

# HR816

## SAP SuccessFactors Onboarding Administration

### COURSE OUTLINE

Course Version: 2511

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	<i>Example text</i>
Window title	<i>Example text</i>

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# Course Overview

## TARGET AUDIENCE

This course is intended for the following audiences:

- System Administrator



## Lesson 1: Exploring the Administration Course

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe general information about the course.



## 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 HCM Suite

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe data retention management 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.



## **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: Assigning Permissions to add 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.

## **Lesson 3: Adding New Hires to SAP SuccessFactors Onboarding**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Add a new hire to SAP SuccessFactors Onboarding to initiate the onboarding process.



## 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: Configuring the Onboarding Data Model

### Lesson Objectives

After completing this lesson, you will be able to:

- Configure the Onboarding Data Model.



## 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

### Lesson Objectives

After completing this lesson, you will be able to:

- Create onboarding programs and tasks.

## Lesson 3: Adding Tasks to an Onboarding Program

### Lesson Objectives

After completing this lesson, you will be able to:

- Add tasks to an onboarding program.

## Lesson 4: Adding and Scheduling Central Orientation Meetings

### Lesson Objectives

After completing this lesson, you will be able to:

- Add and schedule central orientation meetings.



## Lesson 1: Identifying SAP SuccessFactors Onboarding Compliance Forms

### Lesson Objectives

After completing this lesson, you will be able to:

- Identify the available compliance forms in SAP SuccessFactors Onboarding.

## Lesson 2: Enabling and Configuring Available Compliance Forms

### Lesson Objectives

After completing this lesson, you will be able to:

- Permission, enable, and configure available compliance forms in SAP SuccessFactors Onboarding.

## Lesson 3: Enabling E-Verify in SAP SuccessFactors Onboarding

### Lesson Objectives

After completing this lesson, you will be able to:

- Enable E-Verify in SAP SuccessFactors 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.



## Lesson 1: Creating Custom MDF Objects

### Lesson Objectives

After completing this lesson, you will be able to:

- Create Custom MDF Objects for the Additional Data Collection step in the onboarding process.

## Lesson 2: 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.



## **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.

## **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 e-Signature tools.



## **Lesson 1: Using Email Services and Preconfigured Email Templates**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Use Email Services in SAP SuccessFactors Onboarding.

## **Lesson 2: Creating Custom Email Templates**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Customize email templates in Email Services.

## **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.



## **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.

## **Lesson 2: Configuring the Rehire Check and Related Permissions**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Configure the Rehire Check with a responsible group.



## 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.



## 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.



## 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:

- Set up the internal hire process.



## **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 custom cards for onboarding.



## Lesson 1: Triggering Onboarding Processes Manually

### Lesson Objectives

After completing this lesson, you will be able to:

- Trigger an onboarding process restart manually.

## Lesson 2: Triggering Onboarding Processes Automatically

### Lesson Objectives

After completing this lesson, you will be able to:

- Trigger the onboarding process restart automatically.

## 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 and manage notifications after a restart is triggered.



## Lesson 1: Defining and Enabling the Offboarding Process

### Lesson Objectives

After completing this lesson, you will be able to:

- Enable the offboarding process.

## Lesson 2: Assigning Role-Based Permission for Offboarding

### Lesson Objectives

After completing this lesson, you will be able to:

- Assign permissions for the offboarding process.

## Lesson 3: Creating Business Rules for the Offboarding Process

### Lesson Objectives

After completing this lesson, you will be able to:

- Define business rules for the offboarding process.

## Lesson 4: Creating Offboarding Programs

### Lesson Objectives

After completing this lesson, you will be able to:

- Create offboarding programs.

## Lesson 5: Enabling the Alumni Experience

### Lesson Objectives

After completing this lesson, you will be able to:

- Enable the Alumni Experience.



## **Lesson 1: Integrating SAP SuccessFactors Onboarding and SAP SuccessFactors Recruiting**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Describe SAP SuccessFactors Onboarding and SAP SuccessFactors Recruiting integration.

## **Lesson 2: Integrating SAP SuccessFactors Onboarding and SAP SuccessFactors Learning**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Describe SAP SuccessFactors Onboarding and SAP SuccessFactors Learning integration.

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

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Describe SAP SuccessFactors Employee Central and SAP SuccessFactors Onboarding integration.

## **Lesson 4: Integrating SAP SuccessFactors Onboarding with an External HRIS**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Describe the integration of an external HRIS 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 the integration of an external ATS 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 integration of SAP SuccessFactors Onboarding and 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 integration of SAP SuccessFactors Onboarding and SAP Identity Authentication Service (IAS).

## Lesson 1: 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.



## **Lesson 1: Earning SAP SuccessFactors Expert (SFX) Accreditation**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Describe the SFX Accreditation program.

## **Lesson 2: Reviewing Additional Resources**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Review additional resources after completing this course.