Requesting Time Off in SuccessFactors Quick Reference Guide

Last Updated: 09/05/2019

This guide outlines the steps required to request Time Off.

For additional information concerning Time Off policies and procedures, please refer to the Purdue Human Resources Benefits website: https://www.purdue.edu/hr/Benefits/currentEmployees/leaves/leaves.html
Note: The Time Off request feature does not replace conversations and planning between employees and supervisors.

Contents

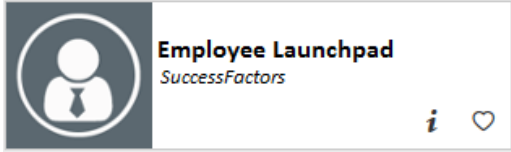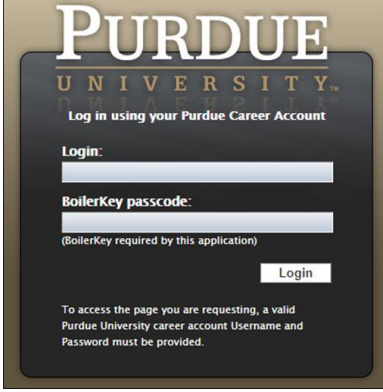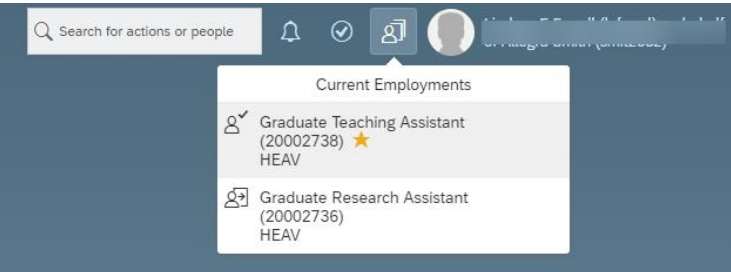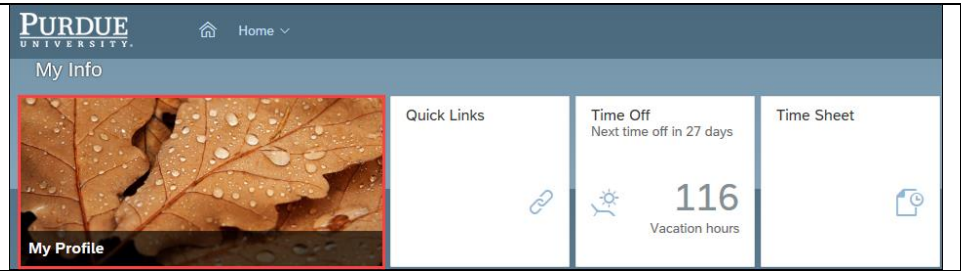## Accessing SuccessFactors

Visit **OneCampus** and select **Employee Launchpad.**	https://one.purdue.edu/
Log in using **Purdue Career Account ID** and **BoilerKey passphrase**. *For assistance using or stetting up BoilerKey, please contact ITaP at itap@purdue.edu or 765-494-4000.*	

Note for Employees with Multiple Appointments

If you hold multiple positions, use the **Change Selected Employment** menu to select the position for which you would like to record time	

If you hold multiple positions and they are similarly named, click **My Profile** to validate that the correct position has been selected	
If you hold multiple positions and they are similarly named, click the **Employment Information** tab to view the details of the position selected in order to ensure time off is requested for the correct position. Click the **Home** icon at the top of the page to return to the SuccessFactors home page.	
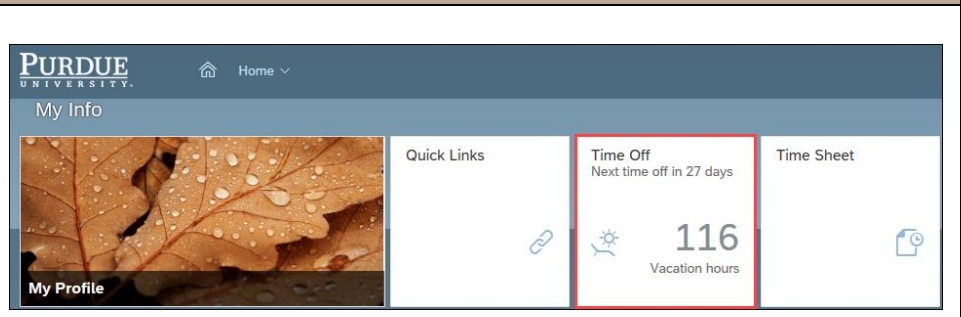
Accessing Time Off Module/Screen Overview

After logging in to SuccessFactors and selecting the appropriate position (if applicable) scroll down to the **My Info** section and click the **Time Off** tile.	

1.	**Calendar**	Displays the current and next month; dates with scheduled time off are indicated by colored bar.
2.	**Calendar Legend**	Describes each color notation that indicate various leave statuses.
3.	**Balances**	Displays Vacation and Sick Employee balances as of today's date.
4.	**Upcoming Time Off**	Displays the next three time Absense and Holiday time off entries.

Time Off: Requesting, Editing, and Cancelling

The system will not allow you to request Time Off if you do not have, at the time that you are submitting the request, a sufficient balance (of the leave type you've chosen) to cover the request.

Time Off: Requesting

From the **Time Off** screen, click **New Absence**.	

PURDUE
UNIVERSITY.

1. Click on the **Time Type** dro-down to select the desired leave type.
2. Enter or select from the calendar the **Start** and **End Date** for the leave request.
3. Enter the number of hours for the leave in the Requesting field.
   NOTE: Leave requests of less than a full day must be entered separately.
   - Employees who do not clock in and out daily will request partial time off in hours and tenths.
   - *Example*: Seth would like to request vacation for half a day on Wednesday and all of Thursday and Friday. Seth must submit one request for the Wednesday half day and another for the full days, Thursday and Friday.
   - Employees who do clock in and out daily will request partial time off using exact hours in military time.
   - Employees who utilize Positive Duration or Webclock time entry are encouraged to wait until they have recorded their working time for the day on which they plan to request partial Time Off before submitting their Time Off request. This will avoid errors and need to re-submit requests if the amount of working time is more or less than expected.
4. Enter any information you would like to provide to your supervisor in the **Comments** text entry box.
5. Click the **+** (**Plus Sign**) to upload and attach any supporting documentation (*Example: Jury Duty summons, Military orders*)
6. Select **YES** in the FMLA drop-down field to request FMLA.

New Request

*Time Type ⑦ **1**

Vacation ⌄

*Start Date **2**

May 31, 2019 📅

*End Date

May 31, 2019 📅

Requesting **3**

8:00

Available Balance

132:00 hours

Recurring Absence

☐

Team Absences
No team members absent

Comment **4**

Attachment **5**

+

No attachments uploaded

Drop files to upload, or use the "+" button.

FMLA **6**

No Selection ⌄

Case Number

• **If this is your initial FMLA request –** The *Case Number* (next field) will be supplied to you by the HR Leaves Group once FMLA request is received. The case number should be left blank for the initial request. • **For all future FMLA time off requests**, include the case number provided by the HR Leaves Group.	
Click **Send Request** to submit request to supervisor for approval. Click **Cancel** to clear all fields; request does not move forward.	
After submitting, the request is listed under the **Upcoming Time Off** heading with a status of **Pending**. The employee's supervisor receives an email notification that a request has been submitted. The request is also now indicated as **Pending** with a gold line on the date on the **Calendar**.	
Once a leave has been approved, the status will change from Pending to **Approved**.	

Comments added by the employee or approver can be viewed by clicking the desired request under the **Upcoming Time Off** heading.	Upcoming Time Off Memorial Day Mon, May 27, 201 Vacation (8 hours) Holiday Vacation (8 hours) Fri, May 31, 2019 Approved Vacation (8 hours) Wed, Jun 12, 2019 Approved Show All	
The **Request Details** opens and all **Comments** are displayed.	Request Details Time Type Vacation ⑦ Date **Fri, May 31, 2019** Requesting **8 hours** Approval Status **Approved** Attachment - FMLA - Case Number - Activity **Adedayo O Adeniyi:** No Comment Approved · May 21, 2019 **Adedayo O Adeniyi:** I am also entering a comment. Commented · May 21, 2019 **Tiffany LB Weatherford:** I am entering a comment. Initiated · May 21, 2019	

Time Off: Editing

The submitted request can be accessed by clicking the **Date** on the **Calendar**, or by clicking the **Absence** listed under the **Upcoming Time Off** heading.	(Calendar showing May 2019 and June 2019 with Balances panel: Vacation 116 hours, Sick Employee 924 hours, Show All. Upcoming Time Off: Memorial Day Mon, May 27, 2019 Holiday; Vacation (8 hours) Fri, May 31, 2019 Approved; Vacation (8 hours) Wed, Jun 12, 2019 Approved; Show All. Legend: Today, Working Day, Approved, Cancellation Pending, Selected, Non-Working Day, Pending, Holiday)	

If using the **Calendar**, click the **Pencil** icon to edit.	
If accessing through **Upcoming Time Off**, click **Edit Absence**.	

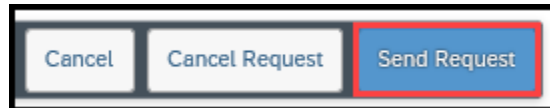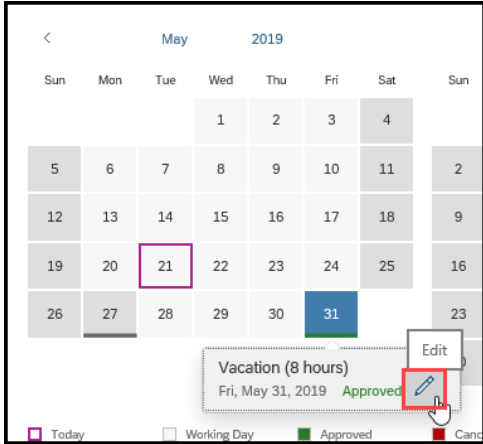|	
Make necessary edits to the request.	**Edit Request** *Time Type ⓘ Vacation ⌄ *Start Date: May 31, 2019 📅 *End Date: May 31, 2019 📅 Requesting: 8:00 Available Balance: 124:00 hours Team Absences No team members absent Comment Attachment + No attachments uploaded Drop files to upload, or use the "+" button. FMLA: No Selection ⌄ Case Number
Click **Send Request**. NOTE: The edited request will be routed for approval only if the original request was already approved.	Cancel Cancel Request **Send Request**
Time Off: Cancelling	
The submitted request can be accessed by clicking the **Date** on the **Calendar**, or by clicking the **Absence** listed under the **Upcoming Time Off** heading.	**Balances** Vacation 116 hours Sick Employee 924 hours Show All **Upcoming Time Off** Memorial Day Mon, May 27, 2019 Holiday Vacation (8 hours) Fri, May 31, 2019 Approved Vacation (8 hours) Wed, Jun 12, 2019 Approved Show All
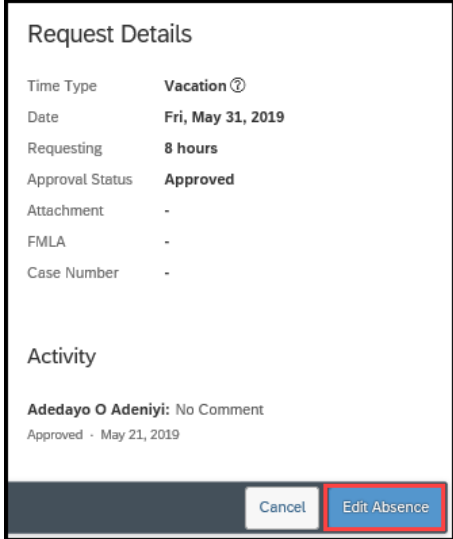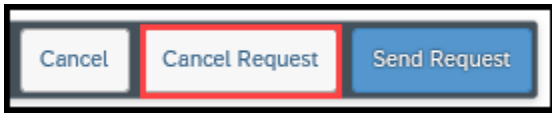
If using the **Calendar**, click the **Pencil** icon to edit.	
If accessing through **Upcoming Time Off**, click **Edit Absence**.	
Click **Cancel Request**. NOTE: The cancelled request will be routed for approval only if the original request was already approved.	
Click **Yes** to confirm cancellation. Click **No** to exit from the cancellation request without submitting.	

Calendar

The calendar displays **Pending**, **Approved**, and **Cancellation Pending** leave requests for the current and next month.

Balance Overview

Vacation and **Sick Employee** balances as of today's date are listed under the **Balances** heading on the top right of the screen.

Click **Show All** to view more leave types.

Balances

Vacation	116 hours
Sick Employee	924 hours

Show All

The appropriate leave types based on your employee class will be displayed.

Balance Overview

Time Type	Available Balance
Vacation	116 hours
Sick Employee	924 hours
Personal Business Day	12 hours
Military Paid	0 hours
Paid Parental Leave	0 hours

As of Today | Account View | Close

To view leave balances as of a future date, click the **As of Today** button.	**Balance Overview** **Time Type** — Available Balance Vacation — 116 hours Sick Employee — 924 hours Personal Business Day — 12 hours Military Paid — 0 hours Paid Parental Leave — 0 hours As of Today / Account View / Close
Select a date past any future approved leaves to view your "true" balances (less any future takings). NOTE: Moving the date will not add to the balances due to projected accruals.	May 2019 Sun Mon Tue Wed Thu Fri Sat 18 — 28 29 30 1 2 3 4 19 — 5 6 7 8 9 10 11 20 — 12 13 14 15 16 17 18 21 — 19 20 21 22 23 24 25 22 — 26 27 28 29 30 31 1 As of Today As of Today / Account V
To view additional balance details, click **Account View**.	**Balance Overview** **Time Type** — Available Balance Vacation — 116 hours Sick Employee — 924 hours Personal Business Day — 12 hours Military Paid — 0 hours Paid Parental Leave — 0 hours As of Today / Account View / Close

Time off balances are displayed with **Earned**, **Taken**, **Planned**, and **Available**.	**Balance Overview** | Time Account	Earned	Taken	Planned	Available Balance
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Military Leave Nov 25, 2018 – Dec 31, 9999	0 hours	0 hours	0 hours	0 hours
Parental Leave Nov 25, 2018 – Dec 31, 9999	0 hours	0 hours	0 hours	0 hours
Personal Business Day Nov 25, 2018 – Jun 30, 2019	12 hours	0 hours	0 hours	12 hours
Sick Employee Dec 1, 2018 – Nov 30, 2019	924 hours	0 hours	0 hours	924 hours
Vacation Nov 25, 2018 – Dec 31, 9999	116 hours	0 hours	8 hours	116 hours	 As of Today · Time Type View · Close

Upcoming Time Off

Holidays and **Pending** or **Approved** absences are listed under the Upcoming Time Off heading. Click **Show All** to view a complete list.	**Upcoming Time Off** Memorial Day — Mon, May 27, 2019 — Holiday Vacation (8 hours) — Wed, Jun 12, 2019 — Pending Independence Day — Thu, Jul 4, 2019 — Holiday Show All
A list of **Absences and Holidays** is displayed.	**Absences and Holidays** — All · Absences · Holidays 2019 Memorial Day — Mon, May 27, 2019 — Holiday Vacation (8 hours) — Wed, Jun 12, 2019 — Pending Independence Day — Thu, Jul 4, 2019 — Holiday Labor Day — Mon, Sep 2, 2019 — Holiday Thanksgiving Day — Thu, Nov 28, 2019 — Holiday Thanksgiving Friday — Fri, Nov 29, 2019 — Holiday President's Designated Holiday — Tue, Dec 24, 2019 — Holiday Christmas Day — Wed, Dec 25, 2019 — Holiday Show in Calendar · Edit · Close

Using the tabs, the view can be changed from displaying only **Absences** or only **Holidays**.

The **Filter** can be used to filter by **Future Events** or **Past Events**.