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 April 1, 2018; First bi-weekly pay period in SuccessFactors is March 19 – April 1.
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
Time

Summary of Changes

• Interfaces with Employee Central (EC) and EC – Payroll
  ➢ Reduces the time types and absence codes
  ➢ Establishes rules based on Time profiles driving automatic calculation of pay (ex. Premium pay, call back
  ➢ Utilizes work schedules to drive when individuals are paid
  ➢ All leave requests submitted through time off functionality
  ➢ Approved leave requests automatically flow to employee’s timesheet
  ➢ Allows the ability to move to exception approval of time wherever possible
  ➢ Accurate Sick Leave bucket will be viewable for Exempt employees, display sick time calculated on an annual basis – removing the rolling 12 month calendar (manual) calculation
Time Profiles and Work Schedules

EC Time

• System drives automation based on Time Profiles and Work Schedules
  ➢ Positive or Negative time recording
  ➢ Holiday calendars
  ➢ Overtime calculations
  ➢ Premium calculations
  ➢ Exception reporting and approval
  ➢ Academic Year employees
  ➢ Timesheet view is a week at a time

• The first bi-weekly pay period to utilize SuccessFactors is March 19 – April 1.
Time Profiles and Work Schedules

EC Time

• Time Profiles
  • Configured in the system and assigned to employees
  • Drive time types, allowances, overtime rules etc.

• Exception Approval based on Time Profile
  • Positive > record all hours
  • Negative > hours flows from work schedule – automatic submission if no exception time recorded

• Time Recording Variants
  • Future: Clock time-based recording (via mobile application) start and end times will be recorded and hours pushed to timesheet
  • Duration-based recording – duration of hours recorded
Key Changes

Time Recording and Approving

• Employee and Supervisor Accountability
  • Correct hours for the prior to pay periods > route to supervisor for approval
  • Time recorded to time types will be controlled by the time profile
  • Cost overrides will be allowed on the timesheet
  • Missed punches – alerts employee and supervisor via notification (in addition employee is told at the next time they clock in)
Key Changes

Time Recording and Approving

• Time Approvals
  • Employees and Supervisors approve – when employees are positive time recording
  • Supervisors approve only exception time for negative time recording
  • Unapproved timesheets
    ▪ Central Payroll Staff - monitor and push through for payment
    ▪ Reporting to Managers of all time paid to employees per pay period
    ▪ Missed punches – no time paid for these days – notification sent to employee and supervisor

Time Administrators no longer part of the approval process – will be able to review cost distribution and correct before payroll is complete
Key Changes

Work Schedules

All employees will need a work schedule:

- Exempt – drives when they are paid (ex. AY) based on Academic Year Calendar
- Non-exempt – drives negative time paid, premium paid, holiday paid

Work Schedule
M-F 8 hours a day

Time sheet

Jane Doe
August 13 - August 19 2017
Sunday Monday Tuesday Wednesday Thursday Friday Saturday
8 8 8 8 8 8
Key Changes

Work Schedules

Type of schedules

- Fixed Schedules – Most benefit eligible employees
  - Ex. Straight M-F 8 hours or M-R 10 hours
  - Rotating shifts – ex. Firefighters and Police

- Flexible Work Schedules
  - Employees who are required to work a set number of hours per week - Based on their FTE
  - Days and number of hours per day may vary each week
  - The timesheet will reflect the number of hours and how this compares to the expected hours

- Ad Hoc Schedules
  - Variable schedule – no set expected hours (ex. Student workers)
Tracy Sondgerath, Operations Support Manager, walks through both recording and approving time. Visit SuccessFactors Sneak Peeks and select the Time demonstration.
Leaves

Process Overview

Employees

- Leave requests will be entered into SuccessFactors time off module
- Three main buckets will be shown with balances
  - Vacation, sick, personal days
- Other drop down will allow for other leave requests
  - Personal Leaves – Sick Family, Paid Parental Leave, Military, Jury Duty etc.
  - Business Leaves – Sabbaticals, Research, Outside Activity
Leaves

Process Overview

Workflow

- Request for standard bucket items and sick family leave will flow to supervisor for approval
- Request for other items will flow to HR for review and approval – based on business requirements
- If request is FMLA – employee has ability to indicate and will have an email notification sent to benefits area
- Business Leaves such as Sabbaticals and Research leaves will have workflow based on business requirements
Leaves Process Flowchart

Workflow to Supervisor Only

- Vacation
- Sick
- Sick Family
- Floating Holiday
- Holiday
- Jury Duty
- Personal Business Days
- Personal Holiday
- Bereavement
- Paid Parental Leave

- Work Comp Paid (for appointments)

Once approved – flows to timesheet
If FMLA central leave group is notified

Once approved – the budget approver is notified
Leave Process Flowchart

Workflow to Supervisor and Department Head

• Personal Unpaid (22 days or less)
• Outside Activity Paid /Unpaid (less than 5 days)
• Research/instruction/Engagement Travel Paid / Unpaid (22 days or less)

Once approved – the budget approver is notified
Once approved – flows to timesheet

If FMLA central leave group is notified

Leave Request workflow to Supervisor and Central Leave Group

• Military Paid and Unpaid

Once approved – flows to timesheet
Leave Process Flowchart

Leave Request Workflow to Budget Approver and Central Leave Group

- Outside Activity Paid/Unpaid (>5 days)
- Research/instruction/Engagement Travel Paid/Unpaid (>22 days)
- Sabbatical

Once approved – the budget approver is notified

Leave Request Workflow to Super., Dept. Head & Central Leave Group

- Personal Unpaid (>22 days)

Once approved – the budget approver is notified

Leave Request Workflow to Central Leave Group

- VPR Paid/Unpaid

Once approved – the budget approver is notified
Leaves Demonstration

Tammy Synesael, Leave of Absence Administrator, demonstrates requesting and approving time off or leave requests. Visit the Sneak Peeks webpage and select the Time-off (Leaves) demonstration.
What’s Next

1. Review the other sneak peeks or PowerPoint presentations, specifically time and leaves information
2. Reach out to your change network with questions
3. Email bpr@purdue.edu for further assistance