

THR97

SAP SuccessFactors Onboarding Academy

COURSE OUTLINE

Course Version: 2111

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

UNIT 1

Introduction to SAP SuccessFactors Onboarding

Lesson 1: What is SAP SuccessFactors Onboarding?

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the functionality of SAP SuccessFactors Onboarding

UNIT 2

Configuration and Enablement of SAP SuccessFactors Onboarding

Lesson 1: Configuring and Enabling Onboarding

Lesson Objectives

After completing this lesson, you will be able to:

- Enable Onboarding in Provisioning
- Configure Additional Onboarding Components

Lesson 1: Setting Role-Based Permissions

Lesson Objectives

After completing this lesson, you will be able to:

- Describe role-based permissions
- Identify and grant role-based permissions for administrators
- Identify role-based permissions for Onboarding tasks
- Assign role-based permissions for data reviewers
- Assign role-based permissions for new hires and managers

UNIT 4

The Data Model for SAP SuccessFactors Onboarding

Lesson 1: Configuring the Data Model for Onboarding

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the HRIS Integrations of Onboarding
- Define the Data Model for the Onboarding process
- Create Custom HRIS Elements for the Onboarding process
- Create a Country-Specific Field for Onboarding Process
- Add more visible data to new hires using External User Visibility Tool

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

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the Data Collection Process in Onboarding
- Associate Custom Objects to UI
- Configure UI for Custom Objects
- Create a Data Collection Rule

Lesson 1: Creating Onboarding Programs

Lesson Objectives

After completing this lesson, you will be able to:

- Create Onboarding Programs and Tasks

Lesson 2: Configuring SAP SuccessFactors Home Page for Onboarding

Lesson Objectives

After completing this lesson, you will be able to:

- Configure Onboarding Home Page Tiles
- Configure the SAP SuccessFactors Latest Home Page for Onboarding

Lesson 3: Manually adding a new hire into Onboarding

Lesson Objectives

After completing this lesson, you will be able to:

- Add a new hire into Onboarding
- Assign role-based permissions for add new hire tool

Lesson 4: Defining the Rehire Process

Lesson Objectives

After completing this lesson, you will be able to:

- Configure the Check for Rehire
- Assign Permissions to Perform Rehire Verification

Lesson 5: Setting Up Internal Hire Process (Crossboarding)

Lesson Objectives

After completing this lesson, you will be able to:

- Define Internal Hire Process in SAP SuccessFactors Onboarding
- Initiate Internal Hire Process from SAP SuccessFactors Employee Central
- Initiate Internal Hire Process from SAP SuccessFactors Recruiting Management
- Initiate Internal Hire Process from an External Applicant Tracking System

Lesson 6: Creating Custom Onboarding Processes using Process Variant Manager

Lesson Objectives

After completing this lesson, you will be able to:

- Identify the Onboarding Process Steps
- Create a Custom Onboarding Process using the Process Variant Manager Tool
- Define a Business Rule for a Process Variant

Lesson 7: Restarting Onboarding Processes

Lesson Objectives

After completing this lesson, you will be able to:

- Restart the Onboarding Processes
- Define Business Rules for Restarting Onboarding Processes

Lesson 8: Triggering No-Show for a New Hire

Lesson Objectives

After completing this lesson, you will be able to:

- Configure the No-Show Event
- Configure the Employee Status
- Create the Event Reason for the No-Show Event

Lesson 9: Using Data Retention Time Management for Onboarding

Lesson Objectives

After completing this lesson, you will be able to:

- Create a Date Purge request using Data Retention Time Management

Lesson 1: Setting Up Document Templates in Onboarding

Lesson Objectives

After completing this lesson, you will be able to:

- Create a Document Template for Document Flow Configuration
- Map Placeholders to Objects
- Define Business Rule for Document Template
- Maintain Document Signatures

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

Lesson Objectives

After completing this lesson, you will be able to:

- Enable and Setup SAP SuccessFactors e-Signature
- Enable and Setup DocuSign

Lesson 1: Configuring and Managing Email Services

Lesson Objectives

After completing this lesson, you will be able to:

- Configure Email Services and Notifications
- Describe how to re-use a preconfigured email template
- Manage and add email templates
- Describe how to use business rules in email services
- Manage Email Status in Onboarding
- Configure email trigger category
- Unsubscribe from Email Notifications

Lesson 1: Integrating SAP SuccessFactors Onboarding and Recruiting

Lesson Objectives

After completing this lesson, you will be able to:

- Describe how to integrate SAP SuccessFactors Onboarding and SAP SuccessFactors Recruiting
- Map Employee Central to Recruiting fields

Lesson 2: Integrating SAP SuccessFactors Onboarding and Learning

Lesson Objectives

After completing this lesson, you will be able to:

- Assign Learning Courses to New Hires

Lesson 1: Identifying the available Compliance Forms in Onboarding

Lesson Objectives

After completing this lesson, you will be able to:

- Identify the purpose of compliance forms in the onboarding process
- Identify the available compliance forms in Onboarding

Lesson 2: Identifying necessary Role-Based Permissions for Compliance Settings

Lesson Objectives

After completing this lesson, you will be able to:

- Assign the necessary permissions for compliance settings in Onboarding

Lesson 3: Configuring Compliance Settings in Onboarding

Lesson Objectives

After completing this lesson, you will be able to:

- Enable the available compliance forms in Onboarding
- Configure the US Compliance Features

Lesson 4: Creating Custom Compliance Forms

Lesson Objectives

After completing this lesson, you will be able to:

- Create custom compliance forms

Lesson 1: Defining the Offboarding Process

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the Offboarding process

Lesson 2: Enabling Offboarding

Lesson Objectives

After completing this lesson, you will be able to:

- Identify the prerequisites for enabling Offboarding
- Enable Offboarding

Lesson 3: Defining Role-Based Permissions for the Offboarding Process

Lesson Objectives

After completing this lesson, you will be able to:

- Identify Role-Based permissions required for Offboarding
- Assign Role-Based permissions for Offboarding

Lesson 4: Defining Business Rules for the Offboarding Process

Lesson Objectives

After completing this lesson, you will be able to:

- Identify different business rules for Offboarding process
- Define business rules for Offboarding process

Lesson 5: Creating and Initiating an Offboarding Program

Lesson Objectives

After completing this lesson, you will be able to:

- Define the Offboarding Program
- Define a business rule for selecting an Offboarding program
- Initiate the Offboarding Process

Lesson 1: Introducing and Enabling Story Reports of People Analytics

Lesson Objectives

After completing this lesson, you will be able to:

- Describe Story Reports in Report Center
- Identify the prerequisites for enabling Story Reports
- Enable Story Reports
- Identify Role-Based permissions required for creating Story Reports

Lesson 2: Creating Story Reports using Data from Onboarding

Lesson Objectives

After completing this lesson, you will be able to:

- Create Story Reports with Data from Onboarding