SuccessFactors
Recruitment and Onboarding
What is SuccessFactors?

• An integrated, cloud-based core human capital management solution

• 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 retiree

• Deploys January 1, 2019
INTEGRATION AND AUTOMATION

• Create Position or Existing Vacancy prompts automated posting options in SuccessFactors

• Manager selects to post, review

• Position posted; position budget approved, automated workflow

• Candidates reviewed – supervisor/committee access information easily in system

• Offer letter auto-generated

• Employee and supervisor have baseline goals and first 90 days mapped

• Employee completes week one activities - enrolls in benefits, when applicable

• New employee has system access day one

• New Employee receives welcome message/ completes pre-start date activities

• Acceptance triggers automated onboarding and employee data populated in HR/Payroll system
All employees will access SuccessFactors to:

- Review pay statements
- Update tax forms
- Update personnel information, including education
- Update bank information
- Request time-off or leaves
SuccessFactors structure:
• Traditional organizational chart view
• Position organization chart displays position details and kicks-off posting or recruitment process
• Positions incorporate job family details including identifying career stream, job and job level
Sasse Steele, Compensation Manager, demonstrates creating and approving a position.

1. Click picture to start demonstration (opens in a new window)
2. An initiator role is available for a department to create or edit position; in this example an administrative assistant is creating the position
3. Human Resources reviews and approves
4. A position must be created to start the recruitment process
Recruitment

The position information demonstrated in the previous slide, will populate important requisition fields, so the initiator only needs to complete the information needed to post and hire the position.

### Recruitment Summary

<table>
<thead>
<tr>
<th>Three Distinctive Hiring Processes:</th>
<th>Four Advantages:</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Faculty</td>
<td>1. Reduced time to post</td>
</tr>
<tr>
<td>- Staff</td>
<td>2. Mobile-enhanced</td>
</tr>
<tr>
<td>- Student</td>
<td>3. Transparency of progress</td>
</tr>
<tr>
<td></td>
<td>4. Integration to onboarding and payroll</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>All Processes Include:</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Automated workflow</td>
</tr>
<tr>
<td>- eApprovals</td>
</tr>
<tr>
<td>- eOffers</td>
</tr>
<tr>
<td>- Ratings and notes captured in SuccessFactors</td>
</tr>
<tr>
<td>- Access to reports and data</td>
</tr>
</tbody>
</table>
Faculty Recruitment

Post a Position

1. Create Req
   Initiator creates requisition from vacant position in org chart

2. Complete Info
   Initiator fills in required information for requisition and supplemental materials for OIE

3. Approve Budget
   Budget approver reviews requisition and approves fiscal details

4. OIE Approval
   OIE (Recruiter) reviews requisition info and supplemental materials and approves

5. Edit Posting
   Department Recruiter reviews requisition info and edits posting information

6. Post Position
   Department Recruiter posts position on purdue.edu/careers
Faculty Recruitment

Extending an Offer

1. Select Finalist
   - Initiator / Search Committee select finalist and notify of intent to offer

2. Approve Salary
   - Budget Approver reviews offer approval details and approves

3. Provost Approval
   - Provost / EVPRP reviews offer approval details and approves

4. Accept e-Offer
   - Candidate reviews and accepts e-offer

5. Offer Approval
   - Department Recruiter completes offer approval template

6. Dean Approval
   - Dean reviews offer approval details and approves

7. Extend e-Offer
   - Budget Approver extends e-offer to candidate

8. Close Search
   - Initiator enters rankings, ratings, comments, notes
     Recruiter (OIE) requests background check
     Department Recruiter initiates Onboarding
# Faculty Recruiting Process

<table>
<thead>
<tr>
<th>Step #</th>
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<th>Action</th>
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<tbody>
<tr>
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<td>Initiator</td>
<td>Creates requisition from vacant position in org chart</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>Completes required requisition information and sends for approval</td>
</tr>
<tr>
<td>3</td>
<td>Budget Approver</td>
<td>Reviews requisition information, enters pay range, frequency and target pay; approves</td>
</tr>
<tr>
<td>4</td>
<td>Department Recruiter</td>
<td>Reviews requisition information, assists in preparing posting verbiage, developing diversity recruitment plan, and affirmative action plan (if applicable)</td>
</tr>
<tr>
<td>5</td>
<td>Recruiter (OIE)</td>
<td>Reviews requisition information, position announcement, diversity recruitment plan and affirmative action plan (if applicable). Approves or returns for edits</td>
</tr>
<tr>
<td>6</td>
<td>Department Recruiter</td>
<td>Receives notice of approved requisition</td>
</tr>
<tr>
<td>7</td>
<td></td>
<td>Posts position</td>
</tr>
<tr>
<td>8</td>
<td></td>
<td>Reviews applicant submissions for qualifications</td>
</tr>
<tr>
<td>9</td>
<td>Initiator / Search Committee</td>
<td>Reviews submissions and makes initial selections</td>
</tr>
<tr>
<td>10</td>
<td>Recruiting Coordinator</td>
<td>Schedules interviews (optional)</td>
</tr>
<tr>
<td>11</td>
<td>Initiator / Search Committee</td>
<td>Conducts interviews &amp; makes hiring decision(s)</td>
</tr>
<tr>
<td>12</td>
<td>Department Recruiter</td>
<td>Completes offer approval template</td>
</tr>
<tr>
<td>13</td>
<td>Budget Approver</td>
<td>Reviews and approves offer details</td>
</tr>
<tr>
<td>14</td>
<td>Dean</td>
<td>Reviews and approves offer details</td>
</tr>
<tr>
<td>15</td>
<td>Provost / EVPRP</td>
<td>Reviews and approves offer details</td>
</tr>
<tr>
<td>16</td>
<td>Budget Approver</td>
<td>Extends e-offer</td>
</tr>
<tr>
<td>17</td>
<td>Candidate</td>
<td>Accepts e-offer</td>
</tr>
<tr>
<td>18</td>
<td>Initiator</td>
<td>Enters search rankings, ratings, and/or comments and uploads search notes as applicable</td>
</tr>
<tr>
<td>19</td>
<td>Recruiter (OIE)</td>
<td>Requests background check (if applicable)</td>
</tr>
<tr>
<td>20</td>
<td>Department Recruiter</td>
<td>Initiates onboarding (if applicable) and closes out requisition</td>
</tr>
</tbody>
</table>
Staff Recruitment

Post a Position

1. Create Req
   - Initiator creates requisition from vacant position on org chart

2. Approve Budget
   - Budget approver reviews requisition and approves fiscal details

3. Complete Info
   - Initiator fills in required information for requisition

4. Edit Posting
   - Recruiter reviews requisition info and edits posting information

5. Post Position
   - Recruiter posts position on purdue.edu/careers
Staff Recruitment

Extending an Offer

1. Select Finalist
   - Initiator / Search Committee select finalist and notify of intent to offer

2. Offer Approval
   - Recruiter completes offer approval template

3. Approve Salary
   - Budget Approver reviews offer approval details and approves

4. Extend e-Offer
   - Recruiter extends e-offer to candidate

5. Accept e-Offer
   - Candidate reviews and accepts e-offer

6. Close Search
   - Initiator enters rankings, ratings, comments, notes
   - Recruiter requests background check and initiates Onboarding
# Staff Recruiting Process

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<td>Completes required requisition information and sends for approval</td>
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<tr>
<td>3</td>
<td>Budget Approver</td>
<td>Reviews requisition information, enters pay range, frequency and target pay; approves</td>
</tr>
<tr>
<td>4</td>
<td>Recruiter</td>
<td>Reviews requisition information, edits posting information</td>
</tr>
<tr>
<td>5</td>
<td></td>
<td>Posts position</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>&lt; 5 Business Day Posting Period &gt;</strong></td>
</tr>
<tr>
<td>6</td>
<td>Recruiter</td>
<td>Reviews applicant pool and forwards submissions that meet minimum requirements</td>
</tr>
<tr>
<td>7</td>
<td>Initiator / Search Committee</td>
<td>Reviews submissions, conducts interviews, makes selections</td>
</tr>
<tr>
<td>8</td>
<td>Initiator</td>
<td>Notifies Recruiter of hiring decision / intent to offer</td>
</tr>
<tr>
<td>9</td>
<td>Recruiter</td>
<td>Completes offer approval template</td>
</tr>
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<td>10</td>
<td>Budget Approver</td>
<td>Reviews and approves offer details</td>
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<td>Recruiter</td>
<td>Extends e-offer</td>
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<td>Candidate</td>
<td>Accepts e-offer</td>
</tr>
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<td>13</td>
<td>Initiator</td>
<td>Enters search rankings, ratings, and/or comments and uploads search notes as applicable</td>
</tr>
<tr>
<td>14</td>
<td>Recruiter</td>
<td>Requests background check (if applicable)</td>
</tr>
<tr>
<td>15</td>
<td></td>
<td>Initiates onboarding (if applicable) and closes out requisition</td>
</tr>
</tbody>
</table>
Student Recruitment
Post a Position

1. Create Req
   Initiator creates requisition from vacant position in org chart

2. Complete Info
   Initiator fills in required information for requisition and posting details

3. Post Position
   Recruiter posts position on purdue.edu/careers
Student Recruitment

Extending an Offer

1. Select Finalist
   Initiator selects finalist

2. Extend e-Offer
   Initiator or Department Recruiter extends e-offer to candidate

3. Offer Approval
   Initiator or Department Recruiter completes offer approval template

4. Accept e-Offer
   Candidate reviews and accepts e-offer

5. Close Search
   Initiator enters rankings, ratings, comments, notes, and initiates Onboarding *
## Student Recruiting Process

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<td>Initiator or Department Recruiter</td>
<td>Creates requisition from vacant position in org chart</td>
</tr>
<tr>
<td>2</td>
<td>Initiator or Department Recruiter</td>
<td>Completes required requisition information</td>
</tr>
<tr>
<td>3</td>
<td>Initiator or Department Recruiter</td>
<td>Reviews / Edits posting information</td>
</tr>
<tr>
<td>4</td>
<td>Initiator or Department Recruiter</td>
<td>Posts Position</td>
</tr>
<tr>
<td>5</td>
<td>Initiator or Department Recruiter</td>
<td>Reviews applicant submissions</td>
</tr>
<tr>
<td>6</td>
<td>Initiator or Department Recruiter</td>
<td>Reviews submissions and makes initial selections</td>
</tr>
<tr>
<td>7</td>
<td>Initiator or Department Recruiter</td>
<td>Conducts interviews &amp; makes hiring decision(s)</td>
</tr>
<tr>
<td>8</td>
<td>Initiator or Department Recruiter</td>
<td>Completes offer approval template</td>
</tr>
<tr>
<td>9</td>
<td>Initiator or Department Recruiter</td>
<td>Extends e-offer</td>
</tr>
<tr>
<td>10</td>
<td>Candidate</td>
<td>Accepts e-offer</td>
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<td>11</td>
<td>Initiator or Department Recruiter</td>
<td>Enters search rankings, ratings, and/or comments and uploads search notes as applicable</td>
</tr>
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<td>12</td>
<td>Recruiter</td>
<td>Requests background check (if applicable)</td>
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<tr>
<td>13</td>
<td>Initiator or Department Recruiter</td>
<td>Initiates onboarding (if applicable) and closes out requisition</td>
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Brenda Coulson, Director – Talent Acquisition walks through the following roles:

1. Initiator – creating requisition

2. Budget Approver - Fiscal Approval

3. Employee Applies for Position

4. Review requisitions, candidate pools, request interviews and select final candidate
Demonstration – Staff Position

5. Create offer letter and review approval flow and acceptance
The onboarding module is used to collect and process new hire information such as taxes and I-9 verification. It also provides the hiring manager or department the opportunity to create a welcome message and link to important departmental information.
Onboarding Information Collected

Collect, Process, Maintain Information

- I9 Information
- Social Security Numbers
- W4/Tax Information
- Direct Deposit
- Address
- Sign Policies and Documents
- Phone Contact Information
- Emergency Contact

Customize Communication Messages

- Welcome Messaging
- Recommended Links
- Scheduled Meetings
- Peer Mentors
- Introduce Team Members
- 90 Day Goals
Five roles will execute the ONB future state

**Initiate** the ONB process by reviewing new hire data collected during the recruitment process.

**Customize** new hire web portal (welcome message, identify important web links, assign mentor, set-up meetings, etc.).

**Submit** new hire information, visit new hire web portal. Meet with HR/PY specialist 1st day of employment.

**Verify** new hire documents on the first day of employment.

**Reviews** payroll information from offer letter, creates employee record in EC and submits information for storage in SuccessFactors.

**Future State**
1. HR recruiter for staff
2. Unit recruiter for faculty
3. Hiring manager or initiator for students

**Future State**
1. Defaults to Post Hire Data Verification (PHDV) completer unless an ONB coordinator is designated during PHDV

**Future State**
1. New hire to complete

**Future State**
1. Combination of central payroll and business offices based on the employee needs

**Future State**
1. Central payroll
Onboarding Process Flow Diagram (External Hire)

Recruiter/Initiator
- Initiate ONB process by reviewing new hire data collected during the recruitment process

Onboarding Coordinator
- Customize ONB new hire portal

New Hire

HR/PY Specialist
- Verify new hire paperwork with new hire on first day of employment

Appointment Specialist
- Review and submit payroll information for storage in SuccessFactor

E-Verify
Crossboarding Process Flow Diagram (Internal Hire)

Recruiter/Initiator
Initiate ONB process by reviewing new hire data collected during the recruitment process

Onboarding Coordinator
Customize ONB new hire portal

Internal Hire
View info pushed by ONB Coordinator as appropriate

Appointment Specialist
Review and submit payroll information for storage in SuccessFactor

Employee Central (EC)