SUCCESSFACTORS:
A GUIDE FOR ACADEMIC ORGANIZATIONS

Deploys April 1, 2018

What is SuccessFactors?
Simply put, SAP SuccessFactors is an integrated, cloud-based core human capital management solution. What this means is that the system’s integration allows information collected in one area to populate information in another area, creating a unified location for employee data through an employee’s life cycle, from new hire to retire.

Why change?
Today, the majority of organizational management, recruitment, onboarding and employee data management business processes are paper-based and require manual entry. Purdue’s organizational structure is not accurately reflected in our system, and as a result, work and approval flows take place outside our core system. Multiple, complex pay processes have led to 52 unscheduled pay cycles in addition to the 50 that are regularly scheduled.

It’s time to rebuild the core human resources structure and utilize automated work and approval flows, electronic timekeeping for time and leaves (instead of paper) and have a single source for all recruiting, onboarding, compensation, career path mapping and performance management processes.

What does this mean to an organization?
The biggest change – all employees, supervisors, administrative assistants, business offices and other support staff will access SuccessFactors to:
- Review pay statements and update personnel information (instead of Employee Self-Service (ESS))
- Request all time off or leaves through SuccessFactors (instead of paper, Employee Self-Service or Kronos)
- Process electronic time sheets instead of paper timecards – Supervisors approve via SuccessFactors
- Request and process new positions, recruitment and hiring tasks through SuccessFactors
- Process and approve pay changes through SuccessFactors
SuccessFactors at a Glance

<table>
<thead>
<tr>
<th>Functionality</th>
<th>Faculty (with no direct reports)</th>
<th>Faculty with direct reports (Supervisor)</th>
<th>Department Head</th>
<th>Dean</th>
<th>Administrative Assistant</th>
<th>Business Office</th>
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<tbody>
<tr>
<td><strong>Employee Self-Service Functionality</strong></td>
<td>Review pay statements, update personnel information including address, education, tax and bank information. Paper forms are eliminated for ESS activities. Employee responsible for interacting within SuccessFactors.</td>
<td>Non-exempt or hourly paid employees will utilize SuccessFactors to record time worked. Supervisors (those with direct reports) will approves timesheets of non-exempt or hourly paid staff</td>
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<td><strong>Time Entry</strong></td>
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<td>Supervisors (those with direct reports) will approve leave requests (will auto approve after a set number of days), when applicable</td>
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<td><strong>Time Off (Leaves) Approvals</strong></td>
<td></td>
<td>All employees will requests time off or leaves (including processing sabbaticals, when applicable) through SuccessFactors</td>
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<tr>
<td><strong>Time Off (Leaves) Requests</strong></td>
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<td>Student, grad student appointments, faculty and staff positions are hired through the recruitment module; Candidate pools, electronic offer letters are all viewable through SuccessFactors</td>
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<td><strong>Recruitment and Hiring</strong></td>
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<td>Asks business office to initiate employee pay change request (pay changes, reclassifications, etc.)</td>
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<td><strong>Pay Changes and other employee actions</strong></td>
<td>Approves employee data changes (pay changes, reclassifications, etc.)</td>
<td>Annual Merit Planning is processed through SuccessFactors</td>
<td>Approves merit increases (Annual Merit Planning)</td>
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<td><strong>Reviews/edits offer letters</strong></td>
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<td>Reviews/edits faculty offer letters</td>
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<td><strong>Hiring supervisor or administrative assistant can initiate position or posting to kick-off faculty recruitment processes in SuccessFactors; assist department with recruitment, similar to today</strong></td>
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<td>Could assist with onboarding tasks (customized email to new hire)</td>
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<td><strong>Recruiting</strong></td>
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<td>All recruitment processes, including staff, student and faculty search activities will utilize SuccessFactors, eliminating Taleo, Student Employment Management (SEMs) and other in-house/third-party systems. SuccessFactors recruitment module will:</td>
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<td><strong>Recruiting</strong></td>
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<td>Replace paper forms with an online requisition initiating the hiring process, including creating the position, when applicable.</td>
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<tr>
<td><strong>Recruiting</strong></td>
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<td>Automate the approval process and utilize offer letter templates.</td>
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<td><strong>Recruiting</strong></td>
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<td>Utilize an online interview-rating tool, eliminating the collection of notes forwarded to Human Resources.</td>
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<tr>
<td><strong>Recruiting</strong></td>
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<td>Gather new employee information during the recruitment process and push to Onboarding, eliminating Personnel Action (PA) forms and duplicative approvals.</td>
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Below is an outline of how SuccessFactors will be utilized.
Onboarding a New Employee
The new employee will have a streamlined hiring experience. The administrative assistant or hiring manager can kick-off the hiring process. New employees will:

- Receive a single welcome email outlining next steps.
- Access an online portal to complete important new hire information including direct deposit information, tax forms and I-9 Employment Eligibility Verification
- Receive career account, email account set up and computer access information

Time and Leaves - Approving Work Time and Time Off
Organizations will transition to the SuccessFactors timekeeping solution. Today's paper timecards will be replaced with an online timesheet to electronically track time.

- Pay period 8 (March 19 – April 1) will be the first pay period utilizing SuccessFactors for timekeeping.
- A phased approach will transition current employees utilizing Kronos clocks today to a mobile application.

SuccessFactors offers:

- Two time profile templates assigned to employees:
  - Positive timekeeping indicates employee is documenting time worked and submitting the timesheet for approval; supervisor approval is required.
  - Negative timekeeping indicates the employee’s schedule designates hours worked therefore employee or supervisor does not touch the timesheet, unless there is an exception (such as overtime).
- Work schedules for all employees. Work schedules drive holidays, over-time calculations, etc.
  - Types of schedules include fixed, variable and ad-hoc.
- All employees, including grad staff, will request time off (leaves) online through SuccessFactors.
- Supervisors will have access to various reporting to help manage and approve time, when needed.
  - Only employee and supervisor have access to timesheets.
  - Employees are accountable for accurately recording time worked.
- Business offices, including current employment or operations centers, will continue to assist with cost distribution.

Processing Employee Data Changes
Most employee data changes today require a variety of paper forms and back-and-forth communications in order to reclassify a position, change an employee’s FTE (full to part-time hours), etc. Starting in April, changes are processed through SuccessFactors by completing an online action. Both your business office (or current employment or operations center) and human resources can provide guidance on how to initiate these requests. All pay increases are routed for approval to the Department Head or Director.

Careers (Career Planning)
- A job family structure and level guide will be available for supervisors and employees to utilize when considering opportunities and planning a career path.
- All employees access Careers within SAP SuccessFactors to view available open positions.

Compensation (and Merit Increases)
Those involved in the annual merit planning will receive training during the merit process period. SuccessFactors offers:

- An online streamlined merit increase process with automated approvals
- Integration with payroll and employee records - approved merit increases automatically update for payroll processing.
- Online compensation statement replaces current manually prepared, printed statements.

Offboarding (Exit Interview Process)
Similar to today, supervisors or appropriate personnel will want to notify the business office or current employment center when terminating an employee. SuccessFactors offers:

- An online request to terminate an employee, notifying all the proper departments (payroll, benefits, etc.) of the employment change and kicks-off tasks to be completed.
- An automated exit interview process, providing employees the opportunity to provide feedback.