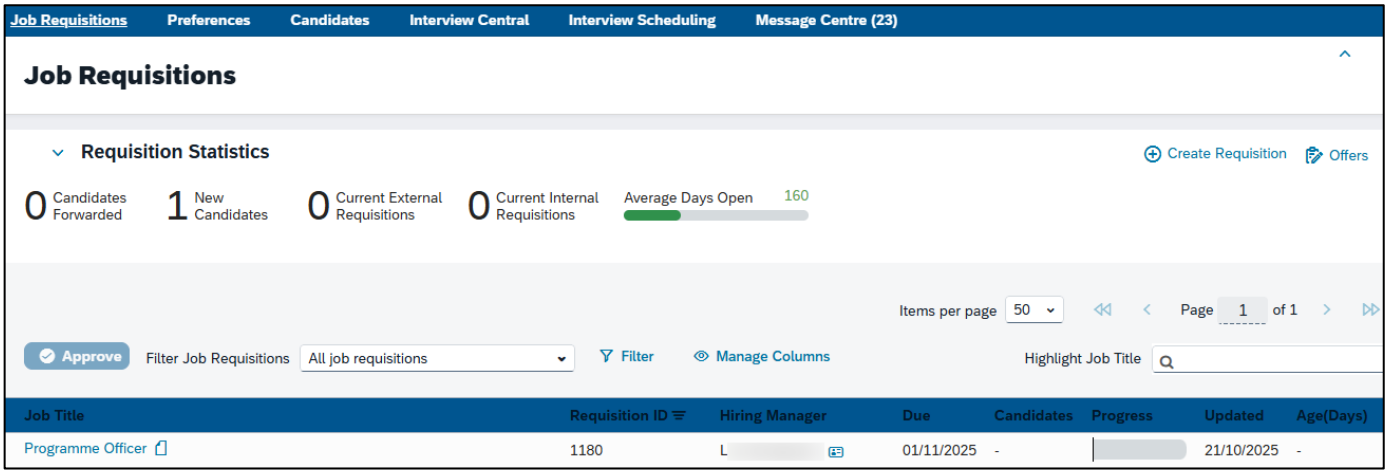


- Click

.
Note: *Send and Open Next Form* only appears if you have more than one job requisition to approve.

Approving a job requisition after the search meeting

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



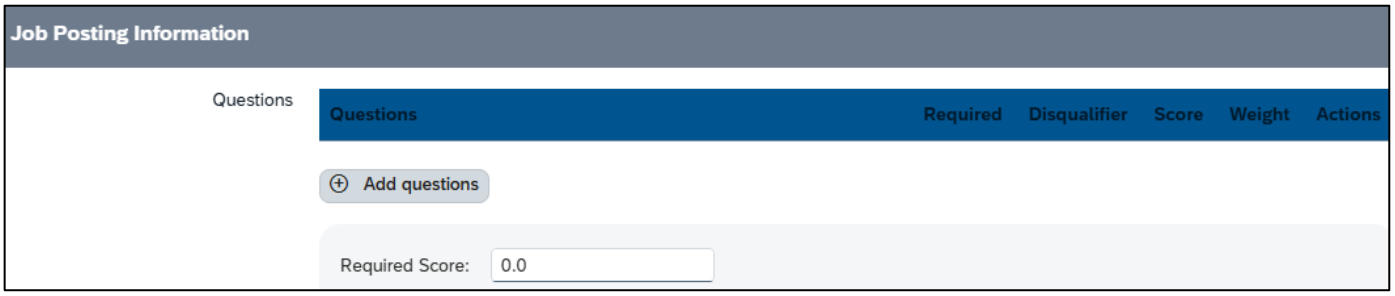
Working with screening questions

Overview

Screening questions can be used to gather applicant information and/or to reduce 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.

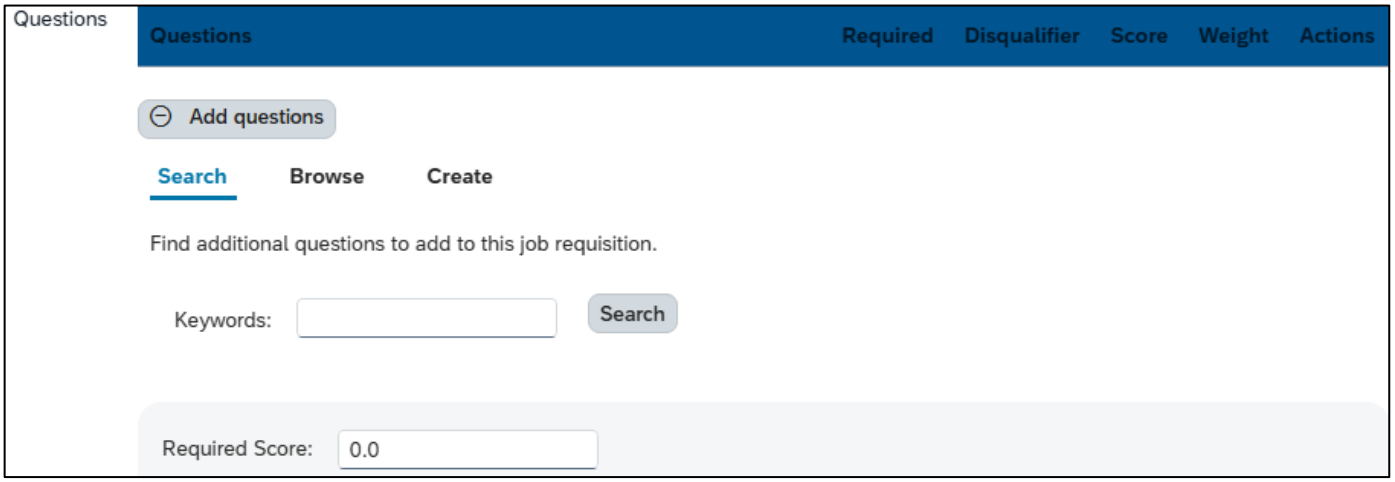
Procedure

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



   - Click Add questions.

2. The *Search* tab appears.



   - Follow the instructions to select existing UCT questions (mandatory questions included) 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, please provide salient particulars below and/or in a separate document). Free Text	☐	☐	☐	0	Select
Are you facing, have you faced, or do you envisage having to face any disciplinary (professional or criminal charges)? If so, please provide salient particulars below and/or in a separate document. Free Text	☐	☐	☐	0	Select
Have you been found guilty of professional misconduct or a crime? If so, please provide salient particulars below and/or in a separate document. Free Text	☐	☐	☐	0	Select
Have you been investigated or envisage being investigated for professional misconduct including bullying, sexual harassment, and research misconduct? Free Text	☐	☐	☐	0	Select
Do you have a valid RSA Drivers Licence Multiple Choices	☐	☐	☐	0	Select
Do you have management experience? Multiple Choices	☐	☐	☐	0	Select
Knowledge of Adobe Photoshop, InDesign and Illustrator? Multiple Choices	☐	☐	☐	0	Select

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

Do you have a valid RSA Drivers Licence
Multiple Choices

Do you have a valid RSA Drivers Licence
Multiple Choices

Answer Format: Multiple Choices

Answer Range: Yes Remove
No Remove
Add another answer

Correct answer: Yes

Close

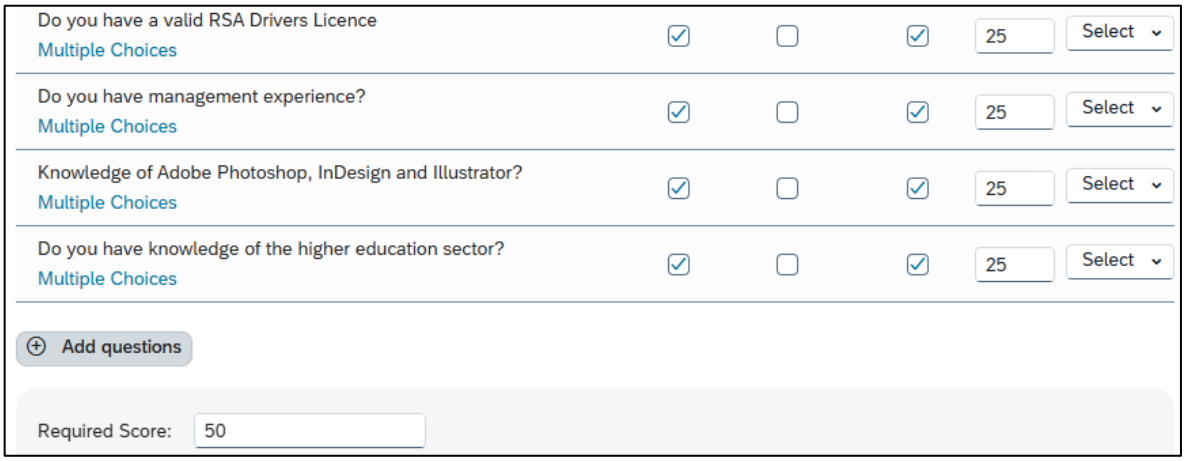
Working with screening questions

- 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, please provide salient particulars below and/or in a separate document). Free Text	☑	☐
Are you facing, have you faced, or do you envisage having to face any disciplinary (professional or criminal charges)? If so, please provide salient particulars below and/or in a separate document. Free Text	☑	☐
Have you been found guilty of professional misconduct or a crime? If so, please provide salient particulars below and/or in a separate document. Free Text	☑	☐
Have you been investigated or envisage being investigated for professional misconduct including bullying, sexual harassment, and research misconduct? Free Text	☑	☐
Do you have a valid RSA Drivers Licence Multiple Choices	☑	☑
Do you have management experience? Multiple Choices	☑	☐

Required	Applicants are required to answer the question when applying.
Disqualifier	Applicants who don't provide a correct answer are automatically disqualified. **Note**: – 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 score for an applicant to pass. An applicant with a score below the required score is automatically disqualified.

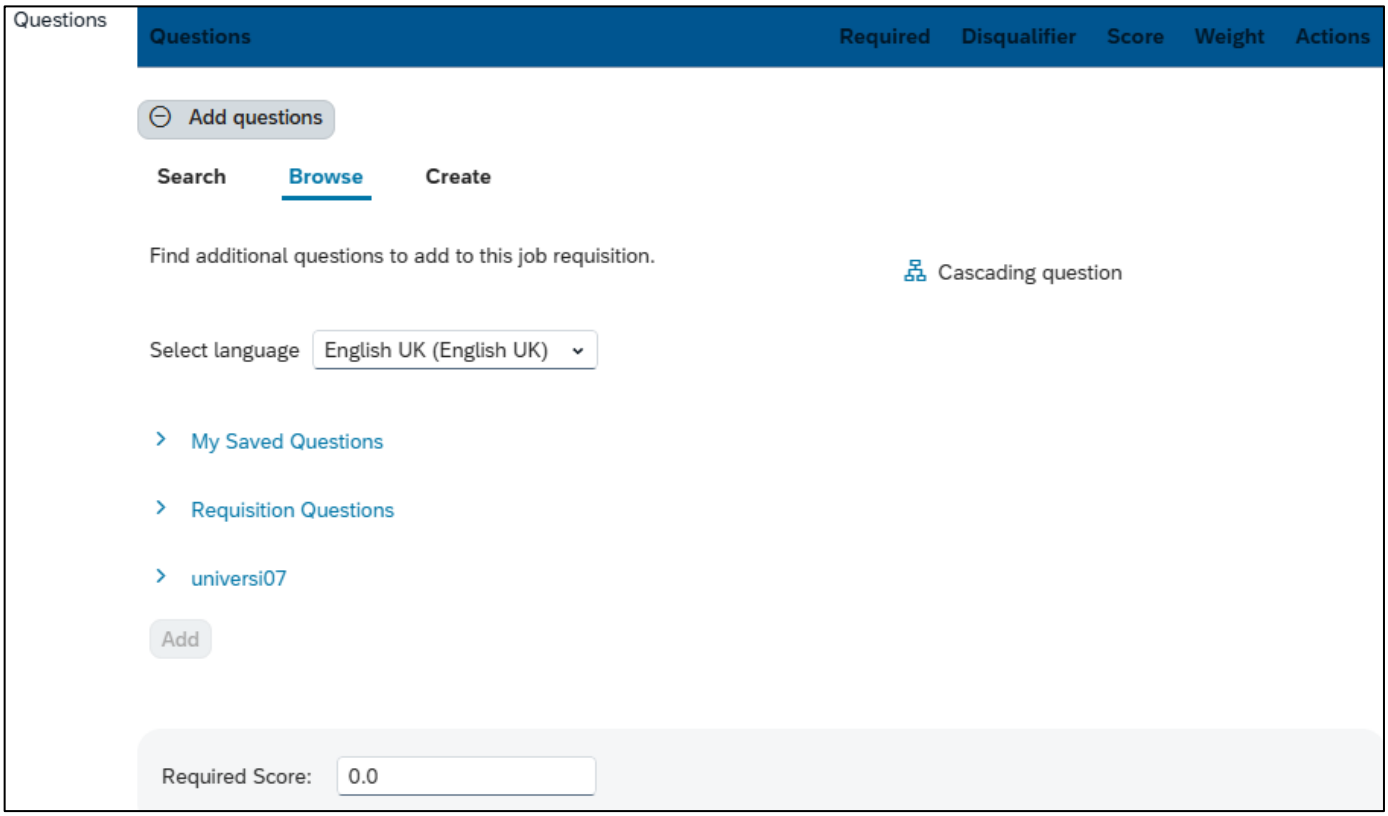


- Use the *Actions* dropdown list on the right to edit or remove questions.
  Note: Question descriptions don't appear for external candidates. Ensure questions are clear enough that an additional description is not required.
- Return to Approving a job requisition after the search meeting.

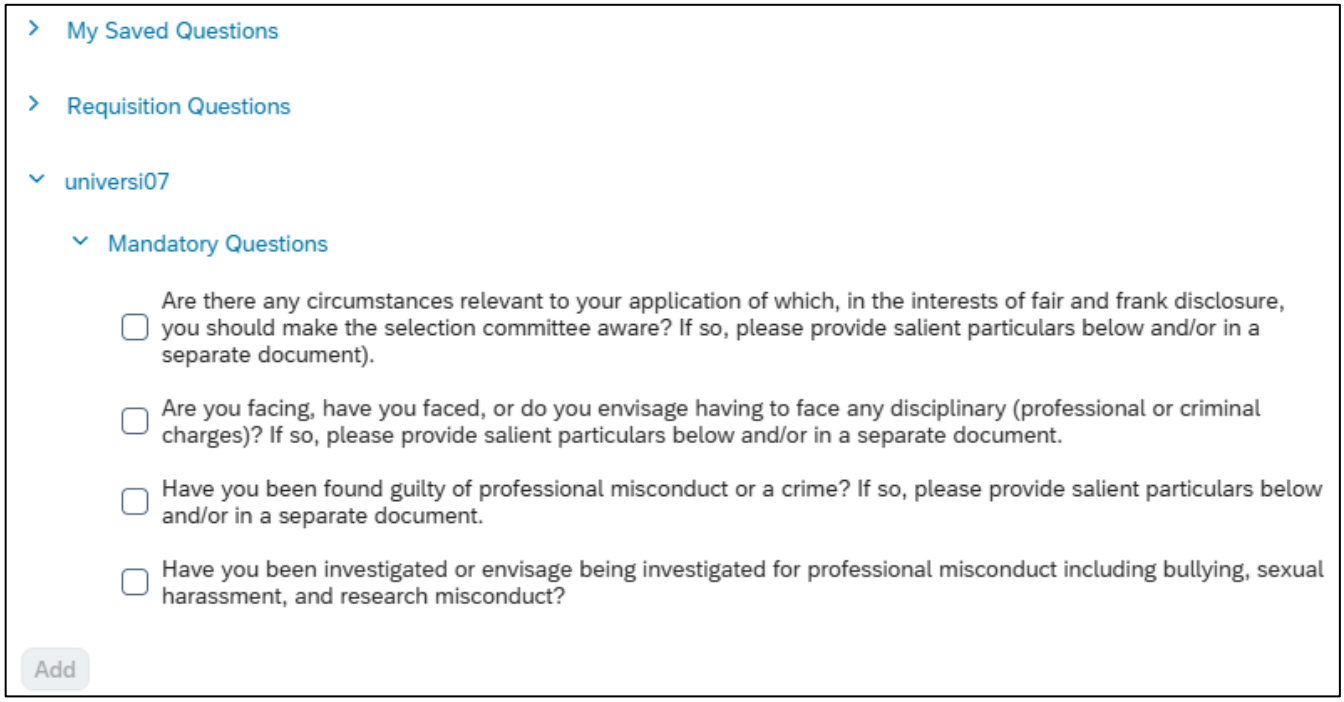
Working with screening questions

Selecting existing UCT questions

1. This procedure continues after step 2 in Working with screening questions.
2. Select the *Browse* tab.



- Expand *universi07* > *Mandatory Questions*.

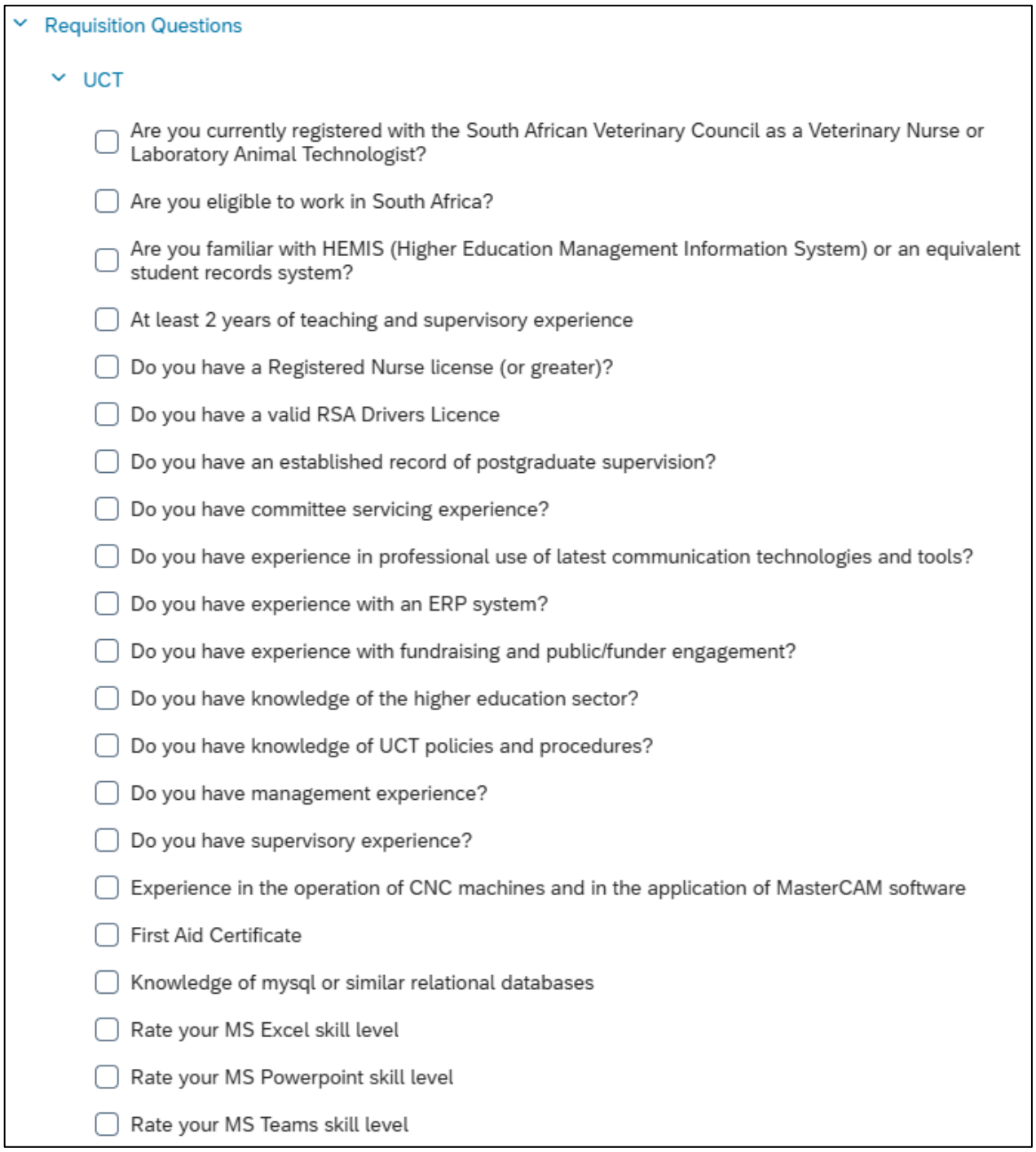


- Select each of the mandatory questions using the appropriate ☐ checkbox(es).
  Note: The applicants will see the questions in the same order as selected here.
- Click Add.

Working with screening questions

Selecting existing UCT questions

- Expand *Requisition Questions* > *UCT*.

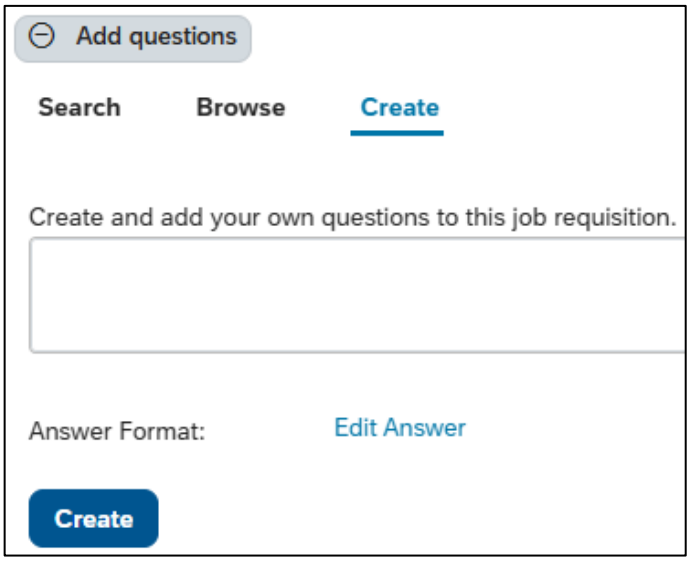


- Select one or more of the UCT questions using the appropriate ☐ checkbox(es).
  Note: The applicants will see the questions in the same order as selected here.
- Click Add.
- Return to Working with screening questions or if there are questions to add that are specific to the current job requisition, see: Creating a new question on the next page.

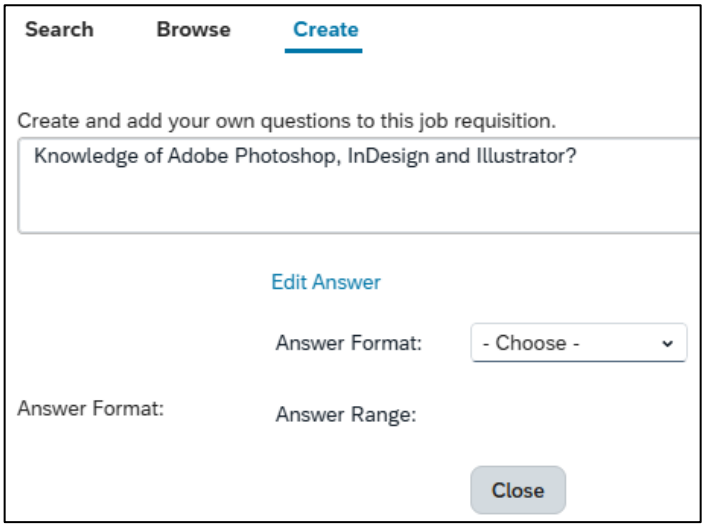
Working with screening questions

Creating a new question

1. This procedure continues after step 2 in Working with screening questions.
2. Select the *Create* tab.



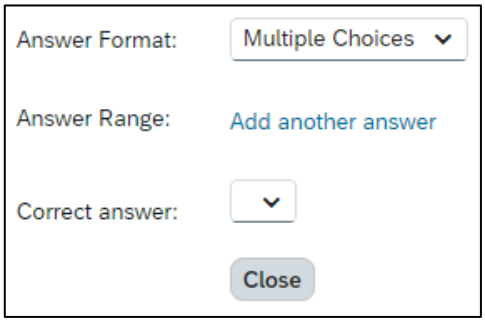
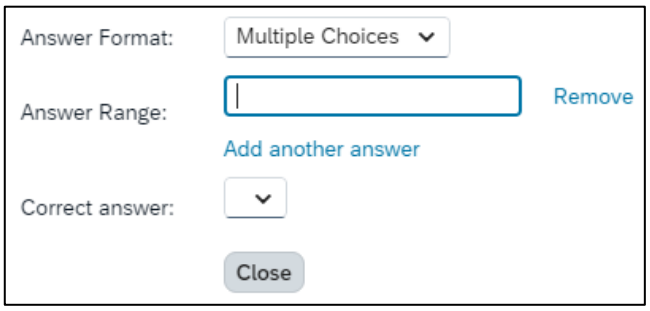
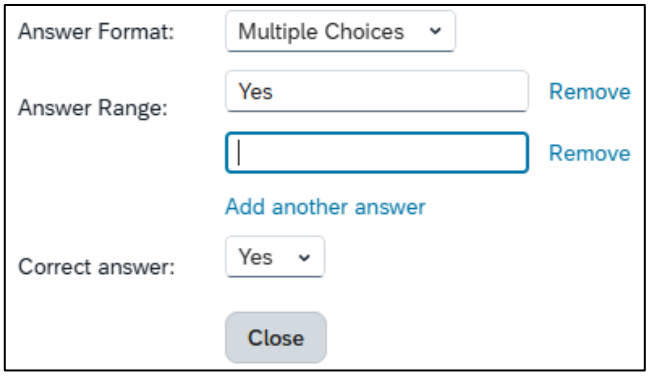
- Enter the question text in the space provided.
- Click *Edit Answer*.



- 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.

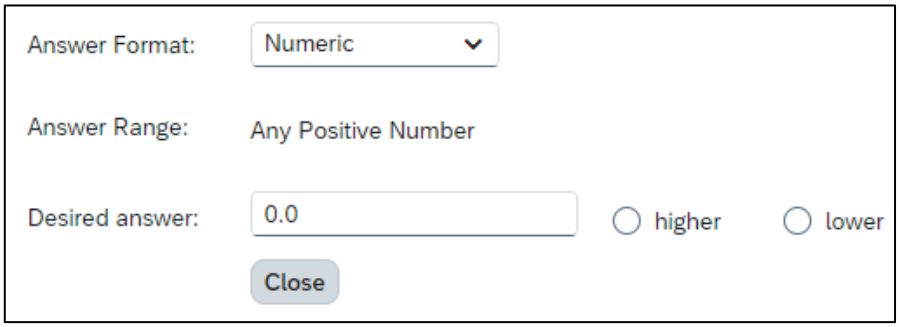
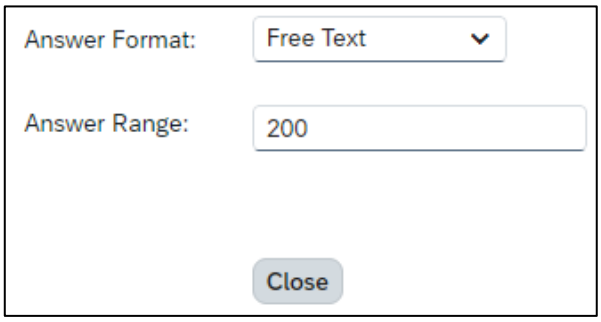
Working with screening questions

Creating a new question

Answer Format	Options
Multiple Choices	 – Click *Add another answer*.  – Enter the first answer in the *Answer Range* field e.g. Yes. – Click *Add another answer*.  – Enter the second answer below the first answer e.g. No. – Enter any remaining answers by clicking *Add another answer* and using the field provided. – Use the *Remove* option to delete any unwanted answers. – Select the *Correct answer* for the question using the dropdown list. – Click Close. – Click Create.

Working with screening questions

Creating a new question

Answer Format	Options
Numeric	 – Enter the *Desired answer*. If applicable, use the *higher* or *lower* options to expand the desired answer range e.g. for number of years management experience the desired answer could be 2 or higher. – Click Close. – Click Create.
Free Text	 – If applicable, change the maximum number of characters allowed in the *Answer Range* field. – Click Close. – Click Create.

Return to Working with screening questions or create more questions by repeating from step 2 above.

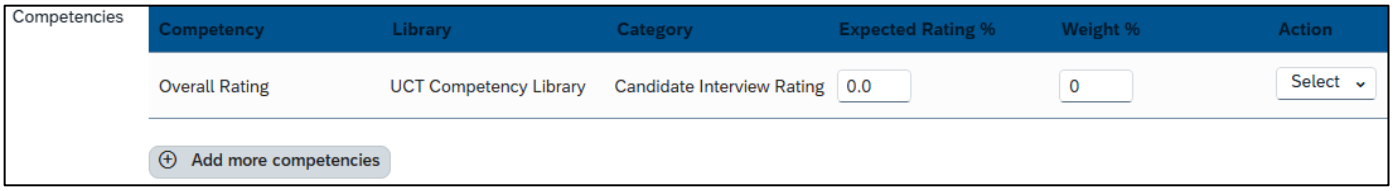
Working with competencies

Background

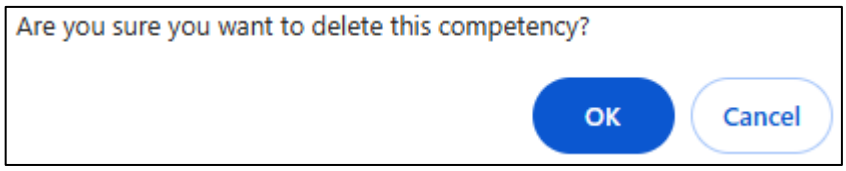
This procedure should be used when the job requisition requires assessment of a set of competencies based on the position description. The *Overall Rating* competency is removed and replaced with multiple competencies that selection committee members will rate after the interview.

Procedure

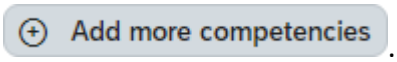
1. In the job requisition page, scroll down to the *Job Posting Information* section.



   - Remove the *Overall Rating* by selecting *Remove Competency* in the *Action* column.
   - A dialogue box appears.

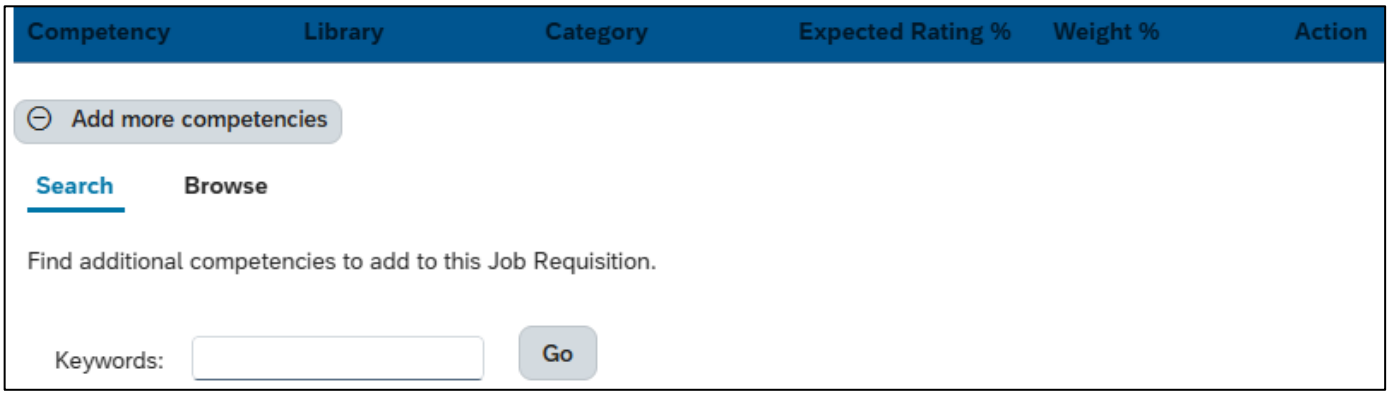


   - Click

 to confirm the competency deletion.
   - Click 

.

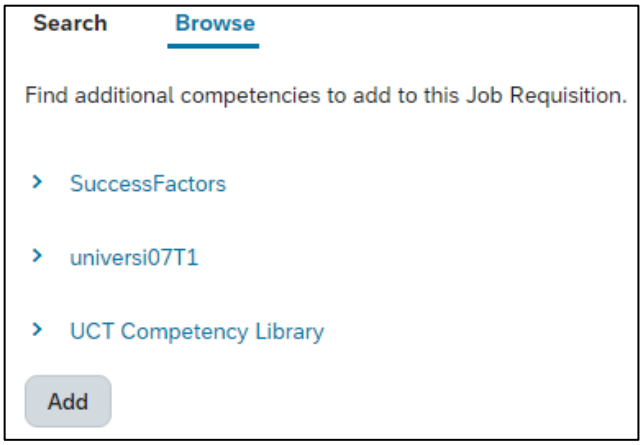
2. The *Search* tab appears.



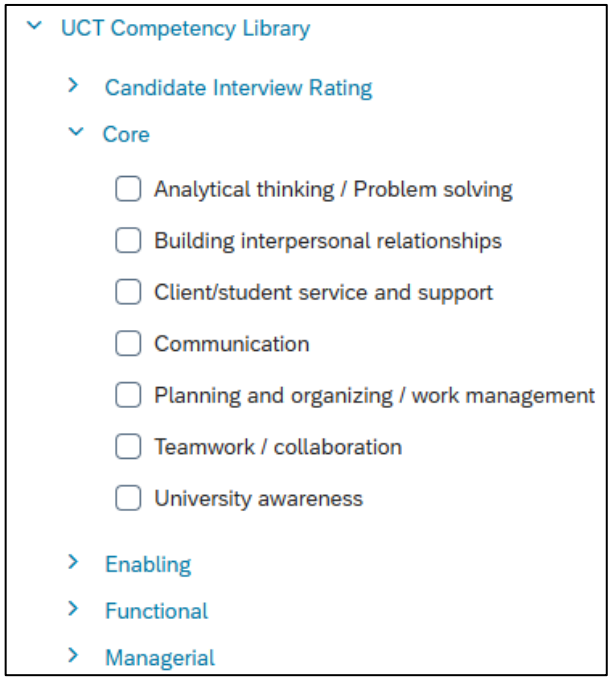
   - Select the *Browse* tab.

Working with competencies

3. The *Browse* tab appears.



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



- 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

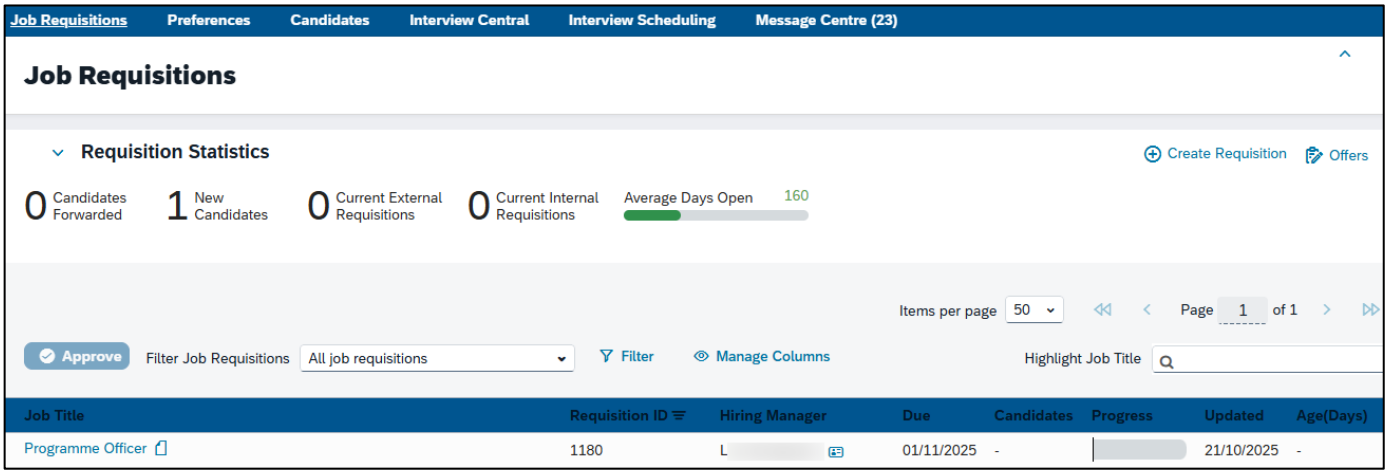
⊕ Add more competencies

- Return to Approving a job requisition after the search meeting.

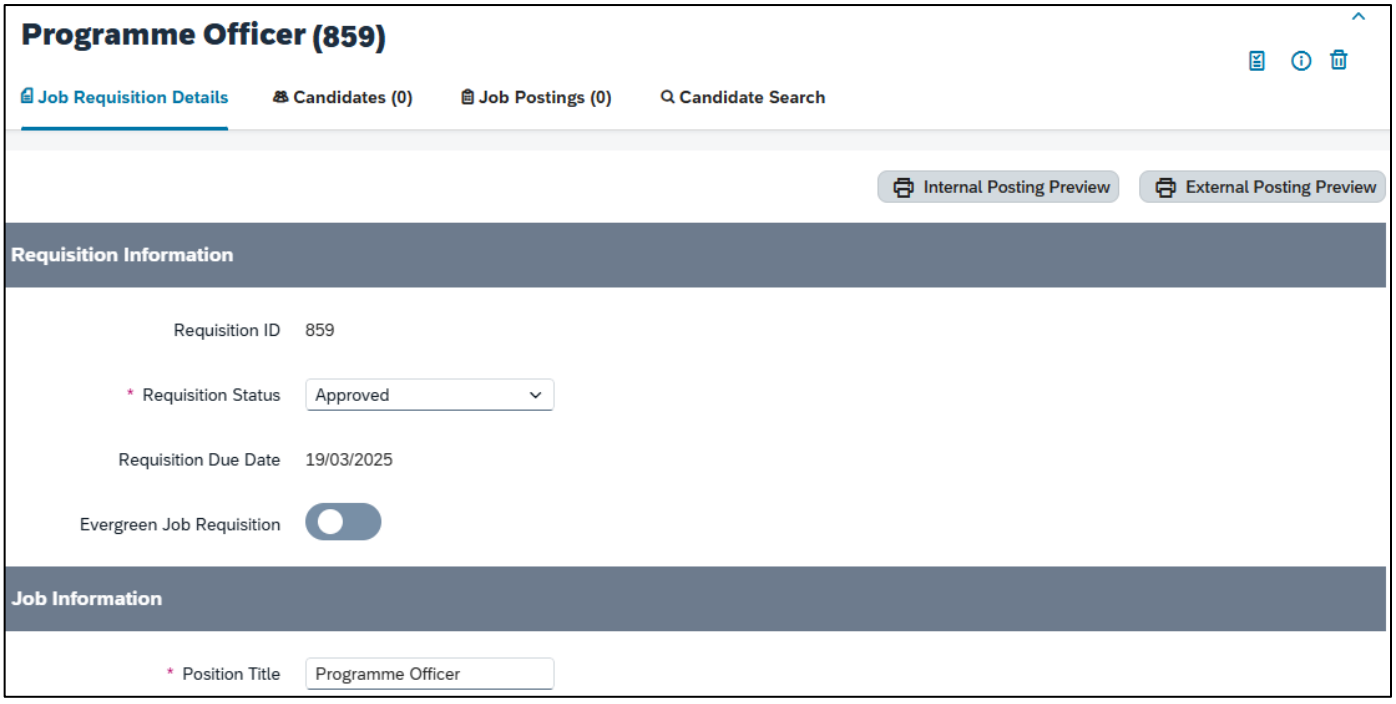
Creating a job posting (advert)

Procedure

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



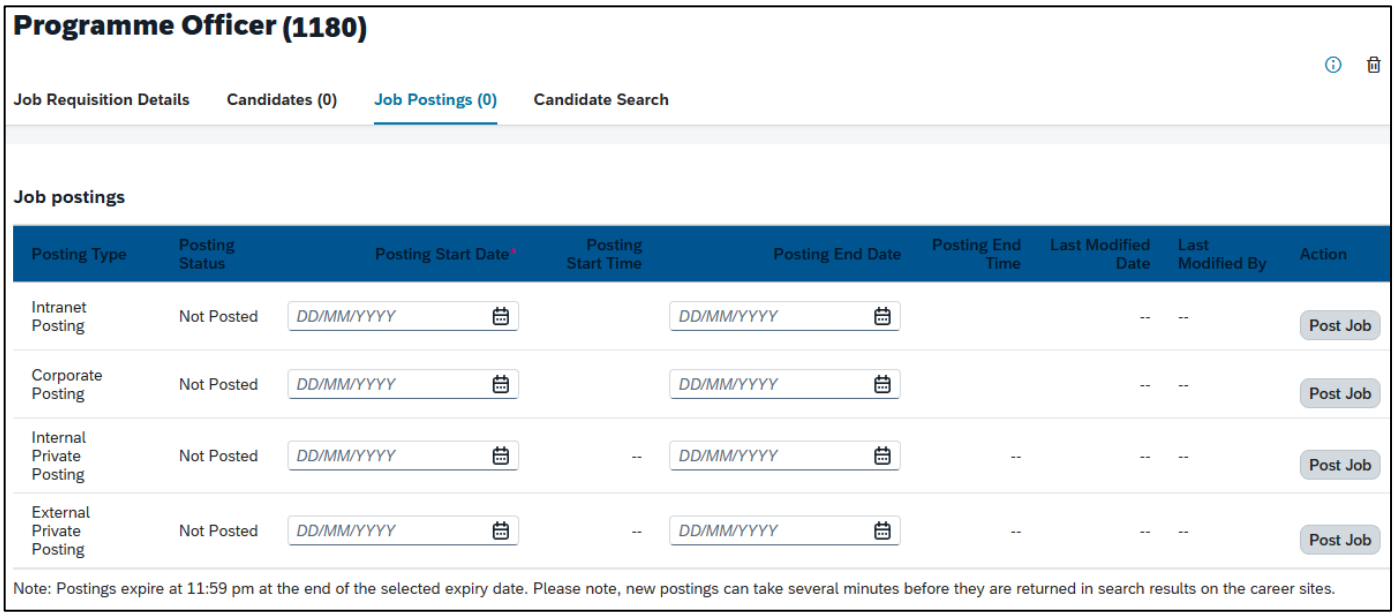
   - Select the appropriate job requisition by clicking the *Job Title* e.g. Programme Officer.
     Note: Job (advert) postings can also be accessed by clicking *View Menu Options* to the right of the job title and choosing Manage Job Postings. Continue from step 4 below.
3. The selected job requisition opens.



   - Click Job Postings (0).

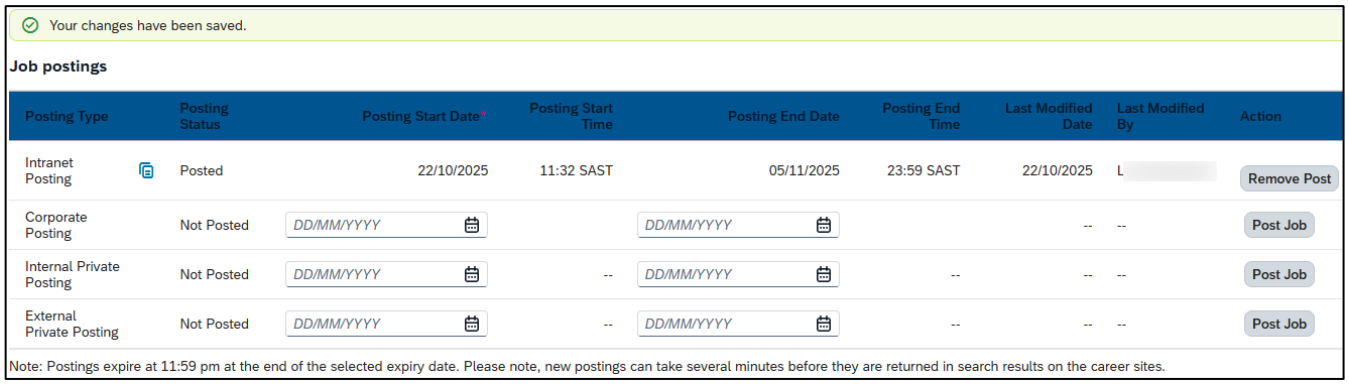
Creating a job posting (advert)

4. The *Job postings* page appears, displaying details of intranet (internal) and corporate (external) postings. Private postings can be used to allow specific candidates to apply under special circumstances, see Creating a private posting in the Administrator guide. The job board posting is not currently in use at UCT.



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.



- 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

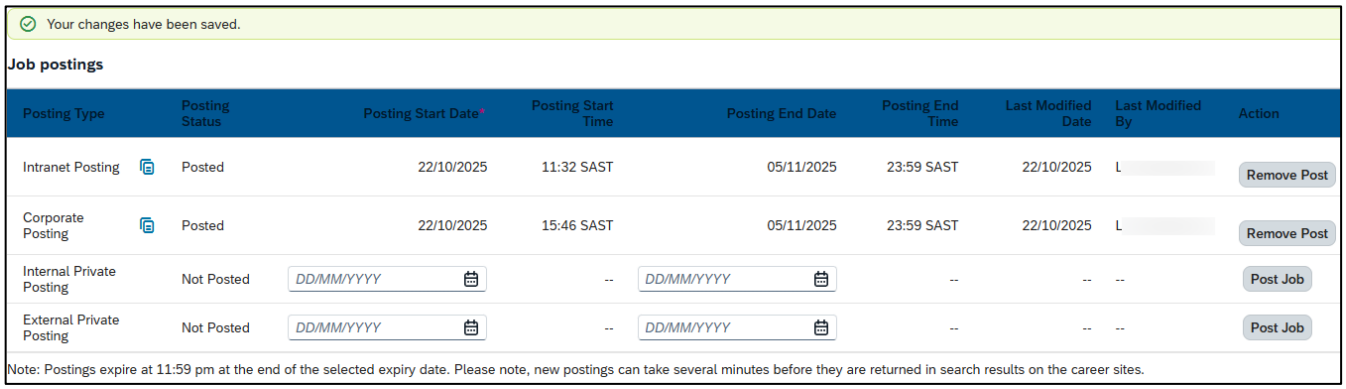
Note:

- A matching internal advert **must** be posted at the same time as the external advert to ensure 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 Details* 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.

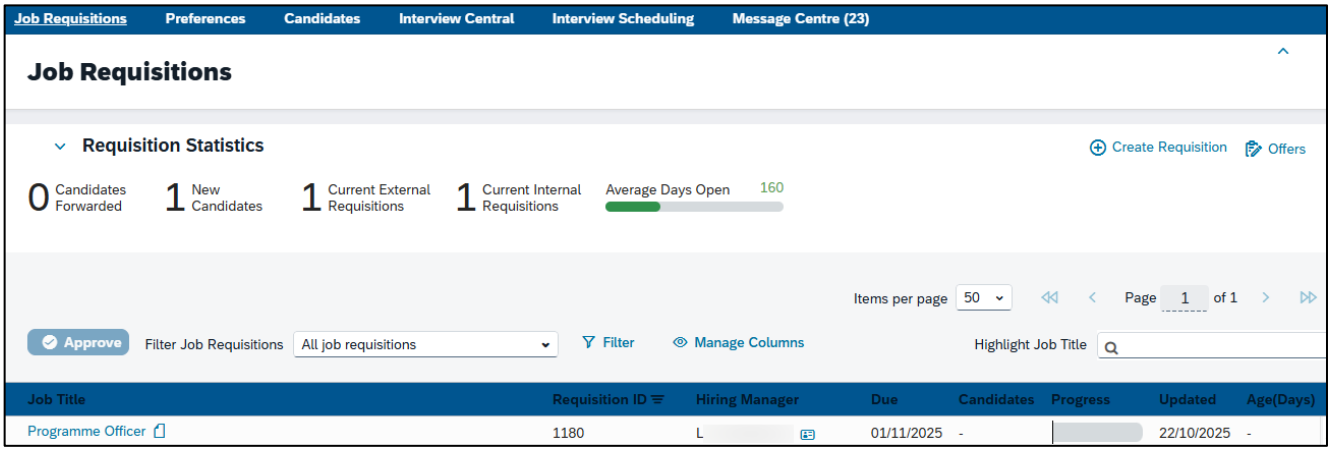


– The job advert will be available on the external careers site (www.jobs.uct.ac.za) on the selected posting date. If today was selected, it takes approximately 15 mins for the advert to appear.

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.

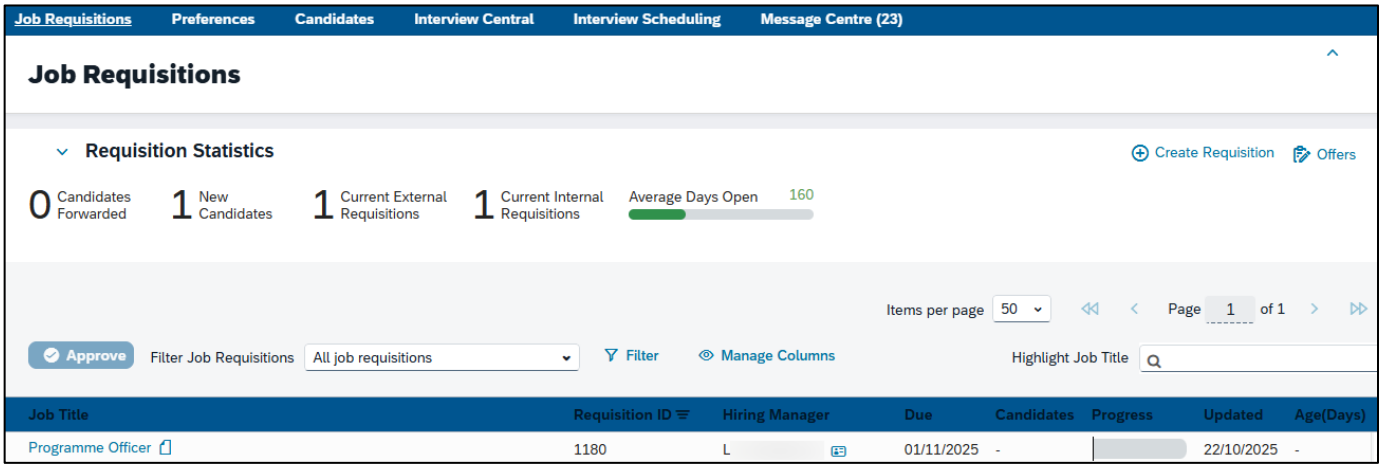
5. The *Job Requisitions* page appears. The *Current External Requisitions* and *Current Internal Requisitions* reflect the number of posted external and internal adverts for job requisitions you are involved in. As applicants apply for a job, the number will increase in the *Candidates* column.



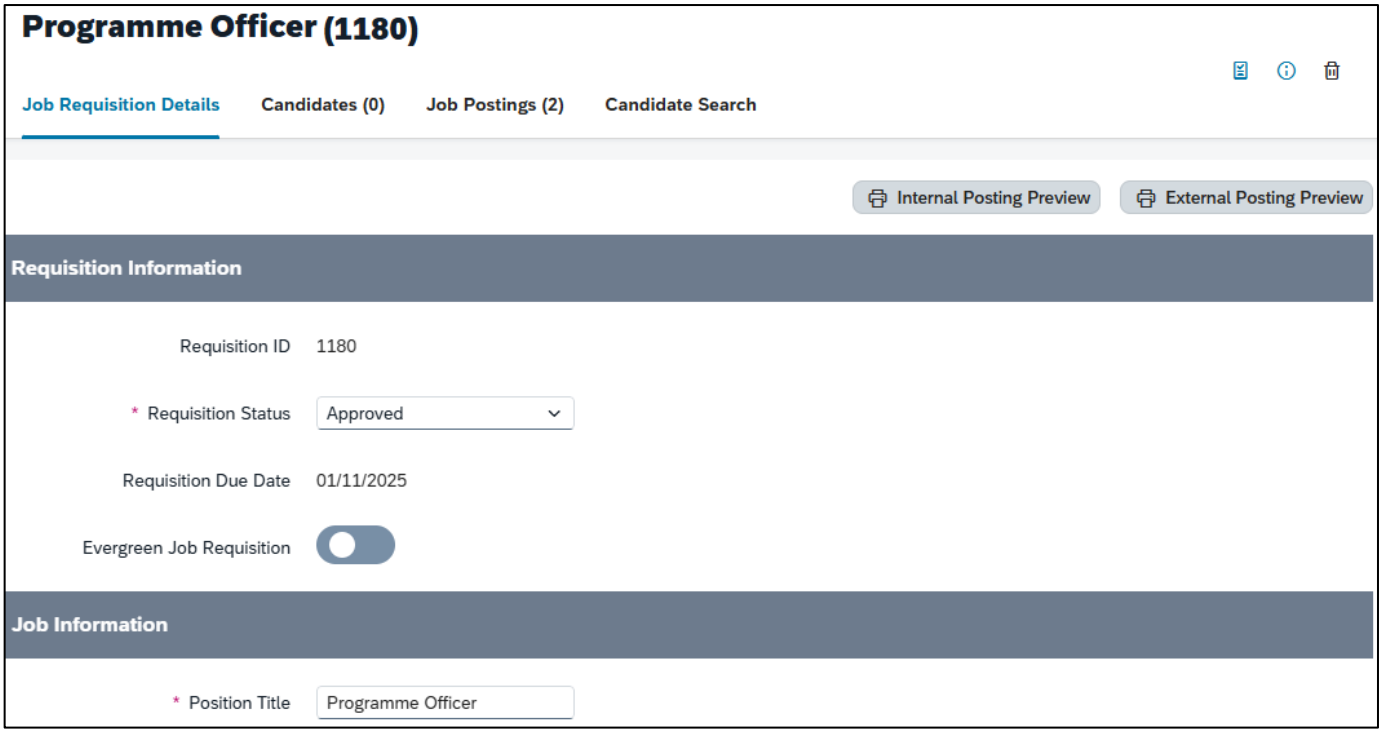
Removing a job posting (advert)

Procedure

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



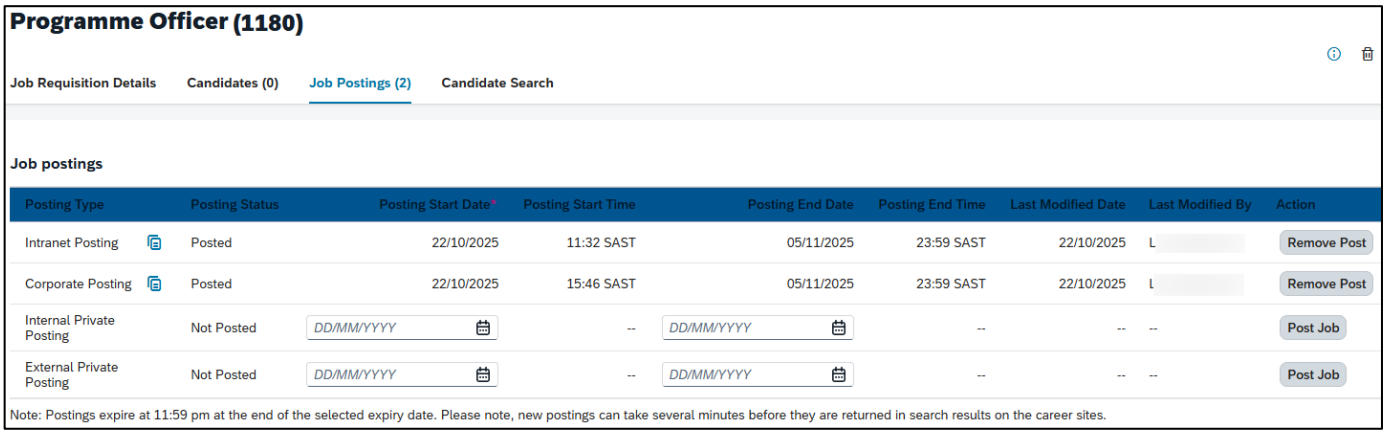
   - Select the appropriate job requisition by clicking the *Job Title* e.g. Programme Officer.
     Note: Job (advert) postings can also be accessed by clicking *View Menu Options* to the right of the job title and choosing Manage Job Postings. Continue from step 4 below.
3. The selected job requisition opens.



   - Click *Job Postings*.

Removing a job posting (advert)

4. The *Job postings* page appears, displaying details of intranet (internal) and corporate (external) postings.



- 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.

5. The *Job Requisitions* page reappears.

Running the Candidate list report

Background

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

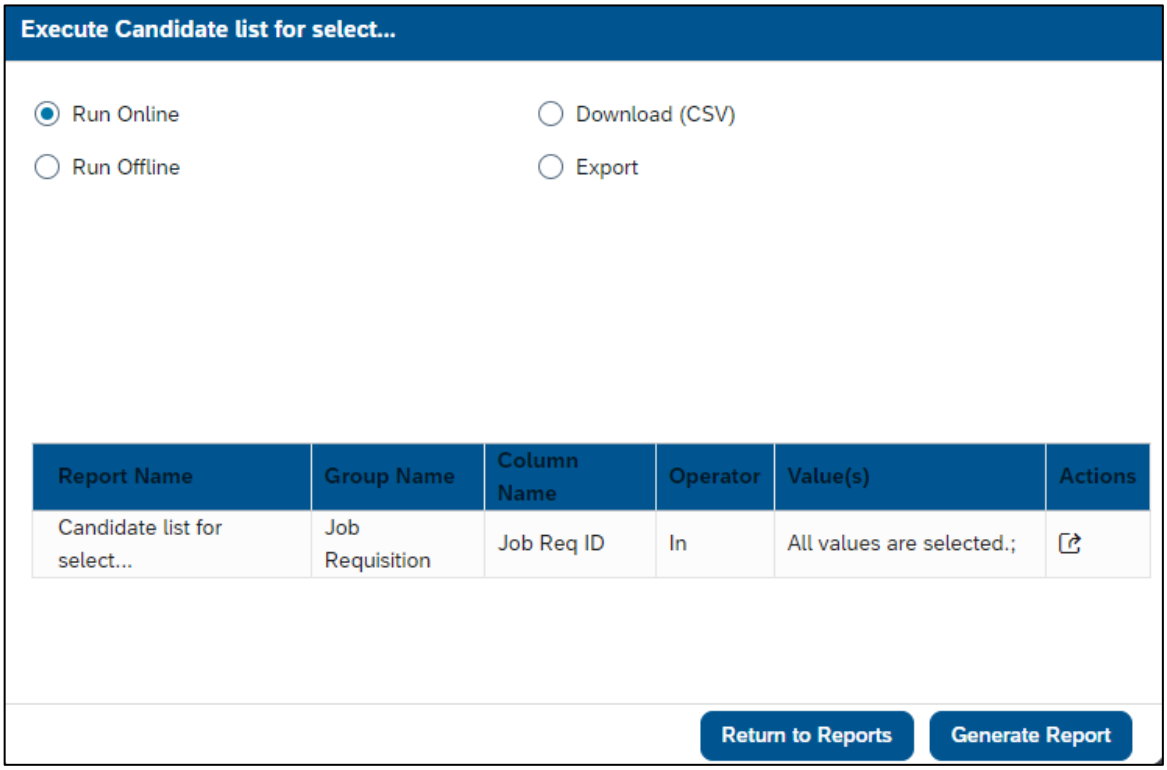
Before you begin

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

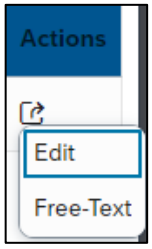
Procedure

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.

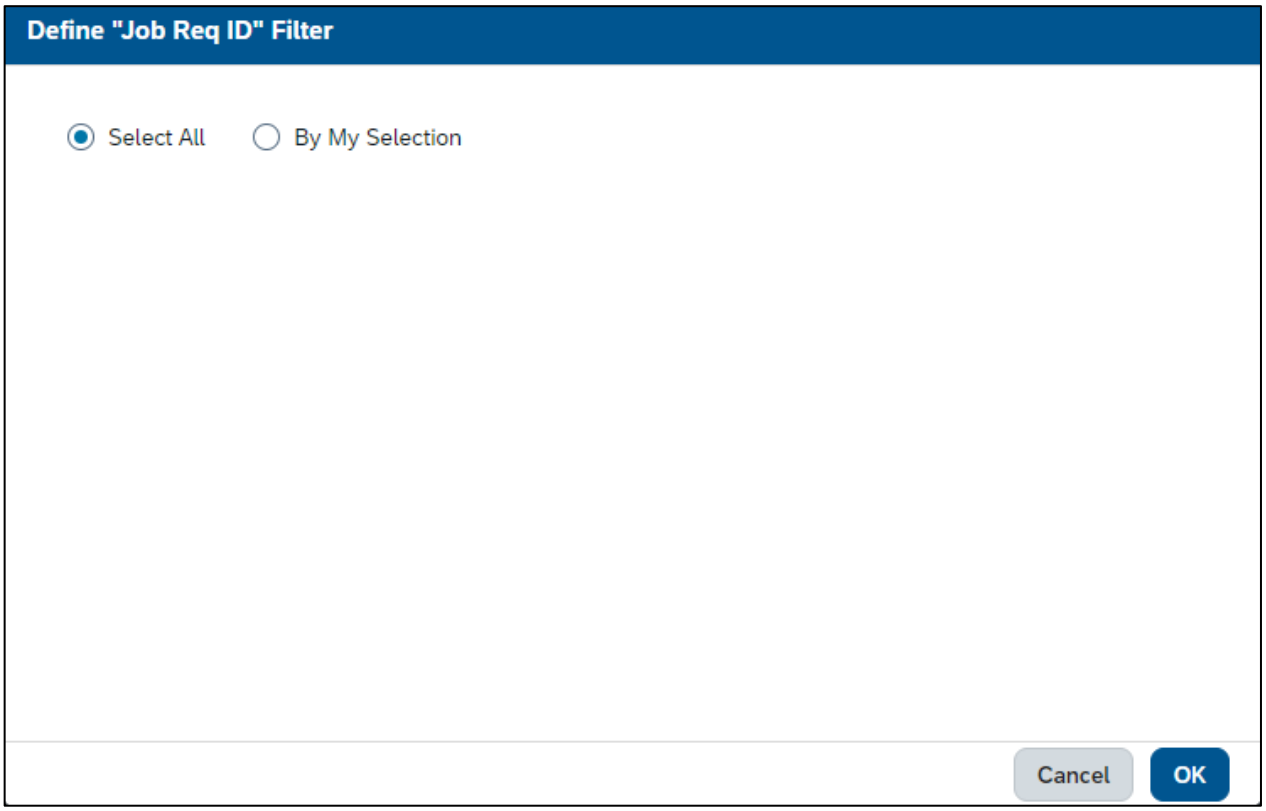


   - In the *Actions* column, click and choose *Edit*.

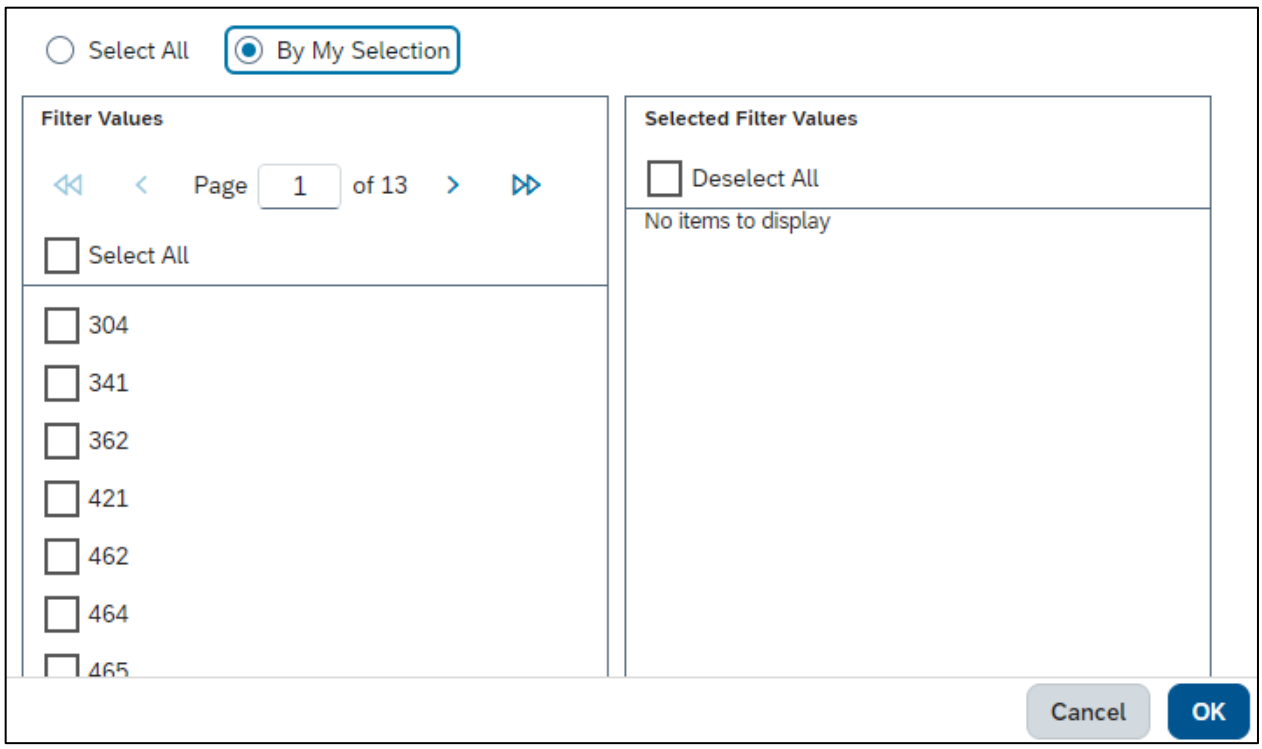


Running the Candidate list report

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



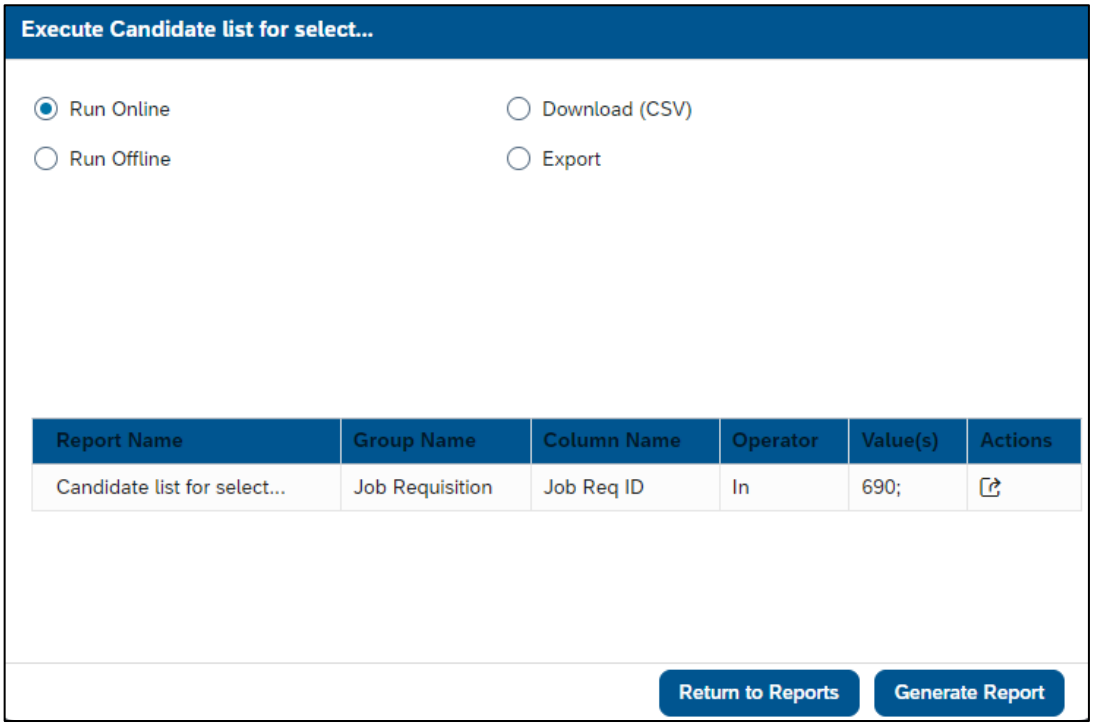
- Select *By My Selection*.
- The *Filter Values* section appears.



- 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 OK.

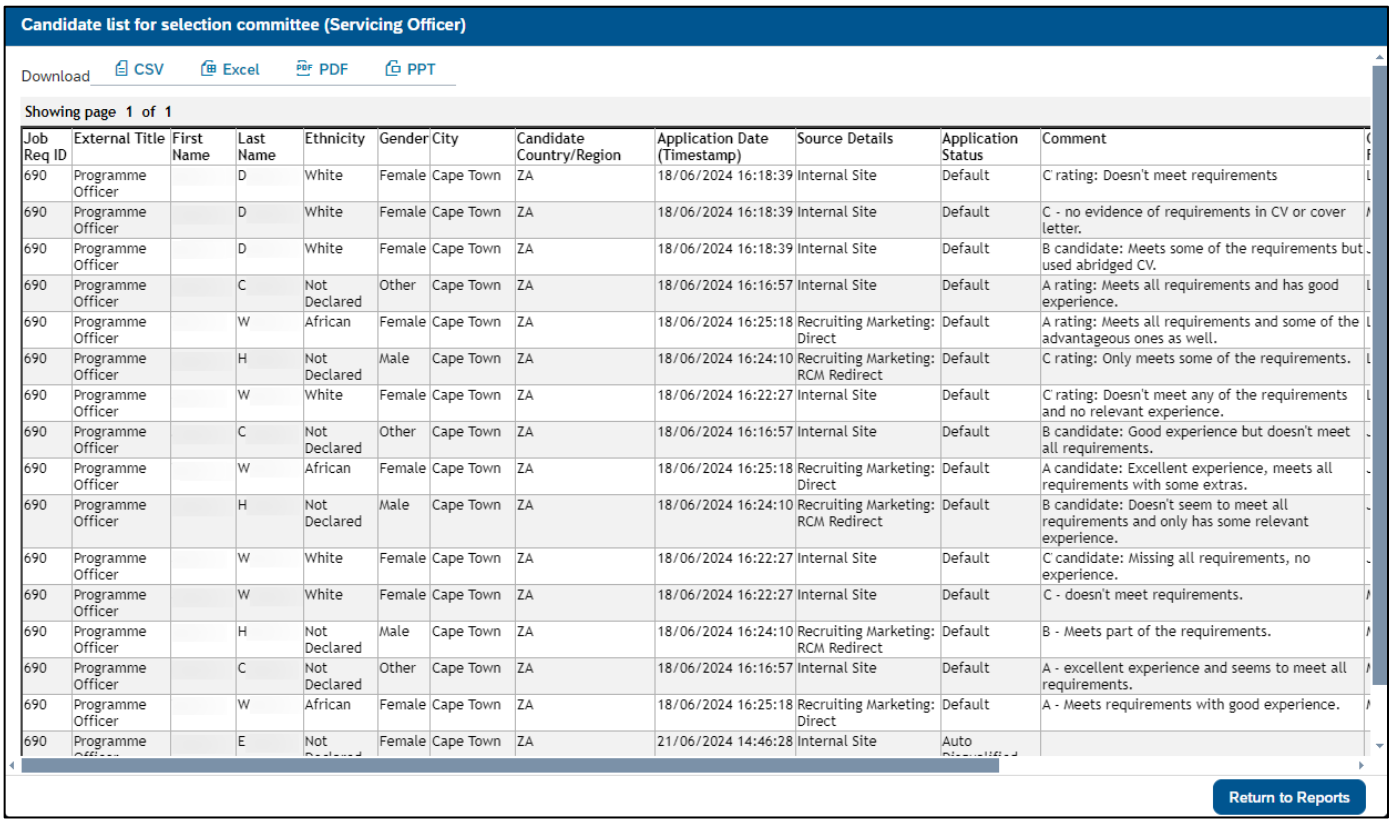
Running the Candidate list report

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



- Click **Generate Report**.

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



- Choose the applicable *Download* option (CSV, Excel, PDF, PPT) at the top.
- When finished downloading, click **Return to Reports** to return to the *Report Centre* page.

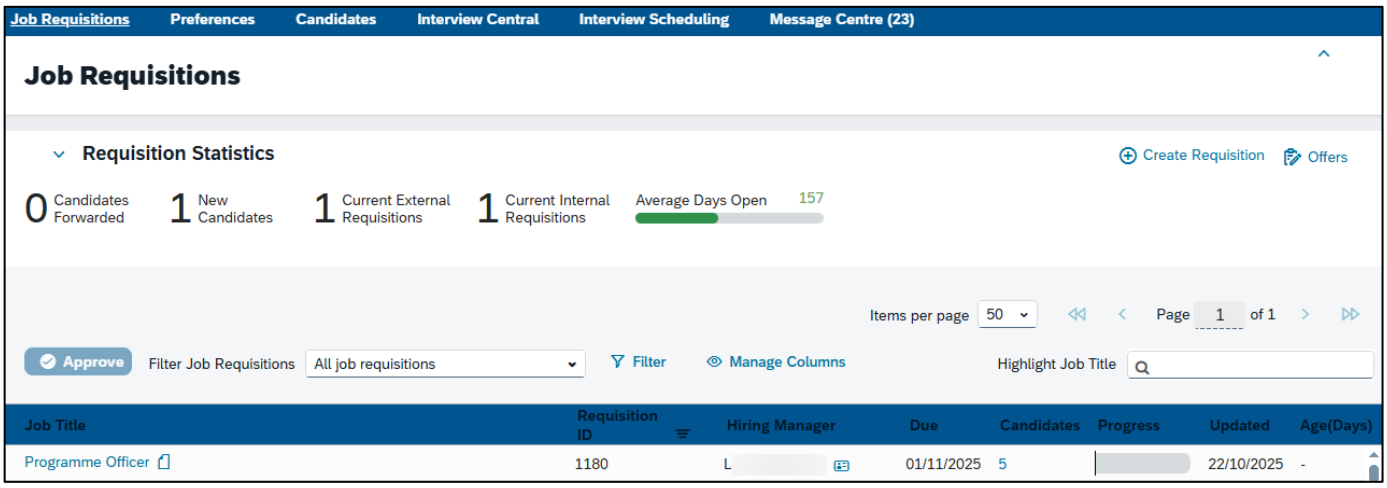
Adding applicant ratings and changing applicant status

Background

After the selection committee members have entered their ratings in the comments for each applicant, this procedure is used to add a final rating for an applicant (A, B or C) and to change their status (e.g. Interview, Retain, Regret).

Procedure

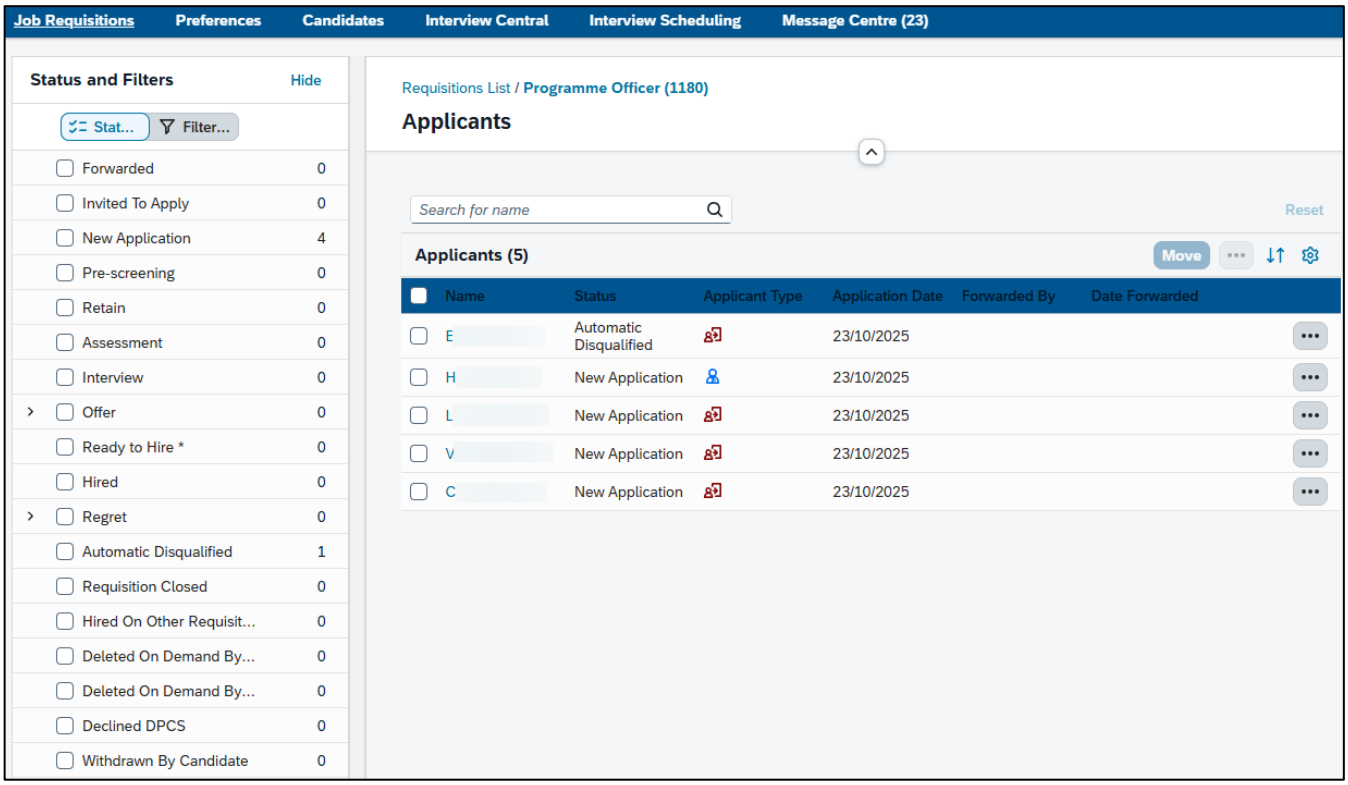
1. Log in to SuccessFactors and access the *Home* page.
   - Choose *Home* > *Recruiting*.
2. The *Job Requisitions* page appears.



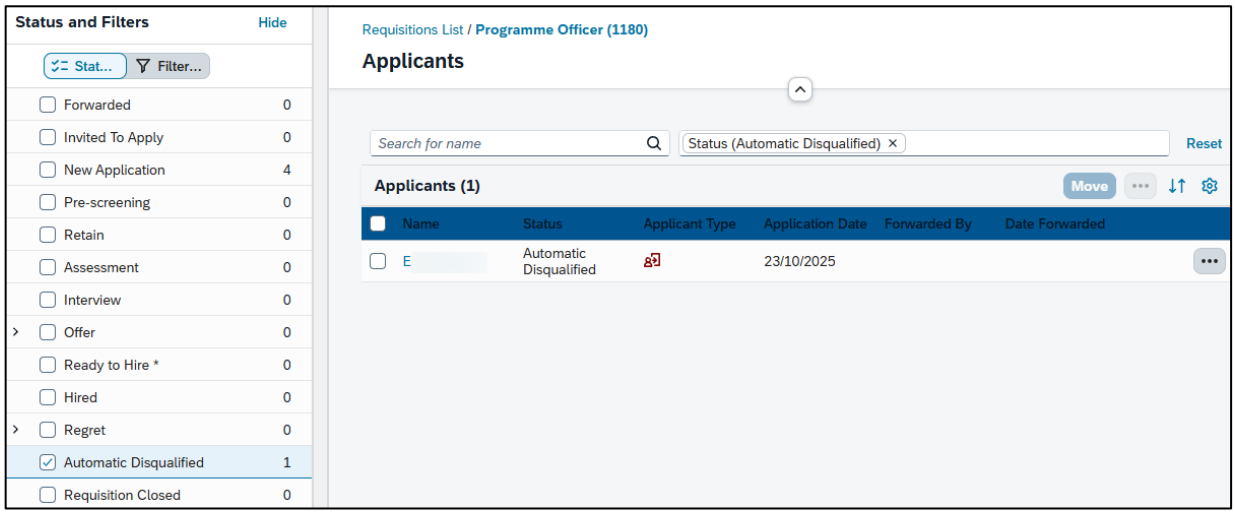
   - Click the number in the *Candidates* column (e.g. 5 above) or click *View Menu Options* to the right of the job title and choose Manage Applicants. **Note**: The number of new applications will change as soon as one person starts viewing candidate profiles or CVs.

Adding applicant ratings and changing applicant status

3. The *Applicants* page appears.



- The *Status and Filters* section shows all possible statuses and the number of applicants per status. In the example above there are 5 applicants, with 4 in *New Application* and 1 in *Automatically Disqualified* based on answers to the application questions. Applicant status can only be changed by the Recruitment Advisor.
  Note: Applicants with the *New Application* status can edit/change their attachments, profile information and answers to the application questions. Once they move to another status, they will no longer be allowed to make changes.
- Select a status on the left to change the list of *Applicants* on the right. When no statuses are selected on the left, all applicants are listed.
  Note: If you select more than one checkbox, you will see applicants with all the selected statuses.

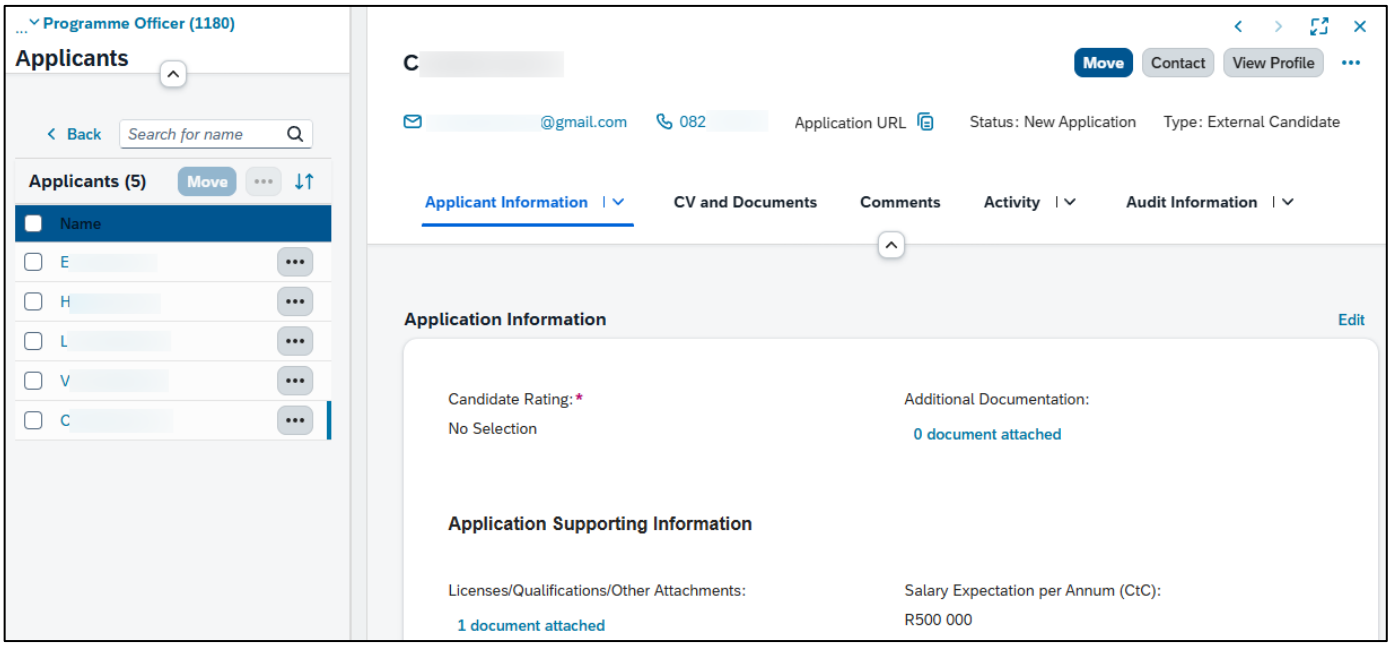


- The *Status and Filters* section can be hidden by clicking *Hide*. Click Status and Filters to show it again.
- Click *Settings* to select columns to show, columns to hide and/or change the column order. A maximum of 9 columns can be selected.

Adding applicant ratings and changing applicant status

- Click *Sort* to select ascending or descending sort order or to choose a specific column to sort by.
- Select an applicant to view by clicking their name in the *Name* column.

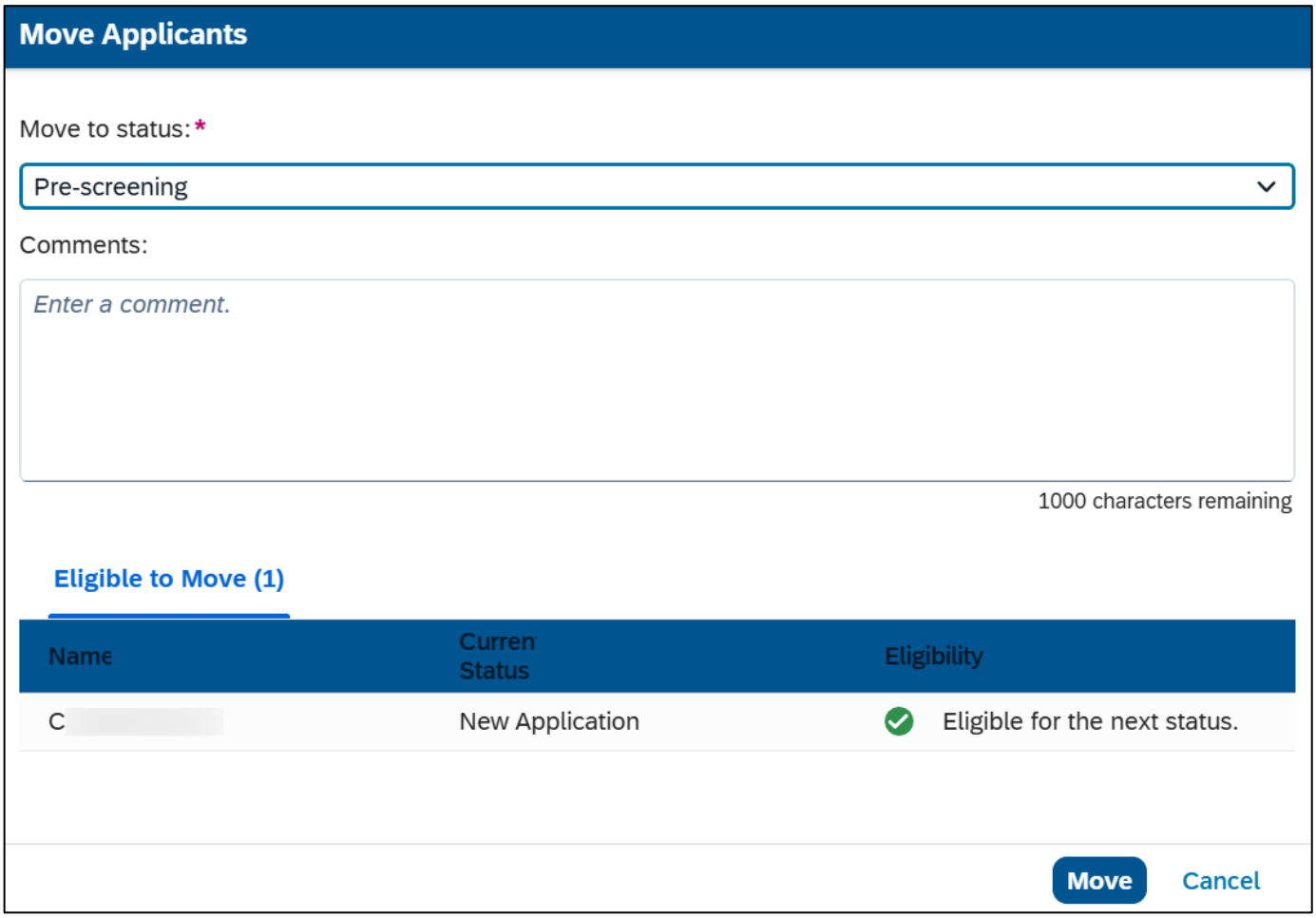
4. The list of applicants appears on the left with the selected applicant's details on the right.



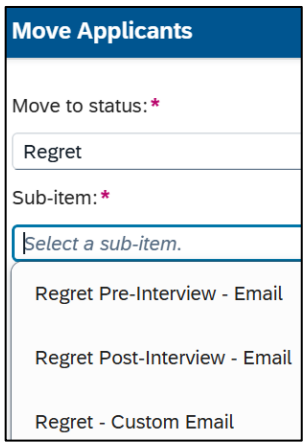
- Click the *Comments* tab to review selection committee ratings and comments for the current applicant. For longer comments, click *More* to view the entire comment. Click the *Applicant Information* tab to return.
- Click *Edit* on the right.
- Select the appropriate *Candidate Rating* (A, B or C).
- Click *Save* on the right. A message above the *Applicant Information* section confirms that the changes were saved.
- Click Move.

Adding applicant ratings and changing applicant status

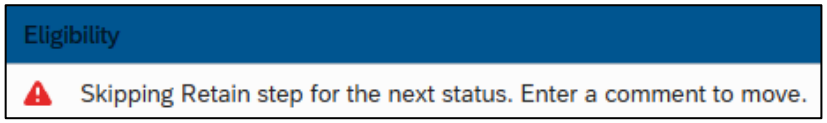
5. The *Move Applicants* dialogue box appears.



- In the *Move to status* field, select the appropriate status for the applicant (e.g. Interview, Retain, Regret).
  Note: If a candidate would be shortlisted but is missing information, the pre-screening status can be assigned while additional information is requested.
- If the *Regret* status was chosen above, select an appropriate *Sub-item*.



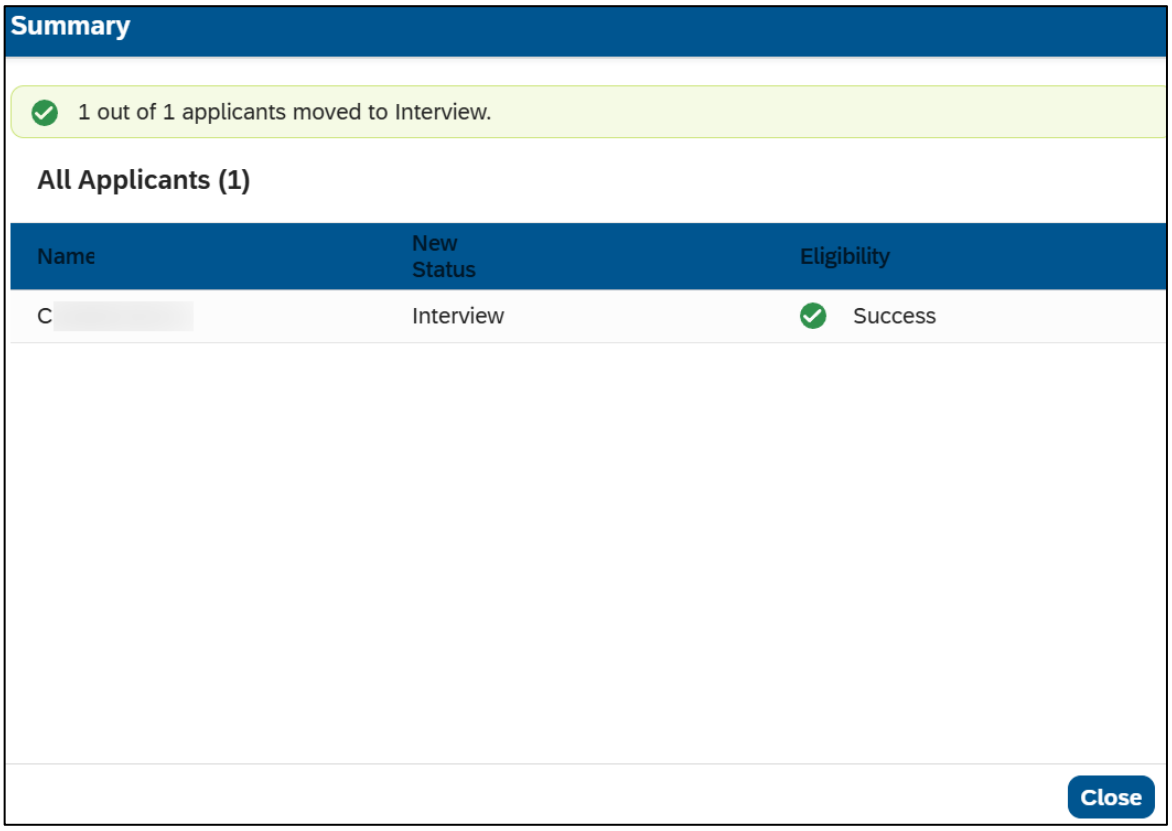
- Enter a comment if the *Eligibility* field indicates a comment is required before moving status.



- Click Move.

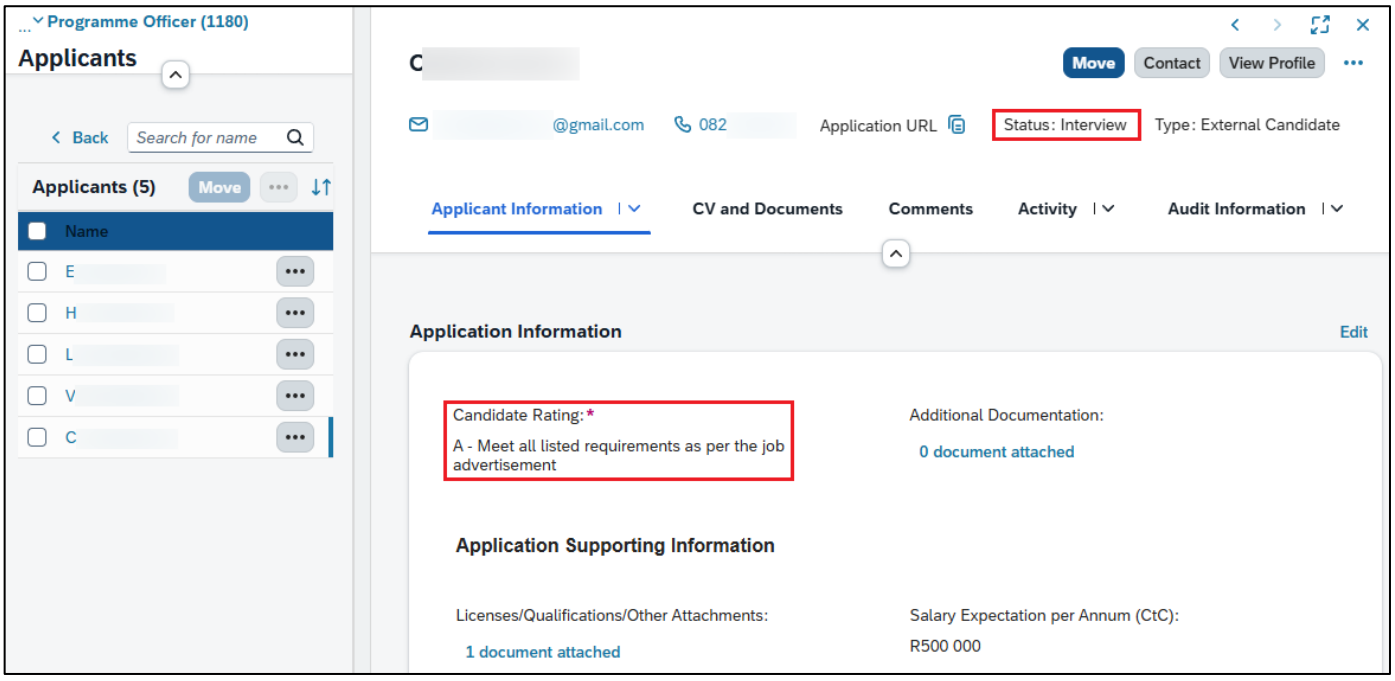
Adding applicant ratings and changing applicant status

6. The *Summary* dialogue box appears, confirming the move to the selected status.



   - Click Close.

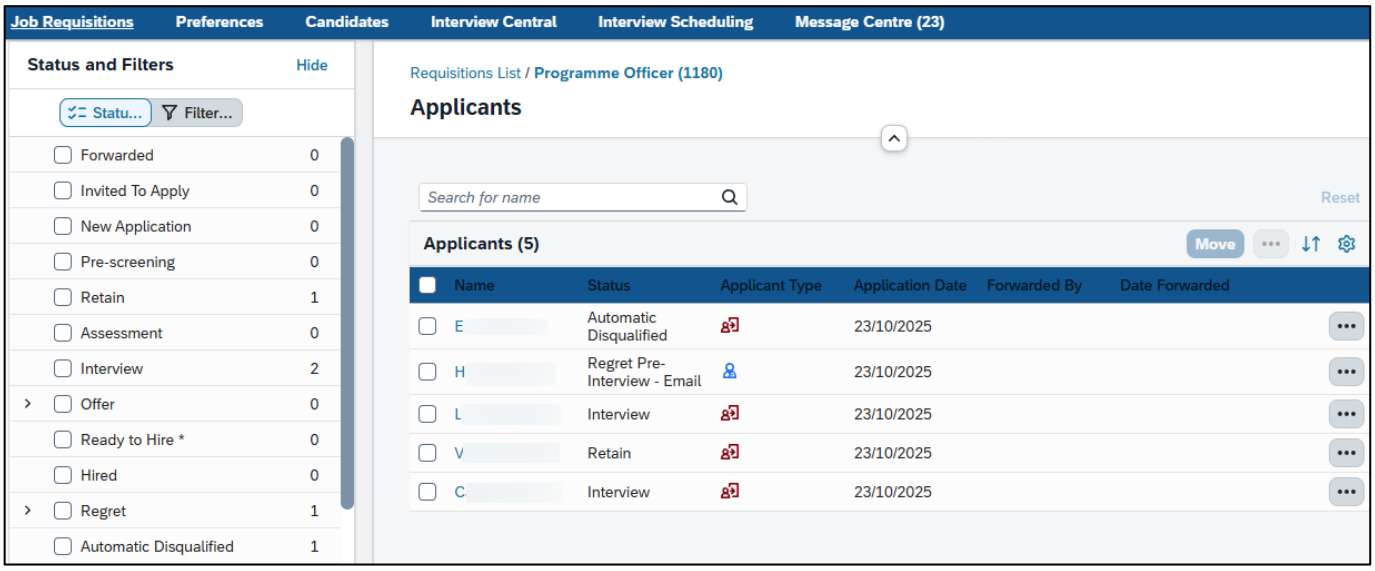
7. The selected applicant's page reappears, displaying the new *Candidate Rating* and *Status*.



   - Select the next applicant using the *Name* column on the left or use the < > arrows in the top right. Repeat from step 4 above to review comments, enter the rating and change the status.
   - When all applicants have been rated and their status changed, click *Back* on the left in the *Applicants* section.

Adding applicant ratings and changing applicant status

8. The *Applicants* page reappears, displaying all applicants and their statuses.



- Click *Job Requisitions* to return to the *Job Requisitions* overview page.

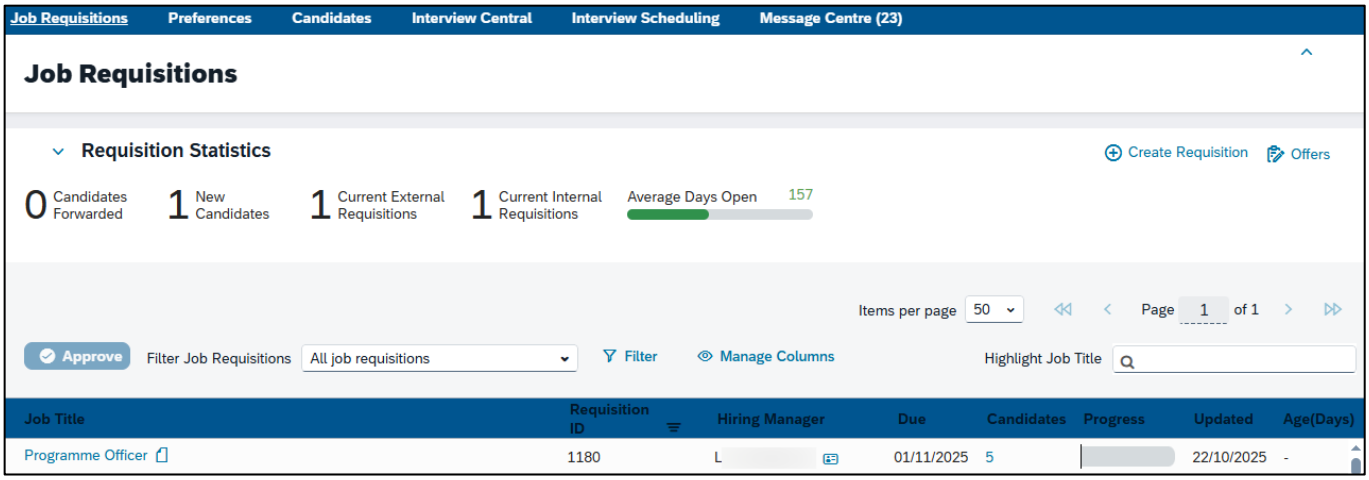
Changing applicant status after initial rating and status change

Background

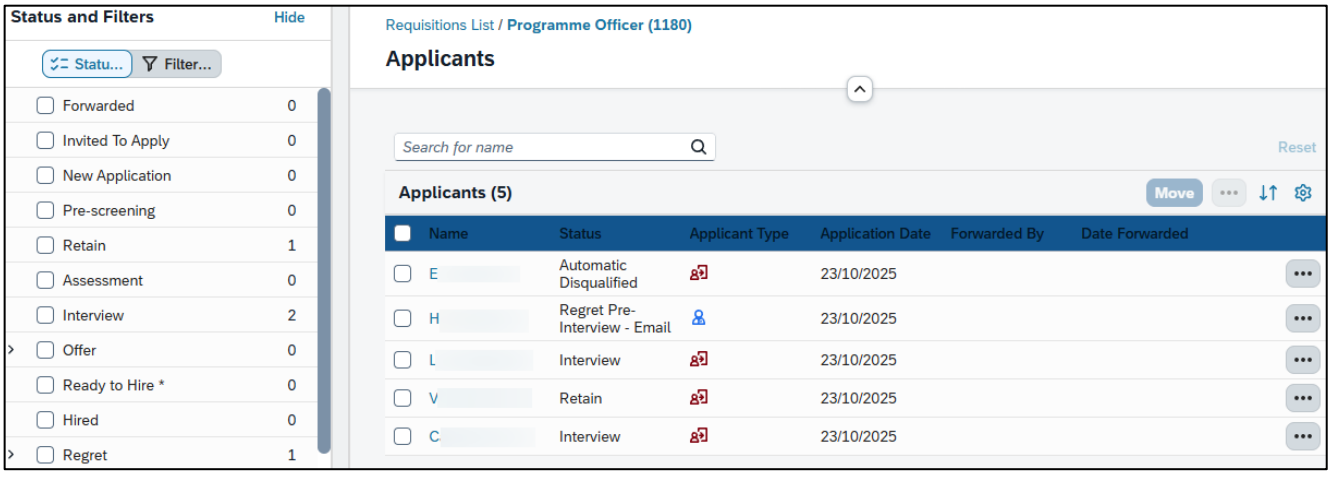
This procedure is used to change applicant status after the initial rating and status change.

Procedure

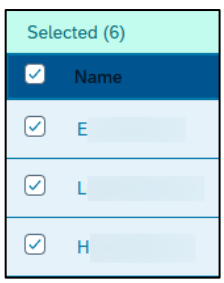
1. Log in to SuccessFactors and access the *Home* page.
   - Choose *Home* > *Recruiting*.
2. The *Job Requisitions* page appears.



   - 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 Manage Applicants.
3. The *Applicants* page appears. All applicants are displayed unless a status was previously selected.



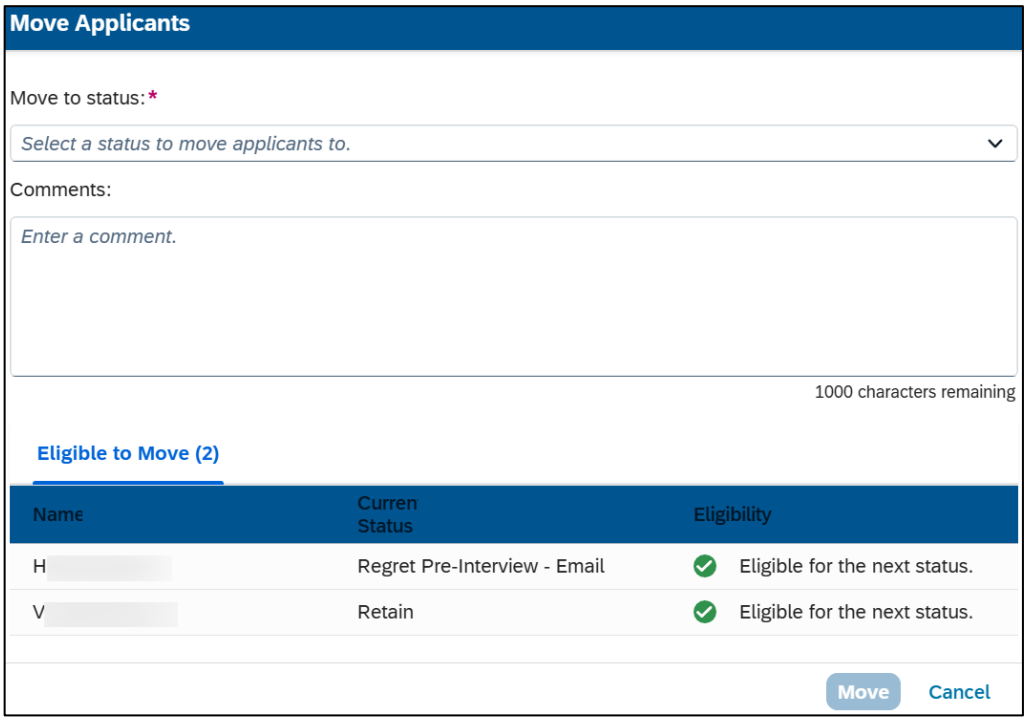
   - Either click the checkbox at the top of the *Name* column to select all applicants or select each applicant using the checkbox to the left of their name.



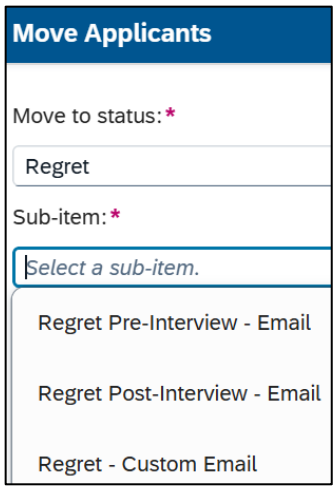
   - Click Move.

Changing applicant status after initial rating and status change

4. The *Move Applicants* dialogue box appears, listing all selected applicants.



- In the *Move to* status field, select the appropriate status.
- If the *Regret* status was chosen above, select an appropriate *Sub-item*.

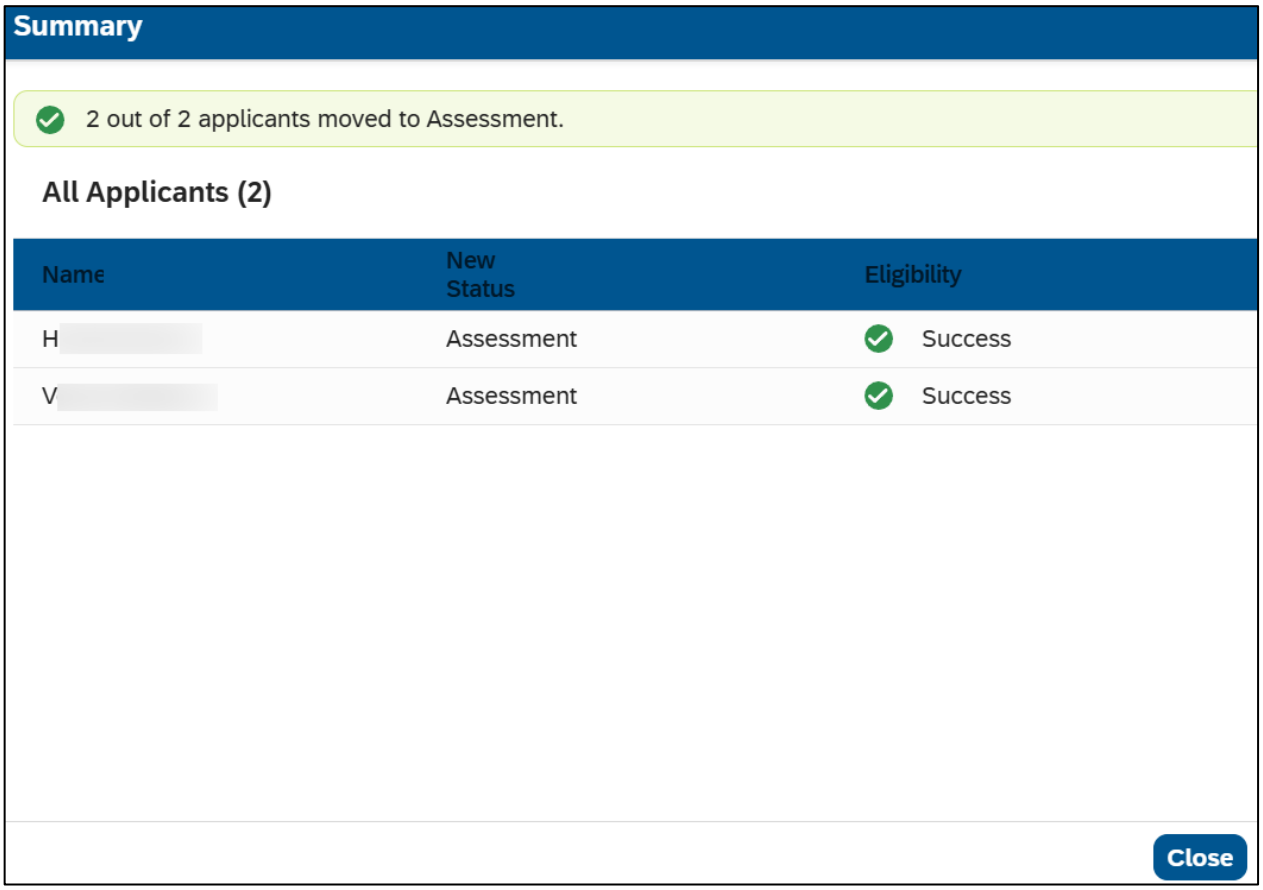


- Enter a comment if the *Eligibility* field indicates a comment is required before moving status.

  Click Move.

Changing applicant status after initial rating and status change

5. The *Summary* dialogue box appears, confirming the move to the selected status.



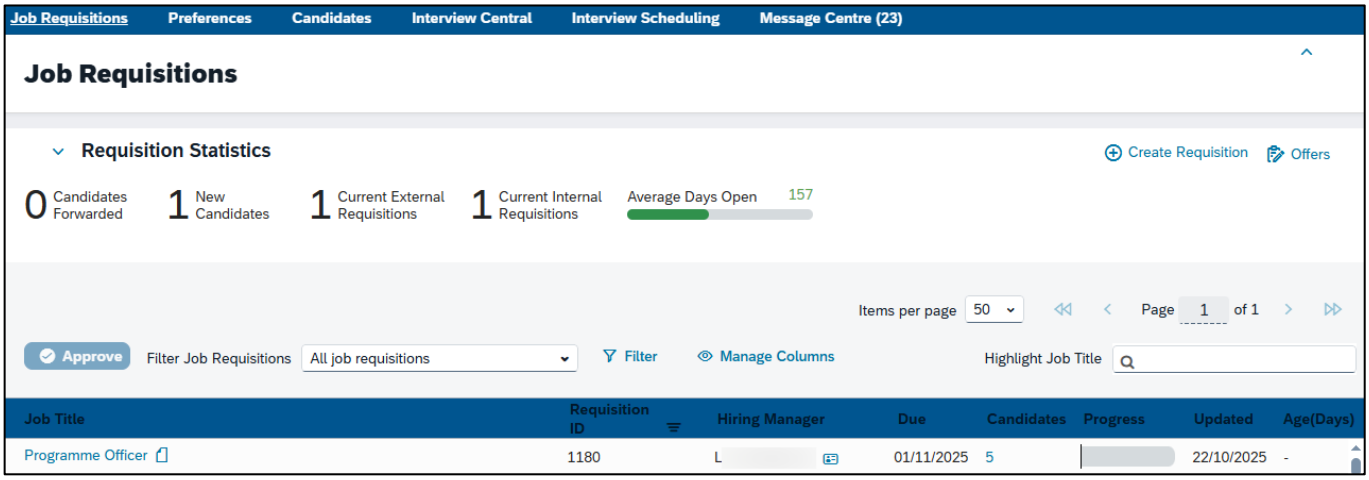
   - Click Close.

6. The *Applicants* page reappears.

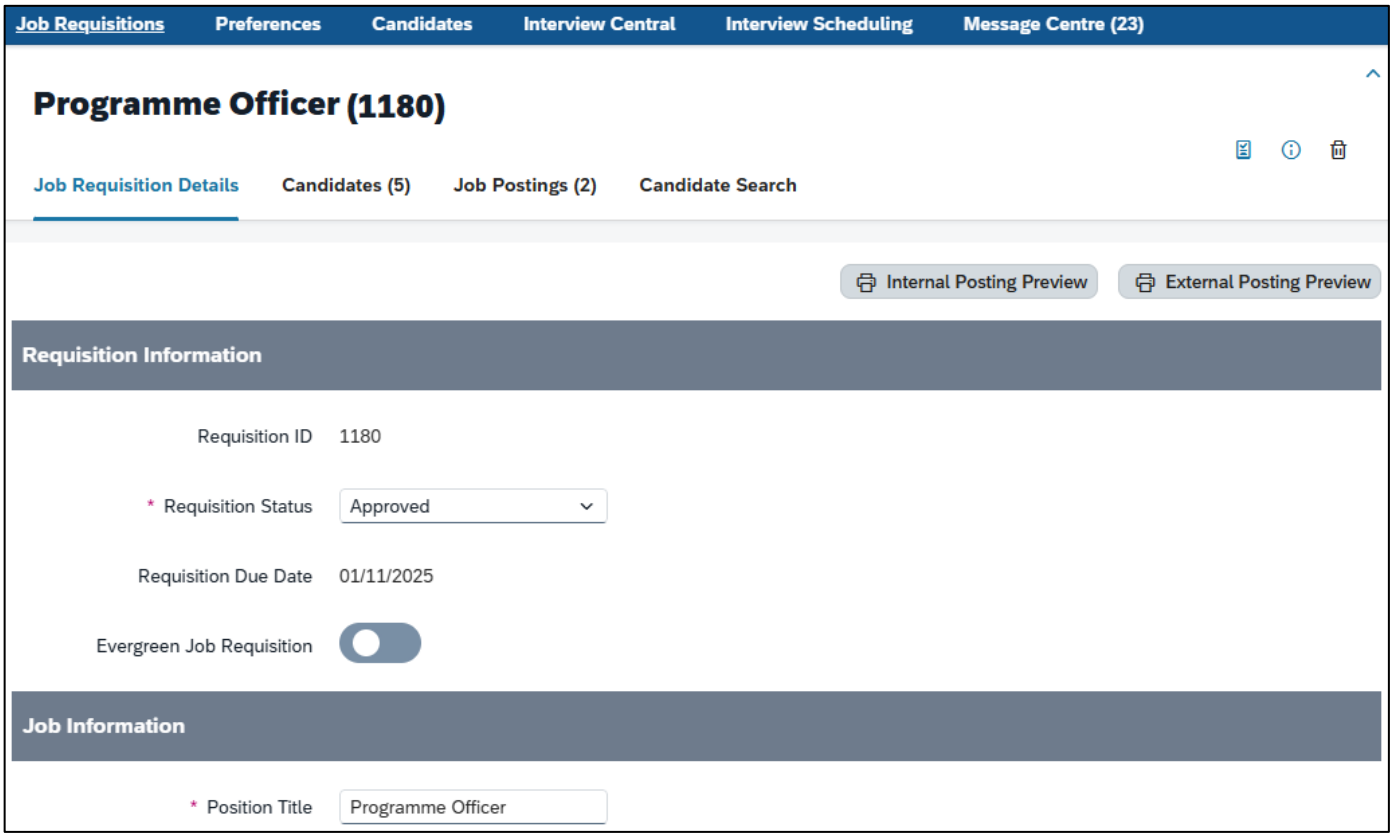
Adding a selection committee member to a job requisition

Procedure

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



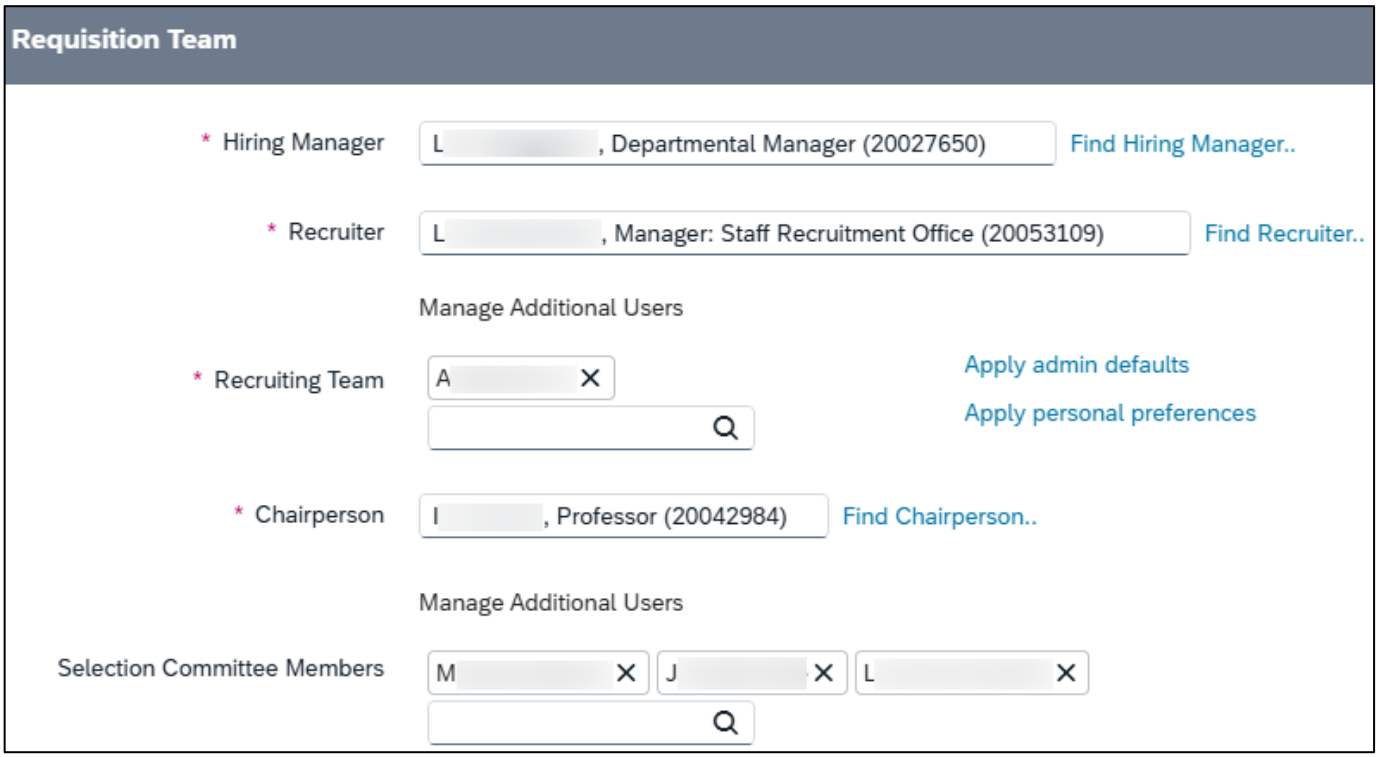
   - Select the appropriate job requisition by clicking the *Job Title* e.g. Programme Officer.
3. The selected job requisition opens.



   - Scroll down to the *Requisition Team* section.

Adding a selection committee member to a job requisition

***Requisition Team* section**:



- In the *Selection Committee Members* field, click in the search field below 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** at the bottom of the page.
- Click *Job Requisitions* to return to the *Job Requisitions* overview page.

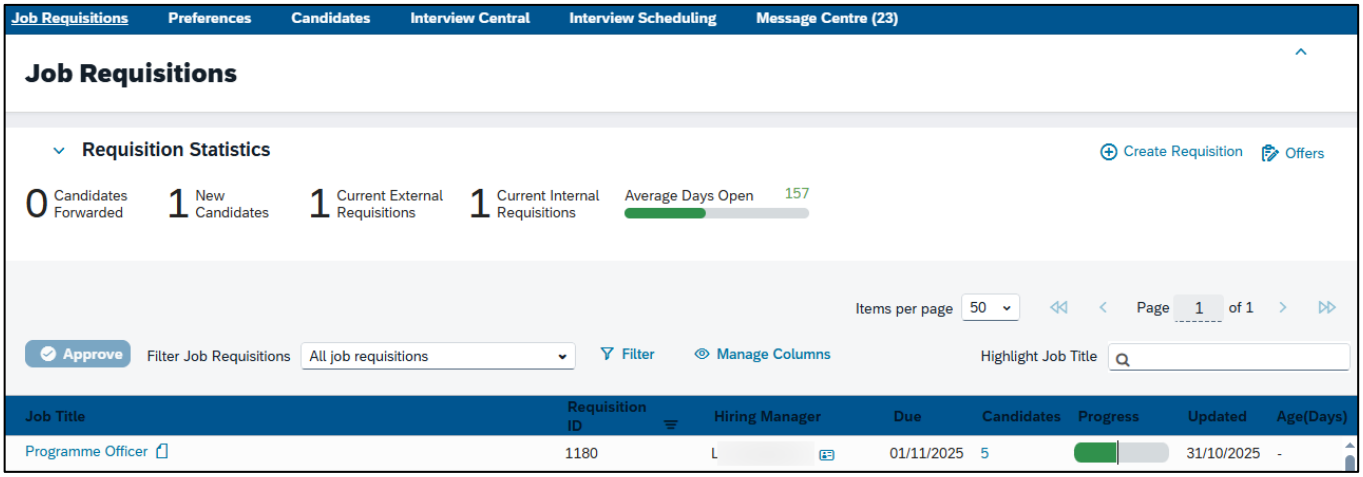
Reviewing interview ratings and candidate recommendations

Background

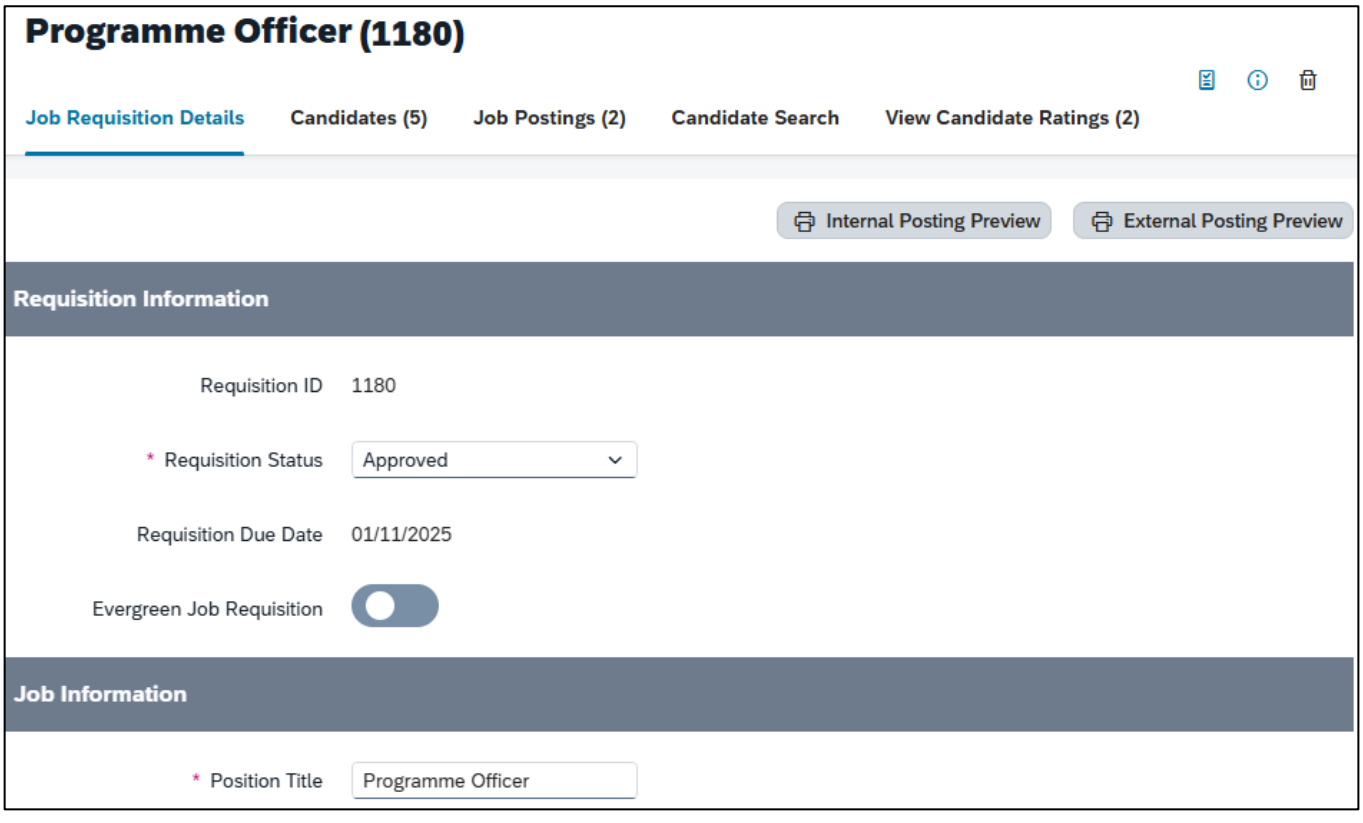
After the interview, selection committee members enter an overall rating or rate a set of competencies for each candidate and can optionally upload their interview notes. Finally, they select whether a candidate is recommended or not. The Recruitment Advisor can review all entries submitted by the selection 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 Details* page appears.

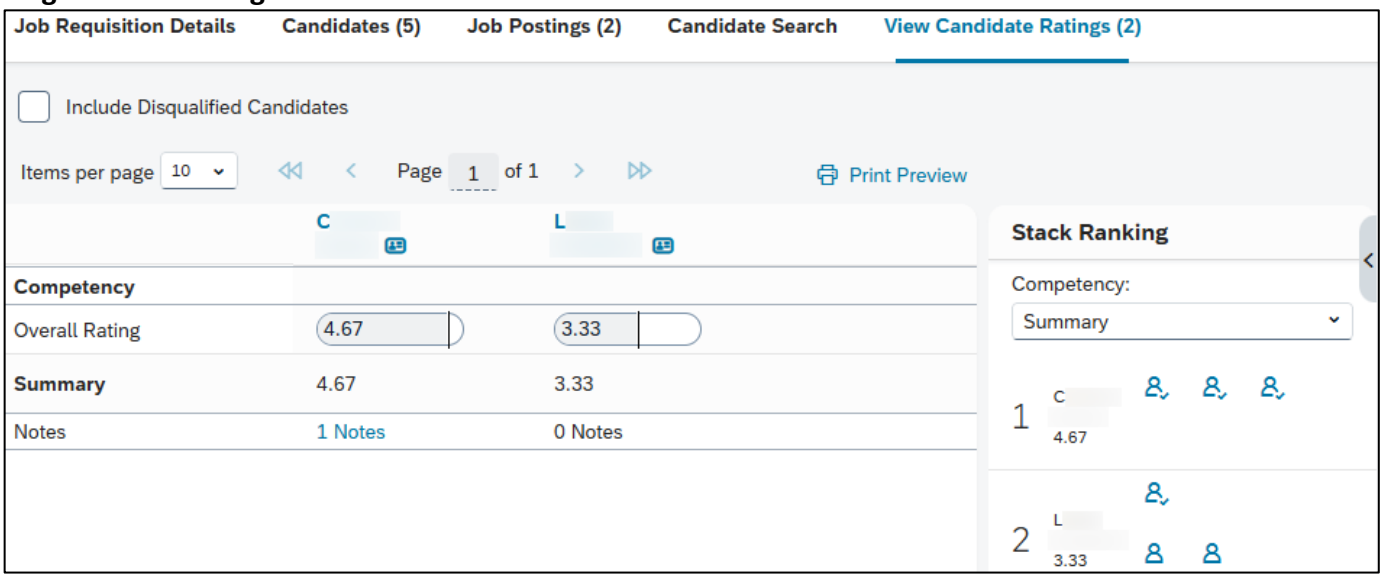


   - Click *View Candidate Ratings*.

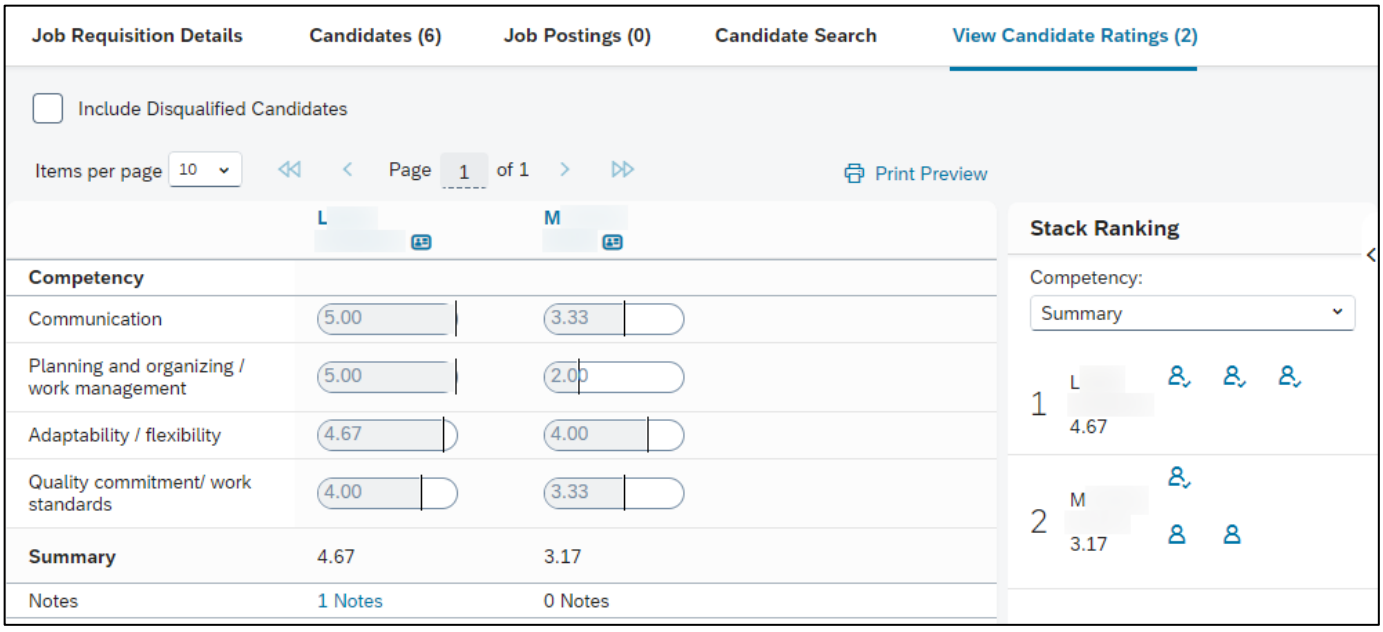
Reviewing interview ratings and candidate recommendations

4. The *View Candidate Ratings* page appears. The candidates either received a single overall rating or were rated on a set of competencies.

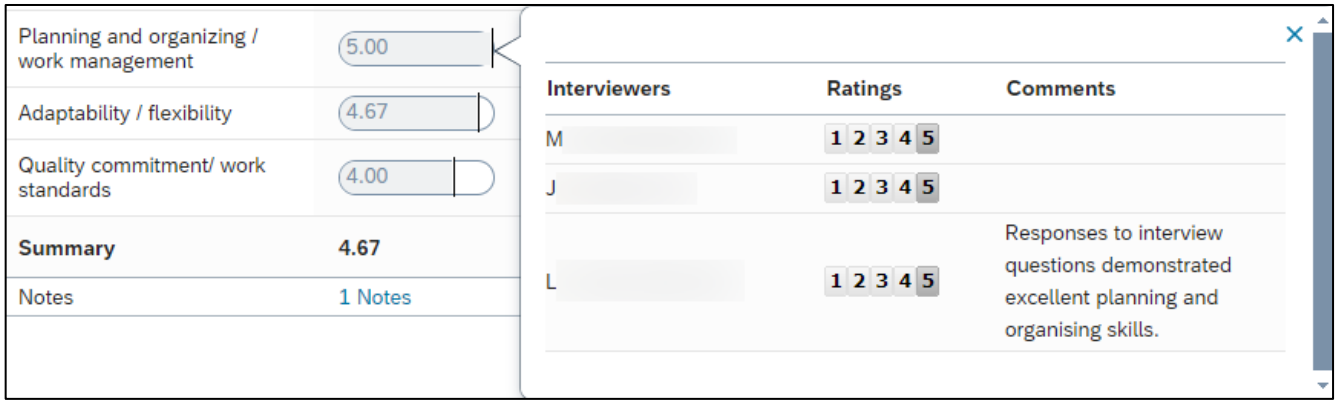
Single overall rating



Rated on a set of competencies



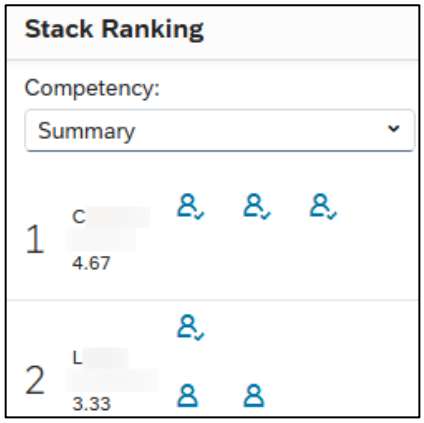
- Hover over a rating to view the rating per interviewer and any comments.



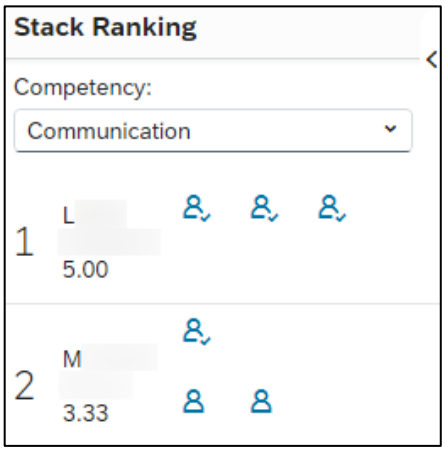
- If selection committee members attached their interview notes, they will appear in the *Notes* section. Click the *Notes* link to access the attached notes.

Reviewing interview ratings and candidate recommendations

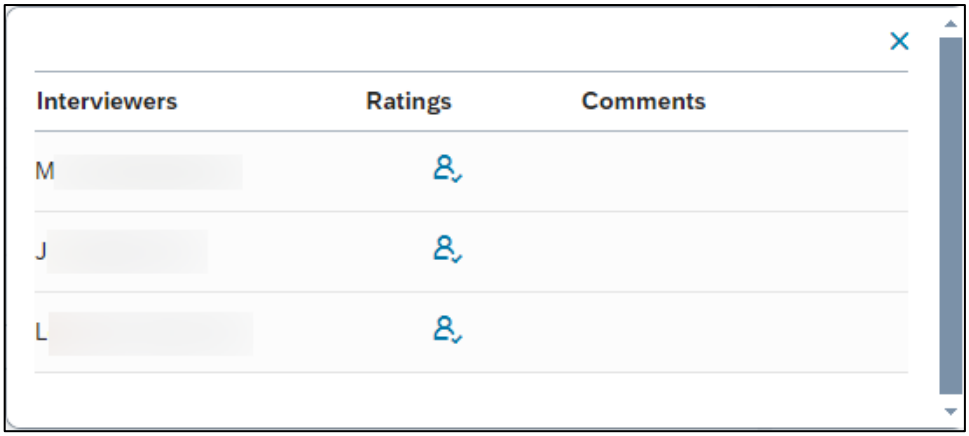
- If candidates were rated on a set of competencies, sort the candidates using the *Stack Ranking* section on the right. Sort by *Summary* or by a single competency.



  - 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 summary 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/Save as 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 ratings and candidate recommendations.

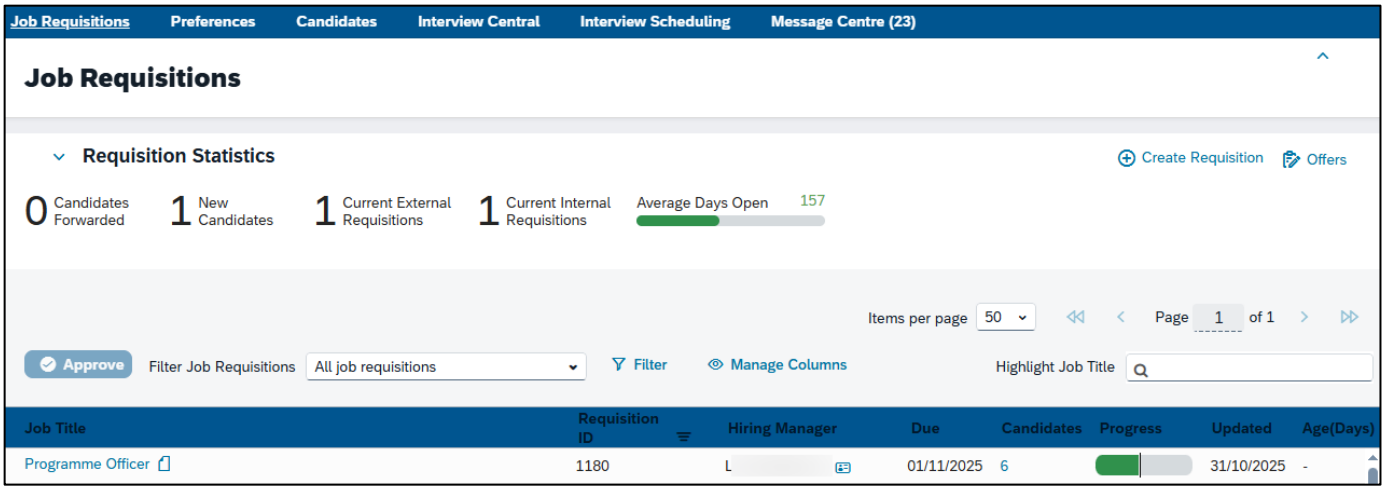
Starting the offer approval process

Before you begin

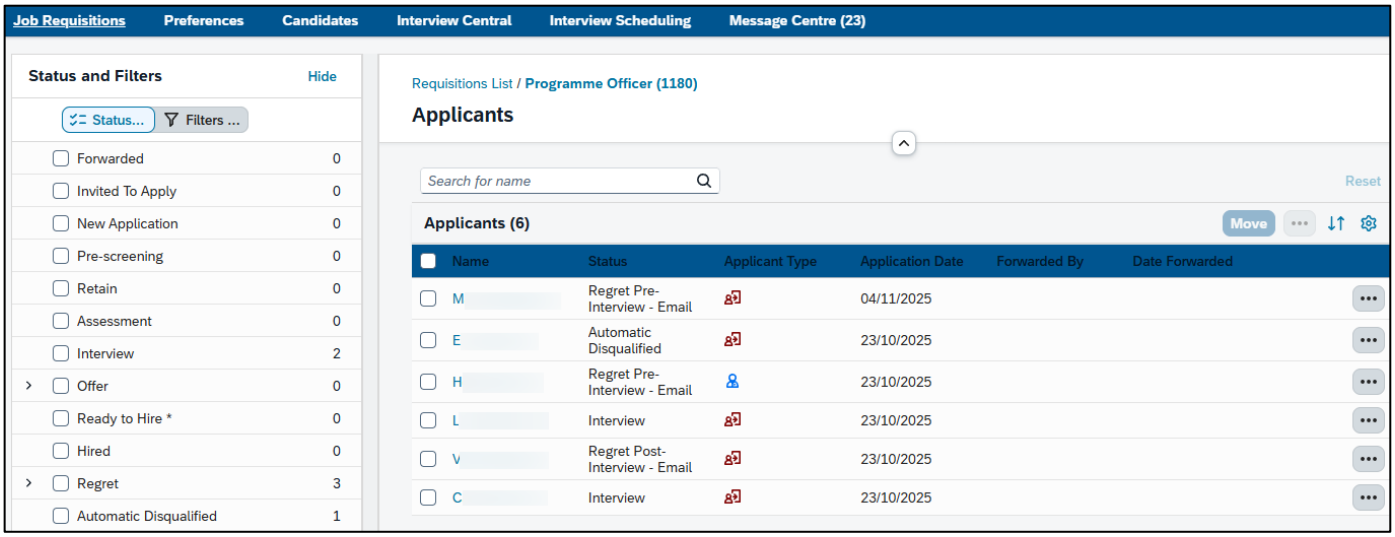
If there is more than one candidate to appoint, repeat this procedure for each candidate.

Procedure

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



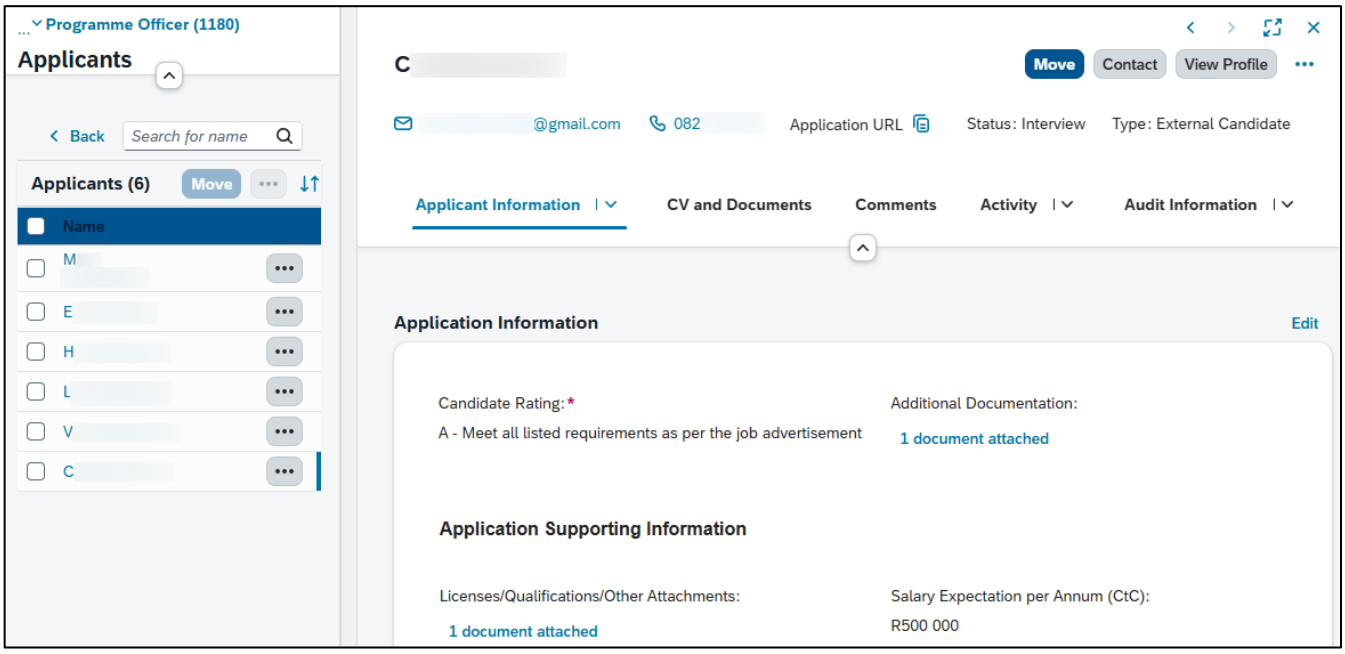
   - Click the number in the *Candidates* column (e.g. 6 above) or click *View Menu Options* to the right of the job title and choose Manage Applicants.
3. The *Applicants* page appears. If the *Interview Result* column doesn't appear, click *Settings* to select it.



   - Select the applicant by clicking their name in the *Name* column.

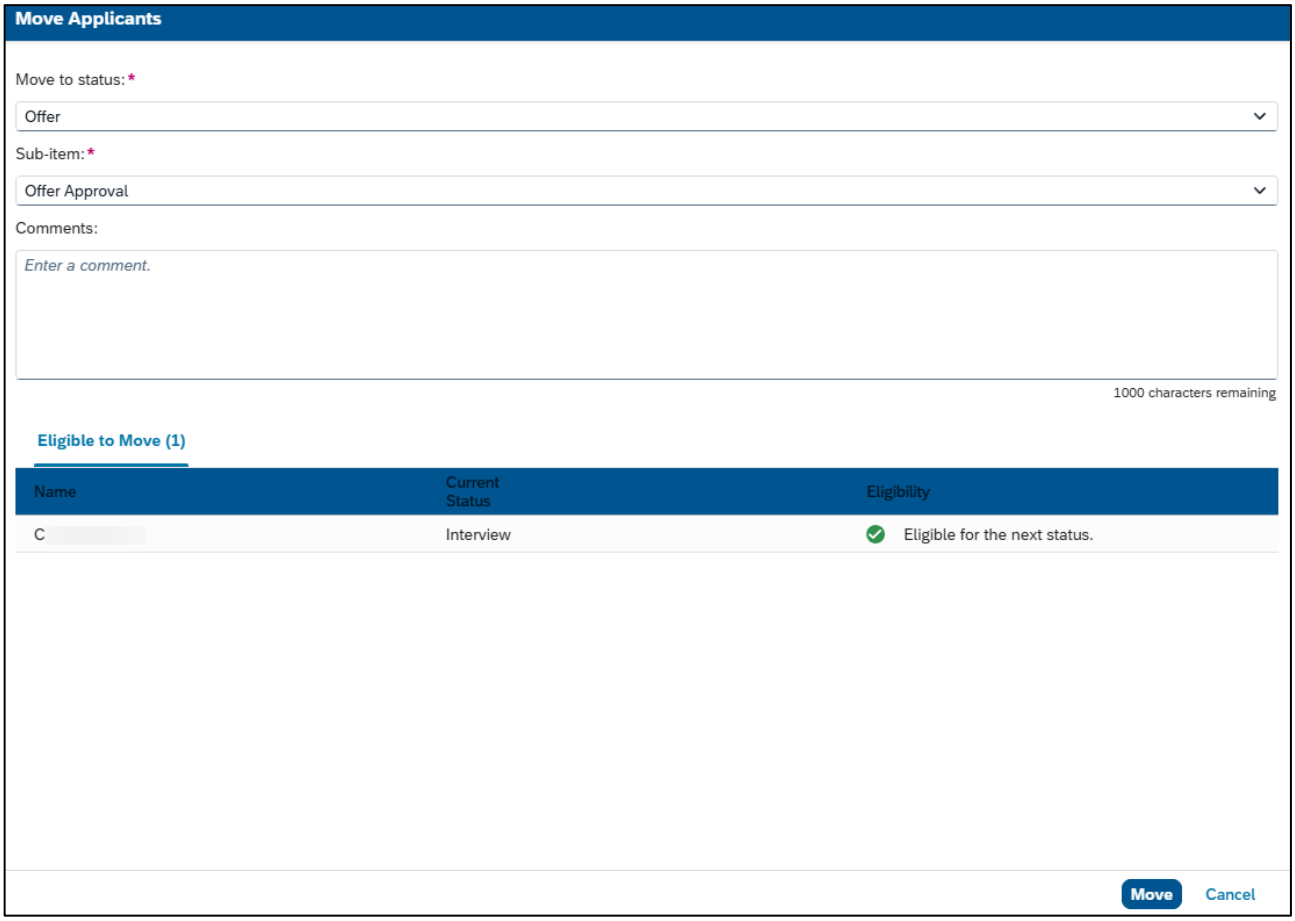
Starting the offer approval process

4. The list of applicants appears on the left with the selected applicant's details on the right.



- Click **Move**.

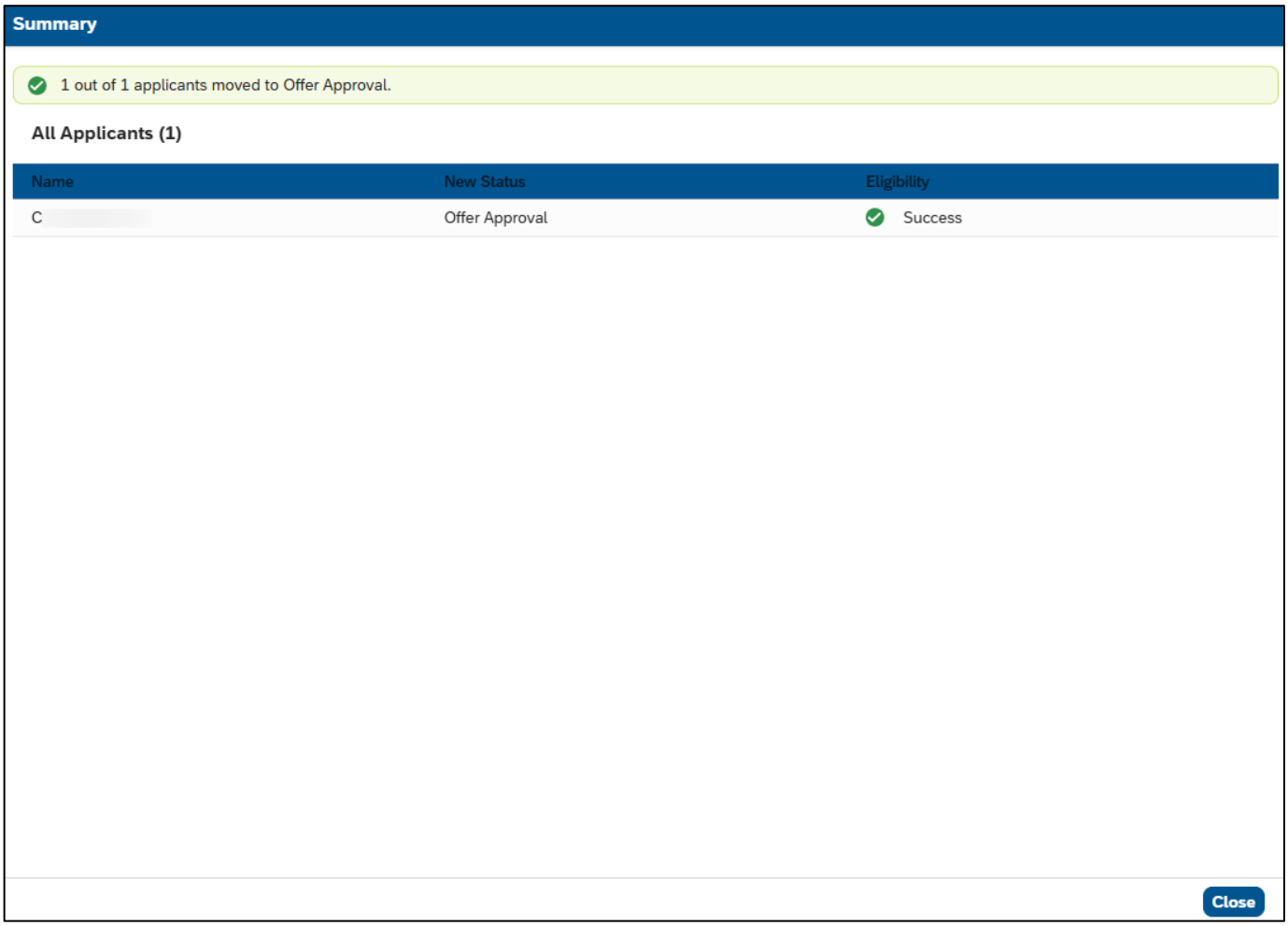
5. The *Move Applicants* dialogue box appears.



- Ensure *Offer* is selected in the *Move to status* field.
- Ensure *Offer Approval* is selected in the *Sub-item* field.
- Click **Move**.

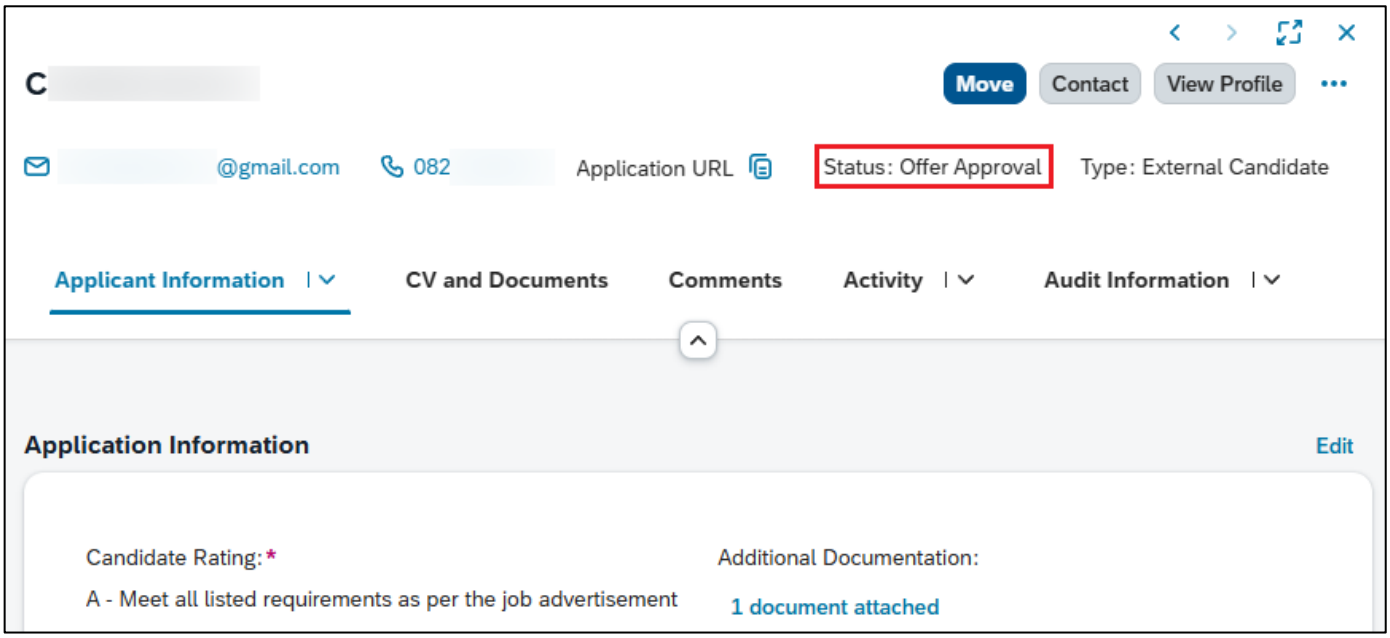
Starting the offer approval process

6. The *Summary* dialogue box appears, confirming the applicant status was changed to *Offer Approval*.



   - Click Close.

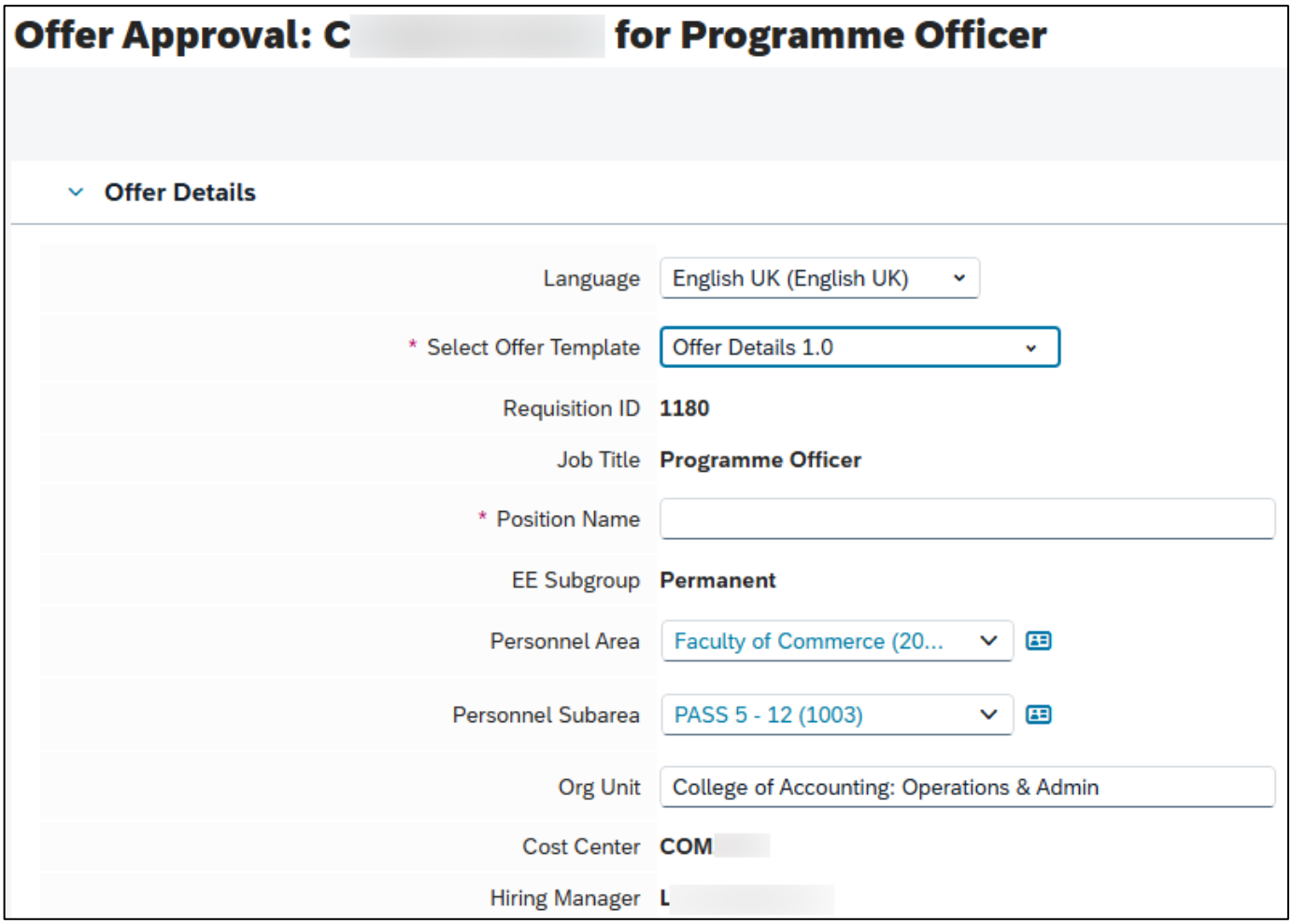
7. The selected applicant's page reappears, displaying the new *Status*.



   - In the top right, click ••• *Show More* and choose *Initiate Offer Approval*.

Starting the offer approval process

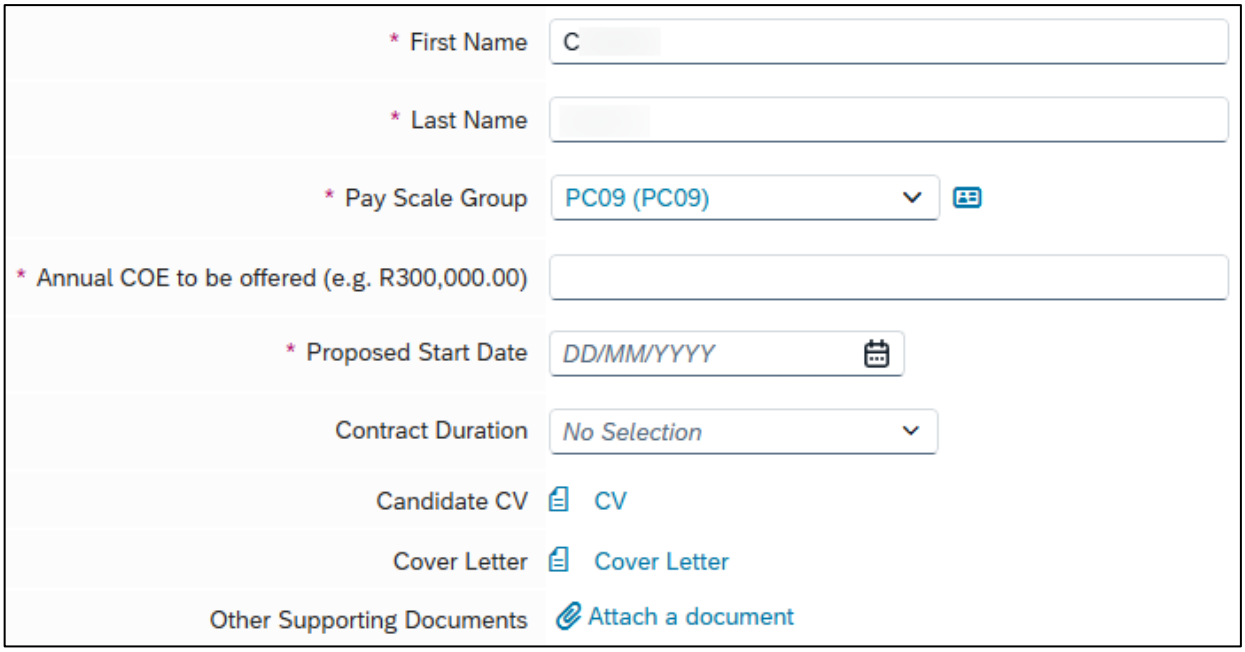
8. The *Offer Approval* page appears



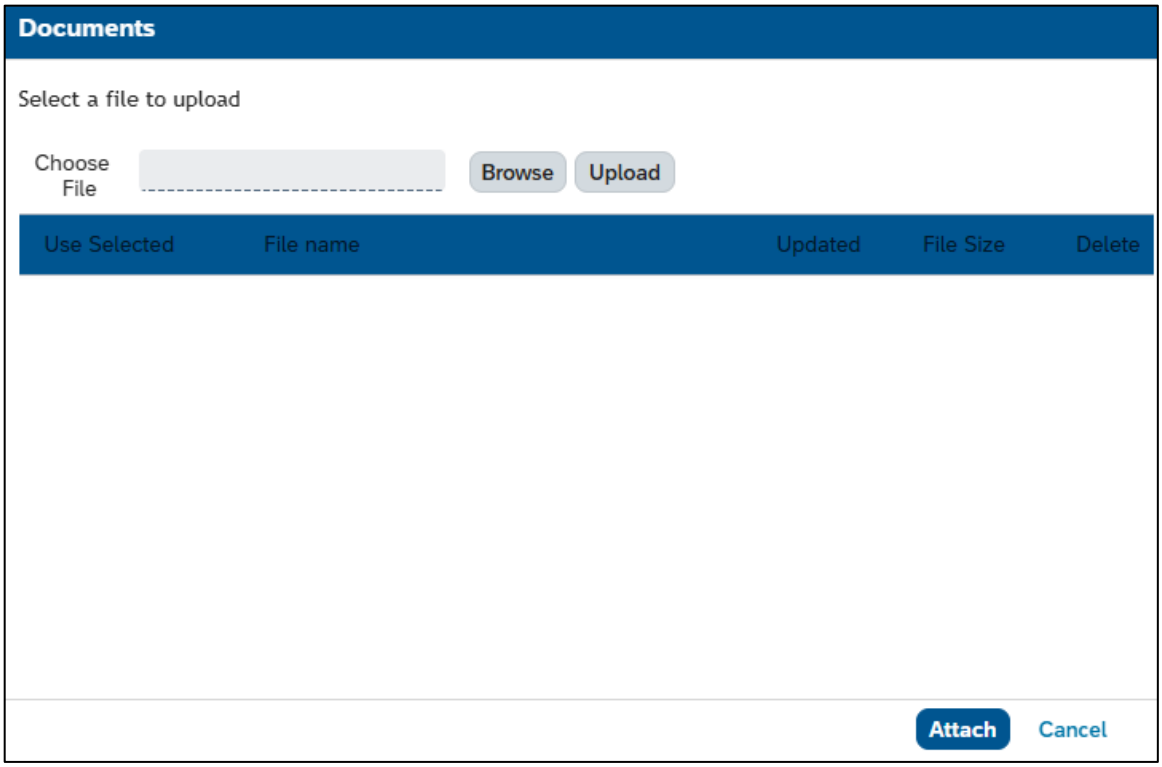
In the *Offer Details* section:

- Enter the *Position Name*.
- Ensure the *Personnel Area, Personnel Subarea* and *Org Unit* are correct.

Starting the offer approval process



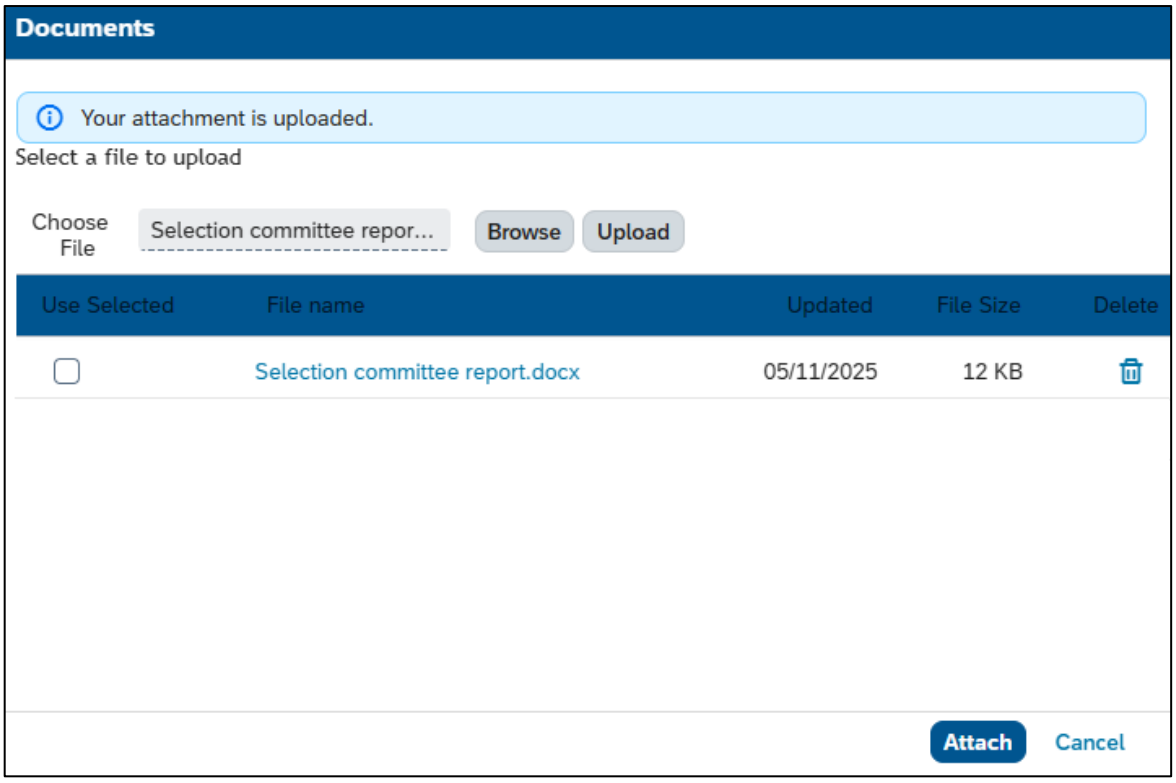
- Ensure the *Pay Scale Group* is correct.
- Enter the *Annual COE to be offered*.
- Select the *Proposed Start Date*.
- If a contract position, select the *Contract Duration*.
- In the *Other Supporting Documents* field, click Attach a document to attach the selection committee report and any other relevant documents.
    - The *Documents* dialogue box appears.



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

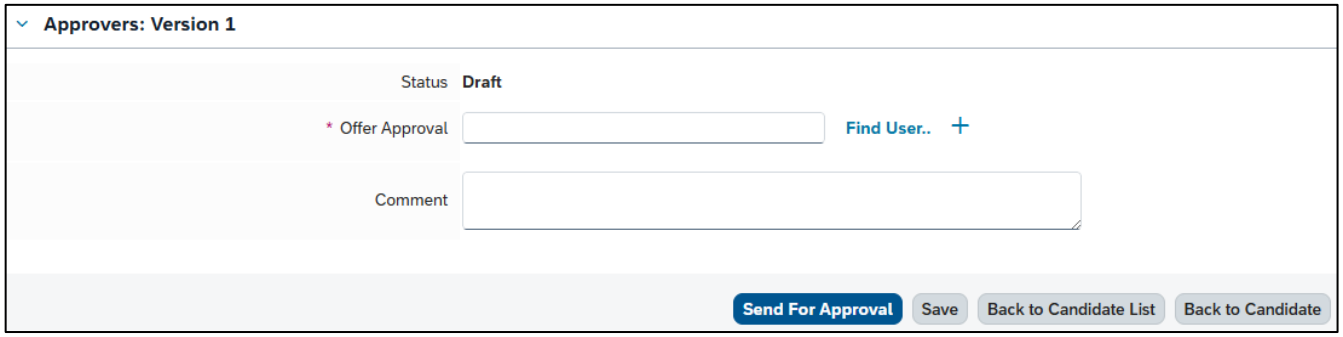
Starting the offer approval process

- 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.



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

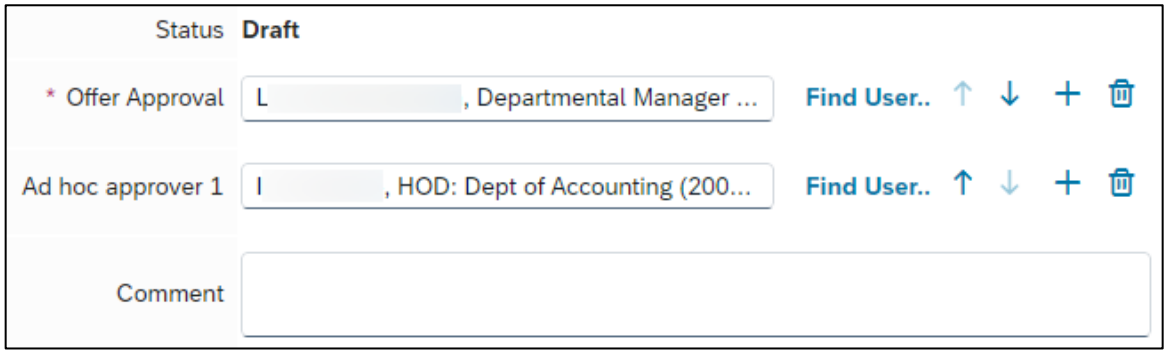
***Approvers: Version 1* section**:



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

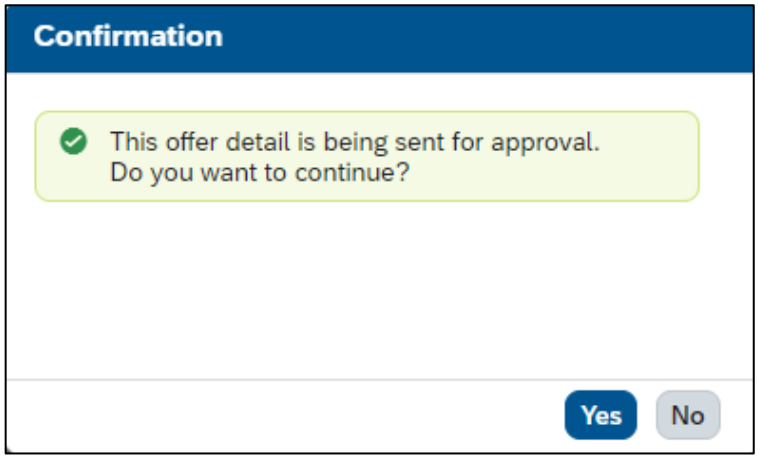
Starting the offer approval process

- 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*.



- 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**.

9. The *Confirmation* dialogue box appears.



- Click **Yes**.

10. The *Offer Approval* page reappears.
    - Click **Job Requisitions**.

11. 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.

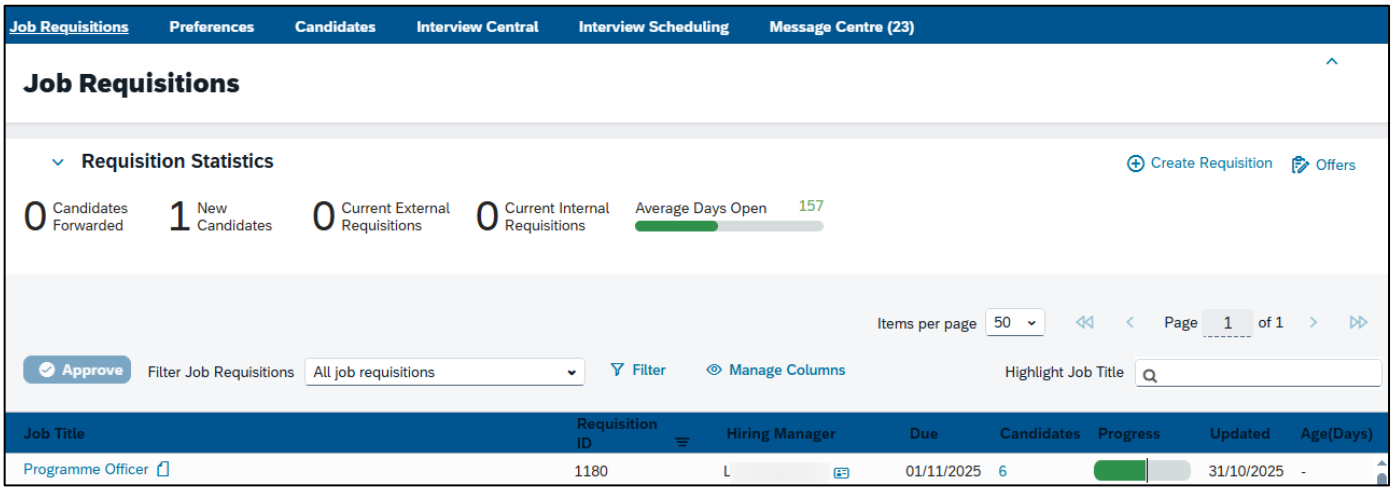
Monitoring offer approvals

Background

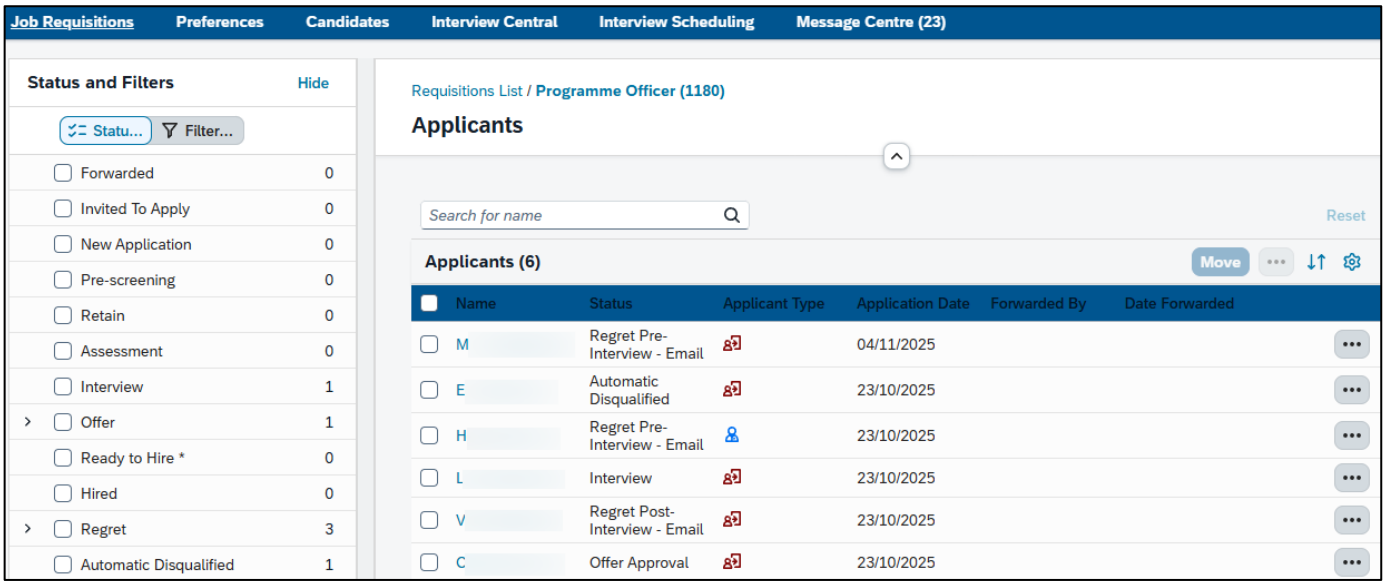
There are no notifications for offer approvals, the Recruitment Advisor must monitor the process and inform each approver that their approval is required on SuccessFactors.

Procedure

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



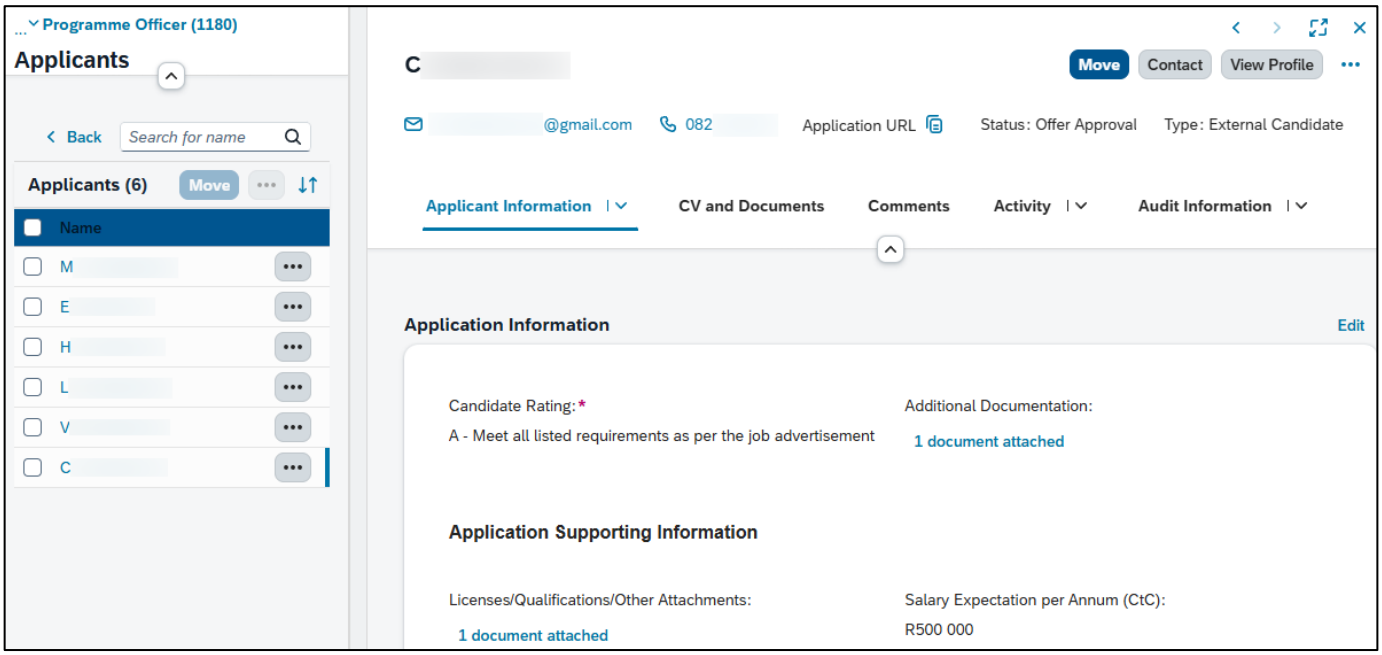
   - Click the number in the *Candidates* column (e.g. 6 above) or click *View Menu Options* to the right of the job title and choose Manage Applicants.
3. The *Applicants* page appears.



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

Monitoring offer approvals

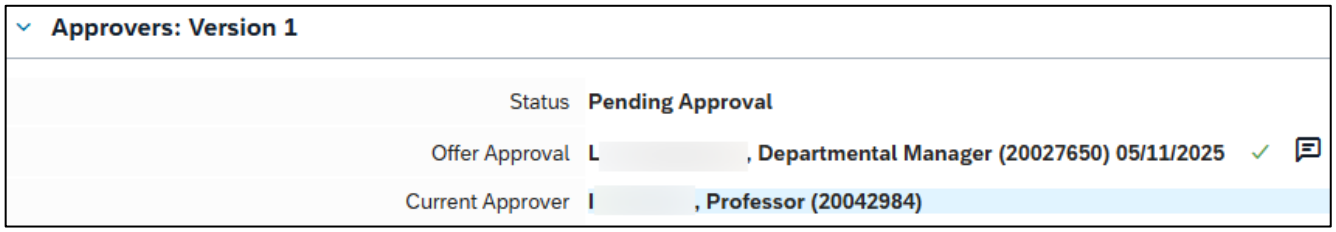
4. The list of applicants appears on the left with the selected applicant's details on the right.



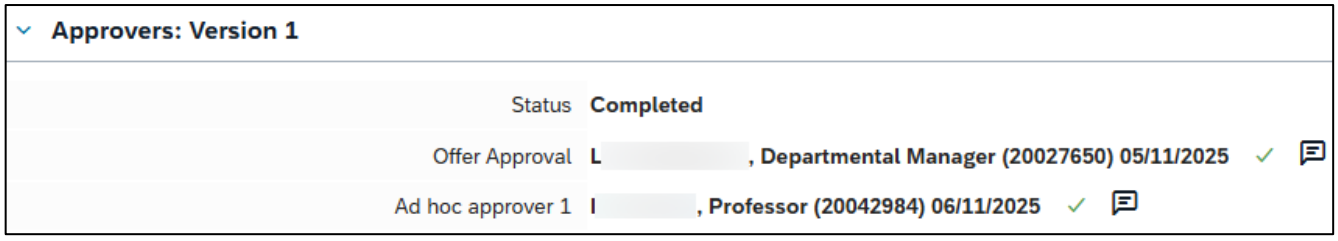
   - Click ••• *Show More* and choose *Initiate Offer Approval*.

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.

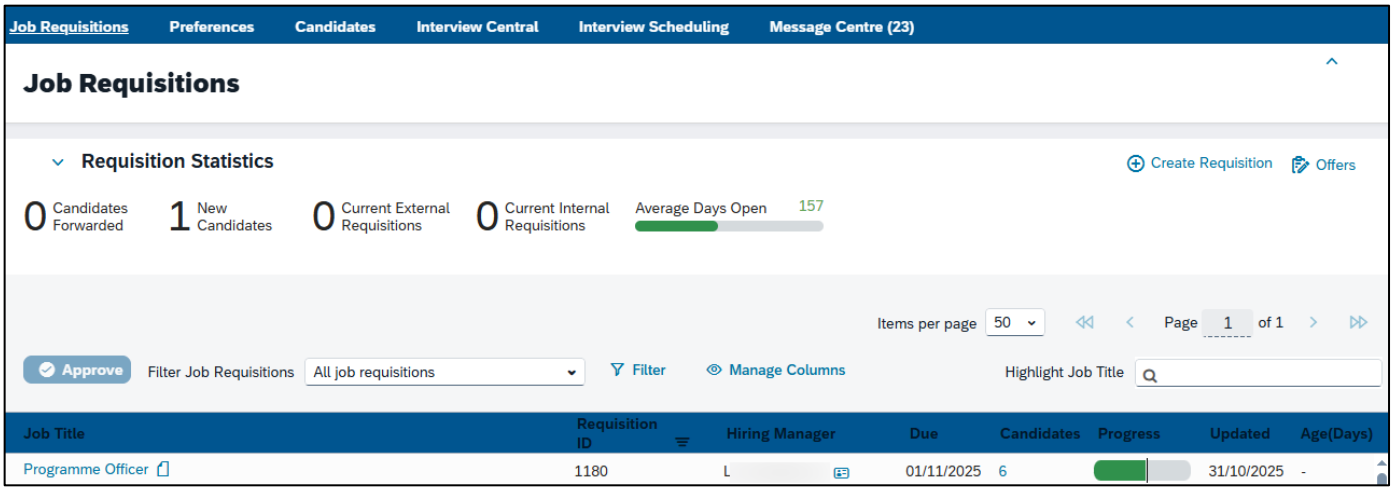
Sending an offer letter to a candidate

Before you begin

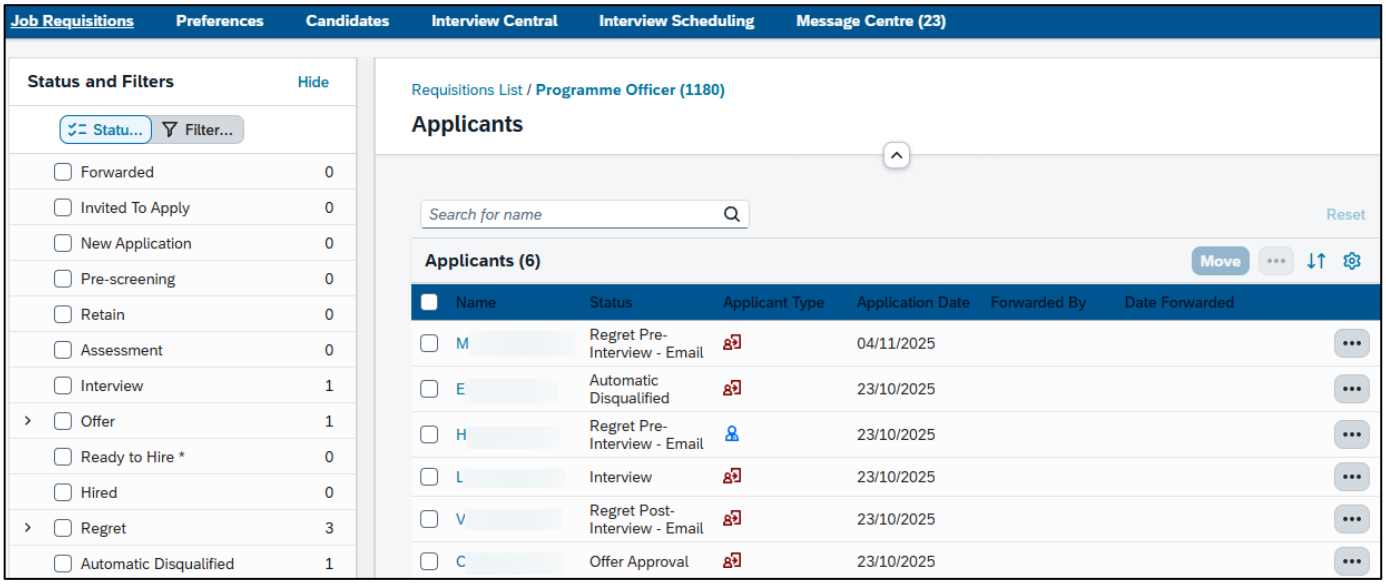
This procedure will result in the candidate receiving a recommendation of appointment email.

Procedure

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



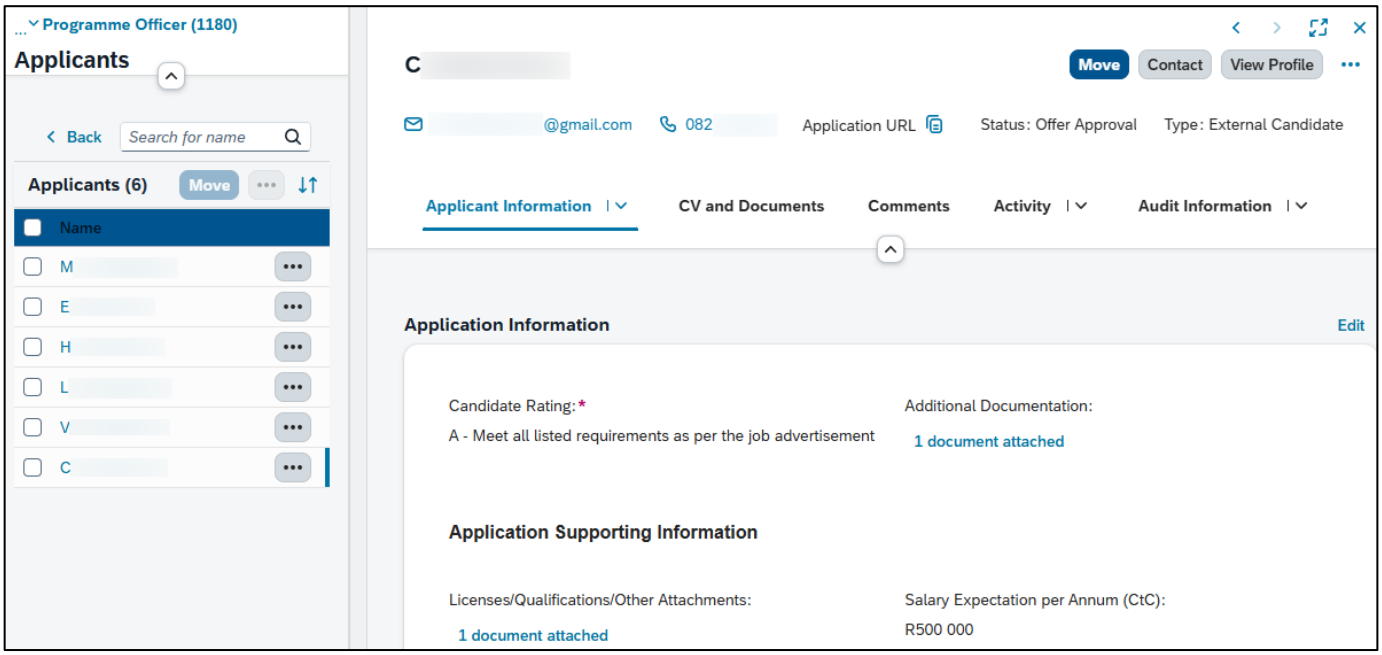
   - Click the number in the *Candidates* column (e.g. 6 above) or click *View Menu Options* to the right of the job title and choose Manage Applicants.
3. The *Applicants* page appears.



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

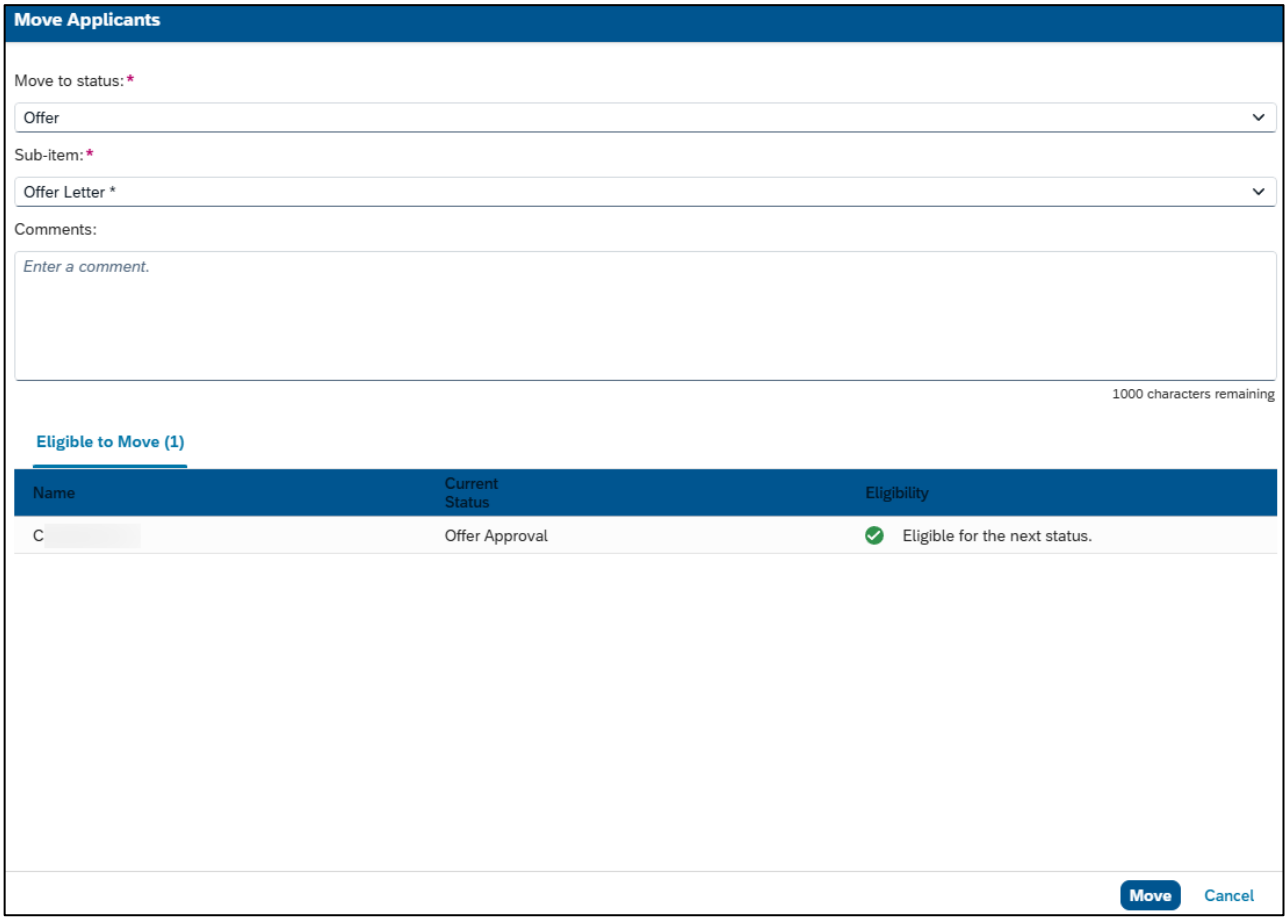
Sending an offer letter to a candidate

4. The list of applicants appears on the left with the selected applicant's details on the right.



- Click **Move**.

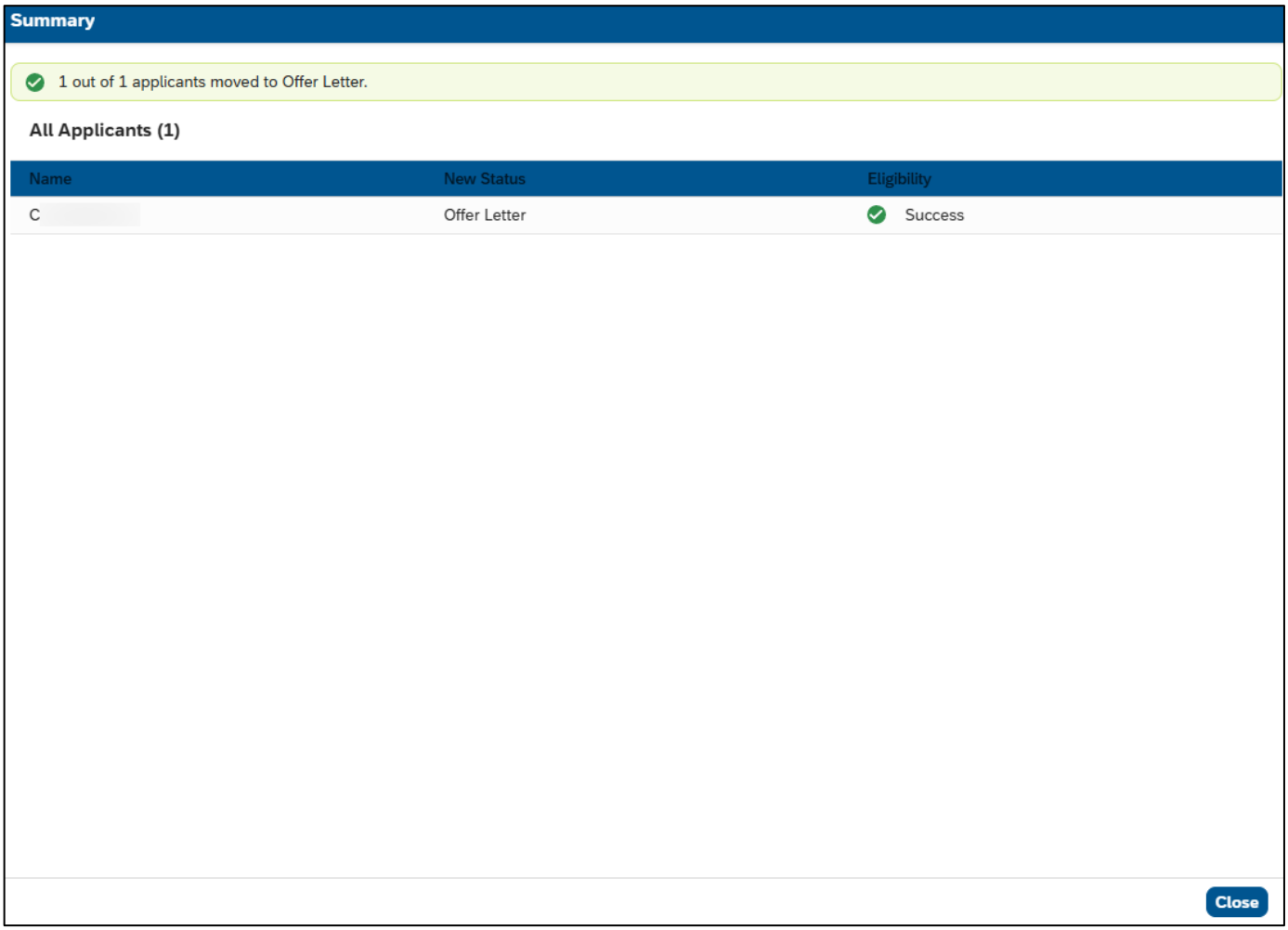
5. The *Move Applicants* dialogue box appears.



- Ensure *Offer* is selected in the *Move to status* field.
- Ensure *Offer Letter* is selected in the *Sub-item* field.
- Click **Move**.

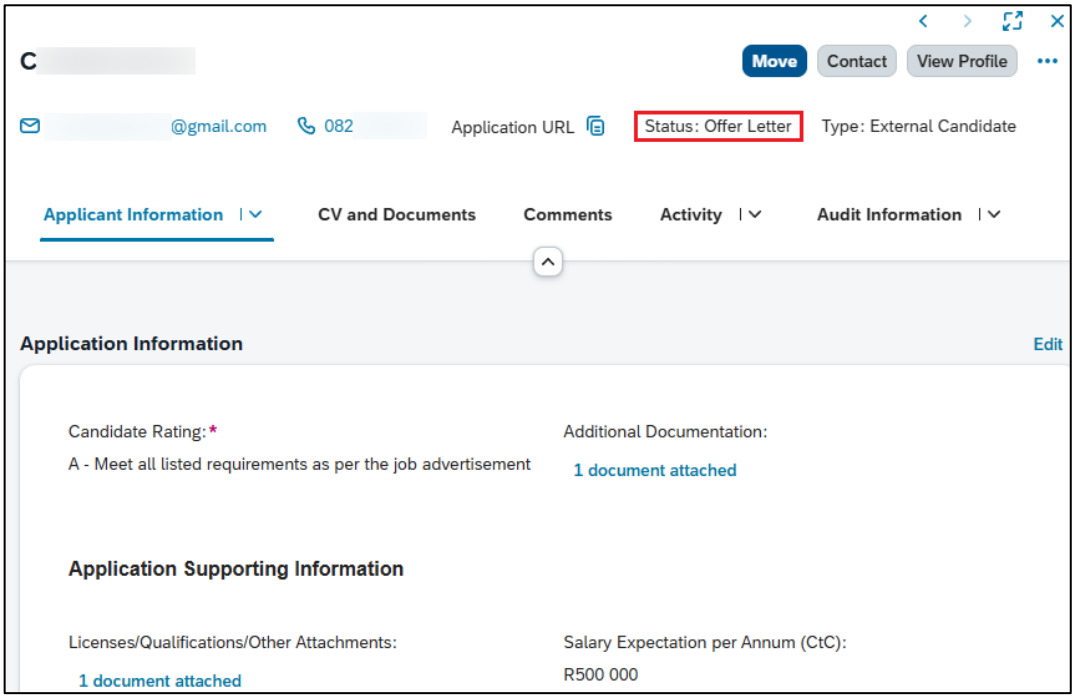
Sending an offer letter to a candidate

6. The *Summary* dialogue box appears, confirming the applicant status was changed to *Offer Letter*.



- Click Close.

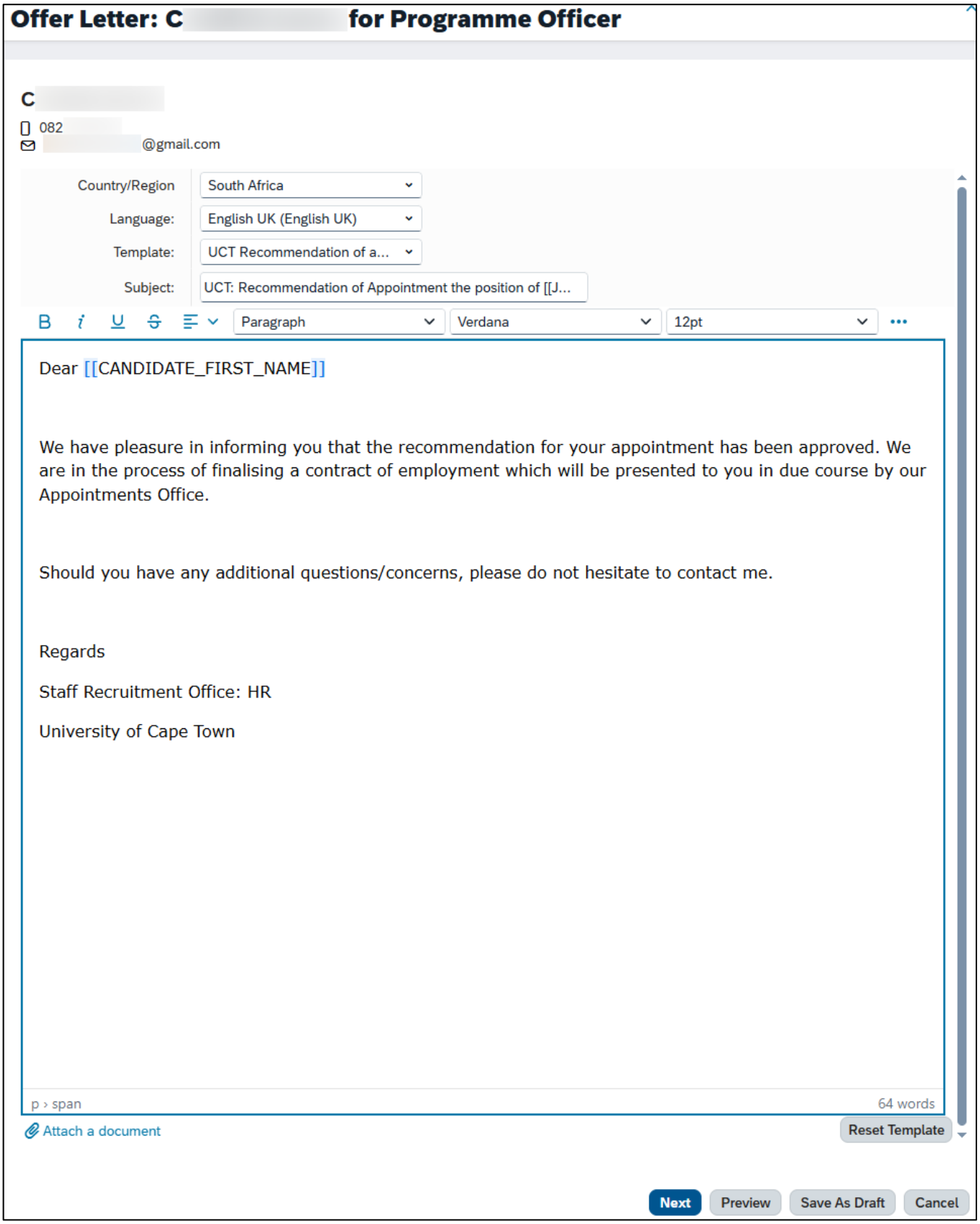
7. The selected applicant's page reappears, displaying the new *Status*.



- In the top right, click ••• *Show More* and choose *Send Offer Letter*.

Sending an offer letter to a candidate

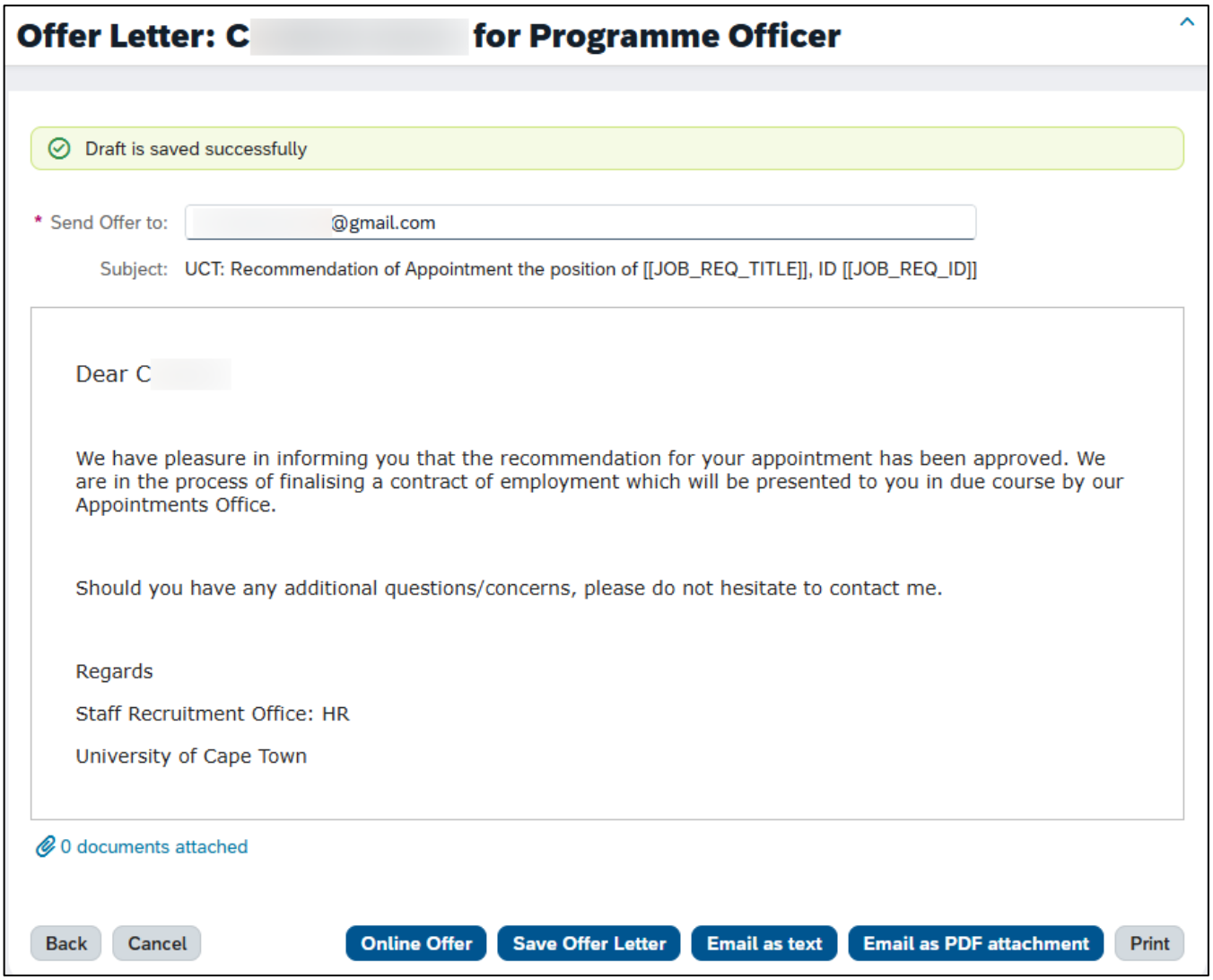
8. The *Offer Letter* page appears.



- If applicable, change the letter wording in the space provided.
  Note: Do not change any of the fields with capitalised text in blue double brackets as these are system generated fields that will pull information from SuccessFactors when the letter is sent.
- Click **Next**.

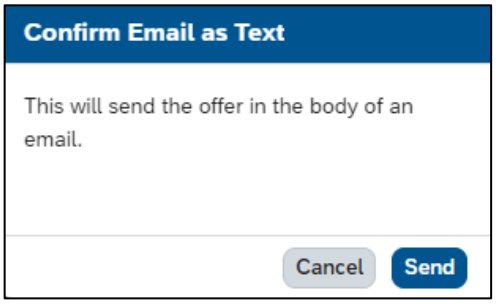
Sending an offer letter to a candidate

9. The second *Offer Letter* page appears.



- Click **Email as text**.

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



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

11. The selected applicant's details reappear.
    - The Recruitment Advisor must inform the Appointments Office to prepare the formal letter of appointment.

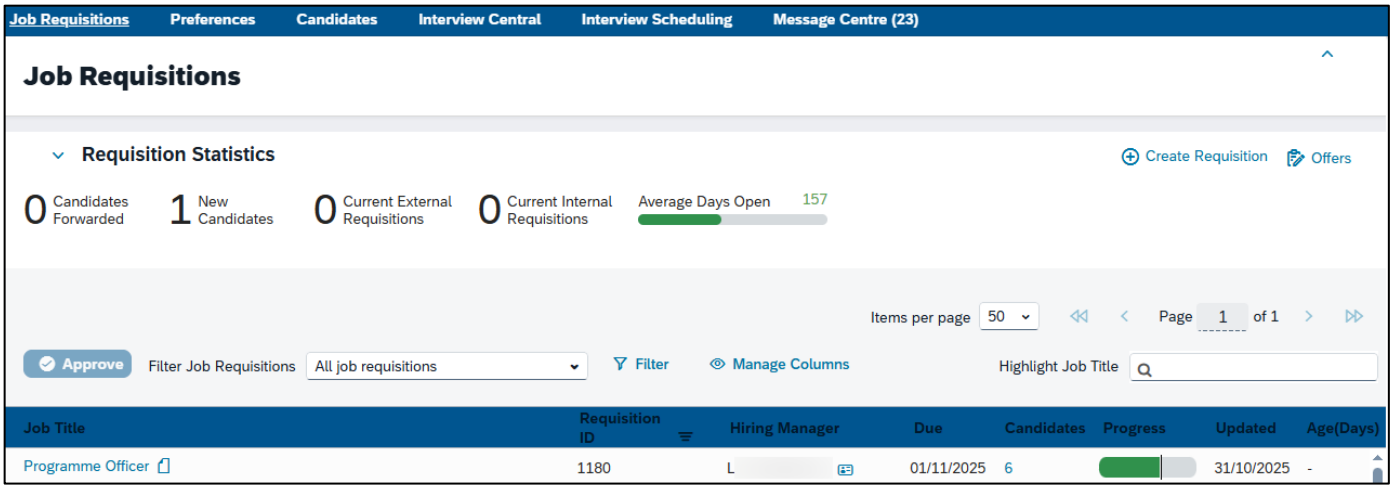
Changing a candidate offer to accepted or declined

Before you begin

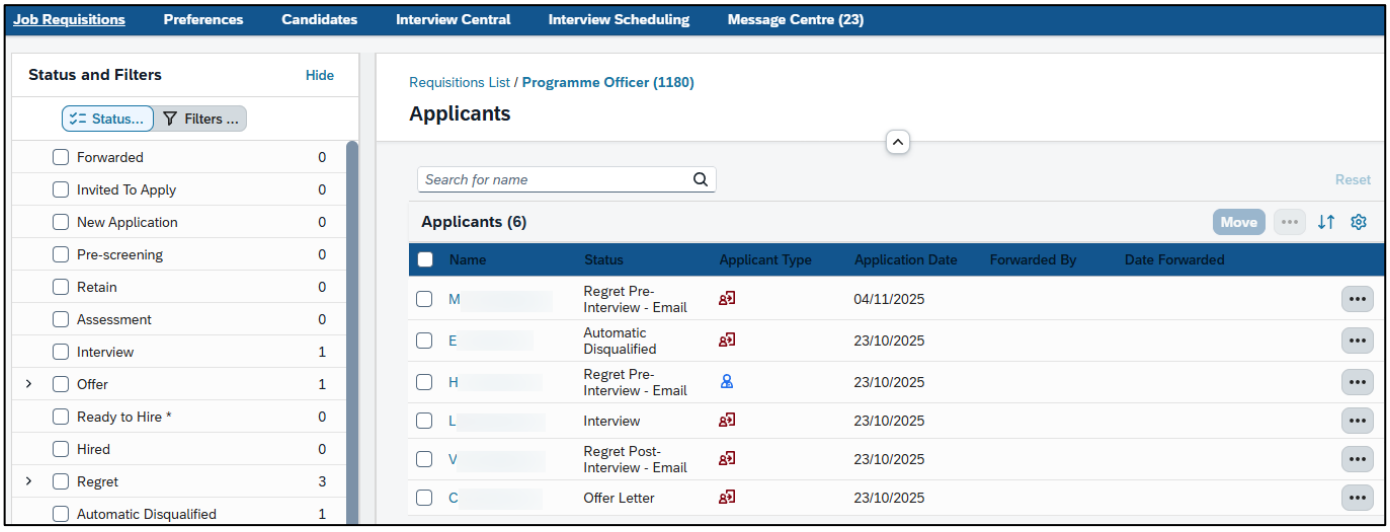
The Appointments Office must confirm whether the candidate has accepted or declined the offer.

Procedure

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



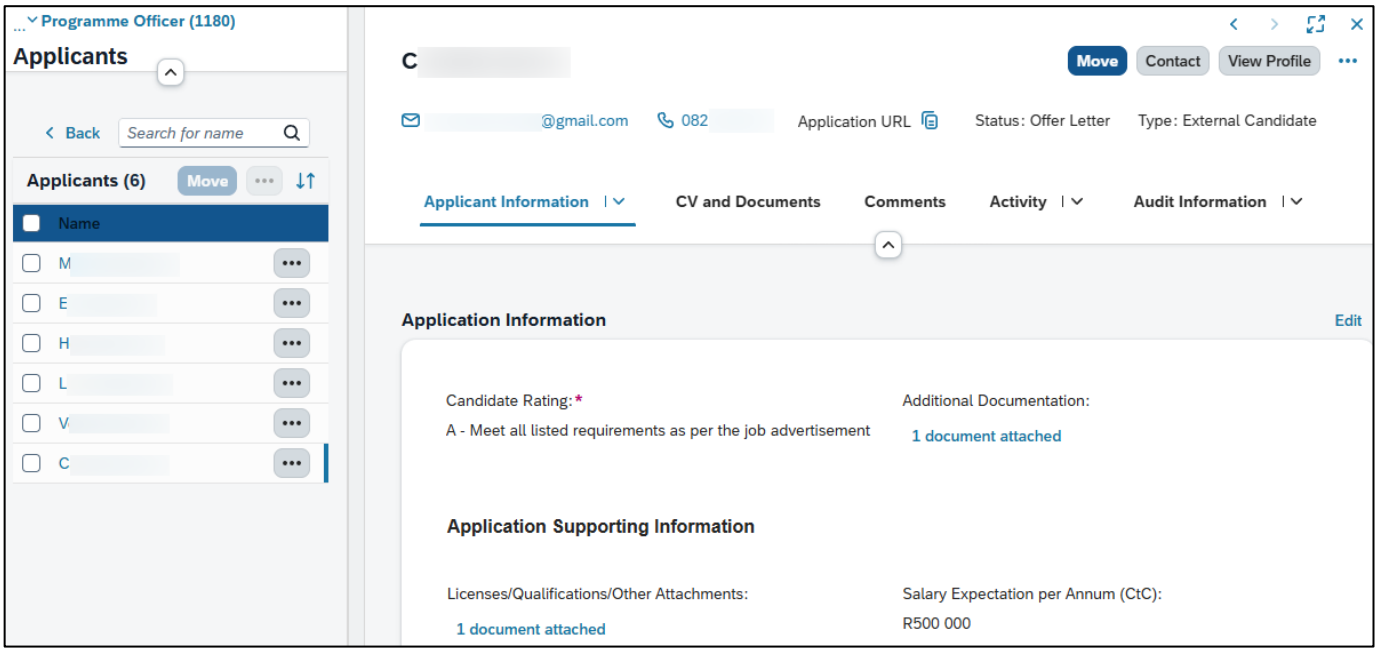
   - Click the number in the *Candidates* column (e.g. 6 above) or click *View Menu Options* to the right of the job title and choose Manage Applicants.
3. The *Applicants* page appears.



   - Select the applicant with *Offer Letter* status by clicking their name in the *Name* column.

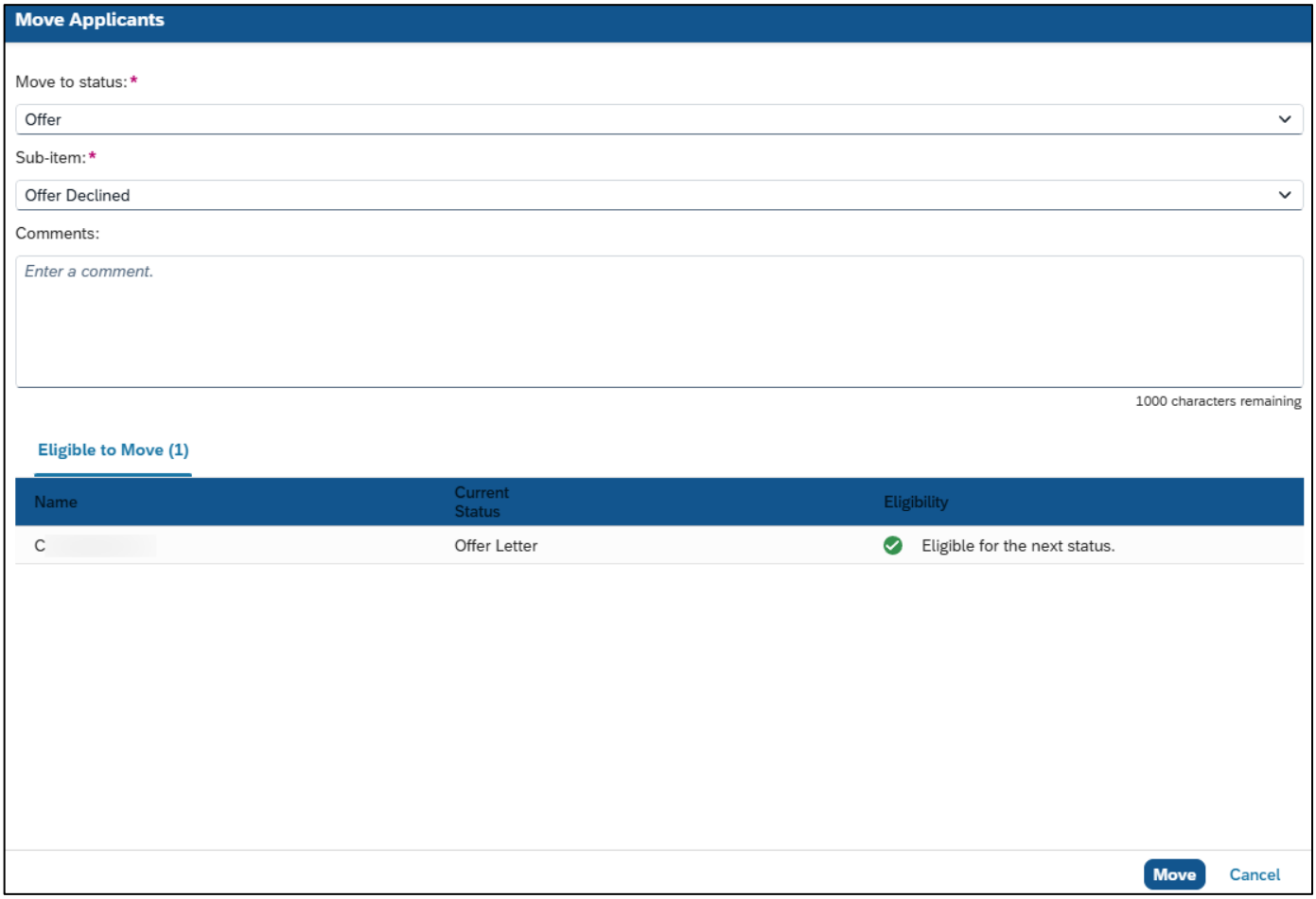
Changing a candidate offer to accepted or declined

4. The list of applicants appears on the left with the selected applicant's details on the right.



- Click **Move**.

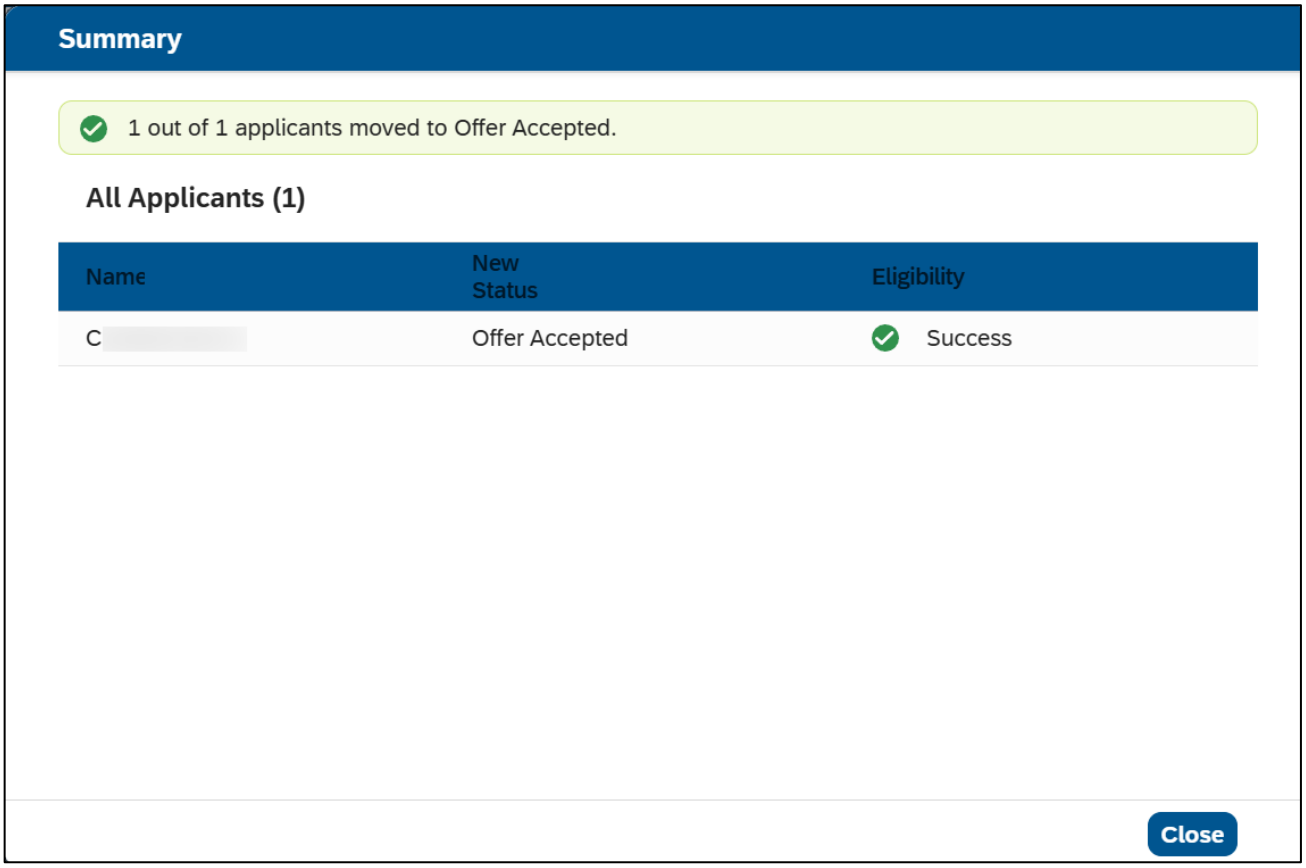
5. The *Move Applicants* dialogue box appears.



- In the *Sub-item* field, below the *Offer* status, select *Offer Accepted* or *Offer Declined*.
- Click **Move**.

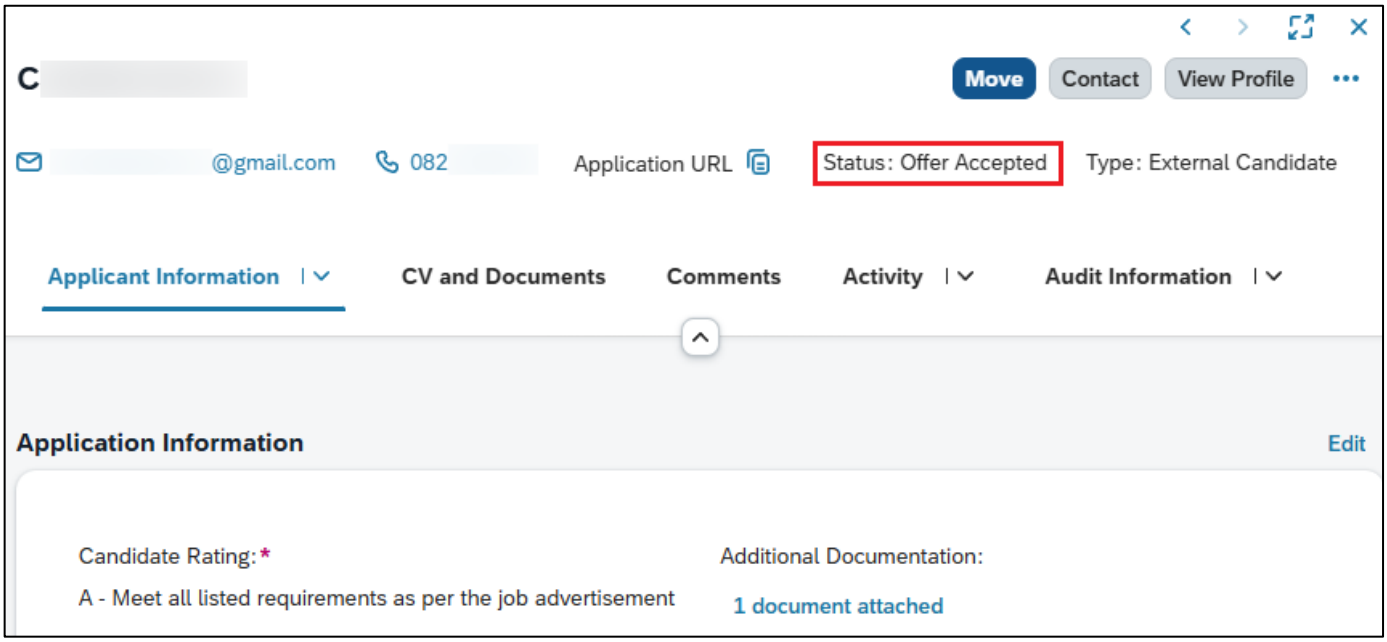
Changing a candidate offer to accepted or declined

6. The *Summary* dialogue box appears, confirming the applicant status was changed to *Offer Accepted* or *Offer Declined*.



- Click Close.

7. The selected applicant's page reappears, displaying the new *Status*.

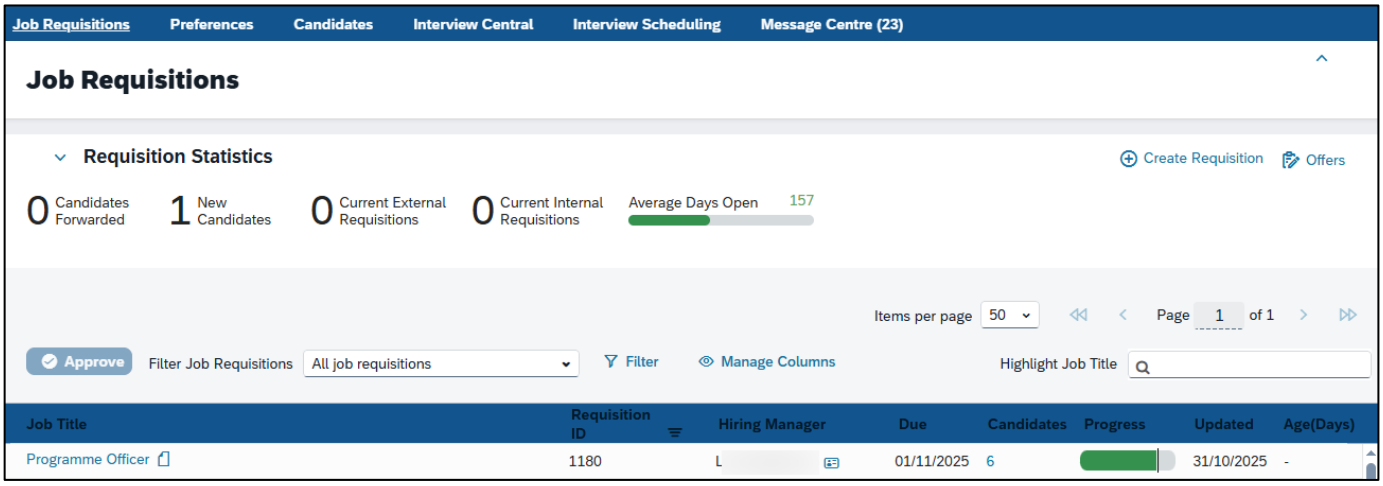


- If ready to change the candidate's status to *Ready to Hire*, continue from step 4 of Changing candidate status after offer acceptance or click Job Requisitions to return to the overview of all requisitions.

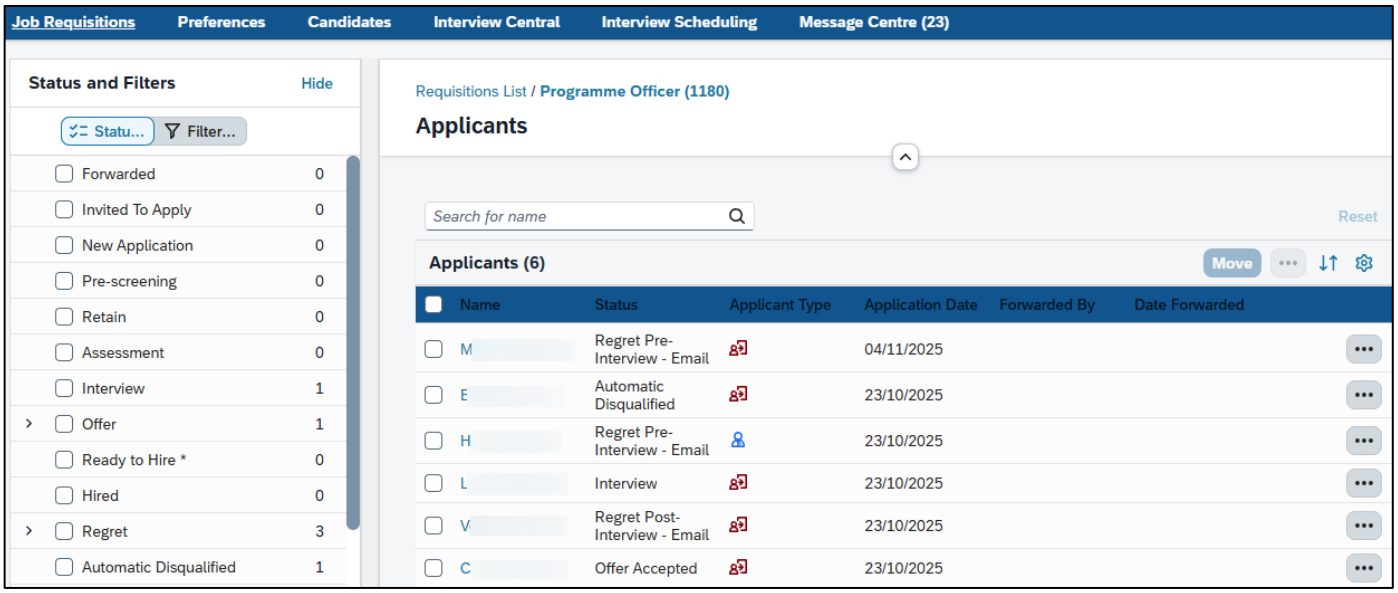
Changing candidate status after offer acceptance

Procedure

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



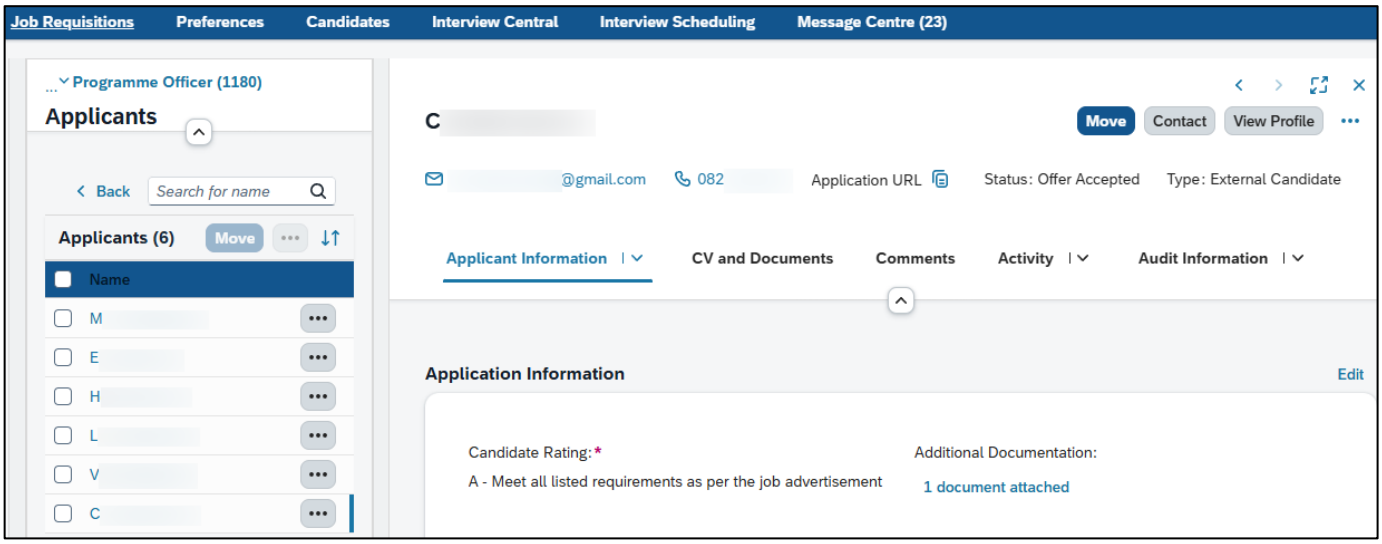
   - Click the number in the *Candidates* column (e.g. 6 above) or click *View Menu Options* to the right of the job title and choose Manage Applicants.
3. The *Applicants* page appears.



   - Select the applicant with *Offer Accepted* status by clicking their name in the *Name* column.

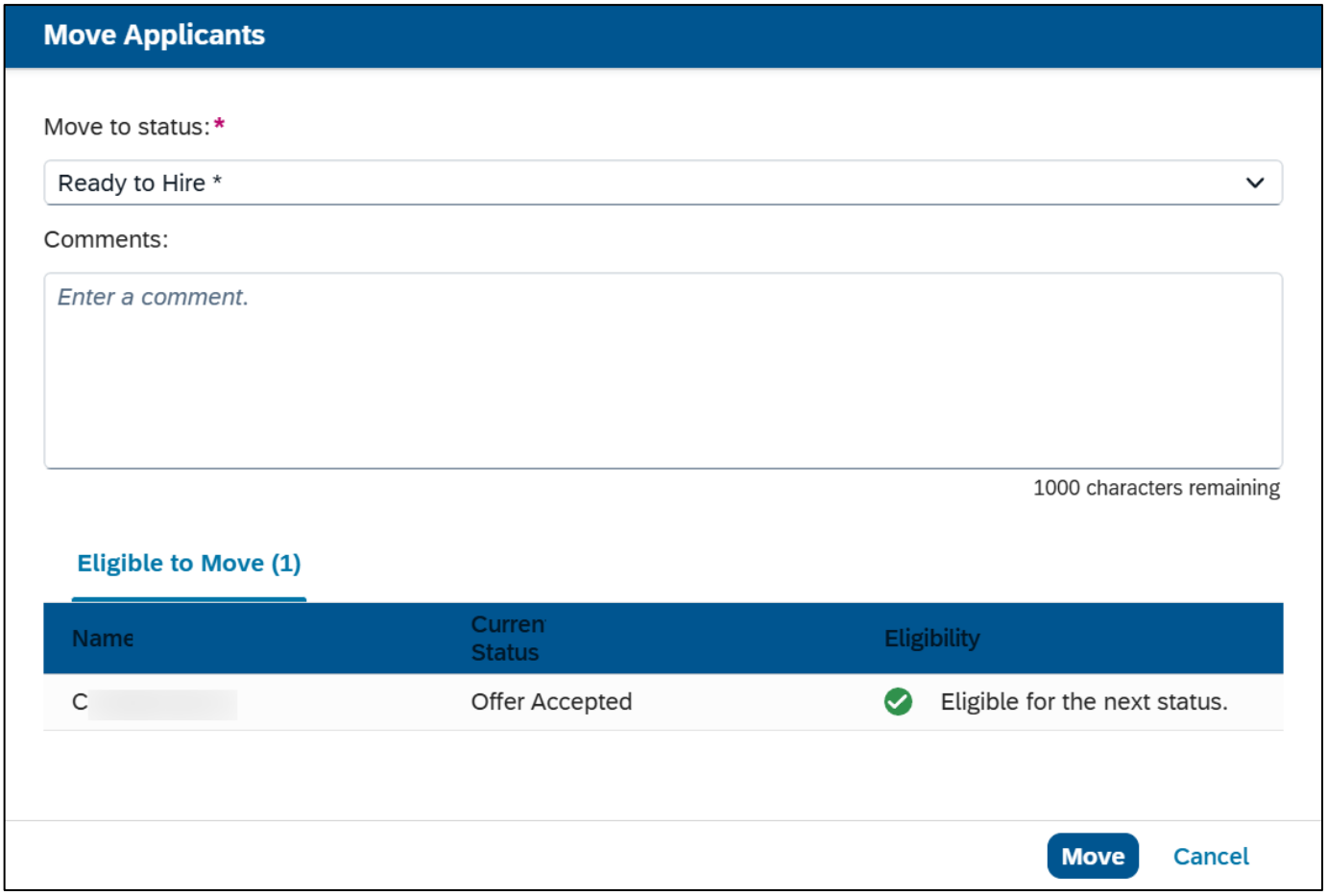
Changing candidate status after offer acceptance

4. The list of applicants appears on the left with the selected applicant's details on the right.



- Click **Move**.

5. The *Move Applicants* dialogue box appears.

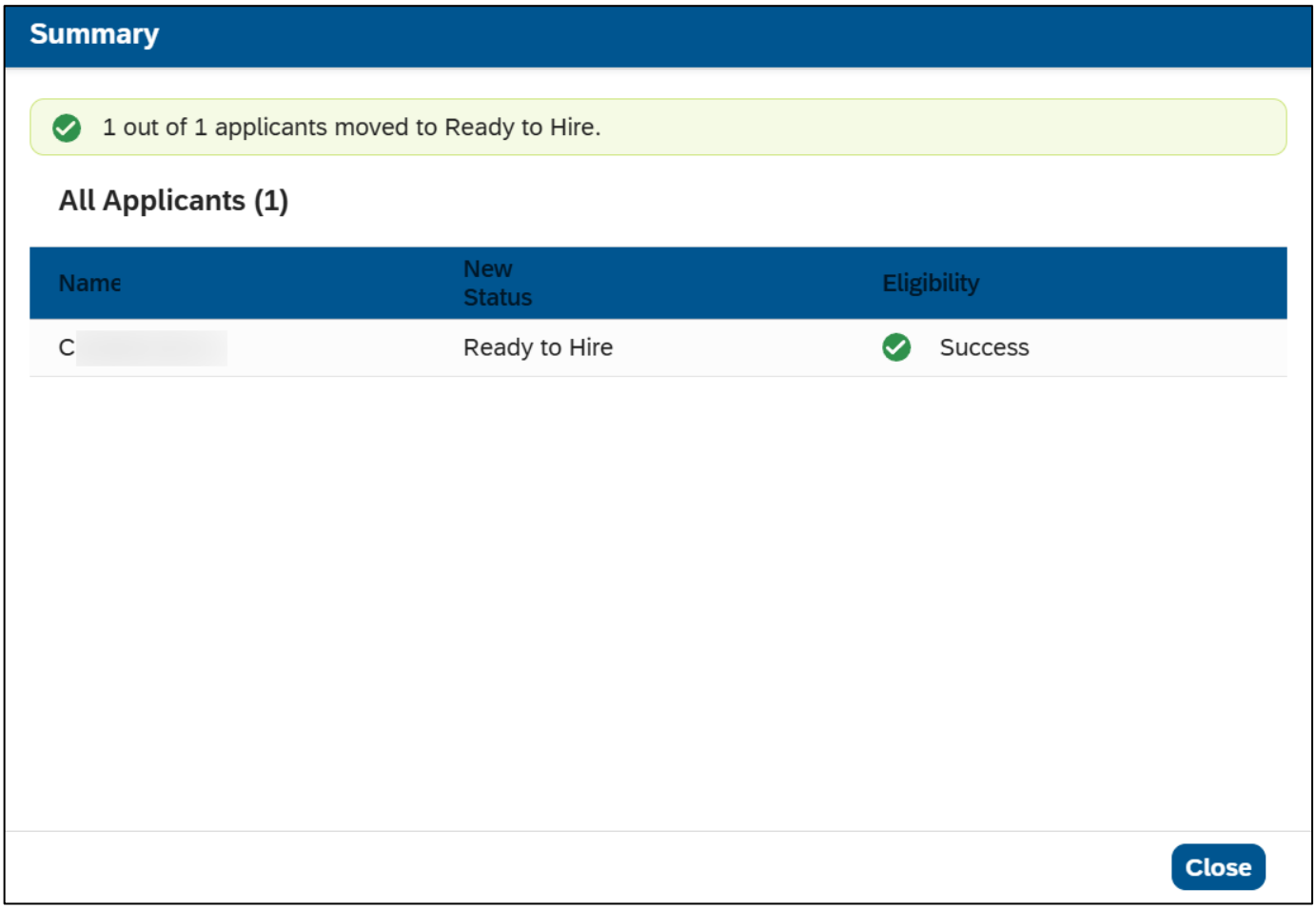


- Ensure the *Move to status* field shows *Ready to Hire*.
- Click **Move**.

  Note: The requisition will be closed when the status is changed for this applicant.

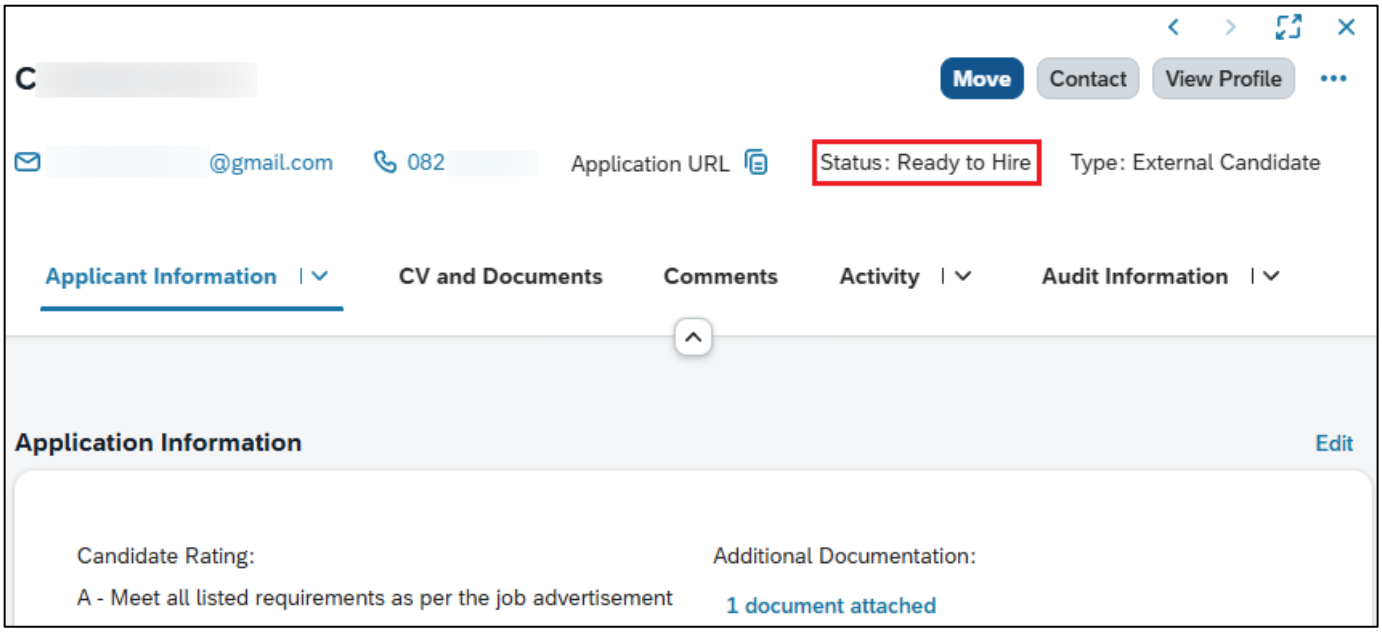
Changing candidate status after offer acceptance

6. The *Summary* dialogue box appears, confirming the applicant status was changed to *Ready to Hire*.



- Click Close.

7. The selected applicant's page reappears, displaying the new *Status* and the requisition is closed.



- If ready to change the candidate's status to *Hired*, continue from step 4 of Final change of candidate status to hired or click Job Requisitions to return to the overview of all requisitions.

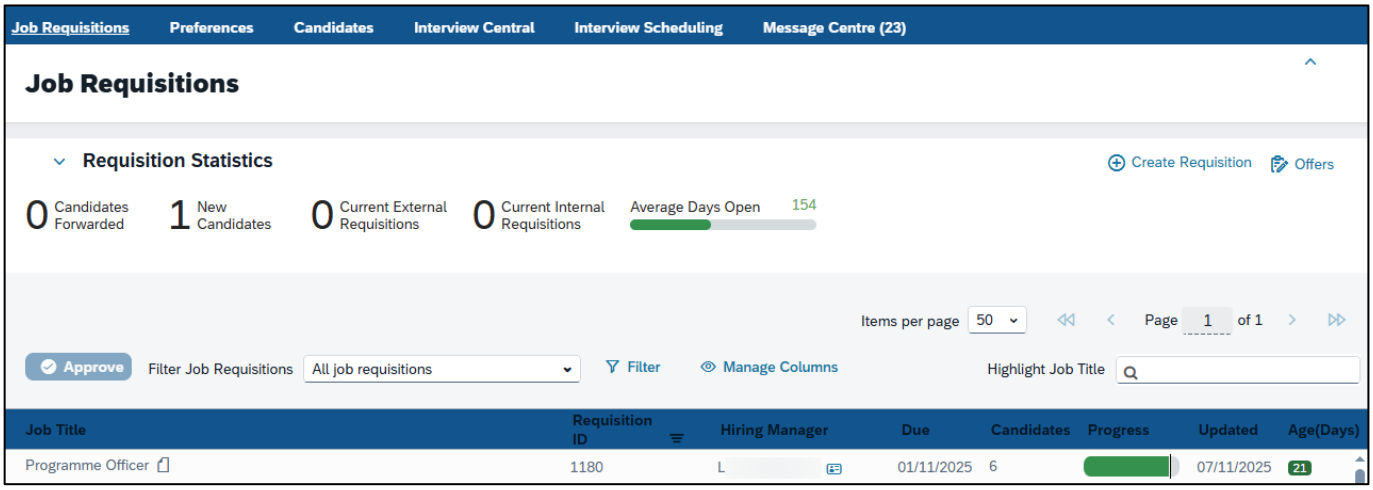
Final change of candidate status to hired

Procedure

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

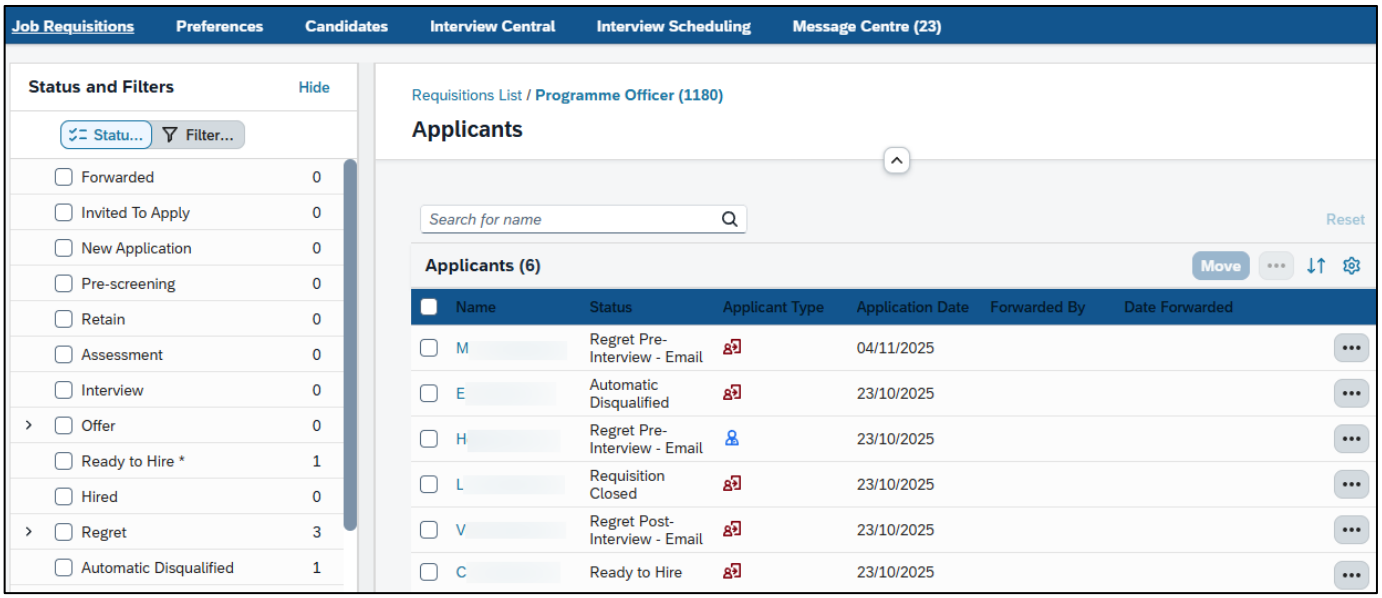
   Choose *Home* > *Recruiting*.

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 Manage Applicants.

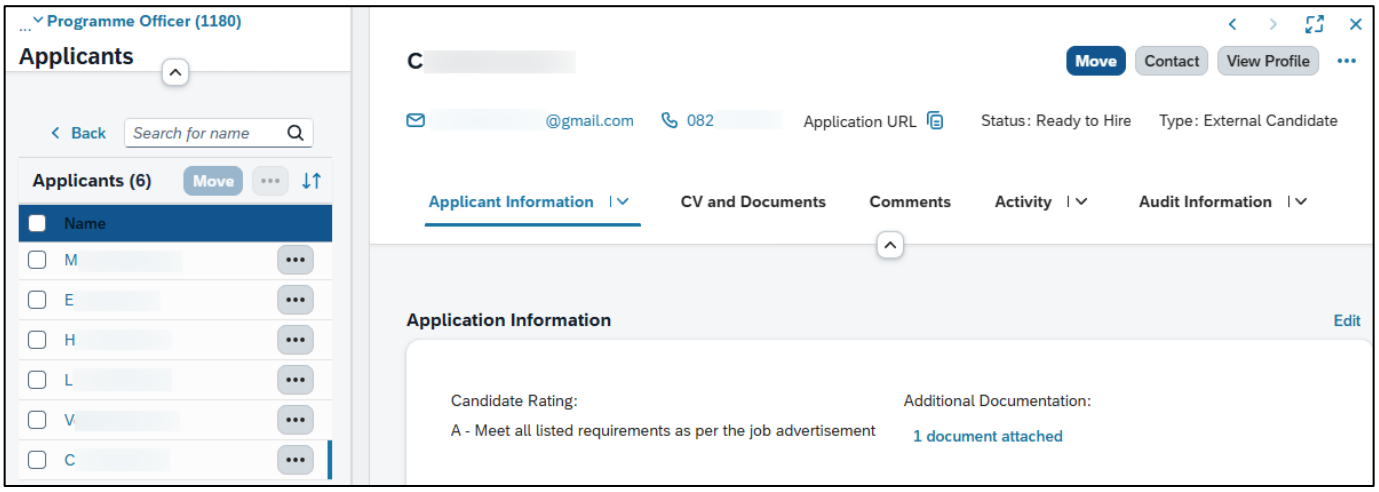
3. The *Applicants* page appears.



   - Select the applicant with *Ready to Hire* status by clicking their name in the *Name* column.

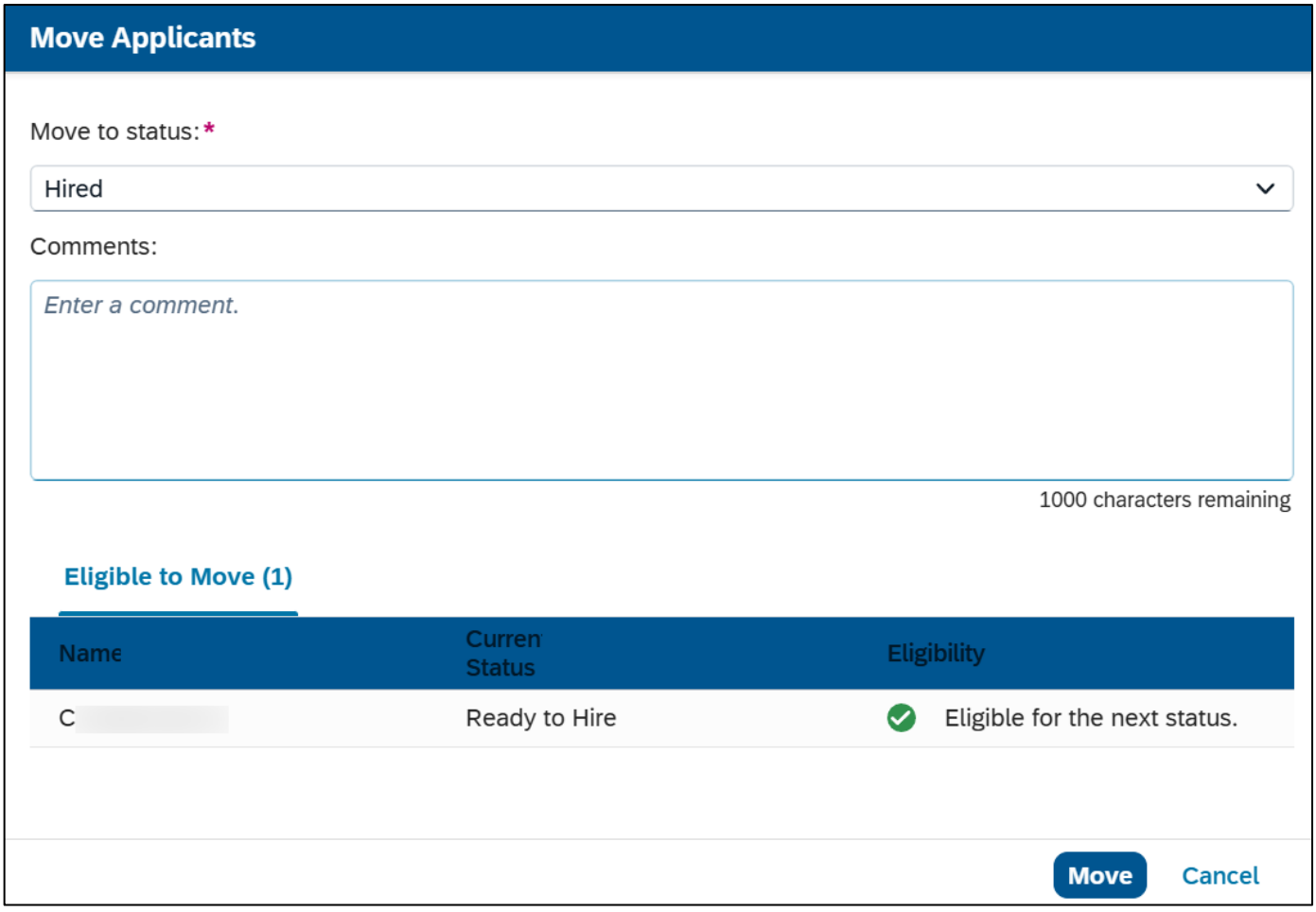
Final change of candidate status to hired

4. The list of applicants appears on the left with the selected applicant's details on the right.



- Click **Move**.

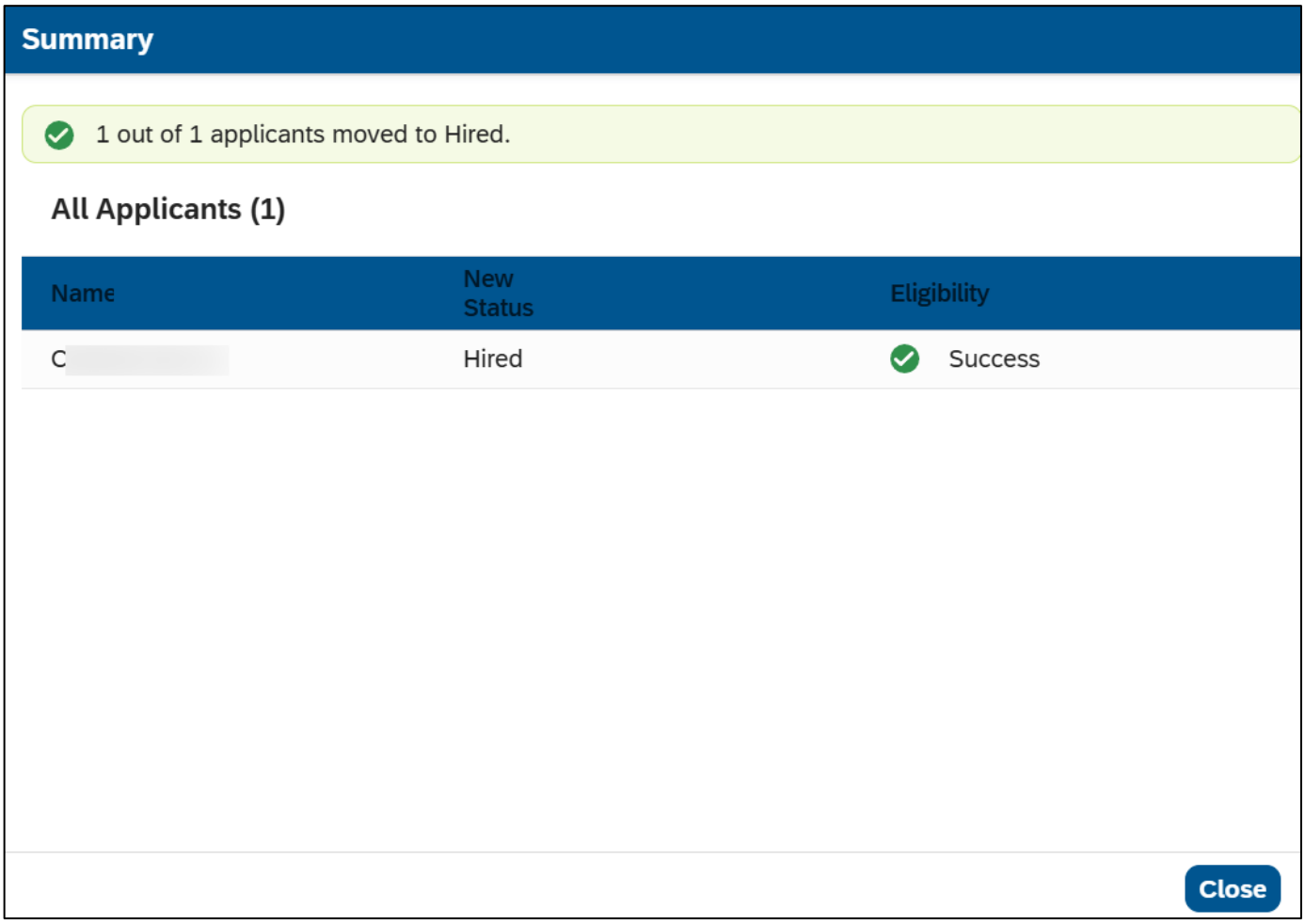
5. The *Move Applicants* dialogue box appears.



- Ensure the *Move to status* field shows *Hired*.
- Click **Move**.

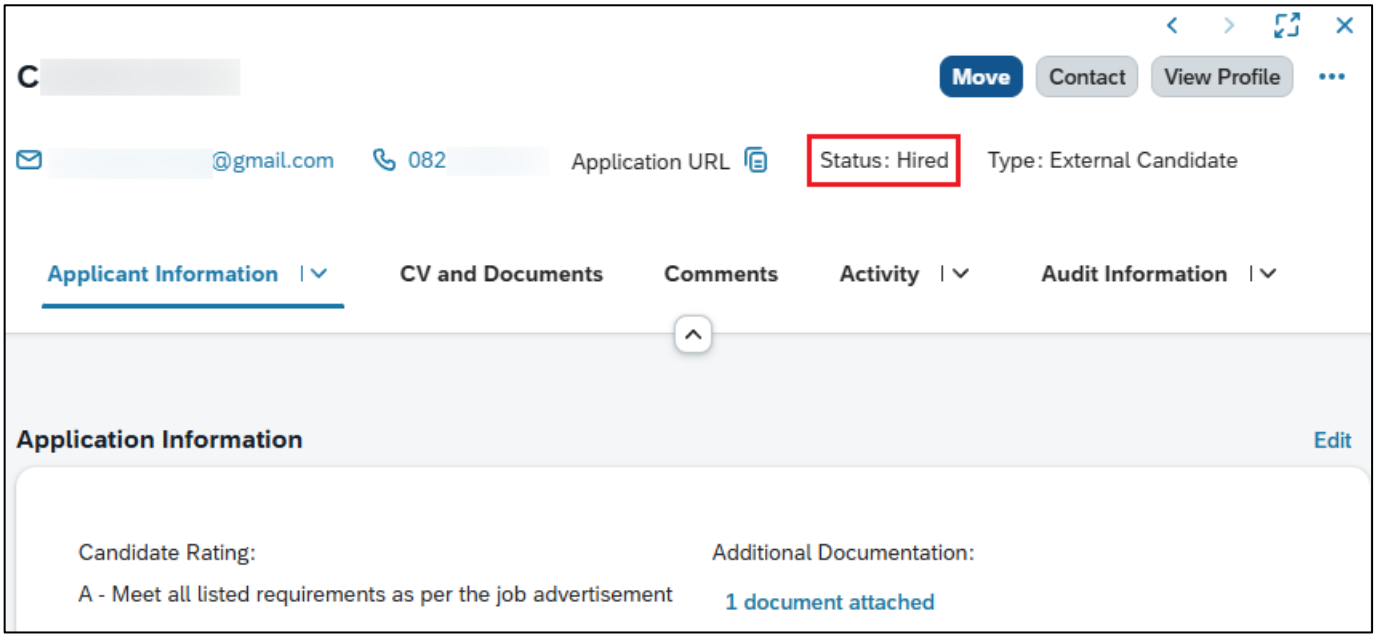
Final change of candidate status to hired

6. The *Summary* dialogue box appears, confirming the applicant status was changed to *Hired*.



   - Click **Close**.

7. The selected applicant's page reappears, displaying the new *Status*.



   - Click **Job Requisitions** to return to the overview of all requisitions.