

SAP SuccessFactors Onboarding Administration

COURSE OUTLINE

Course Version: 2311 Course Duration:

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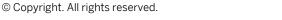
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Typographic Conventions

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	-
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Procedure	1 2 3
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:

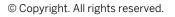
Identify the steps in the SAP SuccessFactors Onboarding process

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





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



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



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



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



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:

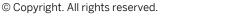
• Enable the available compliance forms in Onboarding

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





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:

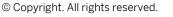
- Create MDF custom objects for the Additional Data Collection step in the onboarding process
- Create UIs for MDF custom objects

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





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





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:

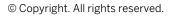
Create custom tokens for email subjects and message content

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





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



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



UNIT 12 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



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



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



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



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



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



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

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

