

# THR97

## SAP SuccessFactors Onboarding Academy

### COURSE OUTLINE

Course Version: 2411

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:

- Application Consultant
- System Administrator



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



## Lesson 1: Activating SAP SuccessFactors Onboarding

### Lesson Objectives

After completing this lesson, you will be able to:

- Activate SAP SuccessFactors Onboarding in Provisioning
- Activate and Set Up Additional Features for Document Management

## Lesson 2: Scheduling Sync Jobs

### Lesson Objectives

After completing this lesson, you will be able to:

- Schedule required jobs in Provisioning for 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: 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



## 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



## 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



## **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: 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 SAP SuccessFactors Onboarding
- 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 5: Adding Corporate Representative for Employer Signature**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Add corporate representative for the employer's signature for all required country compliance forms





## 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 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
- Create UIs for Custom MDF 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



## 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



## 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



## **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





## 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:

- Define conditions for initiating the internal hire process
- Assign Onboarding tasks to future managers
- Configure notifications for 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 a custom card for viewing generated onboarding documents
- Create a custom card for completing a new hire profile in SAP SuccessFactors





## 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



## 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



## 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

## 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