

# THR91

## SAP SuccessFactors Onboarding 1.0 Academy

### COURSE OUTLINE

Course Version: 84  
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:

- Application Consultant





## Lesson 1: Introduction to SAP SuccessFactors Onboarding

### Lesson Objectives

After completing this lesson, you will be able to:

- Identify the main capabilities and users of SAP SuccessFactors Onboarding
- Describe the main features of SAP SuccessFactors Onboarding
- Explain the advantages of using SAP SuccessFactors Onboarding over other solutions
- Identify the limitations of the SAP SuccessFactors Onboarding solution
- List the features that must be enabled for SAP SuccessFactors Onboarding
- Identify the SAP SuccessFactors modules that can be integrated with Onboarding and integration tools that assist in successful integration.
- Describe the SAP SuccessFactors Onboarding application workflow
- List the configuration and administration tools required to set up SAP SuccessFactors Onboarding
- Identify additional resources that can provide assistance when implementing SAP SuccessFactors Onboarding
- Enable features for SAP SuccessFactors Onboarding in Provisioning



### Lesson 1: Implementation Process and Methodology

#### Lesson Objectives

After completing this lesson, you will be able to:

- Describe the objectives and goals for each phase of the implementation workflow
- Identify relevant items in the project checklist
- Describe the content and purpose of the Configuration Workbook
- Identify the four mandatory start dates required for an SAP SuccessFactors Onboarding implementation
- Identify available implementation methodology resources



## UNIT 3

# Initial Technical Configuration and Hiring Manager Activities

### Lesson 1: Performing Initial Technical Configuration and Hiring Manager Activities

#### Lesson Objectives

After completing this lesson, you will be able to:

- Summarize the actions a consultant must take to perform an initial technical configuration in Super Admin and Onboarding Administration
- Explain how to access self-service account options
- Identify the hiring manager activities
- Activate features for SAP SuccessFactors Onboarding
- Create web service logins
- Test the onboarding process
- Demonstrate how the new hire completes paperwork



## Lesson 1: Setting Up Security

### Lesson Objectives

After completing this lesson, you will be able to:

- List the basic "high level" steps for creating roles and assigning permissions in SAP SuccessFactors Onboarding
- Explain how to set up permissions and enable role-based permissions
- Explain how to create admin accounts
- Summarize the steps for synchronizing security, user and foundation data
- List the steps for setting up single-sign on
- Set up role-based permissions
- Create Synchronization Reports and Schedule Sync Jobs





## Lesson 1: Setting Up Corporate Structure

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe the Corporate Structure
- Set up and modify corporate structure

## Lesson 2: Setting Up Security in the Corporate Structure

### Lesson Objectives

After completing this lesson, you will be able to:

- Define security roles, groups and group permissions and security restrictions with corporate structure
- Explain how to establish the Onboarding list of users and enter the attributes
- Explain how to assign users to groups
- Setup users and groups
- Explain the methods for logging in to SAP SuccessFactors Onboarding

## Lesson 3: Setting up the Data Dictionary

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe the purpose and components of the Data Dictionary
- Summarize the process for creating and maintaining Picklists, Data Lists and Provisioning Lists
- Explain how to add a new data key to the Data Dictionary
- Create fields in the Data Dictionary
- Create new picklists

## Lesson 4: Creating PDF Forms and Uploading Attachments

### Lesson Objectives

After completing this lesson, you will be able to:

- Explain how to create PDF forms
- Explain how to upload attachments
- Explain how to edit PDF forms

## **Lesson 5: Enabling DocuSign**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Summarize the steps for enabling and configuring DocuSign

## **Lesson 6: Using the Panel Designer**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Describe how to edit panels and create wizards in the Panel Designer
- Explain how to use the panel designer

## **Lesson 7: Creating Notifications and Generating Reports**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Explain how to create and maintain Notifications
- Describe the Admin Report generated from SAP SuccessFactors Onboarding

## **Lesson 8: Using Other Functions and Activities**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Explain the rules of making activities editable
- List the steps for searching for generated emails
- Explain how to associate a system admin with a Group that allows for mail queue functionality
- Explain how to configure the Display Time for Tiles
- List the steps for configuring the Pronounce My Name feature
- Explain how to create a home page tour
- Explain how to set up themes

## Lesson 1: General Overview of Hiring Manager Activities

### Lesson Objectives

After completing this lesson, you will be able to:

- Identify each part of the Hiring Manager Activities interface

## Lesson 2: Configuration of Hiring Manager Activities

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe the available configuration settings for each Hiring Manager Activity

## Lesson 3: Hiring Manager Activities and Tasks

### Lesson Objectives

After completing this lesson, you will be able to:

- Identify each Hiring Manager Activity as it appears to both the hiring manager and the new hire
- Configure Hiring Manager Activities

## Lesson 4: Business Rule Driven Hiring Manager Activities

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe the configuration of business rule driven hiring manager activities

## Lesson 5: Migration to MDF for New Hiring Activity Planning

### Lesson Objectives

After completing this lesson, you will be able to:

- Explain the reason why an existing customer must migrate to the MDF-based way of new hire activity planning

## **Lesson 6: New Hire Activities and Tasks Before First Day of Employment**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- List the features that the New Hire can access before the first day of employment

## Lesson 1: Integration Overview

### Lesson Objectives

After completing this lesson, you will be able to:

- Define the term "integration" and how it relates to SAP SuccessFactors Onboarding and other SAP SuccessFactors solutions
- Describe a System of Record and how it relates to the SAP SuccessFactors Onboarding implementation
- Describe the user data platform integration flow
- Identify integration points on the SAP SuccessFactors Onboarding Integration map
- Define the term functional integration and its application to the SAP SuccessFactors HCM Suite
- Identify debugging and mapping tools used for SAP SuccessFactors integrations
- List the benefits of integrating SAP SuccessFactors Onboarding with other SAP SuccessFactors HCM solutions

## Lesson 2: Integrating SAP SuccessFactors Recruiting with Onboarding

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe the process to follow in order to integrate SAP SuccessFactors Onboarding and Recruiting
- Configure SAP SuccessFactors Recruiting and Onboarding Integration

## Lesson 3: Integrating SAP SuccessFactors Employee Central with Onboarding

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe the process to follow in order to integrate SAP SuccessFactors Onboarding and Employee Central
- Configure SAP SuccessFactors Onboarding to Employee Central Integration

## **Lesson 4: Integrating SAP SuccessFactors Goal Management with Onboarding**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Describe the process to follow in order to integrate SAP SuccessFactors Onboarding and Goal Management

## Lesson 1: New Process Creation

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe how to configure a new process for a customer

## Lesson 2: New Process and Compliance

### Lesson Objectives

After completing this lesson, you will be able to:

- Identify how global compliance is handled
- Explain how global compliance is enabled
- Create a new process

## Lesson 3: Localizing SAP SuccessFactors Onboarding

### Lesson Objectives

After completing this lesson, you will be able to:

- Identify items that can be localized
- Explain how to enable localization and localize panels
- Localize panels and notifications

## Lesson 4: Crossboarding

### Lesson Objectives

After completing this lesson, you will be able to:

- Identify the term crossboarding and how it relates to SAP SuccessFactors Onboarding
- List crossboarding options

## Lesson 5: Offboarding

### Lesson Objectives

After completing this lesson, you will be able to:

- Explain the term offboarding
- List the offboarding steps
- Summarize the process steps of the offboarding process
- Outline the offboarding application flow
- Describe the important details of the Initiation step
- Describe the important details of the Employee step
- Describe the important details of the Signature step
- Explain how to configure offboarding



## Lesson 1: Setting Up The Employee Portal

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe each component of the Employee Portal that the admin has the ability to manage
- Summarize the steps for implementation consultants must follow to setup the Employee Portal
- Describe the new hire process
- List the items that the implementation consultant must send to the customer once the Employee Portal is set up



## Lesson 1: Enabling Mobile

### Lesson Objectives

After completing this lesson, you will be able to:

- Enable Mobile Onboarding in Provisioning
- Set Mobile Permissions from within Manage Permission Roles

## Lesson 2: Setting up and Using the SAP SuccessFactors Mobile App

### Lesson Objectives

After completing this lesson, you will be able to:

- Explain how to setup the Admin Content in the SAP SuccessFactors mobile app
- Explain how to setup the New Hire Content in the SAP SuccessFactors mobile app when using Employee Central
- Explain the use of Managers of the SAP SuccessFactors mobile app



## Lesson 1: Storing Documents in the Document Center

### Lesson Objectives

After completing this lesson, you will be able to:

- Identify the use of the SAP Document Center for document storage at the end of the onboarding process

## Lesson 2: Reporting in SAP SuccessFactors Onboarding

### Lesson Objectives

After completing this lesson, you will be able to:

- Identify the available types of SAP SuccessFactors Onboarding reports
- Explain how to run an Advanced Report

## Lesson 3: Using Intelligent Services in SAP SuccessFactors Onboarding

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe the features available from Intelligent Services enablement