HR816

SAP SuccessFactors Onboarding Administration

COURSE OUTLINE

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Course Duration:

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Typographic Conventions

American English is the standard used in this handbook.

The following typographic conventions are also used.

This information is displayed in the instructor's presentation	
Demonstration	
Procedure	
Warning or Caution	
Hint	
Related or Additional Information	
Facilitated Discussion	
User interface control	*Example text*
Window title	*Example text*

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Course Overview

TARGET AUDIENCE

This course is intended for the following audiences:

- System Administrator

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UNIT 1 Introducing SAP SuccessFactors Onboarding

Lesson 1: Describing SAP SuccessFactors Onboarding

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the functionality of SAP SuccessFactors Onboarding

Lesson 2: Defining the Onboarding Process Steps

Lesson Objectives

After completing this lesson, you will be able to:

- Identify the steps in the SAP SuccessFactors Onboarding process

Lesson 3: Protecting Onboarding Data in SAP SuccessFactors HXM Suite

Lesson Objectives

After completing this lesson, you will be able to:

- Describe how data privacy is managed in SAP SuccessFactors Onboarding
- Create purge requests for SAP SuccessFactors Onboarding data

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UNIT 2

Assigning Role-Based Permissions in SAP SuccessFactors Onboarding

Lesson 1: Assigning Consultant and Administrator Permissions

Lesson Objectives

After completing this lesson, you will be able to:

- Assign the permissions for SAP SuccessFactors Onboarding consultants and administrators

Lesson 2: Assigning Task Permissions for Hiring Managers, Recruiters, and Other Participants

Lesson Objectives

After completing this lesson, you will be able to:

- Assign the permissions for SAP SuccessFactors Onboarding tasks

Lesson 3: Identifying New Hire Permissions

Lesson Objectives

After completing this lesson, you will be able to:

- Identify the preconfigured permissions and assign more permissions for new hires

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UNIT 3 Initiating the New Hire Onboarding Process

Lesson 1: Initiating Onboarding from SAP SuccessFactors Recruiting

Lesson Objectives

After completing this lesson, you will be able to:

- Initiate the new hire onboarding process from SAP SuccessFactors Recruiting

Lesson 2: Manually Adding New Hires to SAP SuccessFactors Onboarding

Lesson Objectives

After completing this lesson, you will be able to:

- Assign permissions to grant access to add a new hire directly into SAP SuccessFactors Onboarding
- Add a new hire to SAP SuccessFactors Onboarding to initiate the onboarding process

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UNIT 4

Defining the SAP SuccessFactors Onboarding Data Model

Lesson 1: Describing the SAP SuccessFactors Onboarding Data Model

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the SAP SuccessFactors Onboarding Data Model

Lesson 2: Selecting SAP SuccessFactors Employee Central HRIS Elements and Fields

Lesson Objectives

After completing this lesson, you will be able to:

- Select HRIS fields that will be used during the data collection step of the onboarding process
- Add more visible data to new hires using the External User Visibility Tool

Lesson 3: Creating Custom HRIS Fields for SAP SuccessFactors Onboarding

Lesson Objectives

After completing this lesson, you will be able to:

- Create and define custom HRIS fields that will be used in the data collection of the onboarding process

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UNIT 5 Creating SAP SuccessFactors Onboarding Programs

Lesson 1: Creating and Defining Responsible Groups

Lesson Objectives

After completing this lesson, you will be able to:

- Create responsible groups to assign to onboarding tasks

Lesson 2: Creating Onboarding Programs and Tasks

Lesson Objectives

After completing this lesson, you will be able to:

- Create onboarding programs and tasks

Lesson 3: Adding and Scheduling Central Orientation Meetings

Lesson Objectives

After completing this lesson, you will be able to:

- Add and schedule central orientation meetings

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UNIT 6 Activating and Using Compliance Forms

Lesson 1: Identifying the available Compliance Forms in SAP SuccessFactors Onboarding

Lesson Objectives

After completing this lesson, you will be able to:

- Identify the available compliance forms in Onboarding

Lesson 2: Assigning Role-Based Permissions for Compliance Forms

Lesson Objectives

After completing this lesson, you will be able to:

- Assign permissions for compliance settings to the SAP SuccessFactors Onboarding administrator

Lesson 3: Enabling and Configuring Available Compliance Forms

Lesson Objectives

After completing this lesson, you will be able to:

- Enable the available compliance forms in Onboarding

Lesson 4: Adding Compliance Forms Using Compliance Form Builder

Lesson Objectives

After completing this lesson, you will be able to:

- Add more compliance forms into the SAP SuccessFactors Onboarding system using the Compliance Form Builder

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UNIT 7

Creating MDF Custom Objects for Additional Data Collection

Lesson 1: Describing the Additional Data Collection Step in the Onboarding Process

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the Additional Data Collection step in the onboarding process

Lesson 2: Creating MDF Custom Objects

Lesson Objectives

After completing this lesson, you will be able to:

- Create MDF custom objects for the Additional Data Collection step in the onboarding process
- Create UIs for MDF custom objects

Lesson 3: Defining the Visibility of Custom MDF Objects to New Hires

Lesson Objectives

After completing this lesson, you will be able to:

- Define the visibility of custom MDF objects to new hires during the Additional Data Collection step

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UNIT 8 Creating Document Templates and Using e-Signature Tools

Lesson 1: Setting Up Document Templates in SAP SuccessFactors Onboarding

Lesson Objectives

After completing this lesson, you will be able to:

- Create a document template to be generated in the Document Flow step of the onboarding process
- Preview new hire data mapped to a document before it is generated in the Document Flow step

Lesson 2: Setting Up SAP SuccessFactors e-Signature and DocuSign

Lesson Objectives

After completing this lesson, you will be able to:

- Enable and set up SAP SuccessFactors e-Signature
- Enable and set up DocuSign

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UNIT 9 Using Email Services

Lesson 1: Using Email Services and Preconfigured Email Templates

Lesson Objectives

After completing this lesson, you will be able to:

- Access Email Services in SAP SuccessFactors Onboarding
- Add preconfigured email templates for SAP SuccessFactors Onboarding
- Manage email notification settings

Lesson 2: Creating Custom Email Templates

Lesson Objectives

After completing this lesson, you will be able to:

- Create email templates in Email Services
- Define business rules for email templates

Lesson 3: Creating Custom Tokens for Email Content

Lesson Objectives

After completing this lesson, you will be able to:

- Create custom tokens for email subjects and message content

Lesson 4: Troubleshooting Email Notifications using Email Status in Email Services

Lesson Objectives

After completing this lesson, you will be able to:

- Track all email notifications sent by the system

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UNIT 10 Managing the Rehire Process

Lesson 1: Describing the Rehire Process in SAP SuccessFactors Onboarding

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the rehire function in the onboarding process
- Differentiate between old employment and new employment in the rehire function

Lesson 2: Configuring the Rehire Check and Related Permissions

Lesson Objectives

After completing this lesson, you will be able to:

- Select the data that rehire checks use to search matching inactive employee records
- Assign the rehire verification task to a responsible user

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UNIT 11

Canceling Onboarding Processes and Triggering No-Show Events

Lesson 1: Canceling Onboarding Processes

Lesson Objectives

After completing this lesson, you will be able to:

- Cancel an onboarding process

Lesson 2: Triggering a No-Show Event for a New Hire

Lesson Objectives

After completing this lesson, you will be able to:

- Trigger a No-Show event for a new hire

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UNIT 12

Customizing the Onboarding Process Using Process Variant Manager

Lesson 1: Creating Processes Using Process Variant Manager

Lesson Objectives

After completing this lesson, you will be able to:

- Create custom processes using Process Variant Manager

Lesson 2: Defining Business Rules for Process Variants

Lesson Objectives

After completing this lesson, you will be able to:

- Create and define business rules for triggering the correct process variant test

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UNIT 13 Using the Internal Hire Process

Lesson 1: Defining the Internal Hire Process

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the internal hire process

Lesson 2: Setting Up the Internal Hire Process

Lesson Objectives

After completing this lesson, you will be able to:

- Define conditions for initiating the internal hire process
- Assign Onboarding tasks to future managers
- Configure notifications for internal hire process

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UNIT 14

Managing SAP SuccessFactors Home Page for Onboarding

Lesson 1: Managing the Home Page Cards for All Onboarding and Offboarding Participants

Lesson Objectives

After completing this lesson, you will be able to:

- Identify different SAP SuccessFactors home page cards

Lesson 2: Creating Custom Cards for SAP SuccessFactors Onboarding

Lesson Objectives

After completing this lesson, you will be able to:

- Create a custom card for viewing generated onboarding documents
- Create a custom card for completing a new hire profile in SAP SuccessFactors

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UNIT 15 Restarting Onboarding Processes

Lesson 1: Triggering Onboarding Processes Manually

Lesson Objectives

After completing this lesson, you will be able to:

- Trigger an onboarding process restart manually
- Assign permissions for triggering a restart for onboarding processes

Lesson 2: Triggering Onboarding Processes Automatically

Lesson Objectives

After completing this lesson, you will be able to:

- Define a business rule to trigger an automatic onboarding process restart based on a condition
- Trigger an onboarding restart when data is modified from SAP SuccessFactors Recruiting

Lesson 3: Retaining Data and Managing Email Notifications After a Restart

Lesson Objectives

After completing this lesson, you will be able to:

- Retain data captured in SAP SuccessFactors Onboarding after a restart is triggered
- Manage email notifications when a restart is triggered

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UNIT 16 Offboarding and Terminating Employees

Lesson 1: Defining the Offboarding Process

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the offboarding process
- Initiate the offboarding process in SAP SuccessFactors Employee Central

Lesson 2: Enabling Offboarding

Lesson Objectives

After completing this lesson, you will be able to:

- Enable the offboarding process

Lesson 3: Assigning Role-Based Permission for Offboarding

Lesson Objectives

After completing this lesson, you will be able to:

- Assign permissions for the offboarding process

Lesson 4: Creating Business Rules for the Offboarding Process

Lesson Objectives

After completing this lesson, you will be able to:

- Create and define business rules for the offboarding process

Lesson 5: Creating Offboarding Programs

Lesson Objectives

After completing this lesson, you will be able to:

- Create offboarding programs
- Create and define business rules for selecting offboarding programs

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UNIT 17 Describing SAP SuccessFactors Onboarding Integrations

Lesson 1: Integrating SAP SuccessFactors Onboarding and SAP SuccessFactors Recruiting

Lesson Objectives

After completing this lesson, you will be able to:

- Integrate SAP SuccessFactors Onboarding and SAP SuccessFactors Recruiting

Lesson 2: Integrating SAP SuccessFactors Onboarding and SAP SuccessFactors Learning

Lesson Objectives

After completing this lesson, you will be able to:

- Connect SAP SuccessFactors Onboarding with SAP SuccessFactors Learning to assign courses to new hires

Lesson 3: Integrating SAP SuccessFactors Onboarding and SAP SuccessFactors Employee Central

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the use of SAP SuccessFactors Employee Central in SAP SuccessFactors Onboarding
- Identify additional SAP SuccessFactors Employee Central features that can be used in SAP SuccessFactors Onboarding

Lesson 4: Integrating SAP SuccessFactors Onboarding with an External HRIS

Lesson Objectives

After completing this lesson, you will be able to:

- Describe how the integration of an external HRIS works with SAP SuccessFactors Onboarding

Lesson 5: Integrating SAP SuccessFactors Onboarding with an External ATS

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Lesson Objectives
After completing this lesson, you will be able to:

- Describe how the integration of an external ATS works with SAP SuccessFactors Onboarding

Lesson 6: Integrating SAP SuccessFactors Onboarding and SAP SuccessFactors Work Zone

Lesson Objectives
After completing this lesson, you will be able to:

- Describe the Onboarding Guided Experience for new hires when using SAP SuccessFactors Work Zone

Lesson 7: Integrating SAP SuccessFactors Onboarding and SAP Identity Authentication Service (IAS)

Lesson Objectives
After completing this lesson, you will be able to:

- Describe the use of SAP Identity Authentication Service (IAS) in SAP SuccessFactors Onboarding

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UNIT 18 Creating SAP SuccessFactors Onboarding Report

Lesson 1: Activating Story Reports in Report Center

Lesson Objectives

After completing this lesson, you will be able to:

- Activate Story Reports for SAP SuccessFactors Onboarding
- Identify permissions for creating Story Reports

Lesson 2: Creating Story Reports with SAP SuccessFactors Onboarding Data

Lesson Objectives

After completing this lesson, you will be able to:

- Create Story Reports with SAP SuccessFactors Onboarding data

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