

# UCT SuccessFactors Recruiting guide for selection committee members

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#### **Process Overview: Part 1**



Hiring Manager identifies vacancy



Hiring Manager meets with HR
Business Partner to
discuss vacancy



HR Recruitment Advisor reviews documentation and sends to HR Recruitment Administrator

HR Business Partner sends relevant documentation to HR Recruitment Advisor



Servicing Officer (HR
Recruitment Advisor) reviews
job requisition before
search meeting

Servicing Officer finalises job requisition after search meeting

Servicing Officer posts advertisement



Selection committee members add comments and rating per candidate

Selection committee members review candidate applications



Candidates apply for the vacancy



#### **Process overview: Part 2**



HR Recruitment Administrator attaches referee reports for shortlisted candidates

HR Recruitment Administrator schedules candidate interviews

Servicing Officer starts offer approval process

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

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



After approvals, Servicing
Officer sends offer
letter to candidate



Candidate accepts offer





Servicing Officer changes candidate status to *Hired* 

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

Servicing Officer changes candidate status to Offer Accepted

#### **Logging in to SuccessFactors**

#### **Background**

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

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

#### Support

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

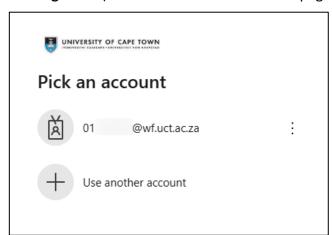
#### **Procedure**

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

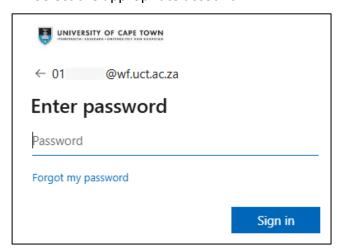
**Note**: You can also access SuccessFactors via the HR website by clicking *SuccessFactors* at the top of the page.

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)



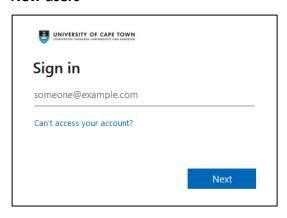
- Select the appropriate account.



- 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 <a href="step 4">step 4</a>).

# **Logging in to SuccessFactors**

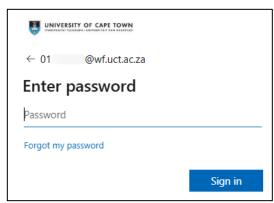
#### **New users**



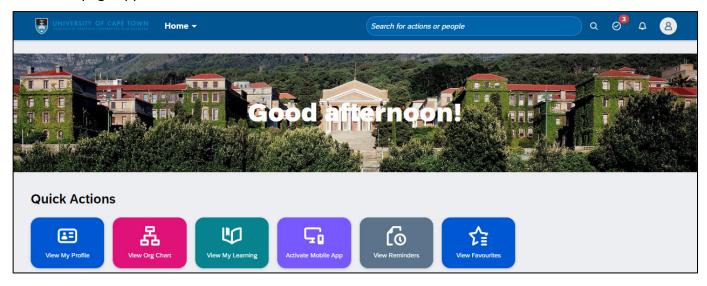
In the field below *Sign in*, enter your UCT staff number followed by @wf.uct.ac.za. E.g. 01234567@wf.uct.ac.za.

**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.

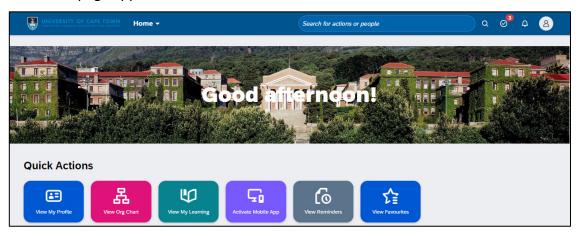


#### **Background**

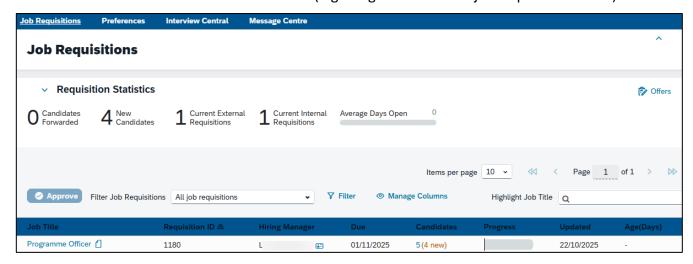
This procedure shows how to access the candidate's full application (including responses to any application/screening questions), their CV and cover letter (if applicable).

#### **Procedure**

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

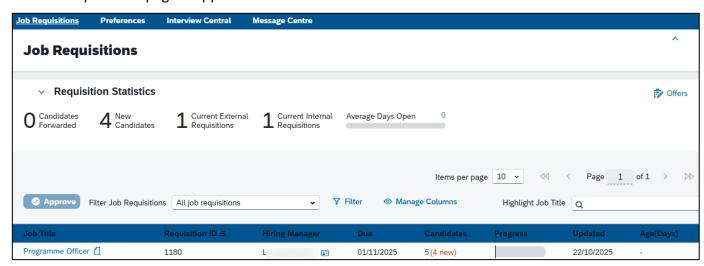


- Choose *Home > Recruiting*.
- 3. The *Job Requisitions* page appears. This page provides an overview of all the job requisitions you are involved in as a selection committee member (e.g. Programme Officer job requisition below).



- The Requisition Statistics section will change over time as job requisitions move through the recruitment process. The Current External Requisitions and Current Internal Requisitions reflect external and internal adverts.
- To open the original advert (as a reference when reviewing candidates):
  - Click the Job Title e.g. Programme Officer.
  - In the Job Requisition Details page, in the top right, click Internal Posting Preview of External Posting Preview
  - The advert appears in a separate window that can be kept open when reviewing the candidate profile and attachments or printed to PDF.
  - Click Job Requisitions to return to the Job Requisitions page.

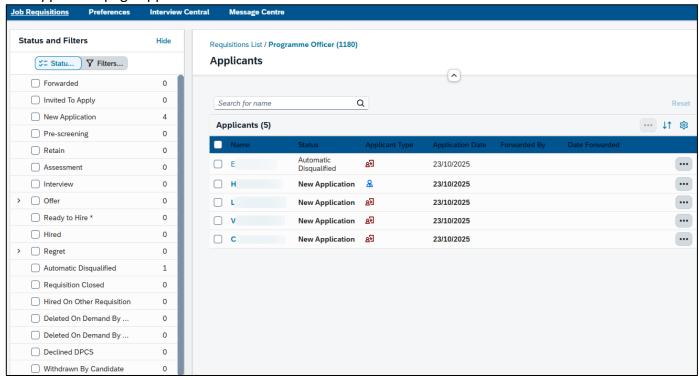
4. The Job Requisitions page reappears.



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.

5. The Applicants page appears.

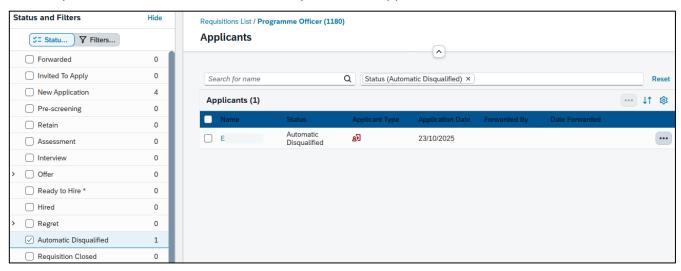


The Status and Filters section shows all possible statuses and the number of applicants per status. In the example above there are 5 applicants, with 4 in New Application and 1 in Automatically Disqualified based on answers to the application questions. Applicant status can only be changed by the Recruitment team.

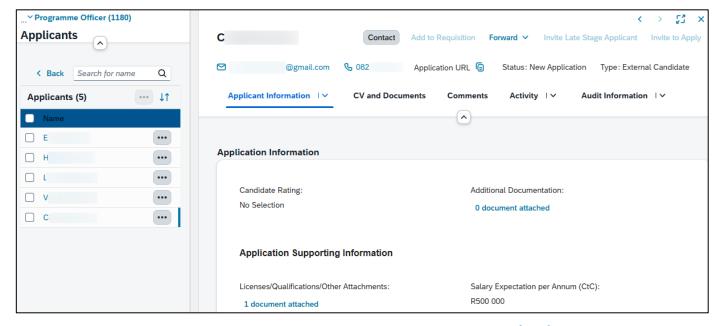
**Note**: Applicants with the *New Application* status can edit/change their attachments, profile information and answers to the application questions. Once they move to another status, they will no longer be allowed to make changes.

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.

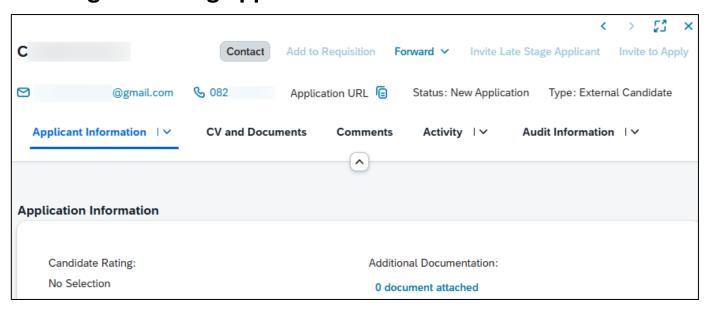


- The Status and Filters section can be hidden by clicking Hide. Click Status and Filters to show it again.
- Click Settings to select columns to show, columns to hide and/or change the column order. A
  maximum of 9 columns can be selected.
- Click I Sort to select ascending or descending sort order or to choose a specific column to sort by.
- Select an applicant to view by clicking their name in the Name column.
- 6. The list of applicants appears on the left with the selected applicant's details on the right.

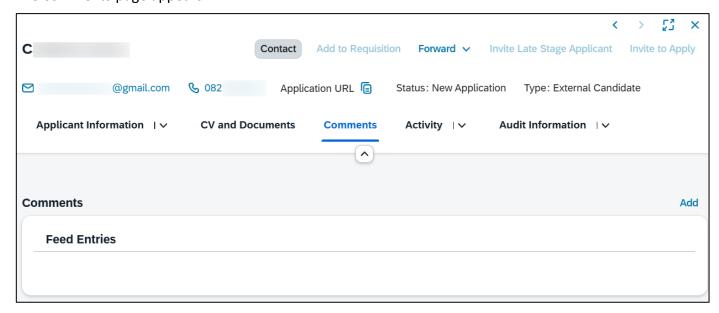


- Switch between applicants using the Name column on the left or use the \( \) arrows in the top right.
- Scroll down the Applicant Information page to review each candidate's full application, including answers to the application questions in the Screening Information section.

**Note**: Completeness of applications may vary as many sections are optional. Candidates with less complete applications should not be penalised.



- Click the CV and Documents tab to view the applicant's CV, cover letter and/or other documents.
   Note: The cover letter is not a required attachment so may not be available for all candidates.
   Candidates with existing cover letters are not prompted to update their cover letter on application so may not have the latest one attached.
- To download CV and cover letter documents for a group of applicants, select each applicant using the checkboxes in the *Applicants* section on the left. Click in the top right of the section and choose *Download Documents*. See: Downloading applicant documents.
- Click the *Comments* tab to enter your rating and comment for the current applicant.
- 7. The *Comments* page appears.

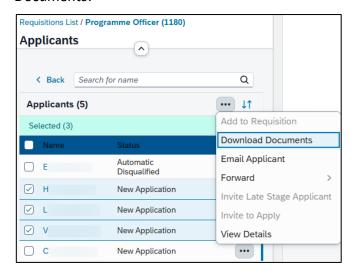


- Click Add on the right to enter your rating and any comments in the Add Comment dialogue box.
  - **Note**: During the shortlisting meeting, the Recruitment Advisor will record each applicant's status (e.g. Interview, Retain, Regret) and the final committee rating (A, B, O, D if standard mandate or A, B, C if open mandate).
- Select the next applicant by clicking their Name on the left and add the rating and any comments.
- When all applicant comments have been entered, click Back to return to the Applicants page.

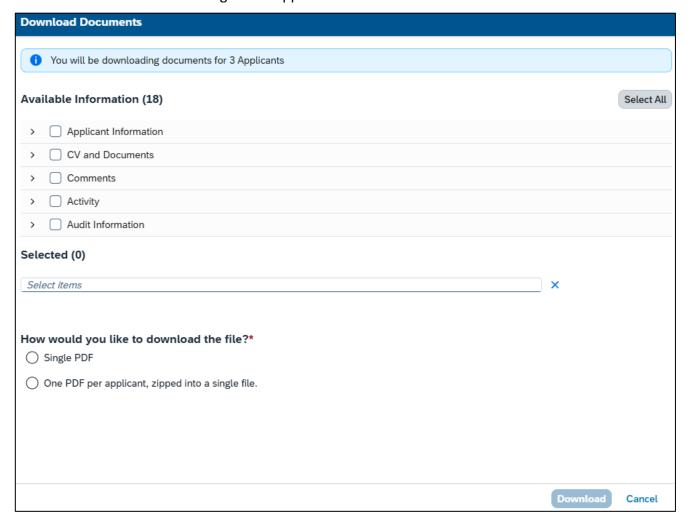
# **Downloading applicant documents**

#### **Procedure**

- 1. This procedure continues from step 6 of Reviewing and rating applications.
  - To download documents for a group of applicants, select each applicant using the checkboxes in the Applicants section on the left. Click in the top right of the section and choose Download Documents.



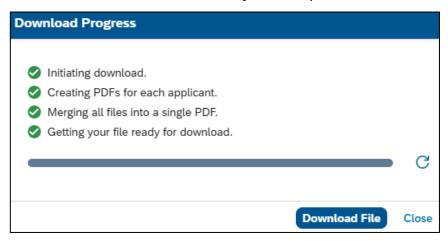
2. The Download Documents dialogue box appears.



- In the Available Information section, select the appropriate checkboxes.

# **Downloading applicant documents**

- Choose a PDF option in the How would you like to download the file? Section.
- Click Download
- A message at the top of the page indicates that the download is in progress. The download can take a
  while to complete, click View Status to receive a status update. You may also receive an email from
  SuccessFactors when the download job is complete.



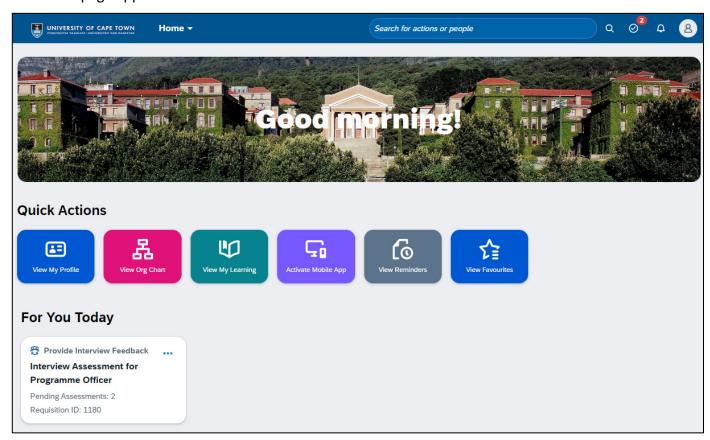
- Click Download File to access the file from your web browser download location.
- Return to <u>step 6 of Reviewing and rating applications</u>.

#### **Overview**

After the interview, selection committee members give each candidate (applicant) an overall rating or rate a set of competencies. They may upload interview notes and will indicate if each candidate is appointable or not.

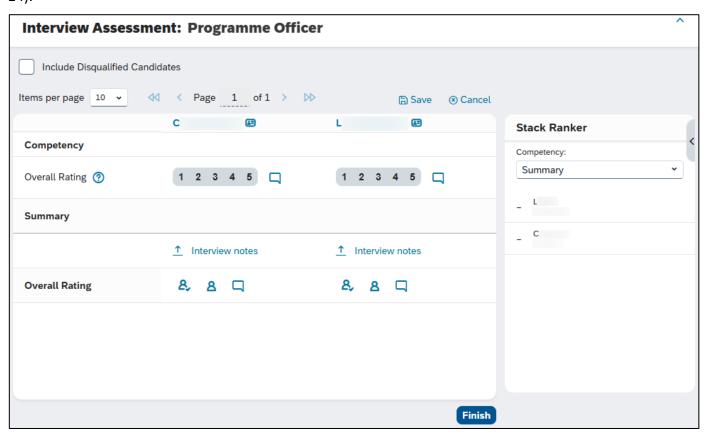
#### **Procedure**

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



Click the *Interview Assessment* for the appropriate job (e.g. Programme Officer).
 If there is more than one job requisition to add interview ratings for, click *View All*. In the *Provide Interview Feedback* dialogue box, click the *Interview Assessment* for the appropriate job.

3. The *Interview Assessment* page appears, each candidate scheduled for an interview appears across the top of the page. Either enter a single *Overall Rating* (see: <u>Selecting an overall rating</u> below) or, if the committee has chosen this option, rate a set of competencies (see: <u>Rating a set of competencies</u> on page 14).



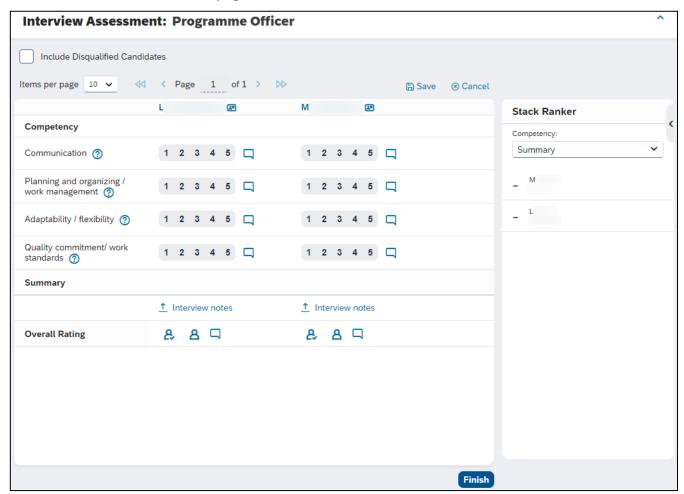
#### Selecting an overall rating

- For the first candidate, select an Overall Rating in the Competency section. To view rating descriptions, hover over the rating numbers. 1 is Unsatisfactory and 5 is Outstanding.
- If applicable, add a comment by clicking Comments alongside the Overall Rating in the Competency section. Enter the comment and click
- To upload interview notes for the candidate, click 1 Interview notes.
   Note: Any interview notes uploaded to SuccessFactors could be viewed by the candidate if they initiate a PAIA (Promotion of Access to Information Act) request. See: Uploading interview notes.
- In the Overall Rating section at the bottom, indicate whether the candidate is appointable or not by selecting Recommended or Not Recommended. The selected option will appear in blue shading.
   Overall Rating
- Repeat the steps above to select an overall rating for each candidate.
- When ratings have been entered for every candidate, click Save.
- Click Finish (bottom right) to return to the Home page.

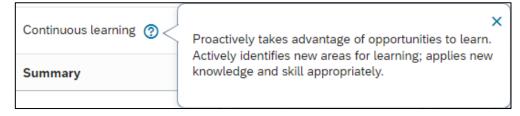
#### Rating a set of competencies

Follow the steps below if the committee has chosen to rate a set of competencies instead of using a single overall competency rating.

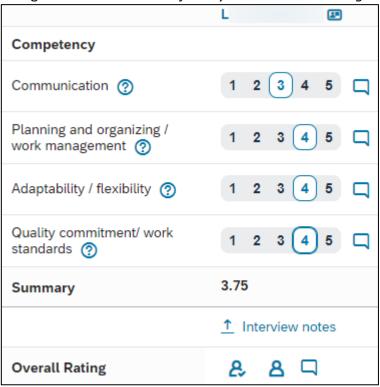
 Each candidate scheduled for an interview appears across the top of the page and the competencies are listed on the left side of the page.



To view a detailed description of a competency, hover over ② Help next to the competency name.



- For the first candidate, select a rating per competency. To view rating descriptions, hover over the rating numbers. 1 is *Unsatisfactory* and 5 is *Outstanding*.



- If applicable, add a comment per rating by clicking Comments alongside each competency rating.
   Enter the comment and click Add
- To upload interview notes for the candidate, click Interview notes.
   Note: Any interview notes uploaded to SuccessFactors could be viewed by the candidate if they initiate a PAIA (Promotion of Access to Information Act) request. See: <u>Uploading interview notes</u>.
- In the Overall Rating section, indicate whether the candidate is appointable or not by selecting Recommended or Not Recommended. The selected option will appear in blue shading.

  Overall Rating
- Repeat from the previous page to add competency ratings for each candidate.
- When ratings have been entered for every candidate, click Save.
- Click Finish (bottom right) to return to the Home page.

# **Uploading interview notes**

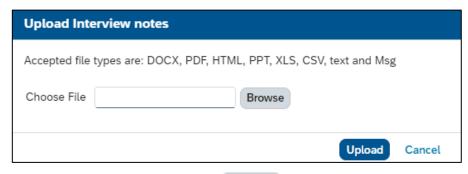
#### **Background**

This procedure continues from step 3 of Adding interview ratings for candidates.

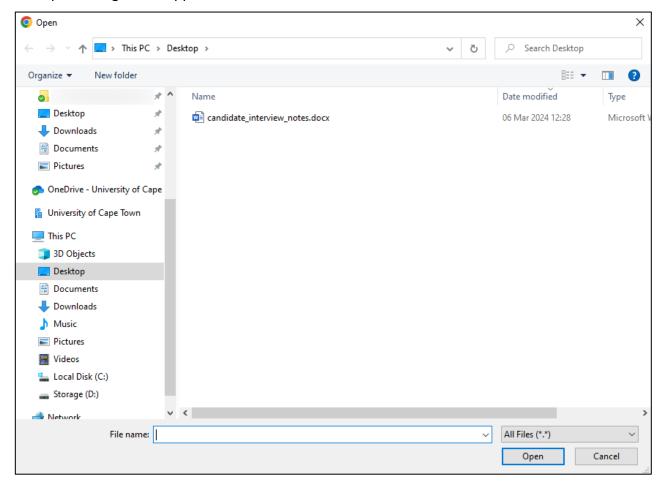
#### **Procedure**

- 1. To upload interview notes for the candidate, click 1 Interview notes in the Summary section.

  Note: Any interview notes uploaded to SuccessFactors could be viewed by the candidate if they initiate a PAIA (Promotion of Access to Information Act) request.
- 2. The *Upload Interview notes* dialogue box appears.



- In the *Choose File* field, click
- 3. The Open dialogue box appears.

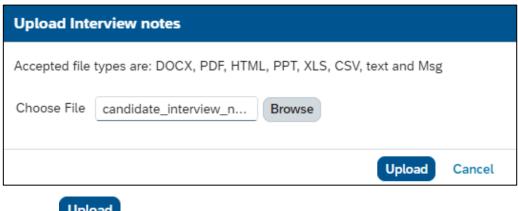


- Select the interview notes document from your computer.

– Click Open

# **Uploading interview notes**

4. The *Upload Interview notes* dialogue box reappears with the file name shown in the *Choose File* field.



Click Upload

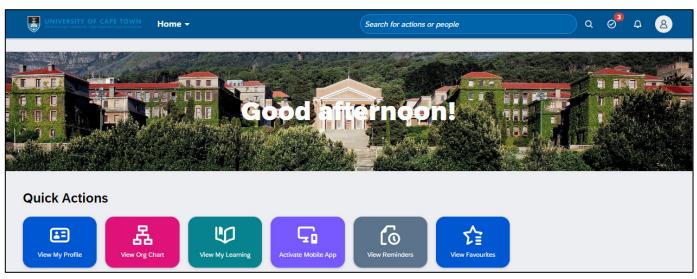


- The *Notes* link appears below the *Summary* score. To remove the notes, click  $^{\scriptsize{\mbox{\scriptsize{1}}}}$  *Delete Interview* Notes.
- Return to step 3 of Adding interview ratings for candidates.

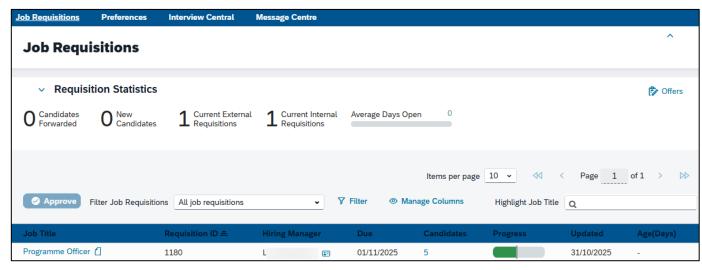
# Reviewing or editing interview feedback

#### **Procedure**

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



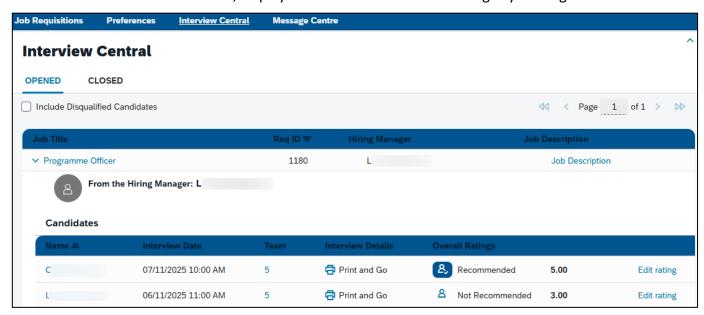
- Choose Home > Recruiting.
- 3. The *Job Requisitions* page appears. This page provides an overview of all the job requisitions you are involved in as a selection committee member (e.g. Programme Officer job requisition below).



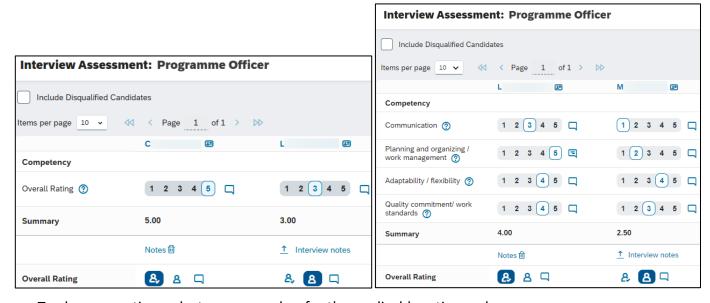
Click Interview Central

## Reviewing or editing interview feedback

- 4. The *Interview Central* page appears. All candidates you've previously rated or marked as *Recommended* or *Not Recommended* are listed.
  - If the candidates are not listed, display the candidates and their ratings by clicking the Job Title.



- Click Edit rating for any candidate.
- 5. The *Interview Assessment* page appears, listing all candidates for that job requisition. The candidates either received a single overall rating or were rated on a set of competencies.



- To change a rating, select a new number for the applicable rating scale.
- To add interview notes, click 1 Interview notes.
- To change Overall Rating in the Summary section, select Recommended or Not Recommended.
   The selected option will appear in blue shading.



- When rating changes are complete, click Save.
- Click Finish to return to Interview Central.