SUCCESSFACTORS PREP
PURDUE FORT WAYNE
ONB, XB, OFB, GMPM
Who will use each system? High-level Overview
ONB, XB, OFB, GMPM

ONB, XB Audience
- Faculty
- Staff
- Students
- Temps

ONB, XB Module

Faculty
Staff
Students

OFB Audience
- Faculty
- Staff
- Students

OFB Module

GMPM Audience
- Staff

GMPM Module
ONB, XB
IN SUCCESSFACTORS
# ONB Functionality in Everyday Speak

## 4 Simple Steps

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1</strong></td>
<td>One last review of data entered during recruitment. Kickoff steps 2A and 2B at the same time</td>
</tr>
<tr>
<td><strong>2A</strong></td>
<td>Submit online paperwork: direct deposit, work authorization, sign important policies, tax forms, other related employment information</td>
</tr>
<tr>
<td><strong>2B</strong></td>
<td>Payroll data is reviewed for accuracy and saved in the system establishing employee identity</td>
</tr>
<tr>
<td><strong>3</strong></td>
<td>Meet face-to-face with employee on first day to complete work authorization paperwork</td>
</tr>
</tbody>
</table>

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**Note:** This table outlines the process of integrating new employees into the ONB system, focusing on the essential steps for ensuring efficiency and accuracy in handling onboarding procedures.
New Hire Salary Information (TestFirst TestLast)
Post Hire Data Verification Step

Pay Rate and Hours

Pay Rate: 23
Frequency: HOUR
Weekly Standard Hours: 40

Relocation Bonus: $
Bonus Target: $
Other Bonus: $
Incentive Pay: $
Other Compensation: $

Finish
Please review the data you have entered. If any information is incorrect simply click on the incorrect data. A wizard screen will pop-up where you can correct the data. Once corrected, click ‘Finish’ on the pop-up to return to the Review and Approval page.

New Hire Set-up Information

Name
First Name: TestFirst  Middle Name: 
Last Name: TestLast  Suffix: 

Dates
Start Date: 07/28/2017  Offer Accepted Date: 07/27/2017
Orientation Date: 
Orientation Time: 

Hire Information
Is the new hire a remote employee? No
Please enter the new hire’s email address: noemail@successfactors.com
Re-enter the new hire’s email: noemail@successfactors.com

Where Will the New Employee be Employed

Job Location
Company: Purdue University (PUD)  Business Unit: 
Division: 
Department: 
Location: 

Post Hire Data Verification Panels
Assign a Peer Mentor

Welcome to Purdue!
Onboarding Set-up Panels

 Assign a Peer Mentor
Assign a Peer Mentor
Assign a Peer Mentor

The buddy will be Amy Greek's main contact during the onboarding phase. Choose a buddy from the suggestions or use the search box.

Search People:
Enter Your Name and Social Security Number (TESTname1 Onboarding)

New Hire Data Collection

Our company participates in the Federal government’s E-Verify program. The E-Verify program requires us to ask for your social security number.

Do you have a social security number? ○ Yes  ○ No

Please enter your SSN:

Please enter your name as it appears on your social security card.

First Name:

Middle Name:

Last Name: Onboarding

Suffix:

Please enter your date of birth.

Date of Birth: (mm/dd/yyyy)

☐ I have verified that this is my correct SSN and that my name is as it appears on my Social Security Card.

☐ If your last name differs from that shown on your social security card, check this box.

☐ I acknowledge that I must call 1-800-772-1213 to obtain a new or replacement Social Security card.
Physical Address (TESTname Onboarding)
New Hire Data Collection

Please enter your current physical address. If there is no address, enter a description of the location of your residence, such as "9 miles south of I-51, to the left of the water tower."

- Street Address 1
- Street Address 2
- Apartment #
- City
- Country
  - UNITED STATES OF AMERICA
- State
  - SELECT A STATE
- Zip Code
- Home Phone #
Form I-9 Employee Information and Attestation (TESTname Onboarding)

New Hire Data Collection

On this panel you will need to answer citizenship questions and determine which documents you will use to prove you are eligible to work in the United States. Select your citizenship status.

I attest, under penalty of perjury, that I am:  -- SELECT --

As proof of your eligibility to work in the United States, please select the document(s) you will use. Choose either one document from List A, or one document from both List B and List C. If you choose to use a Social Security Card as your List C document, click here for more information about valid cards.

LIST A: (Identity and Eligibility)
--- NONE ---

OR

LIST B: (Identity)
--- NONE ---

LIST C: (Eligibility)
--- NONE ---

Please remember to bring original, unexpired documents with you on your first day of employment.
W-4 Withholding Elections (TESTname Onboarding)
New Hire Data Collection

Martial status
-- SELECT --

Total number of allowances I am claiming

Additional amount, if any, you want withheld from each paycheck

I claim exemption from withholding

☐ I agree that the allowances and deductions listed above are accurate.

Need help figuring out your allowances and deductions? Click which W-4 worksheet(s) you need:
- Use this worksheet to figure out the number of allowances you should claim.
- Use this worksheet to figure out the number of deductions you should claim.
- Use this worksheet if you are single and have more than one job or are married and you and your spouse both work and the combined earnings from all jobs exceed $50,000 ($20,000 if married).

W-4 Instructions
New Hire Data Collection Panels

**Direct Deposit (TESTname Onboarding)**

New Hire Data Collection

With direct deposit, your pay is electronically deposited directly into your checking or savings account. Do you wish to enroll in direct deposit?

- [ ] Yes
- [ ] No

Please enter details for your primary bank account. If you split your salary or bonus into other accounts, any remaining funds will be deposited into your primary account.

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bank Country</td>
<td>-Select One-</td>
</tr>
<tr>
<td>Routing Number</td>
<td></td>
</tr>
<tr>
<td>Re-enter Routing Number</td>
<td></td>
</tr>
<tr>
<td>Account Number</td>
<td></td>
</tr>
<tr>
<td>Re-enter Account Number</td>
<td></td>
</tr>
<tr>
<td>Account Type</td>
<td>-Select One-</td>
</tr>
</tbody>
</table>

Do you wish to specify any other bank accounts?

- [ ] Yes
- [ ] No
Welcome to the Orientation Step (TESTname Onboarding)
New Hire Data Verification

Both the New Employee and the Corporate Representative must be present to complete this section.
Employee Name & SSN Information (TESTname Onboarding)

New Hire Data Verification

Our company participates in the Federal government’s E-Verify program. The E-Verify program requires us to ask for your social security number. Please ask the employee to verify that the social security number listed below is correct.

SSN: 014-83-3002

Verify the employee’s name.
*The name must be spelled exactly as it appears on the employee’s Social Security Card*

First Name: TESTname
Middle Name: NA
Last Name: Onboarding
Suffix: 

☐ I have verified with the employee that the name on his/her Social Security card is the same as listed above.

New Hire Data Verification Panels
If an employee presents an Unexpired U.S. Passport or U.S. Passport Card as the verification document, the employer must make a copy of that document and keep it on file with Form I-9.

As the employer, you must make a copy of the document and keep it on file with the Form I-9. You can either scan and upload the document or copy the document for future uploading into the employee's I-9 file. Please choose which option you will use.

- [ ] Scan and Upload Now
- [ ] Scan and Upload Later
Completing the E-Verify Process for (TESTname Onboarding)
Initial Verification

EMPLOYMENT AUTHORIZED

To complete the E-Verify process, please answer the question below regarding the employment status of the employee.

Is the employee currently employed with this company?  ○ Yes  ○ No

Please choose the reason the employee is not currently employed with this company:
○ The employee was terminated by the employer for reasons other than E-Verify.
○ The employee voluntarily quit working for the employer.

Click “Finish” to complete the E-Verify process.

If you click “Close”, the activity will remain in the Work Queue at its current status.

To resolve the case manually, click “Resolve Case” and choose the appropriate resolve reason.
XB Functionality in Everyday Speak
2 Simple Steps (required)

1. One last review of data entered during recruitment.

2. Payroll data is reviewed for accuracy and saved to EC and ECP.
ONB Functionality in Everyday Speak

Key Benefits

Key benefits of the new system

1. Automated, seamless, real-time processing and data storage
2. The system guides a person through the process
3. ONB Dashboards for HR
4. System-generated reminders to employees
5. Streamlined and customized new hire communications
ONB, XB: Process Administration
Data Analysis Focusing on Faculty and Staff

Understanding the volume of activity – Faculty and Staff Only

Hires from 10/31/16 to 9/30/17

- 269 / 35%
- 510 / 65%

**Faculty & Staff Total**

**Student Total**

**Monday**

**Tuesday**

**Wednesday**

**Thursday**

**Friday**
ONB, XB: Process Administration
Data Analysis Focusing on All Hires

Understanding the volume of activity – All Hires

Hires from 10/31/16 to 9/30/17

- Faculty & Staff Total
- Student Total

269 / 35%
510 / 65%
GMPM IN SUCCESSFACTORS
## GMPM Functionality in Everyday Speak
### 3 Simple Steps

<table>
<thead>
<tr>
<th>1</th>
<th>2A</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create and update annual goals and measurements</td>
<td>Create and update development plan</td>
<td>Complete annual review</td>
</tr>
<tr>
<td>2B</td>
<td>Gather 360 feedback</td>
<td></td>
</tr>
</tbody>
</table>

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**Purdue University**
Goals Management
Goals
Management
Goals Management
360 Degree Feedback
360 Degree Feedback
360 Degree Feedback
Performance Management – Employee Self-Assessment
Performance Management – Employee Self-Assessment
Performance Management – Manager Assessment
Performance Management – Manager Assessment

Make edits as appropriate in each section. After making edits, select
Finalize document & submit to employee for signature.
Performance Management – Employee Acknowledgement
Key benefits of the new system

1. Automated data flow from goals management to annual review
2. Dashboards and reports
3. System guided process
4. Goal library
5. Goals can be pushed to an entire organization or unit
6. Writing assistant
7. Legal scan
GMPM: Process Administration

Data Analysis Focusing on the Supervisor

Understanding the volume of activity – Staff

<table>
<thead>
<tr>
<th>Number of Direct Reports</th>
<th>Number of Supervisors</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - 2</td>
<td>89</td>
</tr>
<tr>
<td>3 - 5</td>
<td>52</td>
</tr>
<tr>
<td>6 - 10</td>
<td>24</td>
</tr>
<tr>
<td>11 - 15</td>
<td>6</td>
</tr>
<tr>
<td>16 - 20</td>
<td>1</td>
</tr>
</tbody>
</table>
OFB
IN SUCCESSFACTORS
OFB Functionality in Everyday Speak
3 Simple Steps

1. Push exit interview to employee
2. Employee submits contact information and completes exit interview data and request face-to-face exit interview
3. HR conducts exit interview if requested
Initiation of OFB (Exit Interview)
Welcome to Purdue University’s Offboarding process (Robin Clair)
Employee Step

Please review the following screens. You will be asked to enter information concerning:

- Forwarding address
- Phone number
- Exit interview survey

You may be eligible to continue health coverage benefits through COBRA and if so, you will be receiving information directly from the vendor. For general information on COBRA benefits, see

http://www.purdue.edu/hr/Benefits/currentEmployees/Medical/COBRA.html

Employee Exit Interview
Exit Interview - Demographic Information (Terri Huddleston)

Employee Step

Specific groups within the workforce. Your feedback is very important, so please take a few minutes to answer all of the questions completely. Your responses to this survey are confidential. Human Resources will use the aggregated responses to understand and improve staff and student employment experience at Purdue, but the individual data will remain confidential.*

How long have you been employed at the university?
- Less than 1 year
- 1-3 years
- 4-5 years
- 6-10 years
- 11-15 years
- More than 15 years

Gender (select one)
- Male
- Female
- Other
- Prefer not to answer

Ethnicity (Select one)
- Hispanic/Latino
- Not Hispanic/Latino
- Prefer not to answer

Race (select one)
- American Indian
- Asian
- Black or African American
- Native Hawaiian or Other Pacific Islander
- White
- Multi-race
- Prefer not to answer
Key benefits of the new system

1. Automated, simplified, and streamlined exit interview process
2. Enhanced data reporting capabilities
SuccessFactors Prep-Fort Wayne

ANY QUESTIONS??