www.sap.com

Administrator Training Guide

SAP SuccessFactors Onboarding Administration (HR816)

SAP SE Copyrights and Trademarks

SAP SuccessFactors Onboarding Administration (HR816)

About this Handbook

This handbook is intended to complement the instructor-led presentation of this course, and serve as a source of reference. American English is the standard used in this handbook. The following typographic conventions are also used:

Use	Example/Visualization
Demonstration by Instructor A hint or advanced detail is shown or clarified by the instructor – please indicate reaching any of these points to the instructor	
Warning or Caution A word of caution – generally used to point out limitations or actions with potential negative impact that need to be considered consciously	
Hint A hint, tip or additional detail that helps increate performance of the solution or help improve understanding of the solution	
Additional Information An indicator for pointing to additional information or technique beyond the scope of the exercise but of potential interest to the participant	
Discussion/Group Exercise Used to indicate that collaboration is required to conclude a given exercise. Collaboration can be a discussion or a virtual collaboration	
User Interface Text	Find the *Flavor Gallery* button
Solution or SAP Specific term	E.g. *Flavors* are transaction specific screen personalization created and rendered using SAP Screen Personas.

Course Introduction

Overview

Through a variety of activities which may include discussion, demonstration, and hands-on computer lab work, this course teaches the learner how to navigate the SAP SuccessFactors Onboarding module. The learner will be able to describe the functionality of SAP SuccessFactors Onboarding. Set up role-based permissions for the module, explain data model configuration, and how to create an Onboarding program.

Target Audience

This is an eLearning course (virtual or in person) intended for SAP SuccessFactors Systems Administrators (also referred to as Admins) responsible for:

- Granting permissions for the Onboarding module
- Creating and sending emails and notifications
- Managing data collection and document templates
- Creating onboarding programs
- Configuring the data model

Course Objectives

Upon completion of this course, you will be able to:

- Describe the functionality of SAP SuccessFactors Onboarding
- Identify and grant Role-Based Permissions for Administrators, New Hires, Managers and for Email Services
- Define the Data Model for the onboarding process
- Create Onboarding Program and Tasks
- Describe how to set up the data collection process
- Define the process for document template setup
- Configure Email Services and Notifications
- Describe how to SAP SuccessFactors Onboarding and SAP SuccessFactors Recruiting can be integrated

Data Protection and Privacy Features

With recent releases, several new data protection and privacy features have been made available to our customers and some existing features have been enhanced.

The data protection and privacy features include, for instance, the ability to report on personal data changes and the capacity to report on all the data subject’s personal data available in the application. Customers will also have options to configure data retention rules at country level for active and inactive employees that will permanently purge personal data from SAP SuccessFactors applications.

It is the customer's responsibility to adopt the features that they deem appropriate. More information can be found on the SAP Help Portal: http://help.sap.com/cloud4hr

Data Protection and Privacy Content is Centralized

Data protection and privacy is best when it is implemented suite-wide, and not product-by-product, so we centralized data protection and privacy information content. Please see the latest data protection and privacy content for information about setting up and using data protection and privacy features.

Note:
SAP SuccessFactors values data protection as essential and is fully committed to help customers complying with applicable regulations – including the requirements imposed by the General Data Protection Regulation (GDPR).
By delivering features and functionalities that are designed to strengthen data protection and security customers get valuable support in their compliance efforts. However it remains customer's responsibility to evaluate legal requirements and implement, configure and use the features provided by SAP SuccessFactors in compliance with all applicable regulations.

Latest setting up and using data protection and privacy content

Latest data protection and privacy release information

SAP SuccessFactors Community

Customer Community is your one-stop shop for support, quick answers, product training and quarterly release updates. You may also post ideas for enhancements on product-specific Q&A boards, and "Kudo" other ideas that you like. Enhancement ideas with the most kudos often become part of the product roadmap for future releases.

https://community.successfactors.com/

Additional Resources

For more information about SAP SuccessFactors, refer to these resources:

Main Website	http://www.SuccessFactors.com
SAP SuccessFactors Process Library	https://community.successfactors.com/t5/SAP-SuccessFactors-Process/ct-p/ProcessLibrary
Training and Certification Shop	https://training.sap.com/shop/learninghub

Main Website	http://www.SuccessFactors.com
SAP SuccessFactors HCM Suite Help Portal	http://help.sap.com/cloud4hr

Unit 1 – Introduction to SAP SuccessFactors Onboarding

Unit Objectives

This unit contains one lesson:

- Lesson 1–1 – What is SAP SuccessFactors Onboarding?

Upon completing this unit, you will be able to:

- Describe the functionality of SAP SuccessFactors Onboarding

Lesson 1–1 – What is SAP SuccessFactors Onboarding?

Lesson Overview

The goal of this lesson is to understand the basics of Onboarding and gain an overview of the SAP SuccessFactors Onboarding Administration course.

Lesson Objective

- Describe the functionality of SAP SuccessFactors Onboarding

Welcome to the SAP SuccessFactors Onboarding Administration Course

	Note: If you are looking for training for the legacy SAP SuccessFactors Onboarding module, Onboarding 1.0, please access course code HR834. The Administration course that you are viewing right now is HR816, and specifically covers SAP SuccessFactors Onboarding (2.0).

Onboarding

Onboarding is our vision to deliver our next-generation Onboarding solution: one platform, one approach, and employee lifecycle driven. Onboarding is built upon our already successful solution and sets the stage for future capabilities that give customers the most robust onboarding solution for years to come.

Onboarding participants will have simplified experiences, processes, and administration in Onboarding. With increased use of SAP SuccessFactors platform technologies that include common data structures, business rules engine, document management, and enhanced homepage, Onboarding provides:

- Streamlined configuration and administration

- Overall consistent and engaging user experience through our Fiori-based design
- Improved flexibility and extensibility - for example, easier integration such as document management vendors
- Reduction of duplicate functionalities such as notifications, permissions, document storage, etc.

Onboarding Process Overview

Initiating Onboarding

Onboarding process can be initiated from:

- SAP SuccessFactors Recruiting Management
- An external Application Tracking System
- Admin Center – Add New Hire to Onboarding

Data Verification:

Once initiated, the onboarding process goes through the following stages:

New hire data passed from the recruiting systems is stored in a draft table. Data validity checks ensure that the new hire data is complete, properly mapped, and readable. If not, the system creates a task to review the data and assigns the task to the onboarding participant involved in the process.

	Note: This task is created only if there are discrepancies in new hire data.

Task Creation:

While onboarding tasks are initiated, a welcome message is sent to new hires with information about accessing the system and getting started with onboarding related activities. These events occur simultaneously.
After the initiation of Onboarding tasks, participants in the Onboarding process receive notifications. New hires get access to the Onboarding home page and hiring managers or other Onboarding participants get access to information for processing the new hire.

Personal Data Collection:

After receiving the welcome message, new hires can log in to the Onboarding home page to check their outstanding tasks. Business rules configured in the system determine the accessibility of various tiles on the home page to the new hires. This task can also be completed by another user such as the hiring manager or an HR Rep on behalf of a new hire. The user who will complete this task for the new hire will need a necessary permission for this action.

Note: The visibility of Provide Personal Data tile on the home page is based on business rules. Therefore, if the Provide Personal Data tile is accessible, new hires can provide information that the application does not already have from the recruiting process and required by Employee Central.

Additional Data Collection

After the personal data collection process is complete, the application checks for additional data requirements from Onboarding custom MDF objects. Based on the evaluation of configured business rules, additional task can be assigned to new hires for Onboarding (additional) data collection. Similar to the Personal Data Collection task, this task can also be completed by another user such as the hiring manager or an HR Rep on behalf of a new hire. The user who will complete this task for the new hire will also need a necessary permission for this action.

Document Flow

In the document collection process, all the documents required in the onboarding process are gathered. Documents that require a signature are sent to SAP SuccessFactors eSignature or DocuSign. New hires are notified of any documents that require a signature during the Document Flow step in the process. The status of the signed document availability is trackable from the Onboarding dashboard. An assigned Onboarding participant can nudge a new hire in the form of a reminder to complete the document completion task on time.

When new hires furnish all the documents with signature, wherever required, the hire status is updated accordingly and the new hires are placed in the Manage Pending Hires phase.

Note: New hires can complete their Onboarding tasks a month before their start date and be in the pending hires queue in Employee Central. An administrator can go ahead and hire the candidates. The hired candidates are marked for conversion. During this time, new hires are still external users, even though they are hired as internal users. New hires remain an external user until their start date is reached. During this phase, new hires can access the home page as non-employees to view Onboarding content.

Compliance Taks/Forms

If compliance forms are enabled in the system, compliance forms will be generated during process that will require different users to complete them depending on their role on the compliance process. There are currently 3 countries (United Kingdom, Australia and United States of America) supported in the system with compliance forms.

A batch process converts new hires, who are external users to internal users on their start date.

Lesson Summary

The goal of this lesson is to understand the basics of Onboarding and gain an overview of the SAP SuccessFactors Onboarding Administration course.

You should now be able to:

- Describe the functionality of SAP SuccessFactors Onboarding

Unit Wrap-Up

In this unit, you covered:

- Lesson 1-1 – What is SAP SuccessFactors Onboarding?

You should now be able to:

Describe the functionality of SAP SuccessFactors Onboarding

Unit 2 – Role-Based Permissions and Onboarding

Unit Objectives

This unit contains one lesson:

- Lesson 2–1 – Setting Role-Based Permissions

Upon completing this unit, you will be able to:

- Describe role-based permissions
- Identify and grant Role-Based Permissions for Administrators

Lesson 2–1 –Setting Role-Based Permissions

Lesson Overview

The goal of this lesson is to get familiarized with and manage role-based permission for Onboarding elements.

Lesson Objectives

- Describe role-based permissions
- Identify and grant Role-Based Permissions for Administrators
- Identify Role-Based Permissions for Onboarding Tasks
- Assign Role-Based Permissions for New Hires and Managers
- Identify Role-Based Permissions for Email Services

What are Role-Based Permissions?

The RBP security authorization model uses groups and roles to organize employees (groups) and permissions (roles) to control access to your system; By organizing employees into groups and permissions into roles you can assign a group of employees the same set of permissions by assigning them a role.

Role-based permissions contain three main elements: Permission Groups, Permission Roles, and Target Populations. Permission groups are a set of employees who share certain attributes such as City or Job Code and require access to a similar set of tasks within your system. Roles are defined as a set of permissions. You can assign the permission roles, you define, to a permission group and if the role requires that you define a target population, meaning a group to perform tasks for, you'll assign the target population when you define the role.

Target populations are groups that are assigned to permission roles when the permission granted is performed on behalf of other employees.

	Hint: We recommend that you create groups before creating roles so that during role creation, you can select the group for which to grant the role. In addition, you'll need defined groups for roles that require a target population.

Assigning Permissions to a Role

1. In the *Permission Settings* section, click the *Permission* button to specify the permission you want to assign to the role. The *Permission Settings* window opens.
2. On the left side of the page, you will see the different permission categories. Click a permission category to reveal the different permissions.

   The list of permissions associated with this category is displayed.

3. Select the checkboxes next to the permissions you would like to grant to the role.
4. Click the *Done* button when you finish marking your selections.
5. Click *Save* Changes.

Assign a target population, if your role indicates that a target is needed.

Role-Based Permissions for Administrators in Onboarding

Under User or Administrator Permissions?	Permission Location	Permission Name	Result
User	Recruiting Permissions	Recruit-to-Hire Data Mapping	Allows you to map fields for the recruit-to-hire process.
Admin	Manage Business Configuration	Select the options you need for your scenario	This permission allows you to use the Business Configuration UI, where you can make changes to the Succession Data Model directly, without accessing Provisioning.
Admin	Manage Document Generation	Manage Document Template	Allows you to view and edit the document template.
Admin	Manage Document Generation	Manage Document Template Mapping	Allows you to map document template variables.

Under User or Administrator Permissions?	Permission Location	Permission Name	Result
Admin	Manage Document Generation	Generate All Documents as Admin	Allows you to generate all or selected documents for users.
Admin	Manage On/Off-boarding 2.0	Administrate Onboarding 2.0 or Offboarding 2.0 content	Allows you to manage Onboarding content including configuration settings and document templates.
Admin	Manage On/Off-boarding 2.0	Cancel Onboarding Permission	Allows you to cancel onboarding processes.
Admin	Onboarding 2.0 or Off-boarding 2.0 Admin Object Permissions	Onboarding Program	Allows you to configure and manage the onboarding tasks used in onboarding programs in your system.
Admin	Onboarding 2.0 or Off-boarding 2.0 Admin Object Permissions	ONB2Responsibility Config	Allows you to configure responsible roles for the onboarding and offboarding activities in your system.
Admin	Onboarding 2.0 or Off-boarding 2.0 Admin Object Permissions	Document Template	Allows you to manage form templates.
Admin	Configure Docu-Sign eSignature	Configure Docu-Sign eSignature	Provides access to the admin tool for configuring the Docu-Sign eSignature.
Admin	Configure Docu-Sign eSignature	Manage Docu-Sign envelopes	Provides access to the admin tool for managing Docu-Sign envelopes.
User	Onboarding Object Permissions	Select the options that best fit your scenario	The permissions you select determine the level of access for

Under User or Administrator Permissions?	Permission Location	Permission Name	Result
			each type of onboarding task.
User	General User Permission	User Login	Allows you to log on to the application. Note that this is required for all users.
User	General User Permission	Permission to Create Forms	Select the forms you want to provide permission to create. For administrators in Onboarding, it is recommended to select All.
Admin	Metadata Framework	Configure Object Definitions	Allows you to manage MDF object definitions.
Admin	Metadata Framework	Read/Write Permission on Metadata Framework	This permission allows a user to access information provided by MDF objects.
Admin	Metadata Framework	Import Permission on Metadata Framework	Allows a user to import data related to the Metadata Framework.
Admin	Metadata Framework	Manage Data	Allows a user to manage data related to the Metadata Framework.
Admin	Metadata Framework	Configure Business Rules	Allows you to configure business rules related to MDF objects.
Admin	Metadata Framework	Manage Configuration UI	Provides access to the Manage Configuration Admin Tool.
Admin	Metadata Framework	Manage Positions	Allows you to manage the MDF Position object.

Under User or Administrator Permissions?	Permission Location	Permission Name	Result
Admin	Metadata Framework	Manage Sequence	Provides access to required processes related to MDF objects.
Admin	Metadata Framework	Access to Business Rule Execution Log	Provides access to the business rule execution log, with the option of including a permission for downloading the log.
Admin	Metadata Framework	Manage Mass Changes for Metadata Objects	Provides access to required processes related to MDF objects in Onboarding
Admin	Metadata Framework	Admin access to MDF OData API	Provides access read all the MDF OData API entities.
Admin	Configure Document Management	Configure Document Management	Provides access necessary for managing documents related to Onboarding
User	Home page v3 Tile Group Permission	Home page v3 To-Do tile group	Provides access to the home page tiles for to-do notifications. To provide access to the other home page tiles, select the corresponding permissions.
User	Goals	New Group Goal Creation	Allows you to create Group Goals.
User	Goals	Goal Plan Permissions	Allows you to access the goal plans.

Exercise - Assign Onboarding Administrator Permissions

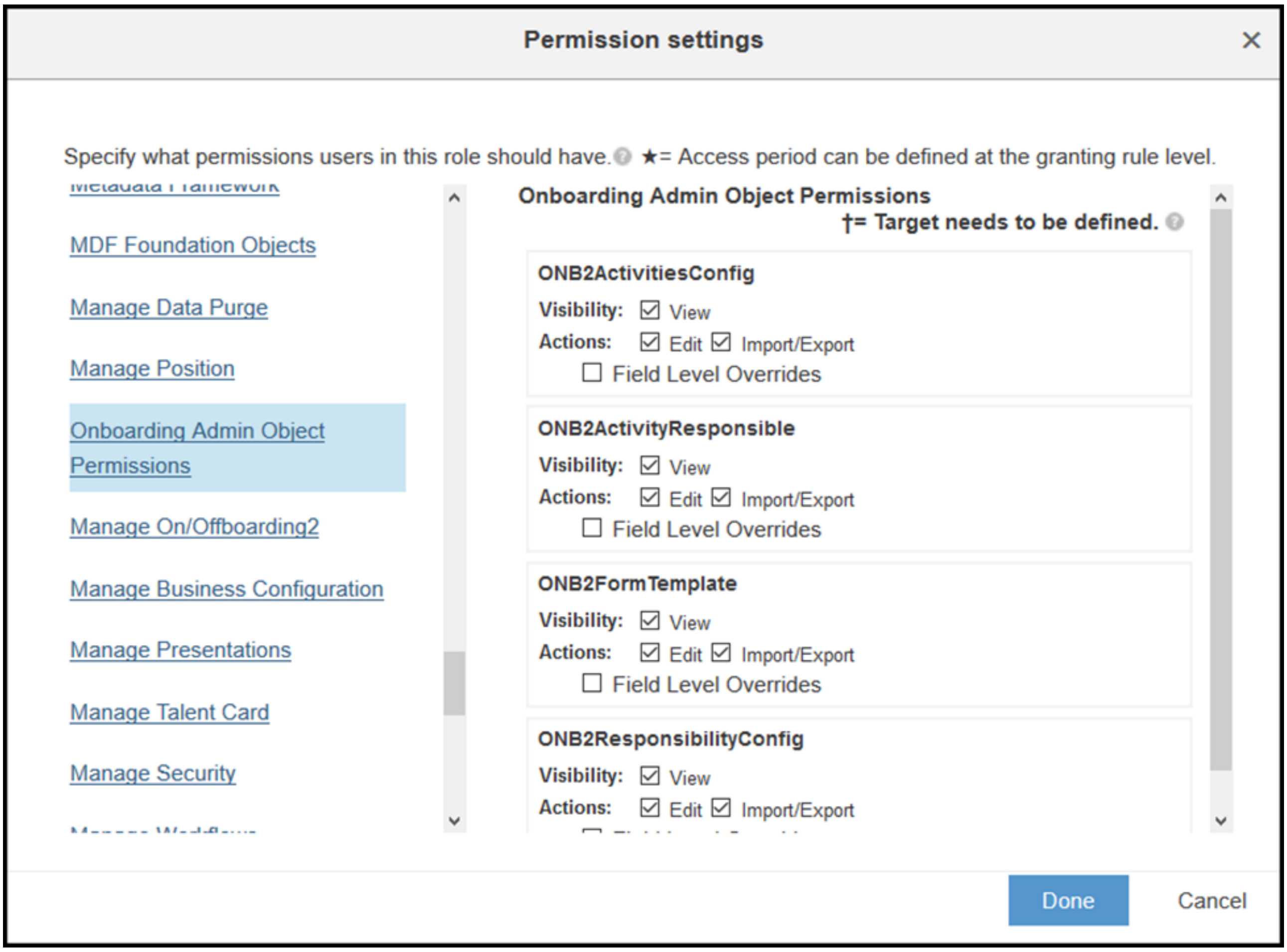
The prerequisites and features to get started on Onboarding configuration have been completed for your customer's instance. The next step is to assign role-based permissions to key users and system administrators, to both configure and test the Onboarding workflow.

On completion of this exercise, you will be able to:

Grant Onboarding Administrator Permissions

1. Log in to your assigned SAP SuccessFactors Instance, as Emily Clark (admin).
2. Navigate to Admin Center → Manage Permission Roles.
3. Choose System Admin Role. Locate and grant role-based permissions for your administrators on the Permission settings screen.

	Note: Information about administrator permissions can also be obtained from the SAP SuccessFactors Onboarding Implementation Guide on the SAP Help Portal.



4. Choose Done.
5. Scroll down to the bottom of the screen and choose Save Changes.
6. Log out and back in to the instance for the role-based permission changes to take effect.

Role-Based Permissions for Onboarding Tasks

Role-based permissions streamline the Onboarding process further by automating the task management activity. Based on the role-based permissions and the type of target population (internal or external) granted to a role, onboarding participants can take responsibility or just track the progress of a given task.

	Note: When the role of a hiring manager has edit permission for the welcome message task, users belonging to that role can draft a welcome message for new hires in their team. However, the role of the hiring manager's manager or the onboarding coordinator may only have permissions to view the task, which allow them to just track the progress of the task or issue reminders.

You can determine the assignment of permissions based on your onboarding process and the involved onboarding participants. Onboarding provides the flexibility to build programs that meet the requirements of your organization using role-based permissions.

Task permissions are used together with onboarding programs, responsibility groups and the business rules which govern them. You can assign tasks to onboarding participants based on your onboarding program definition. If you assign a task to onboarding participants with edit permissions, the task appears in the To-Do tile of their Home Page.

Table 2:

Under User or Administrator Permissions?	**Permission Location**	**Permission Name**	**Result**
User	Onboarding Object Permissions	Message Task	Enables participants to view, set, and update the Welcome Message for the new hire. Full permission recommended for: • Hiring manager • Hiring manager's team
User	Onboarding Object Permissions	Buddy Task	Enables participants to view or edit activity of assigning a buddy. Full permission recommended for: • Hiring manager
User	Onboarding Object Permissions	Recommended People Task	Enables participants to view, add, or remove recommended people for New hire. Full permission recommended for: • Hiring manager

Under User or Administrator Permissions?	Permission Location	Permission Name	Result
User	Onboarding Object Permissions	Recommended Link Task	Enables participants to view or modify recommended links. Full permission recommended for: • Hiring manager
User	Onboarding Object Permissions	Equipment Task	Enables participants to view or edit furnished equipment orders. Full permission recommended for: • Hiring manager
User	Onboarding Object Permissions	Meeting Task	Enables participants to schedule meetings. Full permission recommended for: • Hiring manager
User	Onboarding Object Permissions	Goal Task	Enables participants to set up goals. Full permission recommended for: • Hiring manager
User	Onboarding Object Permissions	Checklist Task	Enables participants to create a checklist.
User	Onboarding Object Permissions	Prepare for Day One Task	Enables participants to view or edit supplemental items.
User	Onboarding Object Permissions	Where To Go Task	Enables participants to view or edit supplemental item locations.

Under User or Administrator Permissions?	Permission Location	Permission Name	Result
User	Onboarding Object Permissions	Document Flow	Enables participants to view or edit paperwork status. View permission recommended for: • Hiring manager • Hiring manager's manager • Onboarding coordinator • HR admin
User	Onboarding Object Permissions	ONB2Process	Enables participants to close Onboarding process flow. Full permission recommended for: • Hiring manager • Hiring manager's manager • Onboarding coordinator • HR admin • System admin
User	Onboarding Object Permissions	ONB2ProcessTrigge r	Enables participants to trigger Onboarding and Offboarding process flow. Full permission recommended for: • Hiring manager • Hiring manager's manager

Under User or Administrator Permissions?	Permission Location	Permission Name	Result
			• Onboarding coordinator • HR admin • System admin
Admin	Manage On/Off-boarding 2	Cancel Onboarding Permission	Enables participants to cancel Onboarding process flow. Full permission recommended for: • Hiring manager • Hiring manager's manager • Onboarding coordinator • HR admin • System admin
User	Manage User	Employee Export	Enables participants to view the new hire name on the dashboard.

Role-Based Permissions for New Hires as External Users

Since new hires are considered as external users until the start date of their employment, you can control the level of access they have to the system with the help of role-based permissions.

> Note:
> Onboarding External User is a permission role that is a part of Onboarding.

Table 3:

Under User or Administrator Permissions?	Permission Location	Permission Name	Result
User	General User Permission	User Login	Provides access to the system.

Under User or Administrator Permissions?	Permission Location	Permission Name	Result
User	Home page v3 Tile Group Permission	Home page v3 To-Do tile group	Displays the To-Do tile group on the Home Page.
User	Home page v3 Tile Group Permission	Home page v3 Onboarding 2.0 tile group	Displays the Onboarding (2.0) tile group on the Home Page.
User	Onboarding 2.0 Object Permissions	Select applicable permissions from the list.	Determines the level of access for each type of onboarding task.
Admin	Meta-data Framework	Read/Write Permission on the Meta-data Framework	Controls access to any MDF objects, including onboarding tasks.

Exercise - Assign Onboarding Manager and External User Permissions

Business Example

Role-Based Permissions must be granted to internal users, such as Hiring Managers and external users (the new hires) in the customer's instance.

On completion of this exercise, you will be able to:

- Grant ONB manager or user permissions
- Grant ONB external user (new hire) permissions

1. Log in to your assigned SAP SuccessFactors instance, as Emily Clark (admin).
2. Navigate to Admin Center → Manage Permission Roles.
3. Choose Manager Role. Locate and grant role-based permissions for administrators. Refer to the following table.

Under User or Administrator Permissions?	Permission Location	Permission Name	Result
Admin	Manage Onboarding 1.0 or Offboarding 2.0	Cancel Onboarding Permission	Enables participants to cancel the Onboarding process flow.

Under User or Administrator Permissions?	Permission Location	Permission Name	Result
			Full permission recommended for: • Hiring manager • Hiring manager's manager • Onboarding coordinator • HR admin • System admin
User	Onboarding Object Permissions	Message Task	Enables participants to view, set, and update the Welcome Message for the new hire. Full permission recommended for: • Hiring manager • Hiring manager's team
User	Onboarding Object Permissions	Buddy Task	Enables participants to view or edit the activity of assigning a buddy. Full permission recommended for: • Hiring manager
User	Onboarding Object Permissions	Recommended People Task	Enables participants to view, add, or remove recommended people for New Hire. Full permission recommended for:

Under User or Administrator Permissions?	Permission Location	Permission Name	Result
			• Hiring manager
User	Onboarding Object Permissions	Recommended Link Task	Enables participants to view or modify recommended links. Full permission recommended for: • Hiring manager
User	Onboarding Object Permissions	Equipment Task	Enables participants to view or edit furnished equipment orders. Full permission recommended for: • Hiring manager
User	Onboarding Object Permissions	Meeting Task	Enables participants to schedule meetings. Full permission recommended for: • Hiring manager
User	Onboarding Object Permissions	Checklist Task	Enables participants to create a checklist.
User	Onboarding Object Permissions	Prepare for Day One Task	Enables participants to view or edit supplemental items.
User	Onboarding Object Permissions	Where To Go Task	Enables participants to view or edit supplemental item locations.
User	Onboarding Object Permissions	Document Flow	Enables participants to view or edit paperwork status. View permission recommended for:

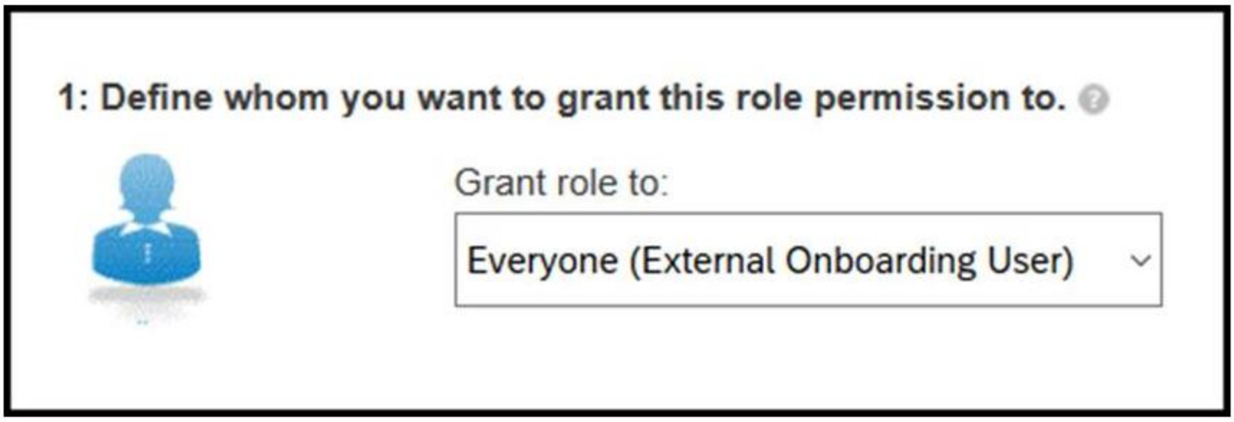
Under User or Administrator Permissions?	Permission Location	Permission Name	Result
			• Hiring manager • Hiring manager's manager • Onboarding coordinator • HR admin
User	Onboarding Object Permissions	ONB2Process	Enables participants to close Onboarding process flow. Full permission recommended for: • Hiring manager • Hiring manager's manager • Onboarding coordinator • HR admin • System admin
User	Manage User	Employee Export	Enables participants to view the new hire name on the dashboard.

4. Choose Done.
5. Scroll down to the bottom of the screen and choose Save Changes.
6. Log out and back into the instance for the role-based permission changes to take effect.
7. Navigate to Admin Center → Manage Permission Roles.
8. Choose Create New Role For External User and enter the following information.

- Role Name: Onboarding External User
- Description: For THR97 ONB Administration
- Locate and grant the role-based permissions in the following table for your administrators.

Under User or Administrator Permissions?	**Permission Location**	**Permission Name**	**Result**
Admin	Metadata Framework	Read/Write Permission on the Metadata Framework	Controls access to any MDF objects, including onboarding tasks.
User	General User Permission	User Login	Provides access to the system.
User	Homepage v3 Tile Group Permission	Homepage v3 To-Do tile group	Displays the To-Do tile group on the Home Page.
User	Homepage v3 Tile Group Permission	Homepage v3 Onboarding 2.0 tile group	Displays the Onboarding (2.0) tile group on the Home Page.
User	Employee Data	HR Information	Provides access to view or edit HR related information.
User	Employee Data	Employment Details	Provides access to view or edit employment details.
User	Employee Central Effective Dated Entities	Select applicable permissions from the list.	Provides access to view or edit effective dated entities in Employee Central.
User	Onboarding 2.0 Object Permissions	Select applicable permissions from the list.	Determines the level of access for each type of onboarding task.

9. Choose Done.
10. Scroll down to the bottom of the screen and choose Add, under 3. Grant this role to….
11. From the Grant role to dropdown list, choose Everyone (External Onboarding User) as shown in the figure:



12. Scroll down to the bottom of the screen and choose Save Changes.
13. Log out and back into the instance for Role-based Permissions changes to take effect.

Role-Based Permissions for Email Services

Note: For those permissions that offer **Field Level Overrides**, you can restrict a specific field so that users in the applicable role cannot view or edit that field (not applicable to mandatory fields).

Table 4:

Under User or Administrator Permissions?	Permission Location	Permission Name	Result
Admin	Configure Email Framework Permissions	Configure Email Categories	Email category represents a certain email template group, such as the Buddy Category: category for buddy assignment and removal. It also includes rules for building email message attributes, such as recipient and content.
Admin	Configure Email Framework Permissions	Configure Email Triggers	Triggers can be applied as rules for sending emails. For example, Buddy

Under User or Administrator Permissions?	Permission Location	Permission Name	Result
			Assignment Cancellation Trigger: Notify the assigned buddy that the task has been reassigned to a different colleague.
Admin	Configure Email Framework Permissions	Configure Email Templates	Email Template provides a specific email form generated by certain conditions and rules.
Admin	Configure Email Framework Permissions	Configure Audit Trail	This allows you to display a list of emails sent by the system. The Actions you can take include: View Email, Resend, and Display Details.
Admin	Configure Email Framework Permissions	Allow Resend Emails	This allows you to trigger new reminder emails and complete or edit the To and CC fields.
Admin	Metadata Framework	Configure Business Rules	Allows you to configure the business rules associated with your onboarding programs.
Admin	Email Framework Object Permissions	Email Message	Provides access necessary for managing email messages sent by the system.
Admin	Email Framework Object Permissions	Email Reminder State	Provides access necessary for managing email reminders to be sent to the New Hire/Employee.

Under User or Administrator Permissions?	Permission Location	Permission Name	Result
			These objects track an email's reminder status and its last sent time stamp.
Admin	Email Framework Object Permissions	Email Template	Provides access necessary for managing email forms (or templates) present in the system.
Admin	Email Framework Object Permissions	Email Trigger	Provides access necessary for managing email rules used for sending different types of emails to the New Hire/Employee.
Admin	Email Framework Object Permissions	Email Trigger Category	Provides access necessary for managing categories of emails that are triggered by the system.

Lesson Summary

The goal of this lesson is to get familiarized with and manage role-based permission for Onboarding 2.0 elements.

You should now 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 New Hires and Managers
- Identify Role-Based Permissions for Email Services

Unit Wrap-Up

In this unit, you covered:

- Lesson 2-1 – Setting Role-Based Permissions

You should now be able to:

- Describe role-based permissions
- Identify and grant Role-Based Permissions for Administrators

Unit 3 – The Data Model for SAP SuccessFactors Onboarding

Unit Objectives

This unit contains one lesson:

- Lesson 3–1 – Configuring the Data Model for Onboarding

Upon completing this unit, you will be able to:

- Describe the HRIS Integrations of Onboarding
- Define the Data Model for the onboarding process
- Create Customer HRIS Elements for Onboarding process
- Create a Country Specific Field to be assigned to a Business Rule
- Configure Business Rule for Country Specific Field

Lesson 3–1 – Configuring the Data Model for Onboarding

Lesson Overview

The goal of this lesson is to get an overview of the Data Models in Onboarding

Lesson Objectives

- Describe the HRIS Integrations of Onboarding
- Define the Data Model for the onboarding process
- Create Customer HRIS Elements for Onboarding process
- Create a Country Specific Field to be assigned to a Business Rule
- Configure Business Rule for Country Specific Field

HRIS Integration with Onboarding

While Onboarding shares features with Employee Central in SAP SuccessFactors, it can also be integrated with any External HRIS. With an External HRIS integration, APIs will be necessary to flow data between Onboarding and the external HRIS.

The stages of the onboarding process before the hiring stage remain the same when using an external HRIS. The list of new hires who are ready to be hired can be exported to the external HRIS. After changing the candidate status to 'Hired' in the external HRIS, the status of the new hire can be updated to “Hired” in Onboarding (2.0) by using the update Hiring Info API.

All the necessary integration configuration of Onboarding with an external HRIS using APIs have already been setup by your consultant during implementation. More details about how it was setup are separately defined since the setup depends on the external HRIS and API/s used.

On this lesson, we will be focusing on the integration of Onboarding with Employee Central as this will be an the more ideal integrated setup due to all the functionalities that can be utilized in SAP SuccessFactors.

	Note: All of the content of this course focuses on the integrated setup of Onboarding with Employee Central whenever necessary. We won't be able to describe external HRIS integrations since there are multiple kinds with different configurations that we won't also be able to describe on our SAP SuccessFactors Demo instances for training. You may need to contact your consultant for further details about the external HRIS integration setup.

Data Models in Onboarding

The Succession Data Model is the primary data model which creates the data structure related to employees working for the company. This data model dictates the fields available for configuration using *Admin Center → Manage Business Configuration*.

When setting up **Onboarding**, the fields configured on the Succession Data Model should be those fields that will become a permanent part of the employee record, for example, address information, phone number, and so on. The data model is sometimes referred to as the Employee Central or Employee data model.

For fields that are only required for the Onboarding process, you can add custom HRIS elements to the Succession Data Model. This should be information that is temporary and only required for Onboarding. For example, if a company has an on-site gym, they could configure a field asking if the new hire would like to use the gym. Then, if the employee answers yes, the system will generate and send the new hire a waiver for the gym facilities. These types of fields together are sometimes referred to as the Onboarding data model.

Data Model Overview

The data models are:

- Corporate Data Model
  This is where you set up a company's organization, pay and job structure. The data model refers to data that is used throughout the entire instance of the customer.

- Succession Data Model
  This is where you set up the data structure of data that relates to the people working in a company, such as compensation and address information.

- Country-Specific Corporate Data Model

This is where you set up fields that are specific to a single country. This data model might be needed if the company has locations in more than one country, for example, to define the corporate address fields for each country.

- Country-Specific Succession Data Model
  This is where you set up international formats and fields, for example, for addresses and national IDs. You might want to set this data model up even if a company operates in only one country, as your employees might live or come from abroad.

Working with Data Models

Four types of data objects are used in the data models:

Foundation objects

- Generic objects (includes MDF Foundation Objects)

Person objects

- Employment objects

Foundation objects define company data. Today, company data is defined using a combination of foundation objects and generic objects (MDF Foundation Objects). Previously, generic objects were used only to define customized behavior like vacation and position information. Starting with the November 2014 Release, foundation objects are being migrated in a phased manner to 'MDF Foundation Objects'. Company data like Cost Center, Business Unit, Legal Entity, Departments and Division are now being defined using 'MDF Foundation Objects'.

For more information on the migrated foundation objects, refer to the Employee Central Migrating to MDF Foundation Objects guide. Also, refer to the Working with MDF Foundation Objects chapter in this guide.

Person and employment objects define employee data and are sometimes referred to as HR data objects. In the following section, you can find more information about these data objects.

Foundation Objects

With foundation objects you set up data that can be shared across the entire company, such as job codes, departments, or cost centers. Foundation objects can be subdivided into four main areas:

- Organization structures
- Job structures
- Pay structures
- Other data objects, such as event reasons, workflows, and dynamic roles

You define foundation objects in the Corporate Data Model and the country-specific Corporate Data Model.

You can find more information about foundation objects in this topic: Introduction to Foundation Objects.

You can also refer to the Data Object Tables reference guide: Foundation Object Tables.

Generic Objects

You use generic objects for settings and information relating to the people working for a business. This information includes, for example, vacation and position information.

You have to enable generic objects in your installation before you can use them. You do this in Provisioning, by checking the Enable Generic Objects box.

	Note: As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact your Implementation Partner. If you are no longer working with an Implementation Partner, contact SAP Cloud Support.

You define generic objects using the Admin Center / Configure Object Definitions page. On the other hand, fields referring to a generic object are defined in the Succession Data Model and the country-specific Succession Data Model.

Person Objects

Person objects include information that is linked to the person but does not depend on the job, such as the employee's address and national ID.

You define person objects in the Succession Data Model and the country-specific Succession Data Model.

You can find more information about person objects in the Data Object Tables reference guide as mentioned above.

Employment Objects

Employment objects include job-related information about a person, such as compensation data and hire date.

You define employment objects in the Succession Data Model.

You can find more information about employment objects in the Data Object Tables reference guide as mentioned above.

The data models are XML files that you can adjust according to a company's requirements. The XML files have standard elements and fields included, so you need only touch those parts of the data model you want to adjust. You can use the existing XML coding as a guideline, and you also find XML examples and explanations in the following chapters.

Succession Data Model (for Employee Central)

This data can be divided into the following areas:

- Person data:
- This includes information that is linked to the person and does not depend on the job, such as the employee's address and national ID.

- Employment data:
- This includes job-related information about a person, such as compensation data and hire date.

You set up this data by defining person objects and employment objects in the XML file for the Succession Data Model. This is where you define what the fields are going to be called on the UI and which fields are hidden. You can also add customer-specific fields. In the following table you find more information about the person and employment objects included in the standard XML file delivered by SuccessFactors. The columns define the following:

- HRIS-element ID: This is the ID that is used to identify the person or employment object in the XML file.
- Standard label: This is the label for the HRIS element shown on the UI. You can overwrite this label. If no label is included in the standard XML file, then the label that appears on the UI is pulled from the backend system. To overwrite the label, add the corresponding label tags in the XML file below the corresponding HRIS element and put the new label text inside the label tags.
- Portlet: Each HRIS element and its fields is shown in a portlet on the UI, that means, in a clearly defined area on the UI. Most HRIS elements have their own portlet. In this column you find the portlet name.
- Data object type: There are two types of data objects you define in the Succession Data Model — person objects and employment objects. Person objects appear on the UI on the Personal Information page in the Employee Files or when adding a new employee. Employment objects appear on the UI on the Employment Information page in the Employee Files or when adding a new employee.

Note: The fields for the person objects globalInfo and homeAddress are defined in the country-specific Succession Data Model. For more information, see Country-Specific Data Models.

HRIS-element ID	Standard label	Portlet	Data object type
personInfo	Biographical Information	Biographical Information	Person object
personalInfo	Personal Information	Personal Information	Person object
globalInfo	Global Information	Part of Personal Information portlet (appears when the user adds a country in this portlet)	Person object All fields for this HRIS element are defined in the country-specific Succession Data Model.
nationalIdCard	National Id Information	National Id Information	Person object
homeAddress	Home Address	Addresses	Person object All fields for this HRIS element are defined in the country-specific Succession Data Model.

HRIS-element ID	Standard label	Portlet	Data object type
phoneInfo	Phone Information	Part of Contact Information portlet	Person object
emailInfo	Email Information	Part of Contact Information portlet	Person object
imInfo	Social Accounts Information	Part of Contact Information portlet	Person object
emergencyContactPrimary	Primary Emergency Contact	Primary Emergency Contact	Person object
personRelationshipInfo	Dependents	Dependents	Person object
directDeposit	Direct Deposit	Direct Deposit	Person object
paymentInfo	Payment Information	Payment Information Note: You have to activate payroll integration to use this feature.	Person object
employmentInfo	Employment Details	Employment Details	Employment object
jobInfo	Job Information	Job Information	Employment object
compInfo	Compensation Information	Compensation Information	Employment object
payComponentRecurring	Compensation	Part of Compensation Information portlet	Employment object
payComponentNonRecurring	Spot Bonus	Spot Bonus	Employment object
jobRelationsInfo	Job Relationships	Job Relationships	Employment object
workPermitInfo	Work Permit Info	Work Permit Info	Employment object Note that when you have activated the Global Assignments feature, the workPermitInfo portlet is displayed on the Personal Information page.
globalAssignmentInfo	Global Assignment Details	Global Assignment Details Note: You have to activate global assignments management to use this feature.	Employment object
pensionPayoutsInfo	Pension Payout Details	Pension Payout Details	Employment object

HRIS-element ID	Standard label	Portlet	Data object type
		Note: You have to activate pension payouts to use this feature.	
userAccountInfo	Employee Information	Employee Information portlet on the Add New Employee screen	Employment object

Synchronize Succession Data Model with Metadata Framework

Once you've enabled Business Configuration UI, you also need to create a job to sync Business Configuration UI with Succession Data Model. This is a one-time task. After the sync runs for the first time, future updates to Business Configuration UI are automatically pushed to Succession Data Model.

Once Succession Data Model and Business Configuration UI have been synchronized, Business Configuration UI will continue to display HRIS and standard elements even if they have been deleted from the XML. However, these deleted elements will appear as disabled.

	Caution: Business Configuration UI is locked during synchronization. Do not edit the attributes of ActivityListObject using *Admin Center* → *Configure Object Definitions* page while sync is in progress. Doing so, may cause differences between Business Configuration UI and Succession Data Model. If Business Configuration UI and Succession Data Model are not in sync, we suggest importing the data model again.

Setting up of Business Configuration UI sync job is a three-step process.

1. Create a Job.

	Note: To create a Business Configuration UI sync job, select Synchronize Business Configuration in Job Type.

2. Schedule the Job.

	Note: Business Configuration UI sync job must only be scheduled to run Once. After the sync runs for the first time, any subsequent upload of Data Model XML will automatically trigger this job.

3. Track the Job.

	Note: If the sync job fails, Business Configuration UI will be locked. Do not edit the attributes of ActivityListObject using *Admin Center* → *Configure Object Definitions*. Check **Details** to identify the issue, fix it, and restart the job. If issue still exists, please contact SAP Cloud Support.

Adding HRIS Elements Specific to Onboarding

The following settings are enabled in Provisioning:

- *Enable Business Configuration in Admin Tools*
- *Enable Dependents Management*

	Note: If you are a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact your Implementation Partner. If you are no longer working with an Implementation Partner, contact SAP Cloud Support.

1. Go to *Admin Center* → *Manage Business Configuration*.
2. For the HRIS element you want to add Onboarding-specific information to, click to expand the element options.
3. Click *Configure New Person Type* then select *Onboardee* from the *Person Type* dropdown menu.

	Note: If there is no onboardee person type configured for an HRIS element, the entity will use the Employee Central HRIS element by default.

4. Click *Save*.

The new onboardee person type entities become part of the **Onboarding** data model.

5. Select the new HRIS compensation information onboardee entity.
6. Click to add fields to the onboardee person type.

Field	Description
Identifier	Edit the name of the HRIS Element Field.
Enabled	Enable the HRIS Element Field.
Mandatory	Determine if the HRIS Element Field is mandatory.
Visibility	Determine the visibility of an HRIS Element Field.

7. Click *Save*.

Onboarding-specific fields are available for review by the Hiring Manager and data collection from the new hire during the onboarding process.

	Note:Onboarding-specific fields are only used during data collection. After the new hire becomes an employee, the Employee Central HRIS elements are used by default.

Exercise: Create a Custom HRIS Element for the Onboarding Process

Business Example

As part of an any onboarding process, companies can choose to gather specific information from new hires. Information about an upcoming employee can be as vital as certifications or licenses that are required for a specific job role. To identify or validate information, we may need to add or create custom HRIS elements that can be used to collect information from new hires/new hires.

In this exercise, you learn how to:

- Create a custom HRIS element that is used for Onboarding.

Exercise Resource

SAP SuccessFactors Onboarding Implementation Guide: Configuring Data Models

1. Navigate to *Admin Center* → *Company Settings* → *Manage Business Configuration*.
2. Expand the *personInfo* HRIS element.
3. Choose *Configure New Person Type*.
4. Select *Onboardee* as the person type and choose *Save*.

	Note: At this point, the new Onboardee person type entity is now part of the Onboarding data model.

5. Expand the *personInfo* HRIS element.
6. Select the new *personInfo_onboardee* entity.
7. Add a new HRIS field at the bottom of the list for a specific onboarding field. For example, Company Uniform
   Details. Specify the field properties provided in the following table.

HRIS Element Field Property	Value
Identifier	**UniformDetails**
Enabled	**Yes**

HRIS Element Field Property	Value
Mandatory	**No**
Visibility	**Edit**

8. Choose *Save*.

Adding Country-Specific HRIS Elements to the Data Model

Configure business rules to determine when country-specific fields display to new hires.

1. Go to *Admin Center* → *Manage Business Configuration*.
2. For the HRIS element you want to add country-specific information to, click to expand the element options.
   Not all HRIS elements have country-specific options.
3. Click *Configure New Country*.
4. Select the *Country*.
5. Click to add *Localized Fields* to the element.
6. In the *Trigger Rules* section, click to add an already-configured business rule.
   The business rules evaluate and determine which new hires see the country-specific fields.
7. Make sure the *Enabled* dropdown is set to **Yes**.
8. Click *Save*.

The data model is configured to accept country-specific information from the appropriate new hires.

Exercise: Create a Country-Specific Field for Assignment to a Business Rule

Business Example

As part of an any onboarding process, companies can choose to gather specific information based on a condition. A common scenario is when a company asks for certain details from a new hire, but only when the new hire is from a specific location. This can be due to available facilities at the office location, such as parking spaces, or the types of equipment available to specific roles in the company.

In this exercise, you learn how to:

- Create a country-specific field that is used to trigger a business rule for Onboarding

In the next exercise, we use this field to assign a business rule that determines when the field is displayed.

	Note: The SAP SuccessFactors Onboarding module is developing progressively. As a result, some features, settings, or steps as documented in this exercise may not be available in your instances of SuccessFactors. We continue to update our training content as features become fully developed or are made available. Consider referencing some configurations in the SAP SuccessFactors Onboarding Implementation Guide as that guide may be updated more frequently.

Exercise Resource

SAP SuccessFactors Onboarding Implementation Guide: Configuring Data Models

1. Navigate to *Admin Center* → *Company Settings* → *Manage Business Configuration*.
2. Expand the *employmentInfo* HRIS element.
3. Choose *Configure New Country*.
4. Choose *Australia* as the country.
5. Select *Employment Details* for the *Based on HRIS Element* option.
6. Choose *Save*.
7. Expand the *employmentInfo* HRIS element.
8. Select *employmentInfo_AUS*.
9. Select *Yes* as the status of the entity (Enabled).
10. Select *custom-string1* as the *Identifier* under *Localized HRIS Fields*.
11. Enter *Parking Space* as the label.
12. Choose *Yes* in the *Enabled* column.
13. Choose *Details*.
14. Choose *yesno* as the *Picklist* value.
15. Choose *Save*.

	Note: We come back to this entity to identify a Business Rule that triggers display of the field during the onboarding process.

Exercise: Create a Business Rule and Assign it to a Country-specific Field

Business Example

As part of an any onboarding process, companies can create different business rules that can be triggered by specific information gathered from new hires. This allows them to be flexible and customize their onboarding process.

In this exercise, you learn how to:

- Create a business rule and assign it to the country-specific field created in the previous exercise.

Exercise Resource

SAP SuccessFactors Onboarding Implementation Guide: Configuring Data Models

1. Navigate to *Admin Center* → *Company Settings* → *Configure Business Rules*.
2. Choose the + *(plus)* button.
3. Select *Basic*.
4. Enter **Parking Space** as the *Rule Name*.
5. Select *Employee Details* as the *Base Object*.
6. Choose *Continue*.
7. For the *If* statement, expand *Employment Details* → *Job Information*, then select *Country*.
8. Select *Australia* from the dropdown list of countries.
9. For the *Then* statement, expand *Set* → *Employment Details* → *(AUS) Parking Space*, choose *to be equal to*, choose *Text* and enter **Please identify if you will need a parking space** in the value field.
10. Choose *Save*.

»	Note: We come back to this entity to identify a Business Rule that triggers display of the field during the onboarding process.

»	Note: The **Personal Data Collection** task of the new hire can also be completed by another user such as the Hiring Manager or Recruiter. This will be part of the list of ***Action*** options for the new hire from the *Onboarding Dashboard*. The user will need to be provided with the role-based permission ***Complete Data Collection Tasks***. This ***Action*** option to ***Complete Personal Data Collection*** task will only appear to the permitted user if this task is also showing on the new hire's To-Do section items from the home page of the system.

Lesson Summary

The goal of this lesson is to get an overview of the Data Models in Onboarding.

You should now be able to:

- Define the Data Model for the onboarding process
- Create Customer HRIS Elements for Onboarding process

- Create a Country Specific Field to be assigned to a Business Rule
- Configure Business Rule for Country Specific Field

Unit Wrap-Up

In this unit, you covered:

- Lesson 3-1 – Configuring the Data Model for Onboarding

You should now be able to:

- Define the Data Model for the onboarding process

Unit 4 – Custom Data Collection

Unit Objectives

This unit contains one lesson:

- Lesson 4 -1 - Configuring the Data Collection Process

Upon completing this unit, you will be able to:

- Configure Custom Onboarding Data Collection Object
- Create a Data Collection Rule

Lesson 4 –1 – Configuring the Data Collection Process

Lesson Overview

The goal of this lesson is to explore the data collection rules and custom objects in Onboarding.

Lesson Objectives

- Configure Custom Onboarding Data Collection Object
- Associate Custom Objects to UI
- Configure UI for Custom Objects
- Create a Data Collection Rule

Manage Onboarding Process

SAP SuccessFactors Onboarding provides options to control various aspects of the onboarding process. One such option is the ability to restart the Onboarding process for a candidate.

Certain fields in the new hire data obtained from Recruiting Management, hold values that can have downstream implications on the system behavior. If any of these field values change before the candidate is hired, the onboarding process must be restarted from the beginning.

Currently, you can configure a trigger event to restart the onboarding process, whenever any of the following field values change.

- Start Date (targetDate in the ONB2Process object)
- Hiring Manager (manager in the ONB2Process object)

In the event of restart to the onboarding process for a new hire,

- The current onboarding process is canceled.

- A new onboarding process is initiated.
- An event is written in the change log, for reporting purposes.
- An email notification is sent to the assigned onboarding participants.
- A short text highlighting the restart to the onboarding process is displayed on the Participant Dashboard.

Data Collection in Onboarding

When you configure your data model for your SAP SuccessFactors implementation, you determine which fields will become part of the employee record. These fields are configured as part of the Succession Data Model, and fields that are mandatory are configured using the Manage Business Configuration tool in the Admin Center.

During the **Onboarding** process, data that was collected from the candidate during the **Recruiting** process is compared against the information required for the employee record. If any information is missing or incorrect, the hiring manager will see a task to review new hire data in the ToDo section from the homepage. Submission of this data triggers the welcome message and onboarding tasks for the new hire.

The first data collection task kicks off when the Provide data for Onboarding tile appears on the new hire's homepage. The new hire then enters any information required for their employee record, as configured on the Succession Data Model. After this information is submitted, if any **Onboarding**-specific fields are configured on the SDM, an additional homepage tile appears and prompts the new hire to enter this information. This data is collected using a custom data object. Typically, this is information used only for **Onboarding** that is not required for the employee record. This can include information like equipment preference, certain office waivers, or other information only needed as part of the **Onboarding** process.

Business Rules

Here is an example for a rule in plain language:

IF…

the company is SAP_USA

AND the employee is eligible for stock

THEN…

the initial stock grant is set to 200.

This is what this rule looks like in the system:

A rule consists of the following parts:

- Information about the rule object itself (Rule ID, Rule Name, Rule Type)
- Objects and fields that determine what can be defined in the rule (defined by Base Object, Manage Parameters)
- IF statement
  You can enter only one IF statement, but you can add multiple conditions in one IF

statement.
You can also add ELSE IF statements (see below).

- THEN statements
  You can add several THEN statements for one rule.
- ELSE statements
  You can add several ELSE statements for one rule. The ELSE statement follows the THEN statement (IF - THEN - ELSE).
- ELSE IF statements
  You can add several ELSE IF statements for one rule. The ELSE IF statement follows the THEN statement.

Note:
When creating a rule, please note that there are restrictions on the characters you can use for the rule ID. Specifically, the rule ID can **only** contain the following:

- Uppercase and lowercase letters
- Digits
- Separators (such as "-" or "_")

In addition to this, the rule ID **cannot** start with "SAP_".

Business Rules for Data Collection Processes in Onboarding

Data collection processes in Onboarding 2.0 are driven by business rules that are configured with a predefined logic. However, you can modify these business rule to include additional conditions as per your business requirements. To configure business rules, go to *Admin Center* → *Configure Business Rules*.

The business rules that drive the data collection processes in Onboarding 2.0 are:

- SAP_ONB2_HMReviewCheck : This business rule is applied to the **Review New Hire Data** step in the onboarding process. The business rule is by default false.
- SAP_ONB2_ECDataCollectionCheck : This business rule is applied to the **Personal Paperwork** step in the onboarding process. The business rule is configured to make **Personal Paperwork** a part of the Onboarding process by default.
- SAP_ONB2_CustomDataCollectionCheck and SAP_ONB2_DataCollectionConfigSelect : This business rule is applied to the **Additional Onboarding Paperwork** step in the onboarding process. The business rule is configured to make **Additional Onboarding Paperwork** a part of the Onboarding process by default.

Hiring Manager Review and Personal Data Collection

New Hires can view the consolidated information collected from Recruiting Management and the hiring manager's update. The new hire provides complete personal information in the personal data collection.

The UI for both hiring manager review and personal data collection reuse the Add New Employee People Profile v3 (PP3) page from Employee Central. Configurations for what appears on the page will be similar to what customers do for Employee Central pages.

Role-based permissions and honoring the Onboarding data model are specific to Onboarding pages. Employee Central pages for hiring a new employee do not honor role-based permissions.

Rules

Hiring Manager Review appears if one of these conditions is satisfied:

- If the data sent from Recruiting Management has any incorrect data or if there is no data sent for mandatory fields. In this instance, the manager would have to validate that all required information is available before the new hire gets to the data collection phase.
- If you have configured a custom rule condition for SAP_ONB2_HMReviewCheck rule, which is satisfied.

> Note: This rule comes with Onboarding with no preconfigured condition.

The Personal Data Collection page appears for the new hire if you have configured a custom rule condition for SAP_ONB2_ECDataCollectionCheck rule, which is satisfied.

> Note: This rule comes with Onboarding with no preconfigured condition.

Onboarding Data Model

The Onboarding data model can be created in *Admin Center* → *Company Settings* → *Manage Business Configuration* for the required entities. The Onboarding data model can only be created if there are certain properties that need to be modified for onboarding users such as:

- Mandatory
- Visibility
- Enabled/Disabled

> Note: If there is no Onboarding data model available for an entity, it defaults to the Employee Central data model.

Permissions

Role-based permissions define what set of fields should be available for the new hire to read or edit. Categories in role-based permissions are:

- *Employee Central Effective Dated Entities*
- *Employee Data*

Roles that define Employee Central field view/edit permissions for the hiring manager may already exist. This role can be updated with certain permissions or used as is.

There is an out of the box external user role that is available with read permissions for all available entities and fields. You can modify this role to provide edit permissions for these fields or revoke existing field permissions.

Creating External User Records in the Application

Data mapping and transformation of new hire data is performed in your API Integration Tool.

Note: While performing data mapping:

- Map the productName value in the payload as ONB.
- It is mandatory to map personal information of the external onboarding user.

1. Create an external user record in the application using the ExternalUser API. For more information about ExternalUser entity, refer to the **Related Information** section.

   The ExternalUser OData API supports Basic as well as OAuth type of authentication. It also supports a few Employee Central entities.

Note: To avoid additional API calls, we recommend you include the optional entities in the API request.

If successful, the API request will add a new external user record in SAP SuccessFactors HCM Suite.

The next step is to associate job and employment related information with the user record.

Configuring Custom Data Collection Objects

Before configuring a custom data collection object, make sure you have the role-based permissions to work with metadata framework. To verify if the permissions are set, go to Admin Center → Manage Permission Roles → Permission... → Administrator Permissions → Metadata Framework.

You can configure the entities listed on the Custom Data Collection page and their respective interfaces using the Metadata Framework and Business Configuration UI respectively.

After configuration, associate the entities with a metadata framework object linked to the ONB2Process object to map them to Onboarding forms.

1. Go to Admin Center → Configure Object Definitions.
2. From the Create New dropdown menu, select the option Object Definition.
3. Enter a name for the custom object in the Code field.

	Hint: Custom object names must begin with the string cust_.

4. Set the API Visibility field to Editable.
5. If you want to associate the custom object with the Onboarding process:
   a) Add a custom field under Fields. Enter the name of the field as cust_userConfig.
   b) Click Details associated with cust_userConfig field.
   c) Set the Data Type as Generic Object.
   d) Enter ONB2DataCollectionUserConfig in the Valid Values Source field.
   e) Click Done.
6. Click Save.

After creating custom data collection object, you can setup the object to work with read audit and change audit functionalities as a part of Data Privacy and Protection. You can also configure your custom object to make it visible to external users in the system.

Creating Business Rule to make External Users Visible in Metadata Framework

1. Go to *Admin Center* → *Configure Object Definitions*.
2. Select a search type as *Object Definition* and enter the name of your custom data collection object in the search field. Open the data collection object by clicking on the search result.
3. From the Take *Action* menu, click *Make Correction*.
4. Click *Details* associated with *mdfSystemExternalUserVisibility* field.
5. Select *Editable* from the dropdown menu for *Visibility*.
6. Click *Done*.
7. Click under *Save Rules*.
   The *Configure Business Rules* page opens in a popup window.
8. Select a rule type as *Basic* and enter a *Rule Name*, *Rule ID* and select a *Start Date*.
9. Enter the custom data collection object name in the *Base Object* field.

10. Click *Continue*.
11. In the business rule configuration page, set the If condition to be *Always True*.
12. Set the *Then* condition as **mdfSystemExternalUserVisibility** to be equal to *Yes*.
13. Click *Save*.
    If saved successfully, the business rule will be created.
14. Select the business rule from the *Save Rules* dropdown menu.
15. Click *Save*.

Associating the Custom Objects to the UserConfig Object

1. Go to *Admin Center* → *Configure Object Definitions*.
2. Select *Object Definition* in the first dropdown.
3. Select *ONB2DataCollectionUserConfig* in the second dropdown.
4. Click *Take Action* → *Make Correction*.
5. Create a new association for the object.
6. For Onboarding custom data collection, set the *Multiplicity* field to **One to One**.
7. In the *Destination Object* field, select the name of the custom object created for Onboarding data collection.
8. Select *Type* dropdown menu, select the *Join By Column* value.
9. Click the *Details* link next to the association.
10. In the *Destination Object Column* enter **cust_userConfig**.
11. Enter **internalid** in the *Source Object Column* field.

Creating Business Rule to make Custom Data Collection Object Visible to External Users

You have configured your custom data collection object to set the value of *mdfSystemExternalUserVisibility* field to *Editable*.

1. Click under *Save Rules* of your data collection object, the *Configure Business Rules* page is opened. The *Rules for MDF Based Objects* scenario is preselected under the *Metadata Framework* category.
2. Select a rule type as *Basic* and enter a *Rule Name*, *Rule ID* and select a *Start Date*.
3. Enter the custom data collection object name in the *Base Object* field.
4. Click *Continue*.
5. In the business rule configuration page:
   a) Configure the *If* condition to be *Always True*.
   b) Configure the *Then* condition to set the value of *mdfSystemExternalUserVisibility* to be *Yes*.
6. Click *Save*.
   A business rule is now created.

Configuring the UI for Custom Data Collection Objects

1. Go to *Admin Center*.
2. In the *Tools Search* field, enter **Manage Configuration UI**. Access the tool by clicking on the search result.
3. Click *Create New*.
4. Provide an *ID*.
5. Select a custom object from the *Select Base Object* dropdown.
   All the available fields for the custom object are displayed.
6. Click next to any of the available fields to add a custom label for the field, or change other attributes about the field display.
7. Click to delete fields.
8. Click *Save*.
   A Configuration UI object is created with the specified ID.

Configuring the UI for Custom Data Collection Objects

Data collection processes in Onboarding 2.0 are driven by business rules that are configured with a predefined logic. However, you can modify these business rule to include additional conditions as per your business requirements. To configure business rules, go to *Admin Center* → *Configure Business Rules*.

The business rules that drive the data collection processes in Onboarding are:

- *SAP_ONB2_HMReviewCheck*: This business rule is applied to the **Review New Hire Data** step in the onboarding process. The business rule is by default false.
- *SAP_ONB2_ECDataCollectionCheck*: This business rule is applied to the **Personal Paperwork** step in the onboarding process. The business rule is configured to make **Personal Paperwork** a part of the Onboarding process by default.
- *SAP_ONB2_CustomDataCollectionCheck and SAP_ONB2_DataCollectionConfigSelect*: This business rule is applied to the **Additional Onboarding Paperwork** step in the onboarding process. The business rule is configured to make **Additional Onboarding Paperwork** a part of the Onboarding process by default.

Making Custom Data Collection Object visible to External Users

External users are new hires who are yet to be converted into internal users. The custom data collection objects that you create are not visible to external users by default. However, you can configure your custom data collection objects and apply business rules to make them visible to external users.

1. Go to *Admin Center* → *Configure Object Definitions*.
2. Select a search type as *Object Definition* and enter the name of your custom data collection object in the search field. Open the data collection object by clicking on the search result.

3. From the *Take Action* menu, click *Make Correction*.
4. Click *Details associated* with *mdfSystemExternalUserVisibility* field.
   The *mdfSystemExternalUserVisibility* field appears after you save the data object for the first time.
5. Select *Editable* from the *Visibility* dropdown.
6. Click *Done*.
7. Click *Save*.
8. From the *Take Action* menu, click *Make Correction*.
9. Create a business rule to make the object visible to external users in the system.
10. Select the newly created business rule from the *Save Rules* dropdown.
11. Click *Save*.
    The custom data collection object is updated with the business rule. The data collection object will now be visible to all external users in the system.

Data Collection Configuration Rule

The Data Collection Configuration rule decides which data collection configuration object should be assigned to the new hire. You can modify this rule and assign any configuration object created in the previous step based on certain conditions.

The ONB_DataCollectionConfig rule is set to Always True and it outputs the DEFAULT_DATA_COLLECTION object. Users can modify the condition based on job location, division, etc., and set the output as required.

The rule is accessible at *Admin Center → Configure Business Rules*.

Configuring the Data Collection Object

This is achieved using the **ONB2DataCollectionConfig** MDF object. This object can hold a list of Configuration UI items that needs to be rendered in the page. You can re-order the entities, add new entities and delete entities.

Out of the box, the default instance of this object with the external code **DEFAULT_DATA_COLLECTION_CONFIG**.

You can create your own meta objects and add the ConfigUI items for each meta as required. The meta to be rendered can be controlled using a rule.

You can create multiple data collection config objects based on your need and you must select them using the rule as per the condition.

To add new entities to the default object:

1. Go to *Admin Center → Employee Files → Manage Data*.
2. Select *ONB2DataCollectionConfig* in the first dropdown and *DEFAULT_DATA_COLLECTION_CONFIG* in the second dropdown.

3. Select *Take Action → Make Correction*.
4. Add custom objects by selection from the available objects in the dropdown menu.
5. Reorder the fields using the arrow icons.
6. Delete fields by clicking the trash can icon.
7. Click *Save*.

> Note:
>
> The **Additional Data Collection** task of the new hire can also be completed by another user such as the Hiring Manager or Recruiter. This will be part of the list of ***Action*** options for the new hire from the *Onboarding Dashboard*. The user will need to be provided with the role-based permission ***Access Additional Onboarding Data Permission***.
>
> This ***Action*** option to ***Complete Additional Data Collection*** task will only appear to the permitted user if this task is also showing on the new hire's To-Do section items from the home page of the system.

Extension Center

After learning from this lesson the general or most basic ways on configuring objects in SAP SuccessFactors which are applicable to most modules, using Extension Center is actually an easier tool to do this. All necessary configurations to creating an extension comprises a series of steps that apply to how you configure and use custom objects in the system. You will also be able to define business rules and even Picklists in Extension Center as well.

Exercise: Create an Extension for Custom Data Collection

The company provides all employees with company shirts, optional access to the company fitness center and optional access to parking space if they plan to use their personal vehicles. For these benefits, they require all new hires to submit necessary details to provide such benefits especial the optional ones. To configure this, we will need to create an extension to collect the data that we need from the new hires.

1. Enter *Picklist Center* on the *Action Search* bar and select *Picklist Center* on the search results.
2. Create the picklists we will need for a new extension we will create for the Onboarding process. Follow the table below for each picklist:

Picklists	Settings	Picklist Items
Shirt Sizes	Code: Shirt_Sizes Name: Shirt Sizes	- Ext Code: SS_Small Label: Small - Ext Code: SS_Medium Label: Medium - Ext Code: SS_Large Label: Large

Picklists	Settings	Picklist Items
	Status: Active Display Order: Custom	
Shirt Color	Code: Shirt_Color Name: Shirt Color Status: Active Display Order: Alphabetical	- Ext Code: SC_NavyBlue Label: Navy Blue - Ext Code: SC_Grey Label: Grey - Ext Code: SC_Red Label: Red - Ext Code: SC_Black Label: Black
Parking Space Needed	Code: Parking_Space Name: Parking Space Status: Active Display Order: Alphabetical	- Ext Code: PS_Yes Label: Yes - Ext Code: PS_No Label: No
Vehicle Type	Code: Vehicle_Type Name: Vehicle Type	- Ext Code: VT_SUV Label: SUV
	Status: Active Display Order: Alphabetical	- Ext Code: VT_MPV Label: MPV - Ext Code: VT_Pickup Label: Pick-up Truck - Ext Code: VT_Sedan Label: Sedan - Ext Code: VT_Compact Label: Compact
Fitness Center Access	Code: Fitness_Center Name: Fitness Center Access	- Ext Code: FCA_Yes Label: Yes - Ext Code: FCA No Label: No
	Status: Active	
	Display Order: Alphabetical	
Fitness Center Schedule	Code: Fitness_Shedule Name: Fitness Center Schedule	- Ext Code: FCS_Morning Label: Morning - Ext Code: FCS Afternoon Label: Afternoon - Ext Code: FCS Evening Label: Evening
	Status: Active	
	Display Order: Alphabetical	

3. Enter *Extension Center* on the *Action Search* bar and select *Extension Center* on the search results.
4. Choose *Create SuccessFactors Extension* to create a new extension.
5. Enter *Employee Benefits* for the *Title* and *EmployeeBenefits* for the *External Code*.
6. Click *Action* and select *Save Extension*.
7. Select *Picklist(s)* tab.
8. Select (+) Add *Existing Picklist* to add all the picklists we created.
9. Select all the picklists you have created: Shirt Sizes, Shirt Color, Vehicle Type, Fitness Center Access
and Fitness Center Schedule.
10. Choose Save to add all the picklist to the new *Employee Benefits* extension.
11. Select the *Objects* tab.
12. Select (+) *Add New Object* to create a new custom object.

13. Enter *Company Shirts* for the label and *CompanyShirts* for the code. You will notice the code add "cust_" to the name because this is a custom object.
    a. Change the *Visibility of externalCode* and *externalName* to *Read Only*.
    b. Switch the *externalCode* to "Not Required."
    c. Select +Add Field.
    d. Enter *userConfig* for the Label and Name of the field.
    e. Select *Generic Object* for the *Data Type*.
    f. Change the *Visibility* of the field to *Not Visible*.
    g. Switch the *userConfig* field to "*Not Required*."
    h. Expand the *Advanced Options* of the *userConfig* field by clicking on the dropdown button beside the delete (trash bin) button.
    i. Select *Onboarding data collection user configuration* for the *Valid Values Source*.
    j. Choose *+Add Field* to add 2 more fields following the details on the tables below:

Settings	**Value**
Label	Shirt Size
Name	cust_ShirtSize
Data Type	Picklist
Visibility	Editable
Required	Yes
Valid Values Source	Shirt_Sizes

Settings	**Value**
Label	Shirt Size
Name	cust_ShirtColor
Data Type	Picklist
Visibility	Editable
Required	Yes
Valid Values Source	Shirt_Color

14. Select *UIs* to create a new UI for the Company Shirts object.
15. Enter *CompanyShirt* for the *ID*.
16. Delete all fields automatically generated based on the Fields defined and leave only the Shirt Size and Shirt Color fields.
17. Select *Save* to save the new UI.
18. Select *Properties* on the left-hand side settings (Under *UIs*).
19. Select *None* for *Effective Dating*.
20. Select *Editable* for API Visibility.
21. Select *Rules>Saving* to create a business rule that will guarantee that the custom object (Company Shirts)

will be visible to new hires (External User).
22. Select +*Add New Rule*.
23. Select *Evaluate* for the rule purpose that will be a pop-up window.
24. Select *Always True* for the “If” expression.
25. Select Set > *mdfSystemExternalUserVisibility* > Yes for the “Then” expression.
26. Choose *Save* to save the new business rule for the Company Shirts custom object.
27. Select *Action* and choose *Save Object* to save the Company Shirts custom object.
28. Choose “Back to:” *Extension* to go back to the main settings of the Employee Benefits extension.
29. Select (+) *Add New Object* to create another new custom object.
30. Enter *Fitness Center* for the label and *FitnessCenter* for the code. You will notice the code add “cust_” to the name because this is a custom object.
    a. Change the *Visibility of externalCode* and *externalName* to *Read Only*.
    b. Switch the *externalCode* to “Not Required.”
    c. Select +*Add Field*.
    d. Enter *userConfig* for the Label and Name of the field.
    e. Select *Generic Object* for the Data Type.
    f. Change the *Visibility* of the field to *Not Visible*.
    g. Switch the userConfig field to “Not Required.”
    h. Expand the *Advanced Options* of the *userConfig* field by clicking on the *dropdown* button beside the delete (trash bin) button.
    i. Select *Onboarding data collection user configuration* for the *Valid Values Source*.
    j. Choose +*Add Field* to add 3 more fields following the details on the tables below:

Settings	Value
Label	Fitness Center Access
Name	cust_FitnessAccess
Data Type	Picklist
Visibility	Editable
Required	No
Valid Values Source	Fitness_Center

Settings	Value
Label	Fitness Center Schedule
Name	cust_FitnessSchedule
Data Type	Picklist
Visibility	Editable
Required	No
Valid Values Source	Fitness_Schedule

Settings	Value
Label	Photo ID
Name	cust_PhotoID
Data Type	Attachment
Visibility	Editable
Required	No

31. Select UIs to create a new UI for the Company Shirts object.
32. Enter *FitnessCenter* for the *ID*.
33. Delete all fields automatically generated based on the Fields defined and leave only the Fitness Center
    Access, Fitness Center Schedule and Photo ID.
34. Select *Save* to save the new UI.
35. Select *Properties* on the left-hand side settings (Under *UIs*).
36. Select *None* for *Effective Dating*.
37. Select *Editable* for API Visibility.
38. Select *Rules* > Saving to create a business rule that will guarantee that the custom object (Fitness Center)
    will be visible to new hires (External User).
39. Select +*Add New Rule*.
40. Select *Evaluate* for the rule purpose that will be a pop-up window.
41. Select *Always True* for the "If" expression.
42. Select *Set* > *mdfSystemExternalUserVisibility* > *Yes* for the "Then" expression.
43. Choose *Save* to save the new business rule for the Fitness Center custom object.
44. Select *Action* and choose *Save* Object to save the Fitness Center custom object.
45. Choose "Back to:" *Extension* to go back to the main settings of the Employee Benefits extension.
46. Select (+) *Add New Object* to create another new custom object.
47. Enter *Parking Space* for the label and *ParkingSpace* for the code. You will notice the code add "cust_"
    to the name because this is a custom object.
    a. Change the *Visibility of externalCode* and *externalName* to *Read Only*.
    b. Switch the *externalCode* to "Not Required."
    c. Select +*Add Field*.
    d. Enter *userConfig* for the Label and Name of the field.
    e. Select *Generic Object* for the Data Type.
    f. Change the *Visibility* of the field to *Not Visible*.
    g. Switch the userConfig field to "Not Required."
    h. Expand the *Advanced Options* of the *userConfig* field by clicking on the *dropdown* button beside
       the delete (trash bin) button.
    i. Select *Onboarding data collection user configuration* for the *Valid Values Source*.

j. Choose +*Add Field* to add 4 more fields following the details on the tables below:

Settings	**Value**
Label	Parking Space
Name	cust_ParkingSpace
Data Type	Picklist
Visibility	Editable
Required	Yes
Valid Values Source	Parking_Space

Settings	**Value**
Label	Vehicle Type
Name	cust_VehicleType
Data Type	Picklist
Visibility	Editable
Required	No
Valid Values Source	Vehicle_Type

Settings	**Value**
Label	Vehicle Brand and Model
Name	cust_VehicleDetails
Data Type	String
Visibility	Editable
Required	No

Settings	**Value**
Label	Vehicle Registration Number
Name	cust_VehicelRegistrationNumber
Data Type	String
Visibility	Editable
Required	No

48. Select *UIs* to create a new UI for the Company Shirts object.
49. Enter *ParkingSpace* for the *ID*.
50. Delete all fields automatically generated based on the Fields defined and leave only the Fitness Center
    Access, Fitness Center Schedule and Photo ID.
51. Select *Save* to save the new UI.
52. Select *Properties* on the left-hand side settings (Under UIs).
53. Select *None* for *Effective Dating*.
54. Select *Editable* for API Visibility.

55. Select *Rules* > *Saving* to create a business rule that will guarantee that the custom object (Parking Space)
    will be visible to new hires (External User).
56. Select +*Add New Rule*.
57. Select *Evaluate* for the rule purpose that will be a pop-up window.
58. Select *Always True* for the “If” expression.
59. Select *Set* > *mdfSystemExternalUserVisibility* > Yes for the “Then” expression.
60. Choose *Save* to save the new business rule for the Parking Space custom object.
61. Select *Action* and choose *Save Object* to save the Parking Space custom object.
62. Choose “Back to:” *Extension* to go back to the main settings of the Employee Benefits extension.
63. Select (+) *Add Existing Object* from the *Objects* tab.
64. Select *SuccessFactors Objects*.
65. Search for *Onboarding* and select *Onboarding data collection user configuration*.
66. Choose *Save* to add the existing Onboarding generic object to the Employee Benefits extension.
67. Select the *ONB2DataCollectionUserConfig* object from the list of objects to open the settings for it.
68. Select *Relationships* to add the details to connecting/linking all custom objects to this generic object for
    collecting custom data in the Onboarding process.
69. Select +*Add Relationship* for each of the custom objects you created by following the tables below:

a. Company Shirts

Settings	**Value**
Label	Company Shirts
Name	cust_CompanyShirts
Data Type	Select > Company Shirts
Visibility	Select > One to One
Required	Select > Join by Column
Advanced Options > Source Object Column	internalId
Advanced Options > Destination Object Column	Cust_userConfig

b. Fitness Center

Settings	**Value**
Label	Company Shirts
Name	cust_FitnessCenter
Data Type	Select > Fitness Center
Visibility	Select > One to One
Required	Select > Join by Column

Settings	Value
Advanced Options > Source Object Column	internalId
Advanced Options > Destination Object Column	Cust_userConfig

c. Parking Space

Settings	Value
Label	Parking Space
Name	cust_ParkingSpace
Data Type	Select > Parking Space
Visibility	Select > One to One
Required	Select > Join by Column
Advanced Options > Source Object Column	internalId
Advanced Options > Destination Object Column	Cust_userConfig

70. Select *Action* and choose *Save Object* to save the generic object.

Lesson Summary

The goal of this lesson is to explore the data collection rules and custom objects in Onboarding.

You should now be able to:

- Configure Custom Onboarding Data Collection Object
- Associate Custom Objects to UI
- Configure UI for Custom Objects
- Create a Data Collection Rule

Unit Wrap-Up

In this unit, you covered:

- Lesson 4 -1 - Configuring the Data Collection Process

You should now be able to:

- Configure Custom Onboarding Data Collection Object
- Create a Data Collection Rule

Unit 5 - The Onboarding Process

Unit Objectives

This unit contains eight lessons:

- Lesson 5–1 – Creating an Onboarding Program in the User Interface
- Lesson 5–2 – Configuring SAP SuccessFactors V3 Home Page for Onboarding
- Lesson 5–3 – Manually adding a new hire into Onboarding
- Lesson 5–4 – Defining the Rehire Process
- Lesson 5–5 – Setting up Internal Hire Process (Crossboarding)
- Lesson 5–6 – Creating Custom Onboarding Processes using Process Variant Manager
- Lesson 5–7 – Restarting Onboarding Processes
- Lesson 5–8 – Using Data Retention Time Management for Onboarding

Upon completing this unit, you will be able to:

- Create Onboarding Program and Tasks
- Configure Onboarding Home Page Tiles
- Add a new hire into Onboarding
- Assign role-based permissions for add new hire tool
- Configure the Check for Rehire
- Assign Permissions to Perform Rehire Verification
- 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
- Identify the Onboarding Process Steps
- Create a Custom Onboarding Process using the Process Variant Manager Tool
- Define a Business Rule for a Process Variant
- Restart Onboarding Processes
- Define Business Rules for Restarting Onboarding Processes
- Create a Date Purge request using Data Retention Time Management

Lesson 5-1 – Creating an Onboarding Program in the User Interface

Lesson Overview

The goal of this lesson is to get equipped with capabilities required to create Onboarding programs and tasks.

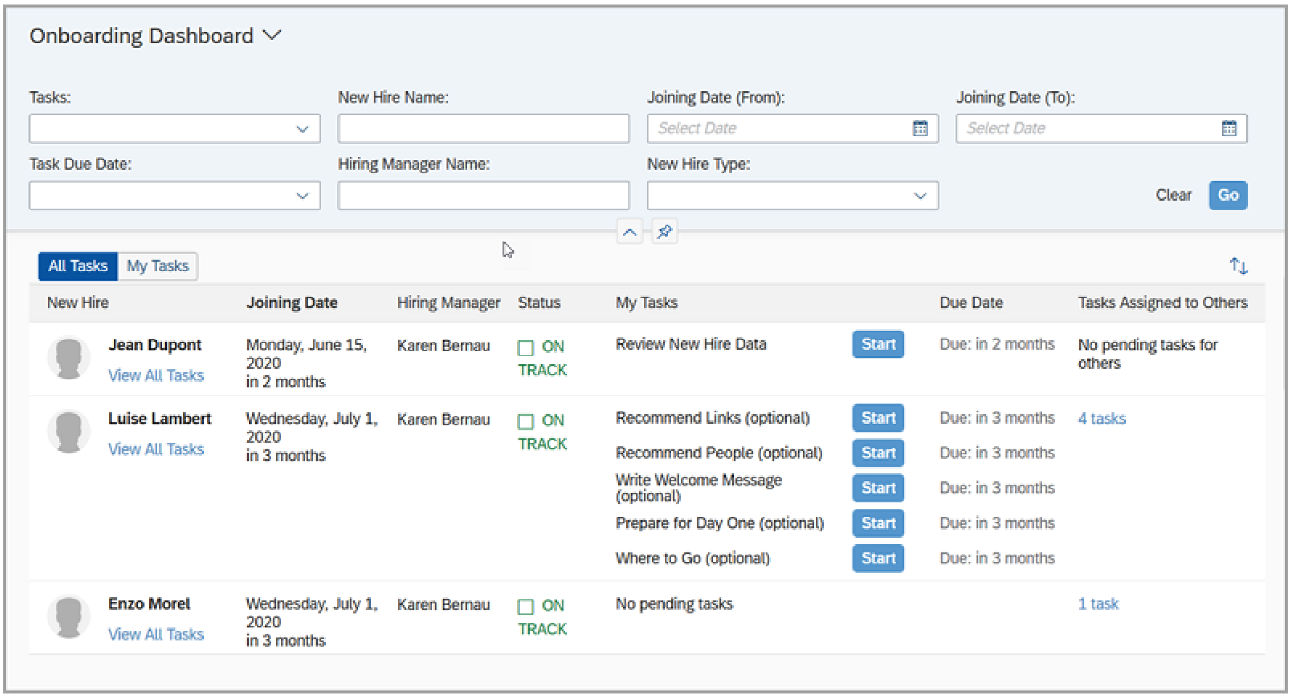
Lesson Objectives

- Create Onboarding Programs and Tasks

Onboarding Tasks

You can set up specific, relevant tasks for your organization and determine responsible groups for the tasks.

The Onboarding Dashboard is the central location for you to efficiently track, manage, and complete onboarding tasks to ensure that everything is prepared for the new hire's first day. Tools, structure, and support are available for the new hire to successfully and quickly assimilate to the new organization and position.



Note:
The Onboarding Dashboard is automatically available when onboarding tasks are configured and no additional configuration is needed in the dashboard.

Pre-requisites are:

- Role-based permissions (RBP) to access new hire task dashboard is necessary.
- Onboarding is initiated from Recruiting Management (RCM) for new hires.
- Goal templates and categories must be set up in *Admin Center → On/Offboarding → Manage Onboarding 2.0 and Offboarding 2.0 Tasks* to use goal integration on the Onboarding Tasks dashboard.

Onboarding Dashboard

With Onboarding Task Dashboard, onboarding participants like recruiters, hiring managers, buddies, onboarding coordinators and HR administrators can efficiently track, manage and complete onboarding tasks. The Onboarding Tasks Dashboard helps you ensure everything is prepared to get new hires up and running, with the right tools, structure and support.

	Note: You require role-based permissions to access the Onboarding Dashboard. Goal Templates and categories must be set-up in Goal Management to use goal integration in the Onboarding Dashboard.

Based on your role-based permissions, you can edit or just view the progress of a given task.

The Onboarding Dashboard is also capable of accommodating flexible role definitions. Your role definition determines the number of onboarding tasks displayed on the Onboarding Task Dashboard. Based upon your role definition, you might track every open onboarding task or nothing at all.

The new Onboarding Task Dashboard is equipped with search capabilities that allow you to filter data based on parameters like:

- Tasks
- Task Due Date
- New Hire Name
- Hiring Manager Name
- Joining Dates (From and To)
- New hire Type

Choose to view all the tasks or the ones just assigned to you.

You can sort the tasks based on:

- Joining Date
- Hew Hire
- Hiring Manager

Creating a Responsible Group

Mandatory onboarding tasks must have a responsibility group assigned. Responsible groups contain onboarding participants who are responsible for completing a given task. A responsibility group can include one to many individuals or roles.

	Note: If a responsibility group is not assigned to a mandatory onboarding task, the Hiring Manager will be considered as the responsible owner by default.

The benefit of assigning a group of users to a task is to ensure the task is completed on time and the progress is user independent.

1. Go to *Admin Center*.
2. In the *Tools Search* section, enter **Manage Onboarding 2.0 and Offboarding 2.0 Tasks**. Click the search result to access the tool.
3. Go to *Task Settings*.
4. Under *Responsible Groups*, click *New Group*.
5. Enter a group *ID* and *Group Name*.
6. To create translated versions of the group name, click *Translations*.
7. Add all users belonging to a particular role by selecting a value from *Role* dropdown. The *User* field is a dropdown menu with a text field, which can be used to manually search and add one to many users to the group.
8. Click *Submit*.

You have created a responsibility group that can be assigned to tasks of onboarding programs available under the *Onboarding Programs* tab.

	Note: Responsibility group assigned to a given task is shown under the *Responsible Group* column of the selected onboarding program. You can edit a task and select a responsibility group from the *Assign To* dropdown menu.

Creating an Equipment Category

You can include a task for ordering or furnishing equipment in your onboarding programs. When your new hires have everything they need to get started on their first day, it projects a positive image, facilitates ramp-up, and limits productivity loss.

By creating equipment categories, you can group specific equipment together to ease equipment selection for users. For example, you may have an equipment category for mobile phones with a list that includes three or four different models.

1. Go to *Admin Center* → *On/Offboarding* → *Manage Onboarding 2.0 and Offboarding 2.0 Tasks* → *Task Settings*.
2. Under *Equipment*, click *New Category*.
   If you have existing equipment categories, you can also edit or delete them.
3. Enter an equipment category *ID* and *Category Name*.
   When you add an equipment task to your onboarding program, both the ID and category name are displayed.
   Equipment categories are generally broad, for example **Laptop** or **Mobile**.

4. Select an equipment icon.

	Hint: You can also *Upload* your own 16x16 icon image in either .jpg or .png format.

5. Add individual items to the category by clicking.

When you add items to the equipment category, they are typically more specific options, for example if the equipment category is **Laptop**, the items might be **PC** or **MacBook**.

6. Enter the *ID* and *Item Name* for each item.
7. To create translated versions of the category or item names, click the corresponding *Translations*.
8. Click *Submit*.

You can add the equipment category to related onboarding tasks. Later, when the responsible party is completing the task, they can select from the items within each category.

Creating a Prepare for Day One List

New hires at different offices or in different positions (data analyst opposed to factory inspector) may need to prepare differently for their first day. Onboarding 2.0 supports your unique business and processes by allowing you to create separate lists to suit the different needs of your new hires. Once you have your lists, you can define your onboarding programs and business rules to display the right list for each new hire. And other onboarding participants, like the manager, can provide supplemental information to the list. For example, they might remind the new hire to wear comfortable shoes for the company campus tour.

1. Go to *Admin Center* → *On/Offboarding* → *Manage Onboarding 2.0 and Offboarding 2.0 Tasks* → *Task Settings.*
2. Under *Prepare for day one lists*, click *New List*.
   If you have existing lists, you can also edit or delete them.
3. Enter an *ID* and *List Name*.
4. To add translated versions of the list name, click *Translations*.
5. To add items to the list, click *Add*.
   Items are free text entry and often include things like a reminder to bring a photo ID, a copy of their offer letter, or even what's considered appropriate work attire.
6. Click *Submit*.
7. Choose which list is *Default*.
   The default list ensures there's always a list assigned for new hires. Most new hires will be assigned a day one list based on business rules. The system assigns the default list to users where no existing rule applies.

Once you have defined your day one lists and your onboarding programs, click *Define Business Rules* to define rules for the **Onboarding 2.0** *Select What-To-Bring Config* scenario.

Exercise: Create a Prepare for Day One List

Business Example

An exciting day for new hires, the first day in a new position may require quite the assortment of items and tasks to be completed. A Prepare for Day One list may be created for different locations, companies, or other business entities. Create a list for the company's US new hires.

On completion of this exercise, you will be able to:

- Configure a Prepare for Day One list
- Configure a business rule for the Prepare for Day One list

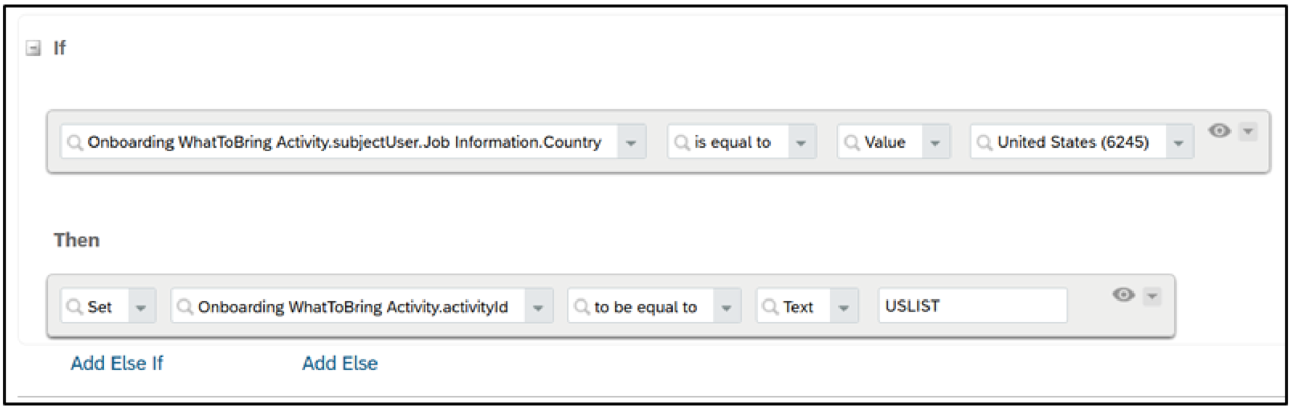
1. Log in to your assigned SAP SuccessFactors instance, as Emily Clark (admin).
2. Navigate to *Admin Center* → *On/Offboarding*.
3. Choose *Manage Onboarding 2.0 and Offboarding 2.0 Tasks.*
4. Choose *Task Settings*.
   a) Navigate to the *List of things to bring*.
   b) Choose + *New List*.
   c) In the *ID*: field, enter **USLIST**.
   d) In the *List Name:* field, enter **US Items to Bring**.
5. Choose + to add a row for each of the following items:
   - Photo ID
   - Automobile Information (Parking)
   - Voided Check and Bank Account Information (Direct Deposit)
   - Social Security Card
   - Birth Certificate
6. Choose *Submit*.
7. Following submission, in the screen that asks you if you want to create a business rule, choose *Setup Business Rule*.
8. The appropriate rule scenario is pre-selected (*Select What-To-Bring Config*). Enter the following business rule parameters and choose *Next*.

Parameter	Value
Rule Name	**ONB_USLIST**
Rule ID	**ONB_USLIST**
Start Date	**01/01/1900**
Description	**Prepare for Day One List for all United States new hires.**

9. In the *If* area of the rule, fill in the rule fields, choose *Onboarding WhatToBring Activity.subjectUser. Job Information.Country* → *is equal to* → *Value* → *United States*. Refer to the figure in the next step.

10. In the Then area of the rule, fill in the rule fields, choose *Set* → *Onboarding WhatToBring Activity.subjectUser.*

Job Information.Country → *to be equal to* → *Text* → *USLIST*. Refer to the following figure.



11. Click *Save*.

Creating a Central Orientation Meeting

1. Go to *Admin Center*.
2. In the *Tools Search* field, enter **Maintain Central Meetings**. Access the tool by clicking the search result.

   The *Central Orientation Meetings* page is displayed.
3. Click + *Add Central Orientation Meeting*.
4. Enter a unique meeting ID in the *ID* field.
5. Enter the meeting subject in the *Meeting Subject* field.
6. Enter the meeting agenda in the *Meeting Agenda* field.
7. Click the to select the start date and time in the *Start Date and Time* field.
8. Click the to select the end date and time in the *End Date and Time* field.
9. Enter the location information for the meeting, including the building name or room if necessary.
10. Click *Submit*.

    A central orientation meeting is now created.

	Note: The meeting details will appear in the *Meetings* tile on the Home Page for new hires and will remain until the start date of the meeting. Post the meeting start date, the corresponding meeting details are removed. However, managers can get historic data about the meetings.

11. All the meeting created are shown on the *Central Orientation Meetings* page. For a given meeting:
    - Click to edit the meeting.
    - To make a copy of the meeting.

	Note: The option to copy a meeting is particularly useful if you wish to create similar meetings with small modifications such as date, time or location. However, you must provide a new meeting *ID*. If you are copying a meeting that has already occurred, then you must provide valid *Start Date and Time* and *End Date and Time* values.

- To delete a meeting.

12. Click *Define Business Rules* to create a rule for assigning a central orientation meeting to new hires.
    On click, *Assign Central Orientation Meeting Rules* page is opened.
13. Click + *Add New Rule*.
    On click, *Configure Business Rules* page is opened. Under the *Onboarding 2.0* scenario, *Assign Central*
    Orientation Meetings rule type is selected by default.
14. Enter a value for *Rule Name*, *Rule ID* and select a *Start Date*.
    The *Rule ID* automatically picks up the value entered in the *Rule Name*. However, it can be changed.
15. Click *Continue*.
16. Configure the rule as per your requirements.
17. Click *Save*.
    A business rule is created with the specified conditions.

Exercise: Create a Central Orientation Meeting

Business Example

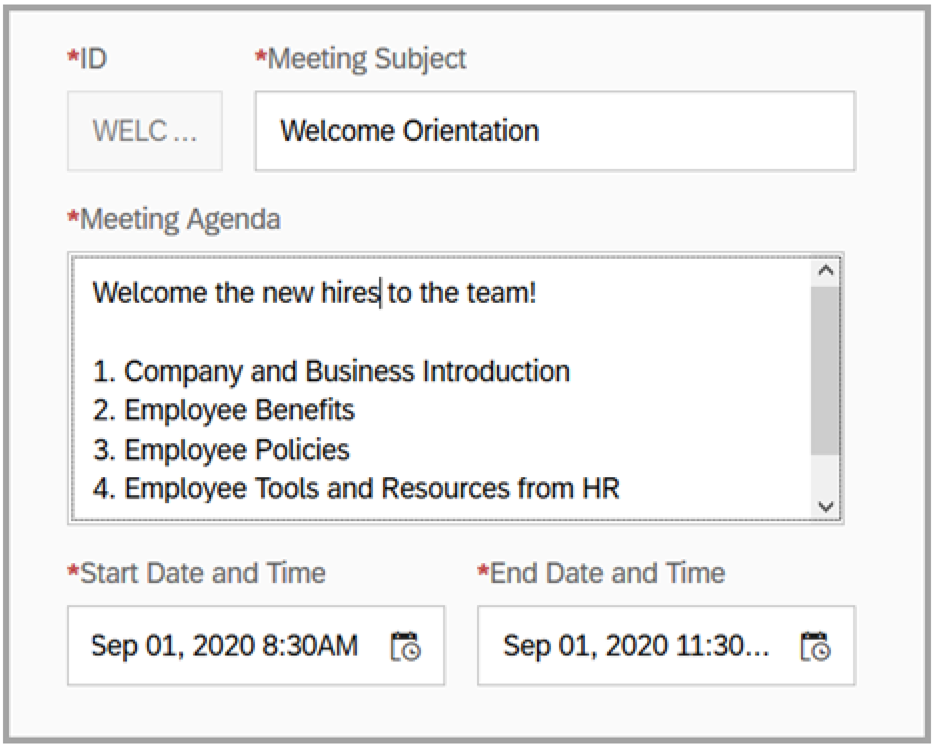
Onboarding allows HR to set up a standardized set of meetings that each new hire must attend. The customer would like to create a meeting for all new hires in the San Mateo (US_SFO) office location to meet with team members in the location's cafeteria. The meeting is only relevant at this location; therefore it require a business rule that you will set up.

On completion of this exercise, you will be able to:

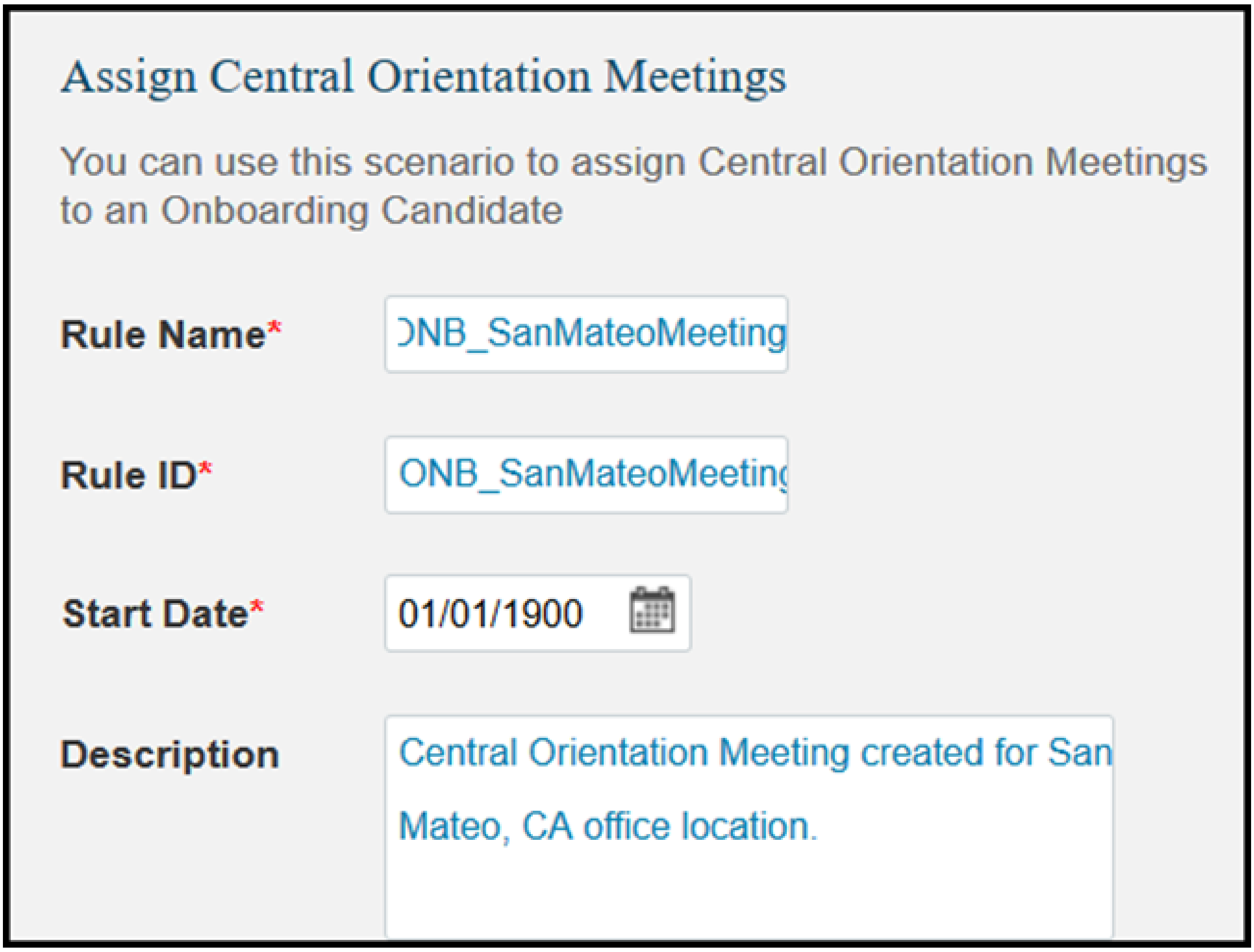
- Create a Central Orientation Meeting
- Configure and assign a Business Rule to the new hire's meeting

1. Log in to your assigned SAP SuccessFactors instance, as Emily Clark (admin).
2. Navigate to *Admin Center* → *On/Offboarding*.

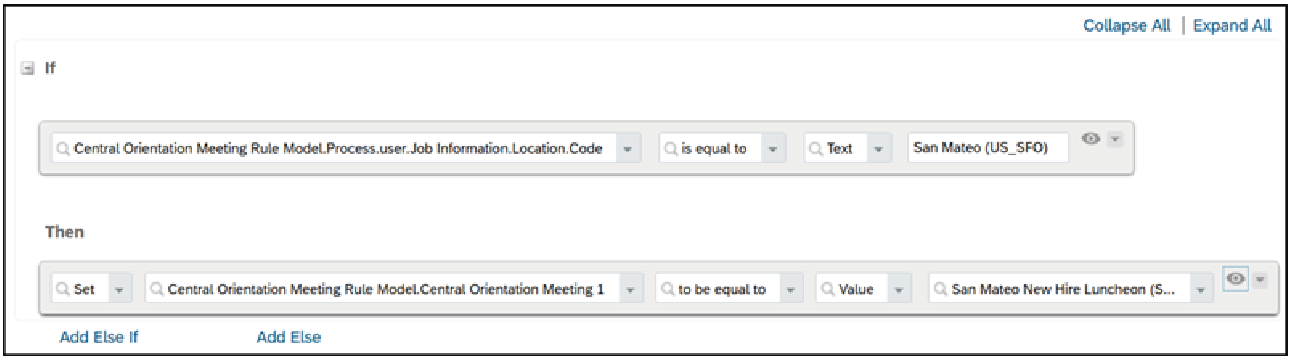
3. Choose *Maintain Central Orientation Meetings*.
4. Choose + *Add Central Orientation Meeting*.
5. Enter the information as shown in the following figure *but replace the schedules with future dates and time*.



6. Choose *Submit*.
7. Navigate back to the *Maintain Central Orientation Meetings* screen.
8. Choose *Define Business Rules*.
9. Click + *Add New Rule*.
10. Notice how the system automatically selects *Onboarding 2.0* → *Assign Central Orientation Meetings* as the scenario.
11. Fill in the information as shown in the following figure.



12. Format the If/Then expression as shown in the following figure.



13. Click *Submit*.

Onboarding Program

1. Configuring the common settings for the onboarding tasks.
2. Creating the onboarding program.
3. Defining tasks to include in the program.

	Note: Each task created as a part of your onboarding program will appear in the Prepare for Hew Hires tile on the Home Page of the involved onboarding participants. However, the owner of a task will see the respective task in the Onboard Hew Hires tile.

4. Defining business rules to control the assignment of the program to a new hire.

Creating an Onboarding Program

- Responsibility groups are defined.
- Goal plans are defined, if you want to include the task of setting goals in the onboarding program.
- *View* and *Edit* permissions to manage onboarding programs.

	Note: To check if you have the permissions, go to Onboarding Admin Object Permissions → Onboarding Program.

Onboarding programs are a collection of new hire tasks. Business rules can be configured to determine which onboarding program should be assigned to a new hire.

1. Go to *Admin Center*.
2. In the *Tools Search* section, enter **Manage Onboarding 2.0 and Offboarding 2.0 Tasks**. Access the tool by clicking on the search result.
   The *Manage Onboarding 2.0 Tasks* configuration page opens and the *Onboarding 2.0 Programs* tab is active.
3. To create a program, click + *New Program*.
4. After defining mandatory program parameters such as the *ID* and *Program Name*, click + *Add Task* and select an onboarding task to add to the program.
5. Define the task attributes that are particular to each task.

Write Welcome Message	Compose a standard welcome message and use tokens (placeholders) to personalize the message for the new hire. You can also create localized versions for the languages configured in your system by clicking.
Assign a Buddy	If the task is set as required, assign it to a responsibility group and set the *Due Date*.

Write Welcome Message	Compose a standard welcome message and use tokens (placeholders) to personalize the message for the new hire. You can also create localized versions for the languages configured in your system by clicking.
Recommend People	If the task is set as required, assign it to a responsibility group and set the *Due Date*.
Recommend Links	To add a link, click .
Checklist	To add an item to the checklist, click .
Schedule Meetings	To add standard meetings to the task, click .
Set Goals	Select a goal plan from the dropdown and enter a due date for each goal category.
Prepare for day one	If the task is set as required, assign it to a responsibility group and set the *Due Date*.
Where to go	If the task is set as required, assign it to a responsibility group and set the *Due Date*.

	Note: If you mark a task as required, you need to assign it to a responsibility group and indicate the *Due Date*. If there is no responsibility group assigned, the Hiring Manager will be considered as the responsible owner of the task by default.

For some tasks, you only get additional options only after you mark the task as required. The type of additional information you can define varies from task to task.

	Note: There are some tasks that require addition of standard content, like the welcome message or checklist. Task owners can still edit the content of the tasks assigned to them. **Example**: The hiring manager can modify the welcome message, add or remove items from the checklist before assigning it to the new hire.

6. After adding the tasks, save the program by clicking *Submit*.
   The newly created program appears on the *Manage Onboarding 2.0 Tasks* page.
7. (Optional) For an existing onboarding program, you can:

	Use this option to edit an existing onboarding program.
	The program *ID* is read-only and cannot be edited.
	Use this option to copy an existing onboarding program.
	Each program requires a unique ID, but the *Program Name* and *Brief Description* are both copied to the new program.
	Changing the name and description of the program is optional. However, it is recommended to provide a distinct name and description of each program.

	Use this option to edit an existing onboarding program.
	Use this option to delete a program.
	You cannot delete programs that are marked as active.

8. Click *Define Business Rules*.

On click, *Configure Business Rules* page is opened. Under the *Onboarding 2.0* scenario, *Select Activities Config* rule type is selected by default.

9. Enter a value for *Rule Name*, *Rule ID* and select a *Start Date*.

The *Rule ID* automatically picks up the value entered in the *Rule Name*. However, it can be changed.

10. Click *Continue*.
11. Configure the rule as per your requirements.
12. Click *Save*.

A business rule is created with the specified conditions.

	Note: There can be only one rule scenario for selecting an onboarding program.

Exercise: Create an Onboarding Program

Business Example

The Onboarding Program consolidates all of the Onboarding Tasks that have been configured into a given process. The customer would like to start with the US Onboarding Program, with plans to add on other countries later. You will create this program.

On completion of this exercise, you will be able to:

- Create an Onboarding Program

1. Log in to your assigned SAP SuccessFactors instance, as Emily Clark (admin).
2. Navigate to *Admin Center* → *On/Offboarding*.
3. Select *Manage Onboarding 2.0 and Offboarding 2.0 Tasks*.
4. Choose + *Add New Program* and enter the information from the following table.

Field	Value
ID	**USONBTASKS**
Program Name	**US Onboarding Program**
Brief Description	**United States Onboarding Program**

5. Click *Submit* to save the onboarding program.

Creating an Onboarding Task Checklist

1. Go to *Admin Center* → *On/Offboarding* → *Manage Onboarding 2.0 and Offboarding 2.0 Tasks*.

2. Under Onboarding Programs, click if you haven't created a program yet.
3. In Manage Program <Program Name>, enter the program ID, Program Name, and Brief Description.
4. Click and select Checklist.
5. In Checklist, click .
6. In Checklist items, provide the checklist item name for each added item.
7. Click if you want to add language translations for each checklist item.
8. In Translations, add language translations as needed and click Done when finished.
9. If necessary, click to remove an item from the checklist.
10. Click Done when you are finished adding items to the checklist.

You have successfully created an onboarding task checklist.

Exercise: Add Tasks to an Onboarding Program

Business Example

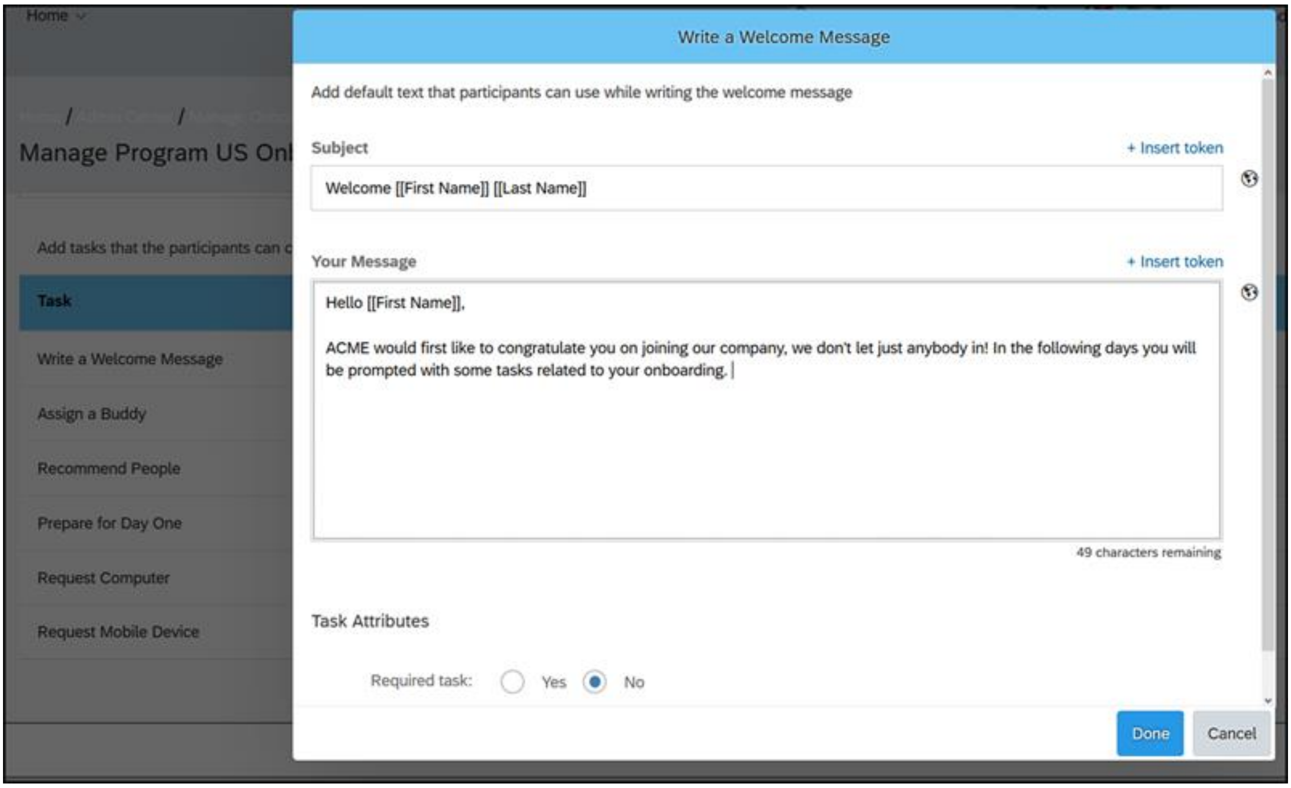
Now that the customer has an Onboarding Program to manage their various tasks, it is time to build out those tasks. Each task added to the list may be modified with default settings, tokens, whether it is required or not, and language translations. The tasks may then be assigned to responsible groups of users that must perform the tasks. You will build out the tasks in this exercise.

On completion of this exercise, you will be able to:

- Add and configure Onboarding Tasks

    1. Log in to your assigned SAP SuccessFactors instance, as Emily Clark (admin).
    2. Navigate to *Admin Center* → *On/Offboarding*.
    3. Choose *Manage Onboarding 2.0 and Offboarding 2.0 Tasks.*
    4. *Click the pencil icon under Actions for the USONBTASKS onboarding program you created in the “Create an Onboarding Program” exercise.*
    5. *Choose + Add Task to add each of the following tasks leaving them all set to* ***No****, not required.*
        - *Write Welcome Message* with some default text
        - *Recommend People*
        - *Assign a Buddy*
        - *Prepare for Day One*
        - *Furnish Equipment* → *Computer*
        - *Furnish Equipment* → *Mobile Device*

The following figure shows an example of the *Write Welcome Message* task.



Lesson Summary

The goal of this lesson is to learn how to create an onboarding program and the onboarding tasks that can be added into it.

You should now be able to:

- Create Onboarding Programs and Tasks

Lesson 5-2 – Configuring SAP SuccessFactors V3 Home Page for Onboarding

Lesson Overview

After completing this lesson, you will be able to:

Lesson Objectives

- Configure Onboarding Home Page Tiles

Home Page Tiles in Onboarding 2.0

In Onboarding, you can manage content that appears on the home page for new hires with the help of tiles. You can use standard tiles or create custom tiles based on your requirements. You can also govern the visibility of tiles to ensure only relevant information is available to new hires.

Home Page tiles are managed using the Manage Home Page configuration tool.

Creating Custom Home Page Tile for New Hires Based on Business Rules

Create business rules under the Show New Hire Onboarding Content rule scenario.

> Note:
> To create a business rule, go to *Admin Center* → *Manage Business Rules*.

Custom Home Page tiles enable you to make relevant content available to new hires based on variables such as work country, locale, start date and so on.

1. Define a custom home page tile.
   For more information about defining a custom home page tile, refer to the **Related Information** section.

> Note: In the *Navigation* step, after selecting the *Rule-based* option:
> a) Select *Show New Hire Onboarding Content* as the *Rule Scenario*.
> b) Select a *Rule* from the dropdown menu.

Based on the rule selected, a tab appears alongside the *Default* tab.

2. Switch to the rule tab and draft the content to be included in the custom tile.
3. Continue through the rest of the settings and create the custom tile.

Managing Home Page Tiles for New Hires

You can assign an onboarding program, assign permissions, and configure default home page settings to manage the tiles shown to new hires on their Home page.

1. Go to *Admin Center*.
2. In the *Tools Search* field, enter **Manage Home Page**. Access the tool by clicking on the search result.
   The *Manage Home Page* tool appears. Under the *Default* tab, all the sections with corresponding tiles are listed.
3. Go to the *Onboarding2* section.
   a. Click to get information about a tile.
   b. Click to adjust Active Dates for a tile.

> Note: By default, active dates for most tiles are set to 30 days before and after the user's start date.

c. Click on the Select Section dropdown if you want to move a given tile to another section.
d. Choose an option from the Move To dropdown.
i. Select Tile Catalog, if you want new hires to have the option to add the tile on their own.
ii. Select Not Used, if you don't want to use the tile on the home page at all.
e. Set a value for the Removable by User switch for each tile.
i. If set to Yes, new hires can add or remove the selected tile from their Home Page.
ii. If set to No, new hires cannot remove the selected tile from their Home Page.

4. Click *Preview* to validate the changes, if any.
5. Click *Save* to commit the changes, if any.

The default content of the home page and tile catalog is updated.

Lesson Summary

The goal of this lesson is to understand how the Onboarding(2.0) Tiles appear on the SAP SuccessFactors home page and configure them for the onboarding participants and new hires.

You should now be able to:

- Configure Onboarding Home Page Tiles

Lesson 5-3 – Manually adding a new hire into Onboarding

Lesson Overview

After completing this lesson, you will be able to add a new hire into Onboarding.

Lesson Objectives

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

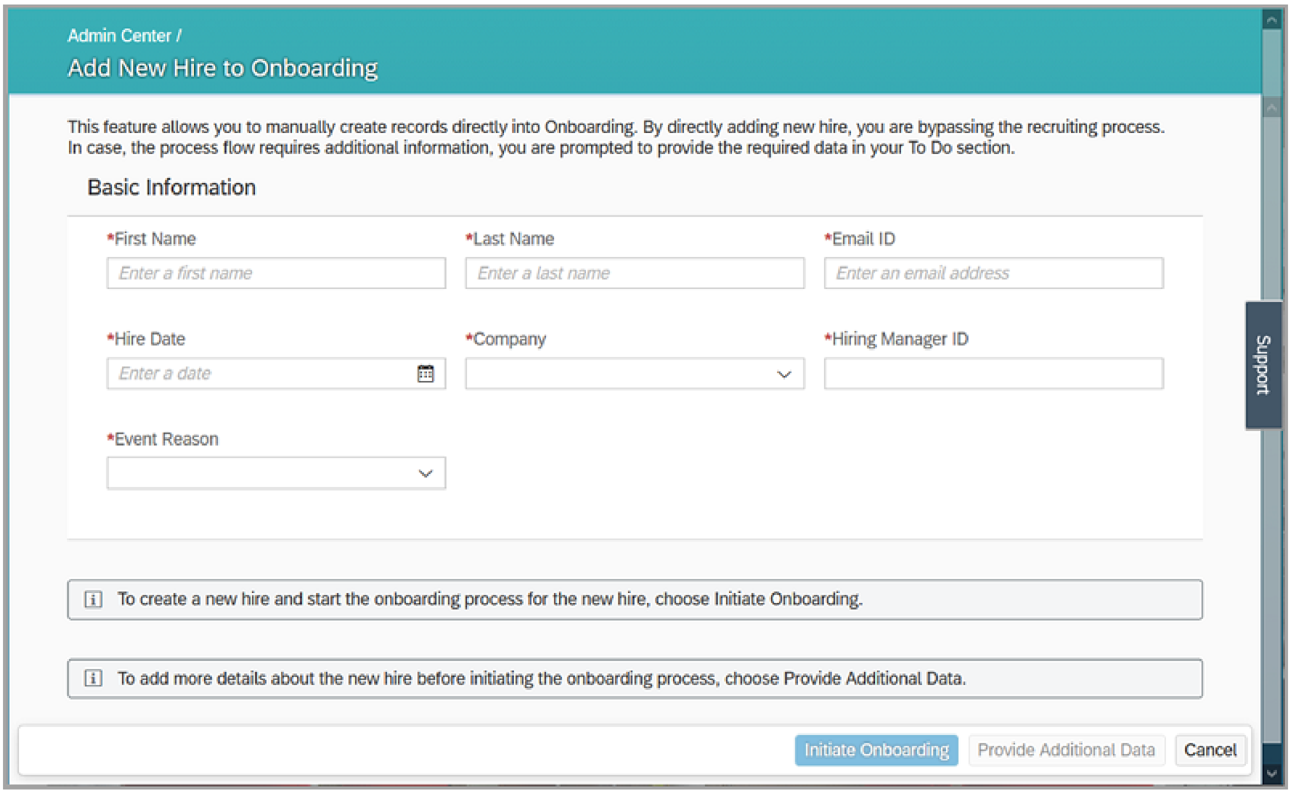
Add New Hire to Onboarding

When new hire data isn’t present in the recruiting system or when you simply need to manually onboard new hires because the standard recruiting process does not apply, you can initiate the onboarding process manually.
This is the reason why Onboarding has the feature that allows you to add a new hire directly into it. Some example scenarios include:

- Onboarding in companies that don't use a recruiting system

- The hiring of a high-level executive that doesn't follow usual recruiting process to ensure confidentiality
- Employees returning from a sabbatical

The same principle applies as when you add a new employee in Employee Central or simply add a new user in SAP SuccessFactors without Employee Central. The main difference is you are initiating the Onboarding process as you are adding the new hire directly to it.



Procedure – Add a New Hire to Onboarding

1. Search for *Add New Hire to Onboarding* on the *Action Search* bar.
2. Select *Add New Hire to Onboarding* from the search results and the *Add New Hire to Onboarding* page opens.
3. Complete the *Basic Information* required for the new hire. You have the option to add more information using the *Provide Additional Data* option.
4. Select Initiate *Onboarding*.

For a user such as the recruiter to have access to add a new hire into Onboarding 2.0, the role-based permission *Initiate Onboarding API Permission*. This is one of the permissions from the category *Manage Onboarding 2.0 or Offboarding 2.0* under *Administrator Permissions*.

Exercise: Assign Permission to Add New Hire to Onboarding

Business Example

The recruiters and the administrator need to have access to add a new hire directly into Onboarding and initiate the onboarding process. We need to assign them the permission to do this task.

1. Search for *Manage Permission Roles* on the *Action Search* bar.
2. Select *Manage Permission Roles* from the search results and the *Manage Permission Roles* page opens.
3. Select your *Recruiter* role.
4. Click *Permission*… to open the *Permission settings* page.
5. Select *Manage Onboarding 2.0 and Offboarding 2.0* category under *Administrator Permissions*.
6. Select *Initiate Onboarding API Permission*.
7. Select *Done*.
8. Select *Save Changes*.
9. Repeat steps 4 to 8 for your *Onboarding Administrator* role.

You just assigned the access for the Onboarding Administrator and Recruiter to add new hires to Onboarding.

Lesson Summary

After completing this lesson, you will be able to add a new hire into Onboarding.

You should now be able to:

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

Lesson 5-4 – Defining the Rehire Process

Lesson Overview

After completing this lesson, you will be able to:

Lesson Objectives

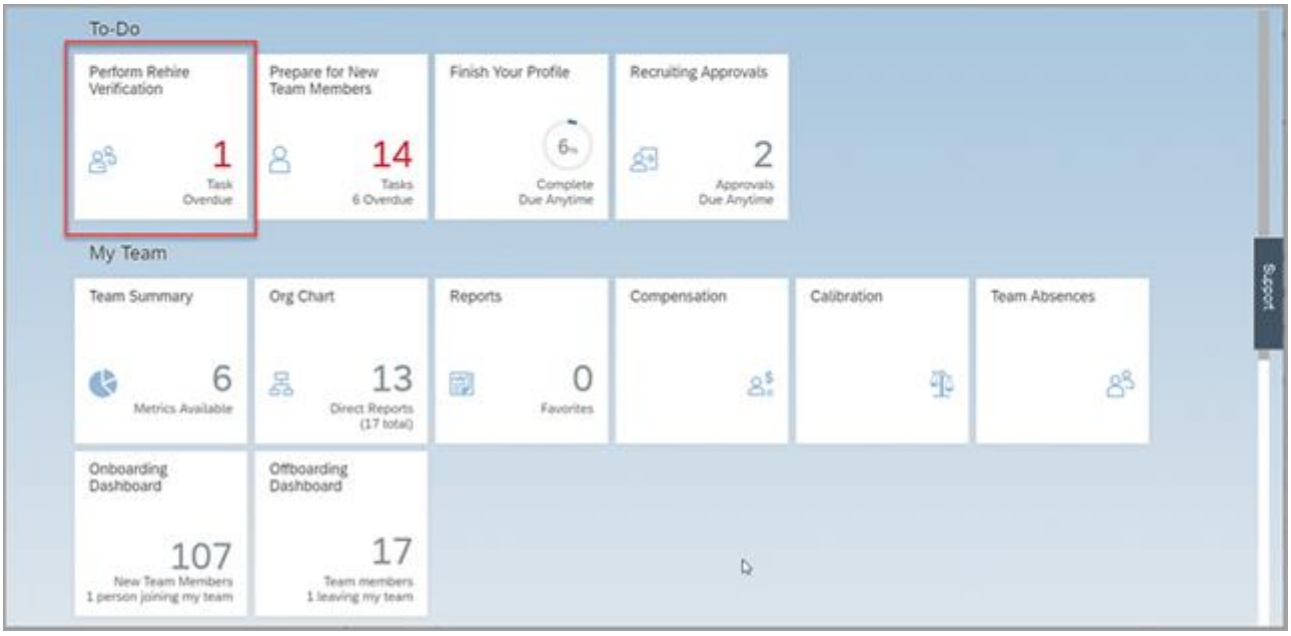
- Configure the Check for Rehire
- Assign Permissions to Perform Rehire Verification

Rehire Process with Onboarding

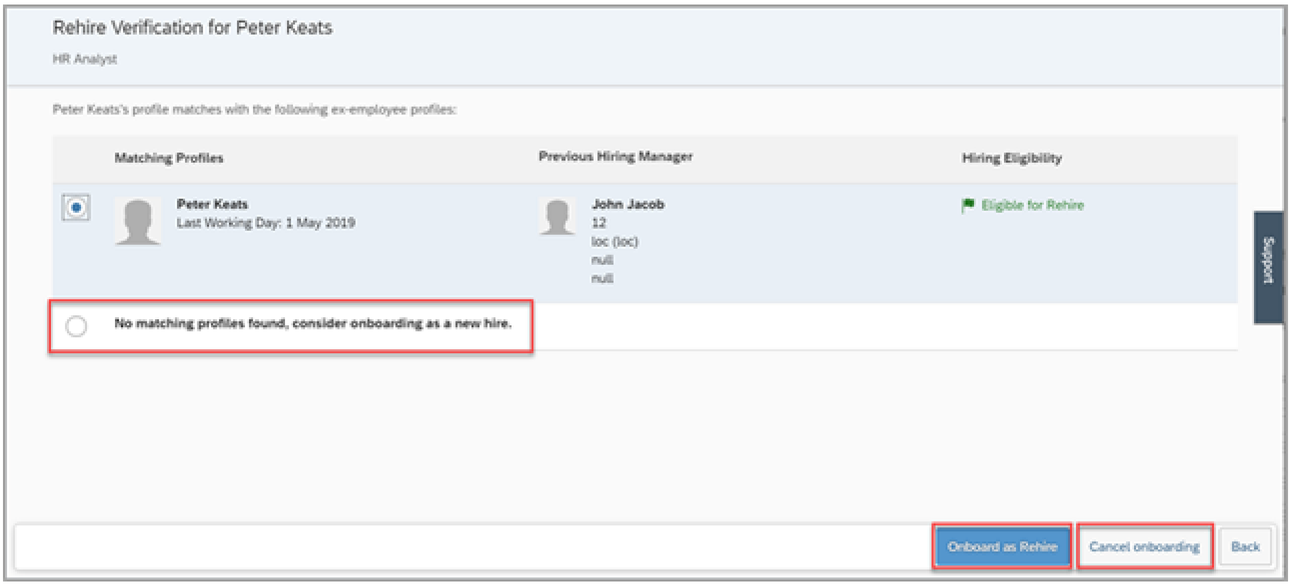
SAP SuccessFactors Onboarding 2.0 uses the existing Hire/Rehire Configuration in the SAP SuccessFactors system for the onboarding process. Using this feature, it allows Onboarding 2.0 to detect information from inactive employees in the system that may match incoming new hires' information. There are currently 5 Rehire conditions in the Hire/Rehire Configuration:

- Enable search for employees using first name and last name
- Enable search for employees using first name and date of birth
- Enable search for employees using last name and date of birth
- Enable search for employees using first name, last name, and date of birth
- Enable search for employees using national ID

When any of these conditions is enabled and one of these conditions is detected with the rehire check, Onboarding will trigger the Perform Rehire Verification process. This will enable it as a To-Do tile on the home page that appears like a separate Onboarding task. This will allow a user/participant (given the permission to perform the Rehire Verification) to decide if the upcoming new hire in Onboarding is going to be a New Hire, Rehire or if the onboarding process needs to be cancelled for the new hire.



This shows the Perform Rehire Verification tile from the To-Do section in the home page.



This shows the matching inactive records detected in the system based on the Hire/Rehire Configuration conditions and allows you to select the next action.

IMPORTANT NOTE:

There are **2 rehire checks** done in Onboarding:
- When Onboarding is initiated
- When Personal Data Collection step is completed

Procedure - To Configure the Check for Rehire

To configure the Check for Rehire, we need to modify the Hire/Rehire Configuration generic obect in the system.

1. Enter *Manage Data* on the *Action Search* bar.
2. Select *Manage Data* from the search results and the *Manage Data* page should open.
3. Enter **Hire/Rehire Configuration** on the *Create New* field and select *Hire/Rehire Configuration* on the results.
4. Enter a code and identify which conditions you want enabled by choosing *Yes*.
5. Choose *Save* to create the new Hire/Rehire Configuration.

Permission: Rehire Inactive Employee with New Employment

In order for an onboarding participant (such as the hiring manager and recruiter) to perform the **Rehire Verification** task when the system detects a matching record/profile from inactive employees in the system, they will need the specific permission for this action/task. The permission is called Rehire Inactive Employee with New Employment.

An additional task we need to perform is to create a new Permission Group for this permission for Onboarding. We must create a group called

“**SAP_ONB2_RehireCoordinator**” and add all onboarding participants/users who will be performing the rehire verification task to this group.

Procedure - Create the SAP_ONB2_RehireCoordinator Group and Assign Rehire Verification Permission

To provide an onboarding participant the access to execute the rehire verification task, we need to assign Rehire Inactive Employee with New Employment permission.

1. Enter *Manage Permission Groups* on the *Action Search* bar.
2. Select *Manage Permission Groups* from the search results and the *Manage Permission Groups* page should open.
3. Choose + *Create New* to create a new permission group.
4. Enter **SAP_ONB2_RehireCoordinator** for the *Group Name*.
5. Add the users or onboarding participants under *Choose Group Members*.
6. Choose *Done* to create the *SAP_ONB2_RehireCoordinator* group.
7. Enter *Manage Permission Roles* on the *Action Search* bar.
8. Select *Manage Permission Roles* from the search results and the *Permission Role List* page should open.
9. Choose + *Create New* to create a new permission role.
10. Enter a name for the role with which you will be assigning rehire verification permission.
11. Choose *Permission…*.
12. Select *Rehire Inactive Employee with New Employment under Administrator Permissions > Manage User*.
13. Choose *Done*.
14. Grant the role to the *SAP_ONB2_RehireCoordinator* permission group.
15. Choose *Save Changes* to create the new role and assign it to the SAP_ONB2_RehireCoordinator permission group.

Lesson Summary

The goal of this lesson is to configure the rehire feature in Onboarding.

You should now be able to:

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

Lesson 5-5 – Setting up Internal Hire Process (Crossboarding)

Lesson Overview

After completing this lesson, you will be able to:

Lesson Objectives

- 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

Internal Hire Process

Internal Hire process enables you to provide internal employees an opportunity to seek other roles within your organization that best suit their capabilities. This initiative provides career growth opportunities to existing resources with the right skill and talent, and explore ways in which they can positively impact your organization.

The intent of Internal Hire process is to create an atmosphere conducive for employees to blend in with their new role, team and management. By doing so, you can help them to be productive quickly and lower the rate of attrition as well.

When an internal employee assumes a new role, there may be a requirement to onboard the employee because of a change to their job or compensation plan, management and so on. You can initiate a fresh onboarding process by configuring your application to monitor transfer events occurring because of job information changes to an employee's profile.

There are prerequisites for a successful internal hire process implementation and the process can be initiated from Employee Central, Recruiting Management or an External Applicant Tracking System.

Prerequisites for Internal Hire Process in Onboarding

For a successful implementation of the Internal Hire process, certain prerequisites must be met.

Configure Notifications for Internal Hire Process

Notifications can keep all onboarding participants updated with relevant information to the different stages of the internal hire process. A set of notifications configured specifically for the Internal Hire process will be more manageable as you separate them from the main onboarding process. There is one preconfigured email template for crossboarding in the system but you can also create new email templates by either copying existing onboarding email templates or creating brand new ones.

Configure a Business Rule to Initiate the Internal Hire Process

After a transfer event is triggered due to a change in the job information of an employee, a business rule needs to be configured to evaluate if the Internal Hire Process should be initiated for the respective employee.

Procedure - To Configure Notifications for Internal Hire Process

Onboarding provides a preconfigured email template to handle notifications related to the Internal Hire Process. However, you must configure the email category of the email template to define recipient information.

1. Enter *Email Services* on the *Action Search* bar.
2. Select *Email Services* from the search results and the *Email Services* page opens.
3. Under *Active Templates* tab, verify if *(ONB) Crossboarding - User Welcome Message Template* is present in the list. This should be present as we have added all templates related to Onboarding from a previous exercise. If the email template is missing, add it to active templates by using *Manage Template*.
4. Switch to the *Email Categories* tab.
5. Select *(Edit)* beside the *(ONB) Crossboarding - User Welcome Message Category*. The email category opens up in edit mode. Verify the details below are selected:

Field	**Value**
To Recipient Builder	Onboarding Simplify Role Based Recipient Builder
Roles	New hire

6. Save your settings by selecting Save.

Procedure - To Configure a Business Rule to Initiate Internal Hire Process

If a change to the job information of an employee has resulted in a transfer event, there can be various reasons for it. A business rule will help determine which employees will need to go through the internal hire process.

1. Enter Configure Business Rules on the Action Search bar.
2. Select Configure Business Rules on the search result below it.
3. Enter Initiate *Internal Hire Configuration* on the Scenario field and select *Initiate Internal Hire Configuration (InitiateInternalHireConfigRule).*
4. Click on Go. The preconfigured business rule *ONB2_InternalHire_Configuration* should display.
5. Click on the rule name *ONB2_InternalHire_Configuration* and the configuration details of the business rule will display.
6. Point to *Take Action* and select *Make Correction*.
7. Modify the business rule based on your requirement.
8. Click on *Save* to save the business rule.

Prerequisites for Initiating Internal Hire Process from Employee Central

To initiate internal hiring process for an employee, the profile of the respective employee must be updated with a job or compensation specific information that results in the occurrence of a transfer event.

The profile of an employee holds all the information related to their job, compensation, job relationships and so on. When an internal employee pursues another opportunity within the organization, the current manager or the HR Representative should update the profile of the respective employee to initiate a transfer event.

Prerequisites

- The employee transfer event should be configured in the system.
- A business rule is configured to evaluate the transfer event if it is necessary to initiate the internal hire process.

> Transfer events are created only for changes made to the job or compensation information of an employee.

Procedure - To Configure an Employee Transfer Event

1. Download Rules from SuccessStore.
2. Adjust the *IF* condition as necessary using Configure Business Rules.
3. Update *Succession Data Model* using the *Business Configuration UI*.
4. Configure the *PostSave Trigger* on the Job Info.

Procedure - To Initiate Internal Hire Process from SAP SuccessFactors Employee Central

To initiate the internal hire process, we must update/change job or compensation information for an employee.

1. Proxy as a manager in the system.
2. In the Search for actions or People field (or Action Search bar), enter the ID or name of the employee whose job information you wish to update/change. Click on the name of the employee on the search result to open the employee's profile.
3. Click on Actions and select Change Job and Compensation Info.
4. Under Choosewhat you want to change, select Job Relationships or Compensation Info, as applicable.
5. Select a date on the When would you like your changes to take effect?.
6. Select Transfer from the Event drop-down.
7. Update the employee profile with information related to the new job or the associated compensation.
8. Click Save.

Prerequisites for Initiating Internal Hire Process from SAP SuccessFactors Recruiting Management

Onboard existing employees pursuing a new role within the organization by initiating the internal hire process from the Recruiting Management module of SAP SuccessFactors.

Once Onboarding internal hire process is initiated, the system procures the existing user ID of the internal hire. Based on the existing user ID, employee data is fetched from the recruiting module and validated against the employee data model.

Prerequisites

- Recruit to Hire mapping should be in sync with the employee data model.
- A business rule is configured to evaluate conditions to initiate the internal hire process as per the business requirement.
- Employee transfer event is configured the system.

Procedure - To Initiate Internal Hire Process from SAP SuccessFactors Recruiting Management

1. Update the internal employee record and create a transfer event using the EmpJob API. If successful, the employee profile is updated and an employee transfer event is created.
2. (Optional) Update the user record with additional information by choosing from a comprehensive list of Employee Central entities.

Prerequisites for Initiating Internal Hire Process from an External Applicant Tracking System (ATS)

Onboard existing employees pursuing a new role within the organization by initiating the internal hire process from an External Applicant Tracking System (ATS). Internal Hire process is initiated based on the conditions specified in the business rule.

Prerequisites

- Ensure that data mapping to convert the data from the external Application Tracking System into the format required by the API is done in your API Integration Tool.
- A business rule is configured to evaluate conditions to initiate the internal hire process as per the business requirement.
- Employee transfer event is configured the system.

Procedure - To Initiate Internal Hire Process from an External Applicant Tracking System (ATS)

1. Update the internal employee record and create a transfer event using the EmpJob API.
2. (Optional) Update the user record with additional information by choosing from a comprehensive list of Employee Central entities.

Internal Hire process is initiated subject to the conditions specified in the business rule.

»	The ID and Name attributes in the employee record will remain the same.

Lesson Summary

You should now 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 5-6 – Restarting Onboarding Processes

Lesson Overview

After completing this lesson, you will be able to:

Lesson Objectives

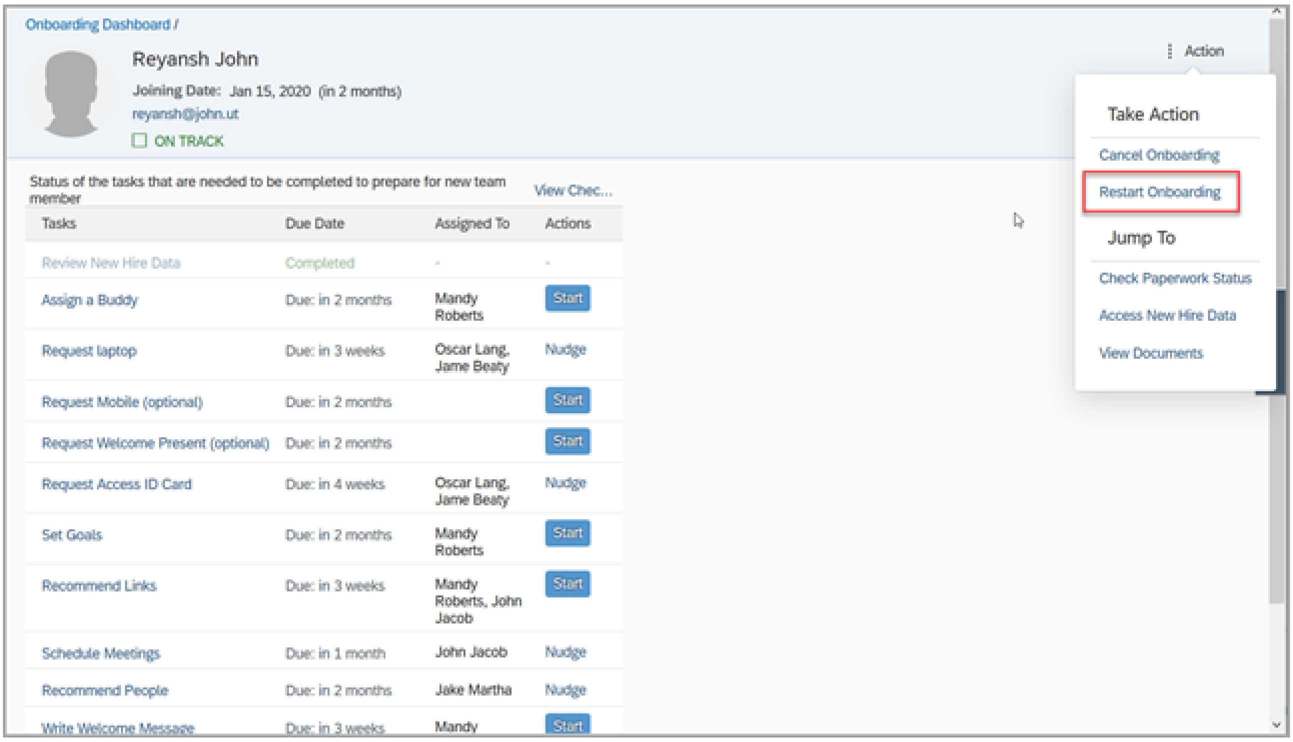
- Restart Onboarding Processes
- Define Business Rules for Restarting Onboarding Processes

Restart Onboarding Process

With Onboarding, you can restart the onboarding process for a candidate if there is a change in new hire data before the candidate gets hired. You can restart the onboarding process manually or you can configure the system to trigger an automatic restart of the process.

Manual Restart

You can manually restart the Onboarding process if there is an incorrect data set and if an unhandled error occurs, and you need to overcome this error. You can manually restart the Offboarding process if the Termination date gets changed.



Automatic Restart

When you initiate the Onboarding process, you pass new hire data from your recruiting system to Onboarding. If the value of certain variables in the new hire data change before the candidate is hired, the onboarding process must be restarted to accommodate the implications on the system behavior.

Currently, you can configure a trigger event to restart the Onboarding process, whenever the value changes for any of the following variables.

- Start Date (targetDate in the *ONB2Process object*)
- Hiring Manager (manager in the *ONB2Process object*)

System behavior when an onboarding restart is triggered for a new hire:

- The current Onboarding process is cancelled.
- A new onboarding process is initiated.
- An event is written in the change log, for reporting purposes.
- An email notification is sent to the assigned onboarding participants.
- A short text highlighting the restart to the Onboarding process is displayed on the participants Dashboard.

Creating and Defining a Business Rule for Automatically Restarting Onboarding Processes

To configure Onboarding to handle an event to restart the onboarding process, you must create a business rule to apply on the *ONB2Process* object definition.

Procedure - To Define a Business Rule for Automatically Restarting Onboarding Processes

1. Enter *Configure Object Definitions* from the *Action Search* bar.
2. Select *Configure Object Definitions* from the search results and the *Configure Object Definitions* page opens.
3. Select *Object Definition* from the *Search* dropdown.
4. Select *Process* from the object definitions or next dropdown.
5. Select *Take Action* then *Make Correction* to modify the Process(ONB2Process) object.
6. Select +(Add Rule) under the Post Save Rules of the Process(*ONB2Process*) object. The Configure Business Rules page is opened. The *Rules* for *MDF Based Objects* scenario is preselected under the *Metadata Framework category.*
7. Enter a *Rule Name* and *ID*. You can also modify the default *Start Date*.
8. Select *Process* for the *Base Object*.
9. Select *Initialize* for the *Purpose*.
10. Define the conditions for the rule.
11. Select *Save* to create the new business rule.
12. Select *Save* to save the corrections on the Process(ONB2Process) object.

Notifications for Onboarding Restart Process

You must configure notifications to inform the involved onboarding participants whenever the onboarding process is restarted because of changes in new hire data. There is an existing email template for the restart process *((ONB) New Team Member Workflow Restarted Message Template).*

Apart from modifying the message on the notification, you must configure the email category of the template to define recipient information. The email category is called *(ONB) New Team Member Workflow Restarted Category.*

Lesson Summary

You should now be able to:

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

Lesson 5-7 – Creating Custom Onboarding Processes using Process Variant Manager

Lesson Overview

After completing this lesson, you will be able to:

Lesson Objectives

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

Process Variant Manager

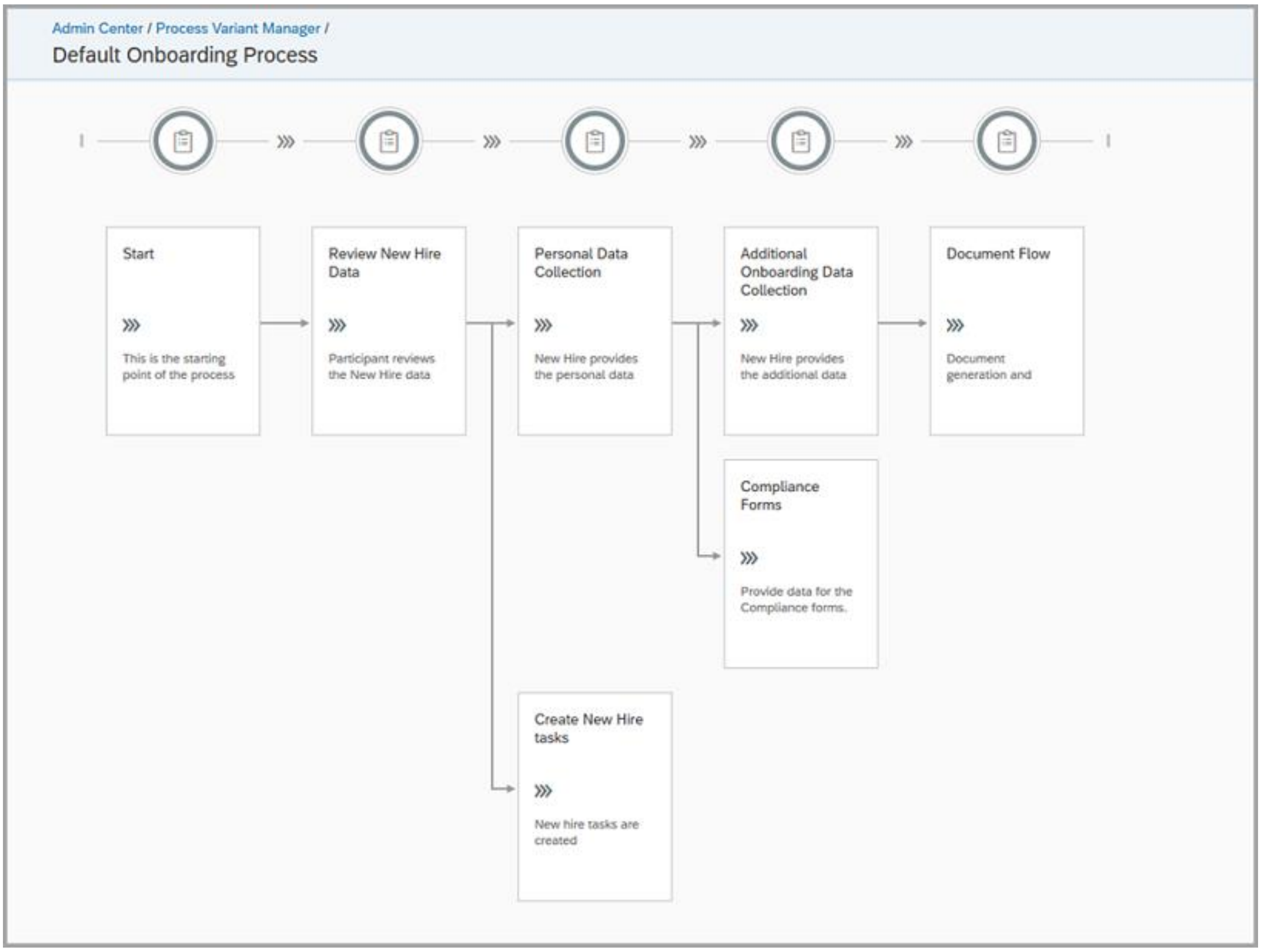
The Process Variant Manager tool adds flexibility into the standard onboarding and offboarding processes. You can use this functionality to create business processes that better fit your business requirements. You can also modify your existing processes.

In order to access the Process Variant Manager in Admin Center, you need to have permission to *Administrate Onboarding 2.0 or Offboarding 2.0 content*. This can be granted from the Role-Based Permission category *Manage Onboarding 2.0 or Offboarding 2.0.*

From the Process Variant Manager page, you can view all the default existing processes for Onboarding, Crossboarding, and Offboarding. You can also add new processes, manage the process flows, and define the business rules for the processes.

Onboarding Standard Processes

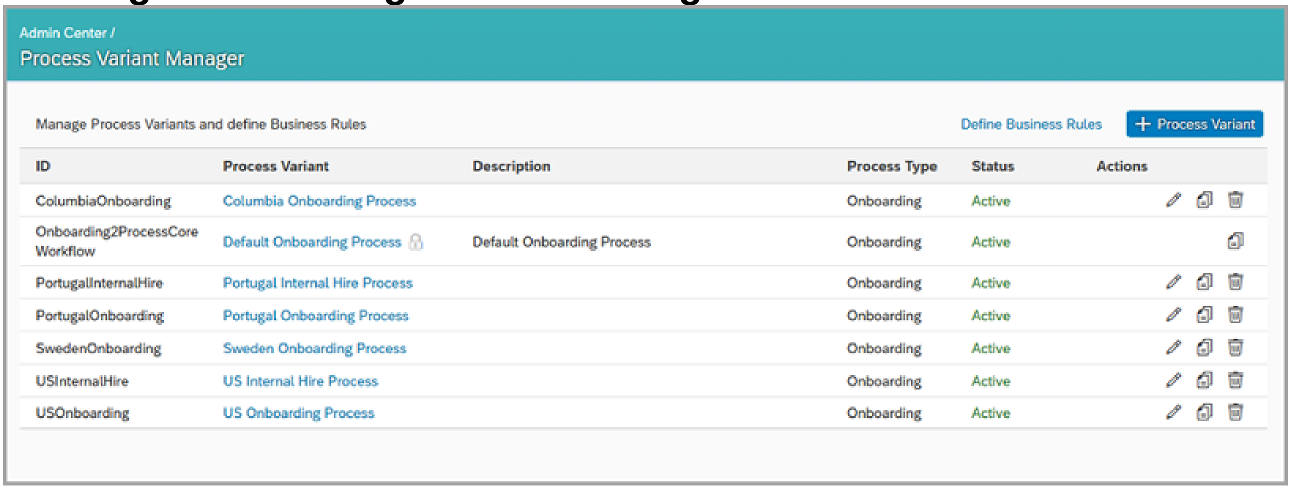
Before you start creating new processes using the Process Variant Manager Tool, we need to understand what steps we have in the Onboarding standard process because these will be the steps you can add to a new process created before making any other modifications to it.

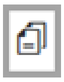


Onboarding Process Standard Steps

- **Review New Hire Data -** This is the first step in the process. In this step, the hiring manager or HR verifies the personal information.
- **New Hire Tasks** - This step is initiated by the hiring manager. This step is executed in parallel to the *Review New Hire Data* step.
- **Personal Data Collection -** In this step, the new hire provides the personal data. This step is executed after the *Review New Hire Data* step.
- **Onboarding Data Collection -** In this step, the new hire provides the data specific to the Onboarding process only.
- **Compliance Forms -** In this step, you can complete the compliance tasks assigned to you. You can add this block after the Review New Hire Data or Additional Onboarding Data Collection steps. Compliance is an independent process and hence you cannot configure any other Onboarding blocks after this block.
- **Document Flow** - In this step, a document gets generated and as per configuration, if this document requires signatures from the hiring manager and the new hire, it is sent to the Signature step.

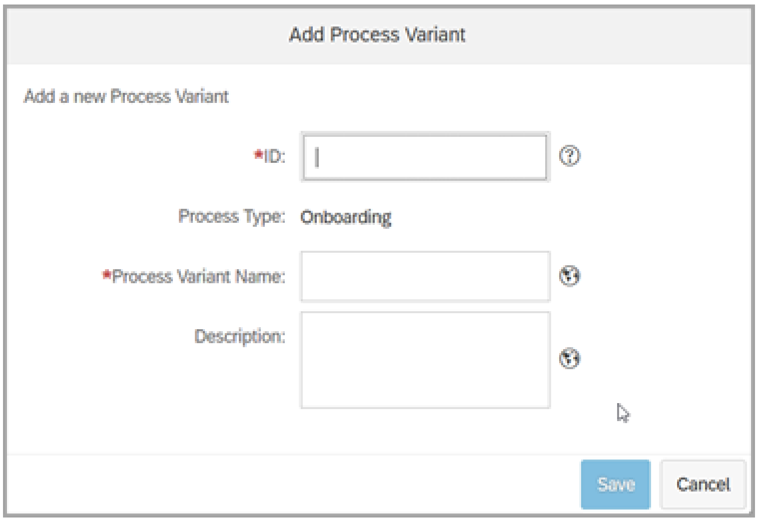
Cloning and Creating an Onboarding Process



You have the ability to clone a process using the  Copy option and create a brand new Onboarding process using the + *Process Variant* button.

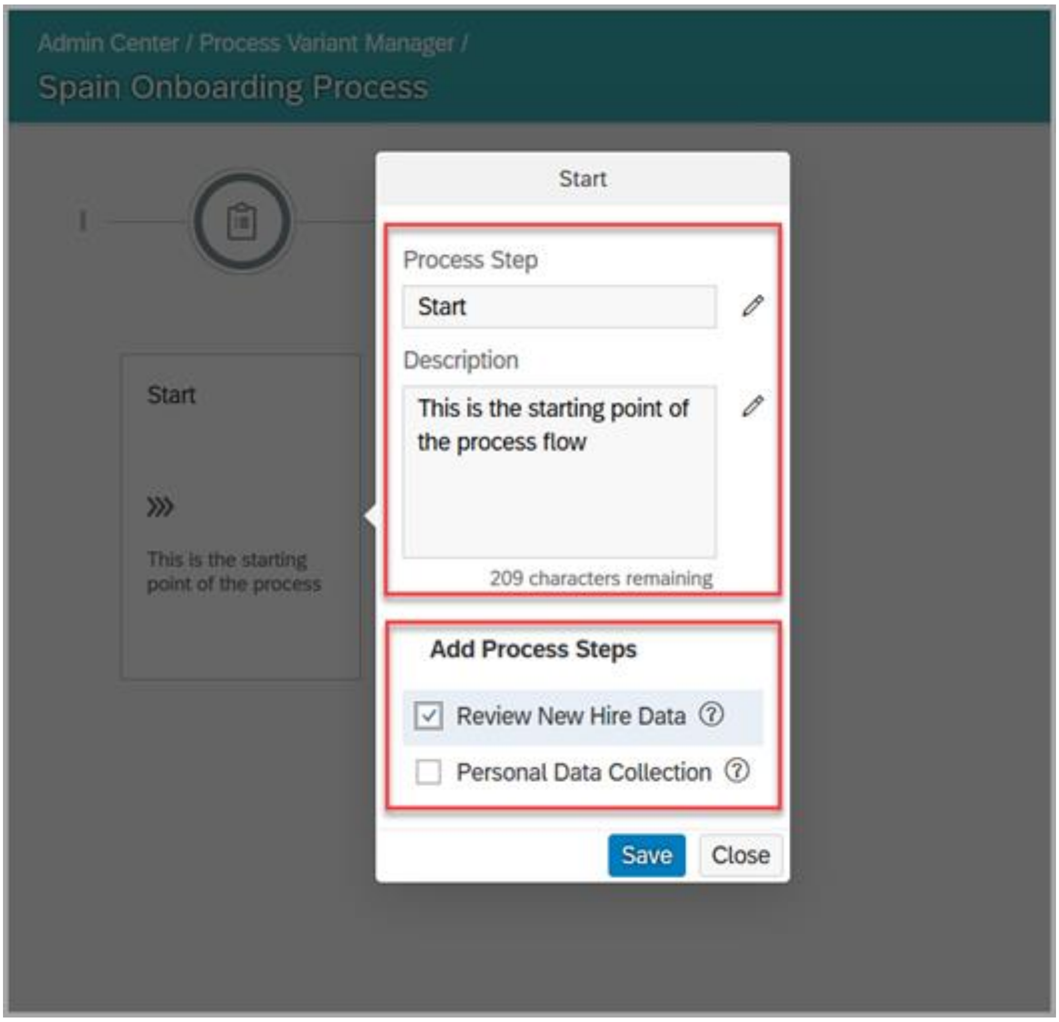
Procedure - To Create a New Process Variant

1. Enter *Process Variant Manager* from the *Action Search bar*.
2. Choose *Process Variant Manager* from the search results and the *Process Variant Manager page* opens.
3. Choose + *Process Variant* to add a process variant.
4. Enter a unique *ID, a Name, and a Description*(optional).



5. Select Save to create the new process variant.
6. Select the Name of the process variant you just created from the list.
7. Select the Start node to add additional steps into the process.
8. On the process step dialog box, select the process step you want to add and select Save. You can also modify the details of the existing step you selected. In this case this is the Start step. You can repeat this procedure for every process step you

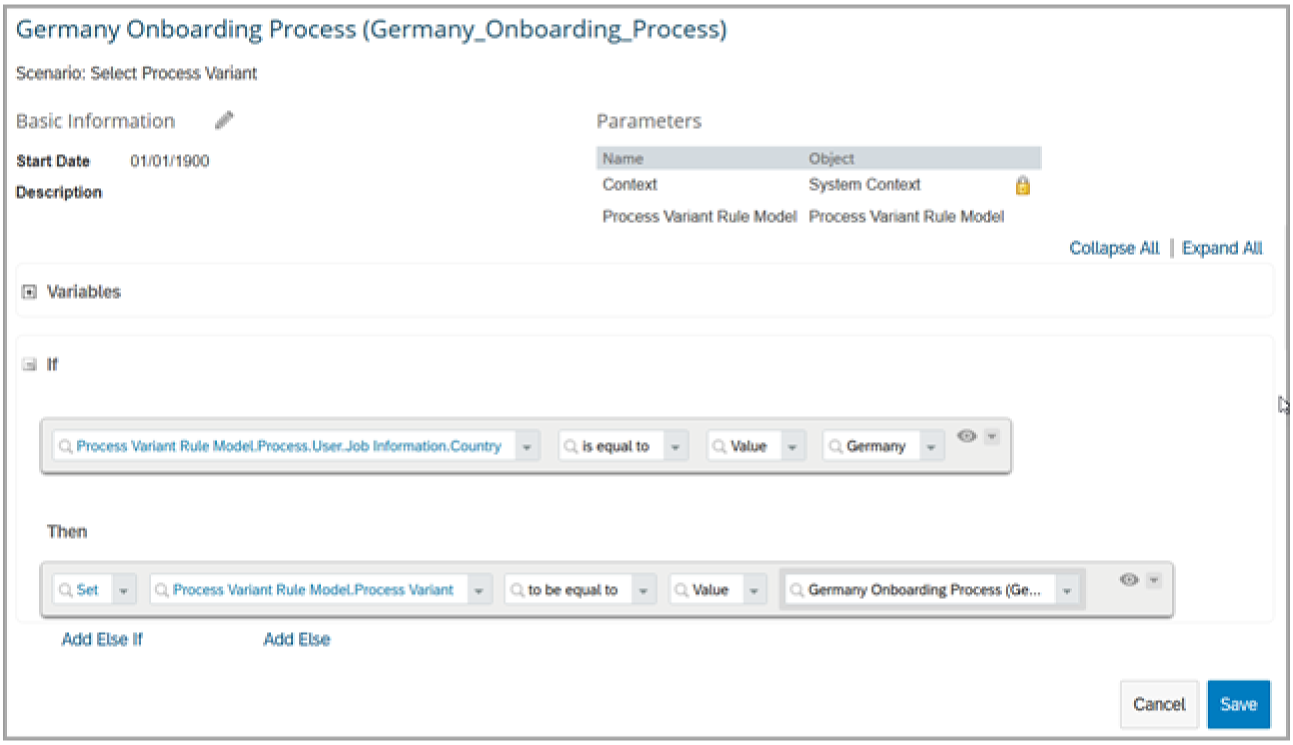
create.



9. Select *Save and Validate.* The process variant is saved and validated successfully. Click *OK* to return to the newly created process flow
10. Select *Activate* to deploy the process variant.

Procedure - To Define a Business Rule for a Process Variant

1. Select *Define Business Rules* from the Process Variant Manager page.
2. Enter a *Rule Name* and *ID*. You can also modify the *Start Date* and add a *Description*.
3. Select the rule conditions and then select the process flow for which the rule will be applied to as the *Value*.



4. Select *Save* to create the new business rule.

Lesson Summary

You should now 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 5-8 – Using Data Retention Time Management for Onboarding

Lesson Overview

After completing this lesson, you will be able to:

Lesson Objectives

- Create a Date Purge request using Data Retention Time Management

Data Protection and Privacy Content is Centralized

Data protection and privacy features work best when implemented suite-wide, and not product-by-product. For this reason, they are documented centrally.

The *Setting Up and Using Data Protection and Privacy* guide provides instructions for setting up and using data protection and privacy features throughout the SAP SuccessFactors HXM Suite. Please refer to the central guide for details. This can be found on SAP Help Portal.

	Note: Read Audit reports will include Onboarding compliance form data **ONLY** if the forms or documents contain sensitive personal data such as Ethnicity, National ID Number Social Security Number and Minority.

Data Retention Time Management for Onboarding

In Onboarding, you can purge data captured during the onboarding process for internal as well as external users by creating a purge request under *Admin > Data Retention Management using the DRTM Onboarding 2.0 Purge* group. Internal users are those who have been converted to employees whereas external users are those who have not yet been converted to employees.

3 Types of Data Purge:

- Data Retention Time Management (DRTM) Onboarding 2.0 purge: The DRTM Onboarding 2.0 purge is used to remove all data related to Onboarding which has been captured during the Onboarding process.
- Data Retention Time Management (DRTM) Audit Data purge: The DRTM Audit Data purge removes data from audit logs for that are used to generate personal data audit reports for data protection and privacy. You can use DRTM to purge audit data for external onboarding users. When you include external onboarding users in a DRTM Audit Data purge request, all of the audit data for the external users can be successfully purged.
- Data Retention Time Management (DRTM) Master data purge: The DRTM Master Data purge is used to fully purge inactive users and their associated data based on a single, common retention time.

Objects that are Included Under the DRTM Onboarding 2.0 Purge

- **Data Collection Extension** - Purging all the information of User collected as part of Custom Data Collection and its Notifications.
- **Documents** - The documents of user and specific notifications are purged. These documents include compliance forms.
- **Process and User Data** - Purging all user specific data like Employee Data, MDF Data, BPE Data, email notifications.
- **Tasks/Activities** - New Hire activities data and specific email notifications are purged.

Procedure - To Create a Data Purge Request for Onboarding 2.0 Data

1. Enter *Data Retention Management* from the *Action Search* bar.
2. Select *Data Retention Management* from the search results and the *Data Retention Management* page opens.
3. Select *Create New Purge Request* to create a purge request.
4. Select *DRTM Onboarding 2.0* from the purge request type dropdown.
5. Define the purge rule from the type of Onboarding 2.0 data, for which new hires and the schedule for which data will be purged.
6. Select *Save.*

Lesson Summary

You should now be able to:

- Create a Date Purge request using Data Retention Time Management

Unit Wrap-Up

In this unit, you covered:

- Lesson 5–1 – Creating an Onboarding Program in the User Interface
- Lesson 5–2 – Configuring SAP SuccessFactors V3 Home Page for Onboarding
- Lesson 5–3 – Manually adding a new hire into Onboarding
- Lesson 5–4 – Defining the Rehire Process
- Lesson 5–5 – Setting up Internal Hire Process (Crossboarding)
- Lesson 5–6 – Creating Custom Onboarding Processes using Process Variant Manager
- Lesson 5–7 – Restarting Onboarding Processes
- Lesson 5–8 – Using Data Retention Time Management for Onboarding (2.0)

You should now be able to:

- Create Onboarding Programs and Tasks
- Configure Onboarding Home Page Tiles
- Add a new hire into Onboarding
- Assign role-based permissions for add new hire tool
- Configure the Check for Rehire
- Assign Permissions to Perform Rehire Verification
- 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
- Identify the Onboarding Process Steps
- Create a Custom Onboarding Process using the Process Variant Manager Tool
- Define a Business Rule for a Process Variant

- Restart Onboarding Processes
- Define Business Rules for Restarting Onboarding Processes
- Create a Date Purge request using Data Retention Time Management

Unit 6 – Document Template Management and eSignatures

Unit Objectives

This unit contains two lessons:

- Lesson 6-1 – Setting up Document Templates in Onboarding
- Lesson 6-2 – Setting up SAP SuccessFactors eSignature and Enabling DocuSign

Upon completing this unit, you will be able to:

- Create a Document Template
- Map Document Placeholders to Objects
- Define Business Rule for Document Templates
- Maintain Document Signatures
- Setup SAP SuccessFactors eSignature
- Enable and manage DocuSign

Lesson 6-1 – Setting up Document Templates in Onboarding

Lesson Overview

The goal of this lesson is to explore the concept of document templates in Onboarding.

Lesson Objectives

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

Onboarding Document Template Management

This includes mapping candidate-specific data to forms, as well as specifying business rules that define which forms are relevant based on job role, location, and other criteria.

After the completion of the data collection part of the Onboarding process, the business rules associated with document templates are evaluated, and any relevant documents for the new hire are generated. If documents require a signature, those documents are sent to DocuSign for electronic signature by the new hire or hiring manager. Once the required forms are signed, the document process is complete.

Creating a Document Template

Before you can upload a new document template, you must configure the template using Adobe LifeCycle and save the document as an .xdp file.

1. Go to *Admin Center* → *On/Offboarding* → *Maintain Onboarding 2.0 and Offboarding 2.0 Document Templates.*
2. Click + *Add New Document Template*.
3. Click *Browse* to upload an XDP file.
4. Enter an ID, locale, category, and name for the document template.
5. Click *Upload*.

After uploading a new document template, you can map document fields to data objects, maintain signatures, and define business rules for the document.

Mapping Document Placeholders

If you want to create a rule-based mapping for placeholders, you need to configure a related business rule first.

1. Go to *Admin Center* → *On/Offboarding* → *Maintain Onboarding 2.0 and Offboarding 2.0 Document Templates*.
2. Under *Actions*, click.
3. Select *Direct* as the mapping type for each placeholder.
4. Select a *Base Object*.
5. Select a *Target Field*.
6. If you have selected rule-based mapping, then select the *Rule* to use.
7. Click *Save*.

Defining Business Rules for Onboarding Documents

1. Go to *Admin Center*.
2. In the *Tools Search* field, enter **Maintain Onboarding 2.0 and Offboarding 2.0 Document Templates**. Access the tool by clicking on the search result.
3. Select *Define Business Rules* and click + *Add New Rule*
4. Select the *Assign Onboarding Forms* scenario in the *Onboarding 2.0* section.
5. Enter a value for *Rule Name*, *Rule ID* and select a *Start Date.*
   The *Rule ID* automatically picks up the value entered in the *Rule Name*. However, it can be changed.
6. Click *Continue*.
   The business rule configuration screen is opened.
7. Define the business rule as per your requirements.
8. Click *Save*.

After creating a business rule, you can generate an onboarding form and assign it to new hires.

Maintaining a Document Signature

Each document template can include employee document signature and manager document signature placeholders.

1. Go to *Admin Center* → *On/Offboarding* → *Maintain Onboarding 2.0 and Offboarding 2.0 Document Templates*.
2. Under *Actions*, click.
3. In Signatures for *Template* → *Role*, select either a *New Hire* or *Manager* role from the pull down menu for signature fields.
4. Click *Done*.

Lesson Summary

The goal of this lesson is to explore the concept of document templates in Onboarding.

You should now be able to:

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

Lesson 6-2 – Setting up SAP SuccessFactors eSignature and Enabling DocuSign

Lesson Overview

The goal of this lesson setup SAP SuccessFactors eSignature and DocuSign.

Lesson Objectives

- Setup SAP SuccessFactors eSignature
- Enable and manage DocuSign

SAP SuccessFactors eSignature and DocuSign

There are 2 eSignature methods in Onboarding:

- Embedded Signature - The embedded signature functionality is supported by *SAP SuccessFactors eSignature*. Using this functionality, users can sign documents from within the Onboarding instance. For users who are familiar with Onboarding 1.0, this is similar to the *Click to Sign feature*. The SAP SuccessFactors eSignature is also supported in mobile devices.
- Remote Signature - This functionality is supported by *DocuSign.* With the Remote signature support, you can sign documents directly in *DocuSign*, using a web

browser or a mobile device. Whenever a signature is required, you will receive an email with a URL and instructions on how to sign the forms. Click on the URL, to sign the document.

By default, the embedded signature will be available in Onboarding but you can switch to using remote signature (DocuSign) if you have an existing DocuSign account. DocuSign feature in SuccessFactors needs to be enabled in Provisioning to use it on an SAP SuccessFactors system.

> Note: Both SAP SuccessFactors eSignature and DocuSign are supported on the available compliance forms in Onboarding.

> Note: As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact your Implementation Partner. If you are no longer working with an Implementation Partner, contact SAP Cloud Support.

Procedure - To Switch between Embedded and Remote eSignature

1. Enter Onboarding 2.0 General Settings from the Action Search bar.
2. Select Onboarding 2.0 General Settings from the search results and the *Onboarding 2.0 General Settings* page opens.
3. Under eSignature Settings, you should see what type of eSignature is enabled. By default, this should be Embedded Signature.
4. Choose *Remote Signature* or *Embedded Signature* to switch between SAP SF eSignature(Embedded) and DocuSign(Remote).

SAP SuccessFactors eSignature (Embedded) Permissions

Permissions where discussed on a previous unit but we have to remember that there are 2 important type of permissions for the embedded signature: eSignature permissions and document permissions.

You must provide ***Consent*** and ***Signatures*** "*Edit*" permissions for all users who will be using the SuccessFactors eSignature (embedded) tool to sign documents in Onboarding 2.0. These can be found under *Miscellaneous Permissions.*

Apart from this, you must provide "*View*" permission to the ***Document Template*** and ***Document Data*** *object permissions which are part of the Onboarding 2.0 or Offboarding 2.0 Object Permissions*.

Enabling DocuSign

Customers need a DocuSign corporate account. If a customer already has a DocuSign corporate account (for example, one used with Recruiting), it can also be used for Onboarding.

- If you don’t not have an existing DocuSign Account, you can contact SuccessFactors account executive to purchase a subscription to SAP Signature Management by DocuSign.
- Only one system administrator e-mail address and password can be associated with the DocuSign account. These are required to enable DocuSign for Onboarding. The admin e-mail address is the primary account for the integration.
- Once the account is created, DocuSign provides the account ID.
- Customers must have the DocuSign Connect option enabled in their DocuSign account to use remote signing.
- The DocuSign integration requires the Configure DocuSign eSignature role-based permissions

Managing Sent DocuSign Envelopes

1. Go to *SAP SuccessFactors* → *Admin Center* and search for *Manage DocuSign envelopes* in the search tool. If there are more than 10 envelopes, click *More* to continue to the next page.
2. Click to resend e-mails for selected envelopes.
3. Click to refresh the status of selected envelopes.
4. Click to cancel selected envelopes.
5. Click to filter selected envelopes.
   • Provide the Envelope ID.
   • Provide the Module.
   • Select the Last Time Updated using <= or >= of the date and time provided (MMM, d, y, h:mm:ss a).
   • Provide the Status.
   • Click Apply Filter.

6. Click to sort selected envelopes.
   • Select the sorting criteria. Sorting criteria are:
   • Ascending
   • Descending
   • Envelope Id
   • Last Time Updated
   • Module
   • Status
   • Click OK

Lesson Summary

The goal of this lesson setup SAP SuccessFactors eSignature and DocuSign.

You should now be able to:

- Setup SAP SuccessFactors eSignature
- Enable and manage DocuSign

Unit Wrap-Up

In this unit, you covered:

- Lesson 6-1 – Setting up Document Templates in Onboarding
- Lesson 6-2 – Setting up SAP SuccessFactors eSignature and Enabling DocuSign

You should now be able to:

- Create a Document Template
- Map Document Placeholders to Objects
- Define Business Rule for Document Templates
- Maintain Document Signatures
- Setup SAP SuccessFactors eSignature
- Enable and manage DocuSign

Unit 7 – Notifications using Email Services

Unit Objectives

This unit contains one lesson:

- Lesson 7-1 – Configuring and Managing Email Services

Upon completing this unit, 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 and category
- Customize the Email Layout of Email Templates
- Attach documents to emails
- Unsubscribe from Email Notifications

Lesson 7–1 – Configuring and Managing Email Services

Lesson Overview

The goal of this lesson is to gain in-depth knowledge of configuring and managing email services in Onboarding.

Lesson Objectives

- 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 and category
- Customize the Email Layout of Email Templates
- Attach documents to emails
- Unsubscribe from Email Notifications

Notifications in Onboarding

Email Services in Onboarding aim to facilitate a simplified onboarding experience with a consistent communication mechanism.

Email services in Onboarding enable you to:

- Utilize preconfigured email templates, tailor made to work with the onboarding process.
- Create new email templates with business and locale specific rules and content.
- Send timely notifications to assigned onboarding participants during different stages of the onboarding process.
- Configure reminder notifications to control the frequency of reminders messages.
- Unsubscribe from notifications, and so on.

Configuring Email Services in Onboarding

To access Email Services in Onboarding 2.0, you need to have role based permissions. This should have already been granted through previous exercises that have been completed in this course.

1. To check if you have the role based permissions, see **Role-Based Permissions for Email Services**.
2. Go to *Admin Center*.
3. In the *Tools Search* field, enter **Email Services**.
4. Select the search result to access the *Email Services* tool.

Preconfigured Email Templates in Onboarding

Onboarding 2.0 comes with a set of preconfigured email templates, ready for use. These email templates are designed to seamlessly work throughout the onboarding process. You can choose to utilize these templates in their existing configuration or customize them according to your requirements.

Preconfigured Email Templates:

When you access the Email Services configuration page for the first time after setup, there will be no email templates listed under the Active Email Templates tab. You can reuse preconfigured email templates or create custom email templates from the Manage Email Template section.

	Notification	**Template Name**	**Description**
1	Start Onboarding Process	(ONB) Start Onboarding process Template	Notify new hires to begin tasks related to the onboarding process by providing related information.
2	Continue Onboarding Process	(ONB) Continue Onboarding process Template	Notify new hires about the onboarding progress and prompt them to continue with the remaining tasks by providing related information.
3	New Buddy Assignment (New Hire)	(ONB) New Buddy Assignment Template	Notify new hires about the assignment of a new buddy.

	Notification	Template Name	Description
4	New Buddy Assignment (Buddy)	((ONB) Buddy Assignment Template	Notify the assigned onboarding participant that they've been selected as a buddy for the team's new hire, along with related information.
5	New Buddy Assignment Cancellation	(ONB) Buddy Assignment Cancellation Template	Notify the assigned buddy about reassignment or cancellation of the buddy assignment task.
6	Recommended People Assignment (New Hire)	(ONB) New Recommended People Template	Notify new hires about contacting the people recommended by the Hiring Manager.
7	Recommended People Assignment (Recommended Person)	(ONB) Recommended People Assignment Template	Notify the assigned onboarding participant that they’ve been recommended to the new hire by the Hiring Manager to help speedup the onboarding process.
8	Recommended People Cancellation	(ONB) Recommended People Assignment Cancellation Template	Notify the assigned recommended person about cancellation or reassignment of the recommended people task.
9	Meeting updated for new hires	(ONB) A meeting updated Template	Notify new hires about meeting updates added to the home page.
10	Meeting updated for Participants	(ONB) A meeting updated for participants Template	Notify assigned onboarding participants about new meeting updates.

	Notification	Template Name	Description
11	Suite mapping Error	(ONB) Suite mapping error Template	Notify admins about new hire data alignment issues identified in the suite mapping, and provide information about postponement of the onboarding task.
12	Prepare for New Team Member	(ONB) Prepare for New Team Member Template	Notify assigned onboarding participants that onboarding activities are pending for a new hire with an approaching start date. **Note**: Assigned onboarding participants will receive one notification for each pending task respectively.
13	Furnish Equipment	(ONB) Furnish Equipment Template	Notify assigned onboarding participant to procure specified equipment for the new hire.
14	Furnish Equipment Cancellation	(ONB) Furnish Equipment Cancellation Template	Notify assigned onboarding participant about cancellation of the Furnish Equipment task.
15	Onboarding Cancelled	(ONB) Onboarding Cancelled Template	Notify all onboarding participants about cancellation of the onboarding process for a new hire.
16	Recommended Links Updated	(ONB) Recommended	Notify new hire about updated Recommended

	Notification	Template Name	Description
		Links Updated Template	Links added to the new hire home page.
17	New Welcome Message Added	(ONB) New Welcome Message Added Template	Notify new hire about updated Welcome Message added to the new hire home page.
18	Where To Go (Participant)	(ONB) Where To Go Template	Notify assigned onboarding participants with supplemental information, to help new hires reach their designated work location.
19	Prepare For The First Day (Participant)	(ONB) Prepare for New Hire First Day Template	Notify assigned onboarding participants to provide supplemental information, to help new hires through their first day at work.
20	Where to Go (New Hire)	(ONB) Where To Go updated Template	Notify new hires with information about where to go on their first day at work.
21	Prepare for Day One (New Hire)	(ONB) Prepare for New Hire First Day updated Template	Notify new hires with information essential to prepare for day one.
22	New Goal Assignment	(ONB) Goal assignment updated Template	Notify new hire about updated goal information added to the new hire home page.
23	External User Welcome Message	(ONB) External User Welcome Message Template	Notify new hires that are external users with a welcome message as a part of the post hire task.

	Notification	Template Name	Description
24	Nudge Assignment	(ONB) Nudge assignment Template	To nudge the assignment
25	New Team Member Onboarding Restarted	(ONB) New Team Member Onboarding Restarted Template	Notify new hires that their onboarding process has been restarted due to reasonable circumstances.
26	New Team Member Onboarding Restarted - Hiring Manager	(ONB) New Team Member Onboarding Restarted - Hiring Manager Template	Notify the assigned hiring manager that the onboarding process for a given new hire has been restarted due to reasonable circumstances.
27	Onboarding Cancelled due to Restart - Hiring Manager	(ONB) Onboarding Cancelled due to Restart - Hiring Manager Template	Notify the assigned hiring manager that a restart to the onboarding process for a new hire has resulted in the cancellation of the ongoing onboarding process.
28	Document signature declined	(ONB) Document Signature Declined Message To Participants Template	Notify the participants that a document has been declined for e-signature.
29	Document signature completed	(ONB) Document Signature task completion Template	Notify the employee about completion of document signing.
30	Document signature task created	(ONB) Document Signature task creation Template	Notify the participants that they have documents pending for e-signature.
31	Document signature task created for new hire	(ONB) Document Signature task for new hire creation Template	Notify the new hire that they must sign the documents before their start date.

	Notification	Template Name	Description
32	Document signature completed for new hire	(ONB) Documents signed by New Hire Template	Notify the new hire about the completion of document signing.
33	Missing SSN in Form I-9 Section 1	(ONB) I-9 Section 1 Missing SSN	Notify the new hire that they must update their Social Security Number (SSN) in Form I-9.
34	Bring original documents	(ONB) Bring Original Documents on Day 1	Notify the new hire to bring original documents on Day 1 to complete Form I-9 section 2.
35	Complete receipt flow (Hiring Manager)	(ONB) Hiring Manager Complete Receipt Flow	Notify the hiring manager to complete the receipt flow within 90 days.
36	Correct data flow	(ONB) New Hire Correct Form I-9 Section 1	Notify the new hire to correct Form I-9 Section 1 data.
37	I-9 Section 1 Reminder	(ONB) Hiring Manager I-9 Section 1 Reminder	Notify the hiring manager that the new hire's Form I-9 Section 1 data is overdue.
38	I-9 Section 2 Reminder	(ONB) Hiring Manager I-9 Section 2 Reminder	Notify the hiring manager to complete Form I-9 Section 2 within three days of the new hire's Day 1.
39	Complete compliance paperwork	(ONB) Compliance Paperwork	Notify the new hire and hiring manager to provide compliance-related information before the start date.
40	Compliance Document Flow created	(ONB) Compliance Document Flow Template	Notify the participants that they have documents pending for e-signature.
41	Compliance Document signature declined	(ONB) Compliance Document Signature	Notify the participants that a

	Notification	Template Name	Description
		Declined Message Template	document has been declined for e-signature.
42	Compliance Document signature completed	(ONB) Compliance Document Signature task completion Template	Notify the participants that the compliance document has been signed.

Reusing Preconfigured Email Templates

Onboarding provides a few preconfigured email templates that can be directly added into the system, or customized as per your requirements.

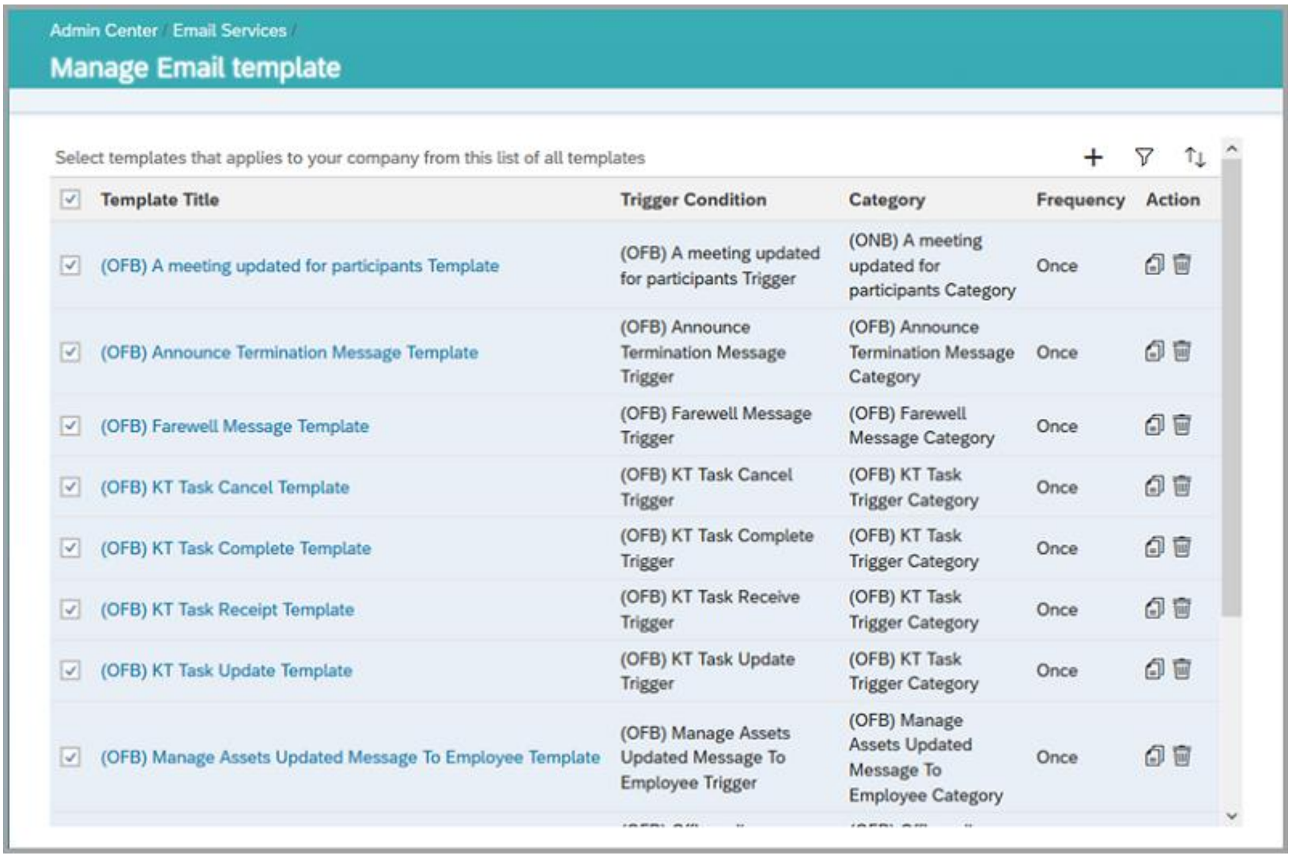
1. Go to *Admin Center*.
2. In the *Tools Search* field, enter **Email Services**. Access the tool by clicking on the search result.
3. In the *Email Services* tool, click *Manage Template*.
   The *Manage Email template* page appears.
4. In the *Manage Email template* section, choose + *(New Template)*.
5. From the resultant drop-down menu, select *Reuse Templates*.
   In the *Preconfigured Email Templates* page, you can see all the preconfigured email templates available in the system.
6. Select all the email templates you need and choose *Add to Active List* after selecting the required templates.
   The selected templates are added to your list of active templates.
7. Click under the *Action* column to view the configuration details of the corresponding template.

Selected email templates will be added to the active email template list of the current account. If the email template already exists in the account, it will be overridden.

	Note: There cannot be multiple email templates with the same name as the email template name is unique.

Managing Email Templates in Onboarding

Email Services in Onboarding 2.0 provide a set of preconfigured email templates. As an administrator, you can create new templates or reuse preconfigured ones as per your business requirements. You can also activate or deactivate email templates as per your requirements.



1. Log in to the *Admin Center*.
2. In the *Tools Search* field, enter **Email Services**. Access the tool by clicking on the search result.
3. Under the *Active Email Templates* tab, click *Manage Template*.
   The *Manage Email template* section displays the entire list of email templates. This list includes templates that are preconfigured, user-defined, active as well as inactive.
4. If a template is selected, it is a part of the active list of templates. To remove a template from the active list of templates, deselect the respective template.

- To add a new email template, click and select *Create New Template* from the resultant dropdown.
- To reuse a preconfigured email template, click and select *Reuse Template* from the resultant dropdown.
- To create a copy of an email template, click corresponding to the template.

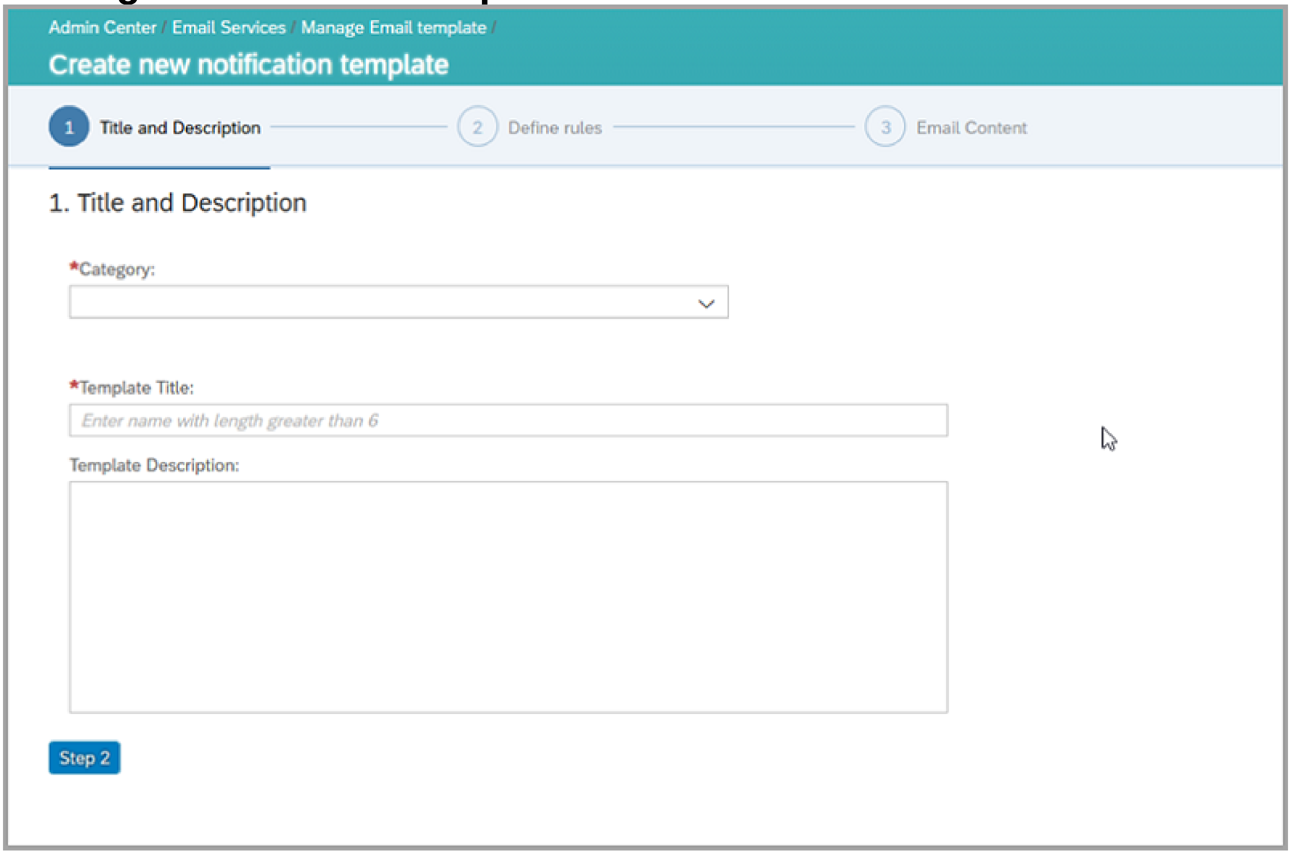
Note: While creating a copy of a template, you can choose to disable the source template.

- To delete an email template, click corresponding to the template.

	Note: You cannot delete a preconfigured email template. However, you can delete user-defined templates or a copy of a preconfigured email template that you have added to your list of active templates. If you delete a copy of a preconfigured email template, you can add it to your active list of templates again by reusing the template from the list of preconfigured templates. However, any customizations made to the former template will be lost.

- To apply a filter criteria to the list of email templates, click
- To apply a sort criteria to the list of email templates, click
- Open an email template for viewing or editing by clicking on any email template in the list.

Adding a New Email Template



1. Go to *Admin Center*.
2. In the *Tools Search* field, enter **Email Services**. Access the tool by clicking the search result.
3. Under *Active Templates* tab, click *Manage Template*.
4. In *Manage Email template* page, click *New Template*.
5. From the resultant dropdown menu, select *Create New Template*. A setup wizard appears.
6. In the first step, *Title and Description*, define the following attributes:

Category	Select a category from the dropdown menu. A category represents a template group and defines rules for email attributes, such as recipients and content.
Template Title	Provide a unique template name.
Template Description	Provide a template description.

7. Click *Step 2*.
8. In the second step, *Define rules*, identify a value for the following attributes:

Trigger	Select a value from the dropdown menu that serves as a trigger condition for the email notification.
Setup Reminder	Check this option to configure reminder messages.
Set reminder before the due date	Check this option to configure the process of sending reminder messages, before the due date. Note: If unchecked, reminders are not always sent after the due date. The configuration of *Set reminder after due date* is independent of *Set reminder before the due date*.
Frequency of reminders in days	Enter a numeric value, which is the time span between reminders sent before due date. This option is considered only if *Set reminder before the due date* is checked.
Number of reminders to be sent	Enter a numeric value, which is the maximum number of generated reminder messages. If this value is set to *0*, messages are generated till due date.
Send reminder 1 day before the due date	Check this option to send a reminder message one day before the due date.
Set reminder after due date	Check this option to configure the process of sending reminder messages, after the due date.
Frequency of reminders in days	Enter a numeric value, which is the time span between reminder messages sent after due date.
Until, number of times (count), reminders to be sent	Enter a numeric value, which is the maximum number of generated reminders. This option is considered only if *Set reminder after due date* is checked.
Until number of days, reminder to be sent	Enter a numeric value that is the maximum number of days, reminders will be sent after

Trigger	Select a value from the dropdown menu that serves as a trigger condition for the email notification.
	the due date. This option is considered only with the *Set reminder after due date* configuration.
Filter Business Rule	Select a business rule to evaluate a precondition before triggering a notification. When there are multiple templates with a same trigger, the business rule acts as a filter to choose the right template. Note: For more information about creating filter business rules, see **Configuring Business Rule for Filtering Email Templates**.
Language Selection Business Rule	Select a business rule from the dropdown menu to dynamically set the language of the notification. Note: For more information about creating business rules for setting message language, see **Configuring Business Rule for Selecting Message Locale**.
Priority	Select a value that determines the priority of the email. By default, this value is set to *LOW*.

9. Click *Step 3*.
10. In the third step, *Email Content*, identify a value for the following attributes:

Email Subject	Provide an introduction that defines the intent of the email.
Body Text	Provide information that is intended to be shared with the email recipient.
Global Footer	Provide an email footer that reflects in all emails globally. Note: Since the Global Footer is editable, it shows the last modified date value along with the ID of the user who has modified the footer.

You can use tokens (placeholders for a certain value) to extend the amount of specific information during email message generation. Click + *Insert Token* to get a list of predefined tokens available for use in *Email Subject* and *Body Text* of the template.

Before saving, you can preview the content in the template by clicking on *Preview*.

11. Click *Save*.

Business Rules in Email Services

Your onboarding process might have cases when there are multiple notifications eligible to be triggered for a given scenario. There might also be scenarios when you have to dynamically determine the locale of the recipient before sending out notifications. In such cases, you can create business rules with specific conditions and apply these rules to your email templates. Notifications that satisfy the conditions specified in the applied business rules will be triggered.

Available Business Rules in Email Services

Email Services in Onboarding have two business rules available:

- Filter Email Template
- Select Email Message Locale

Configuring Business Rule for Filtering Email Templates

1. Go to *Admin Center*.
2. In the *Tools Search* field, enter **Configure Business Rules**.
3. Select the search result to access the *Business Rules Admin* tool.
4. To create a new business rule, click *Create New Rule*.
5. Select *Filter Email template* rule scenario under *Email Services* category.
6. Enter a value for *Rule Name*, *Rule ID* and select a *Start Date*.
   The *Rule ID* automatically picks up the value entered in the *Rule Name*. However, it can be changed.
7. Select the *Email Category* from the drop-down menu.
   The business rule will apply to the selected *Email Category*.
8. Click *Continue*.
   The business rule base object is automatically selected as per the base object of the target email category.
9. Define only an *If* condition.
   For defining the business rule, all the objects and properties associated with the base object are available.
10. Click *Save.*

A business rule is created as per the specified conditions.

After creation, you can assign the business rule to an email template through the email template configuration wizard.

Configuring Business Rule for Selecting Message Locale

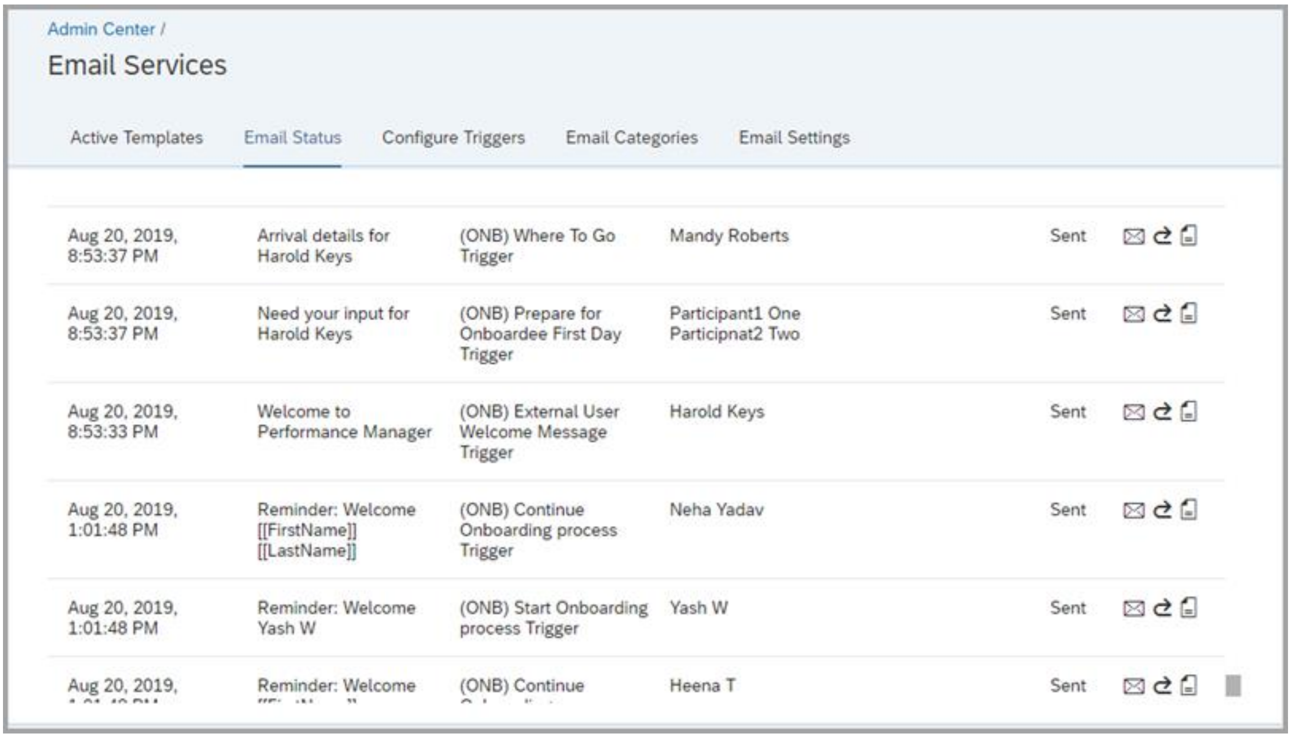
1. Go to *Admin Center*.
2. In the *Tools Search* field, enter **Configure Business Rules**.
3. Select the search result to access the *Business Rules Admin* tool.
4. To create a new business rule, click.
5. Choose *Select Email Message Locale* rule scenario under *Email Services* category.
6. Enter a value for *Rule Name*, *Rule ID* and select a *Start Date*.
   The *Rule ID* automatically picks up the value entered in the *Rule Name*. However, it can be changed.
7. Select the *Email Category* from the drop-down menu.
   The business rule will apply to the selected *Email Category*.
8. Click *Continue* to create a business rule.
   The business rule base object is automatically selected as per the base object of the target email category.
9. Define the *If* condition.
   For defining the business rule, all the objects and properties associated with the base object are available.
10. Based on the outcome of the *If* condition, define the *Then* condition by setting the **EmailMessage.locale**
    attribute to a value that will be the language of the notification.
11. Click *Save*.

After creation, you can assign the business rule to an email template through the email template configuration wizard.

Working with Email Status in Onboarding

Email Services in Onboarding keep track of all the email notifications sent by the system. You can refer to Email Status, which is a part of Email Services too.

- Check details of sent emails.
- Resend emails to additional recipients.
- Cancel active email reminder series.
- Check recipients who have unsubscribed from receiving emails.



1. Log in to *Admin Center*.
2. In the *Tools Search* field, enter **Email Services**. Click the search result to access the tool.
3. In the *Email Services* tool, go to the *Email Status* tab.
   A historical list of messages sent out by the system is displayed.
4. Under the *Actions* column,
   - Click to view the sent email.
   - Click to resend a notification to additional recipients.
   - Click to review notification details.

Note: For a given notification, you can cancel an active reminder series by clicking *Cancel Reminder* on the notification details popup.

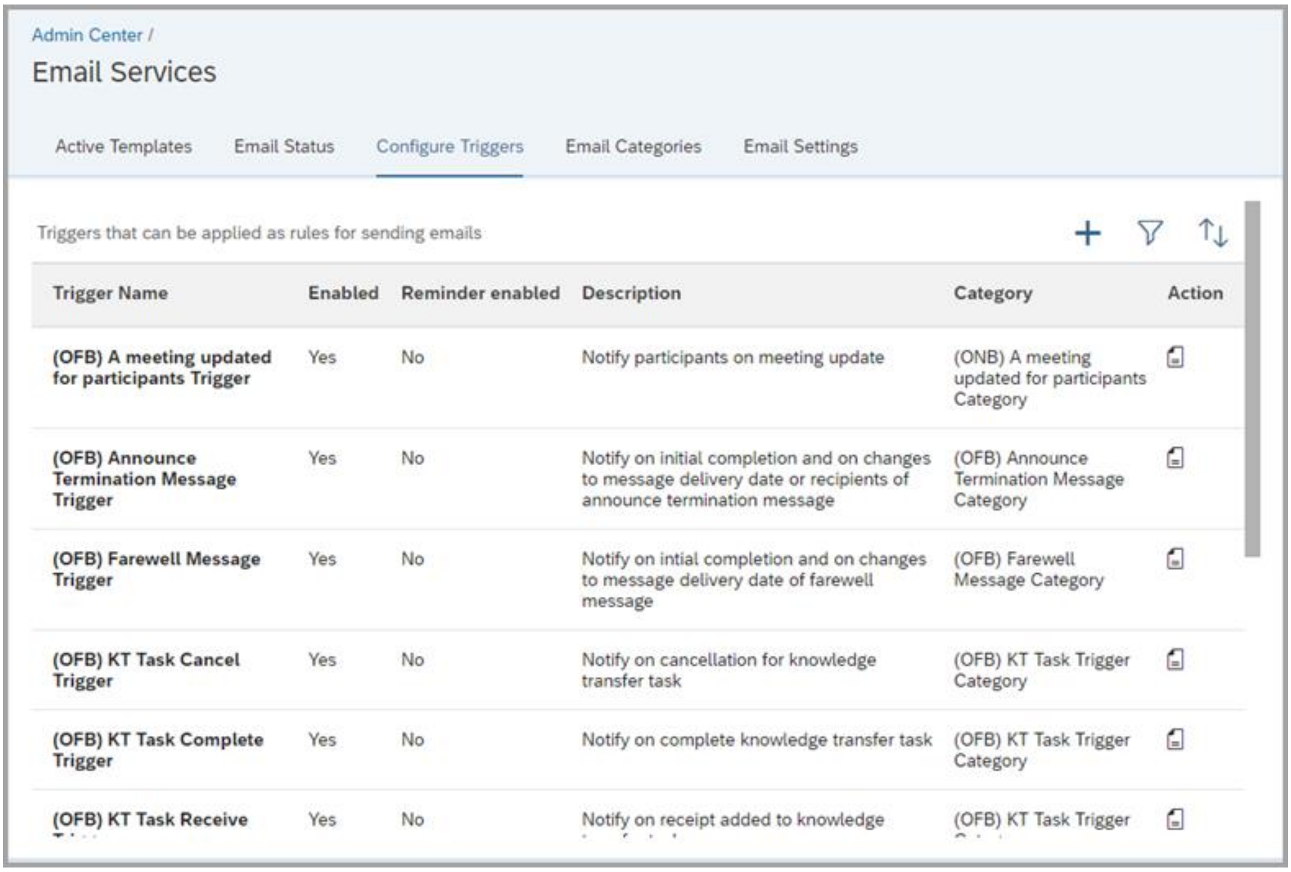
- In general, click to refresh the list of sent emails.
- To apply a filter criteria, click.
- To apply a sort criteria, click.

Configuring Email Triggers

An email trigger belongs to a corresponding email category. Onboarding comes with a set of preconfigured email triggers that you can use while configuring email notifications.

Note: Email triggers are not customizable.

Note: Email Services in Onboarding allows you to create an email trigger. However, the application of new email triggers to the notification process is not supported.



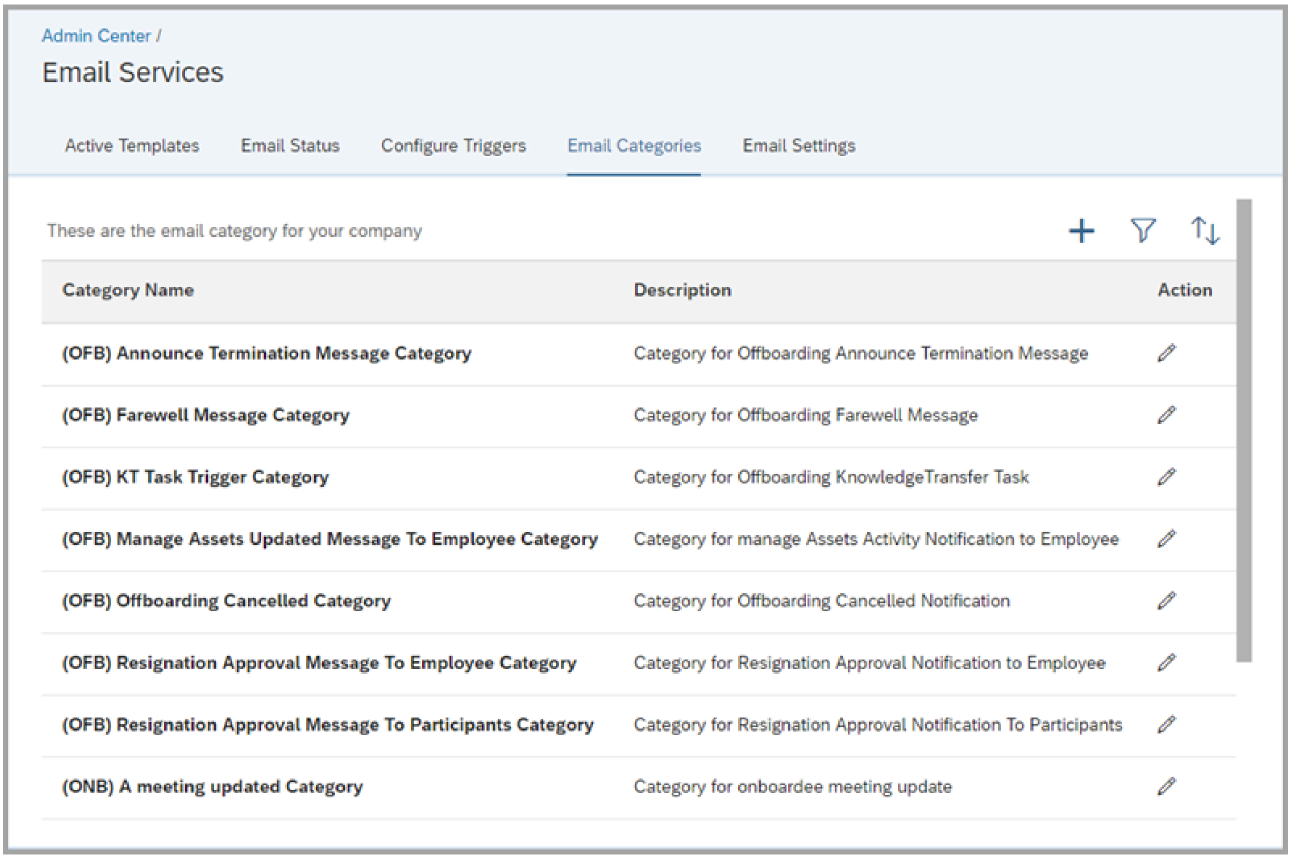
1. Go to *Admin Center*.
2. In the *Tools Search* field, enter **Email Services**. Access the tool by clicking the search result.
3. Under Configure Triggers tab, you can see a list of available triggers.
   - To view the details of an email trigger, click *Details*.
   - To create an email trigger, click *Add New Trigger.*
   - To apply a filter criteria, click *Filter.*
   - To apply a sort criteria, click *Sort.*

Configuring Email Categories

Each email template in Onboarding belongs to a particular email category. There can be multiple email templates that can have same email category. Onboarding 2.0 comes with preconfigured email categories that you can use while configuring email templates.

Note: Email categories are partially customizable.

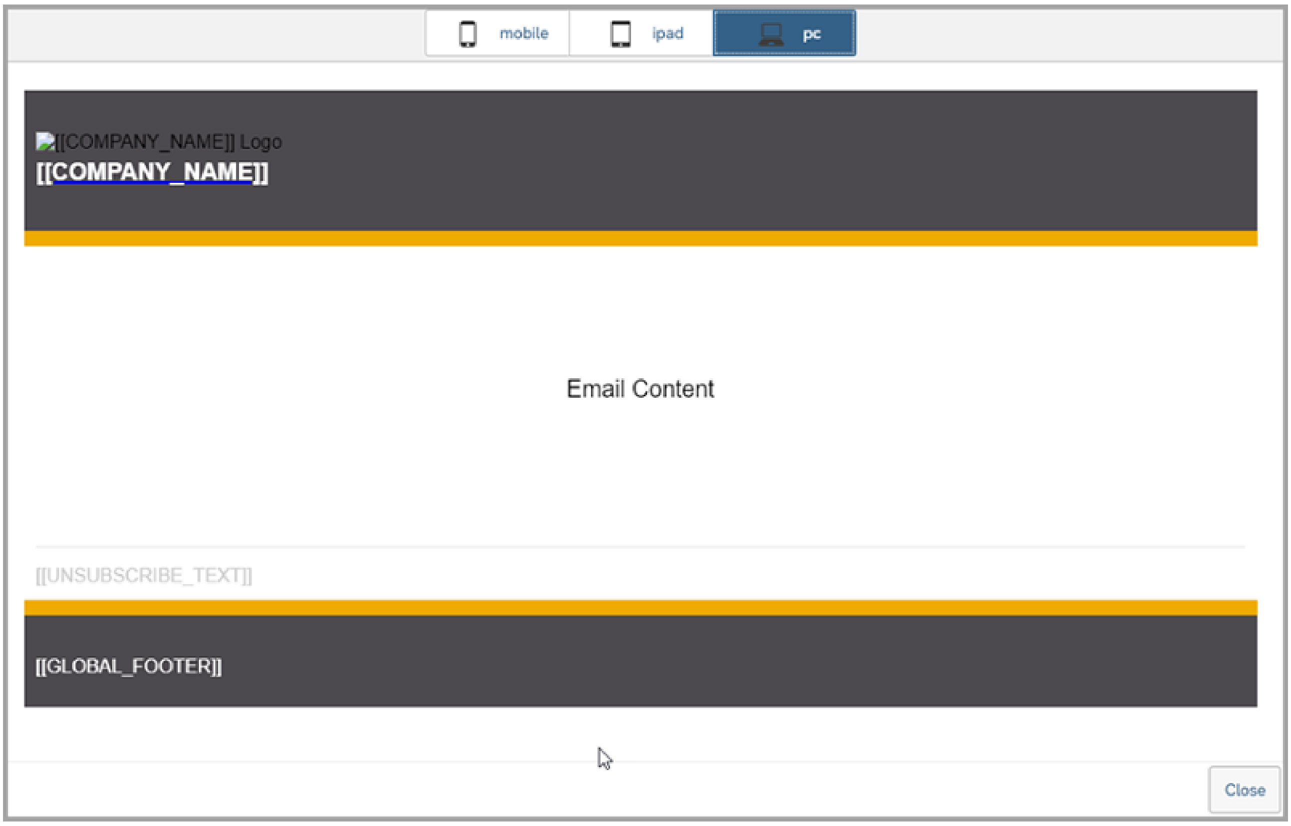
Note: Email Services in Onboarding allows you to create an email category. However, the application of new email categories to the notification process is not supported.



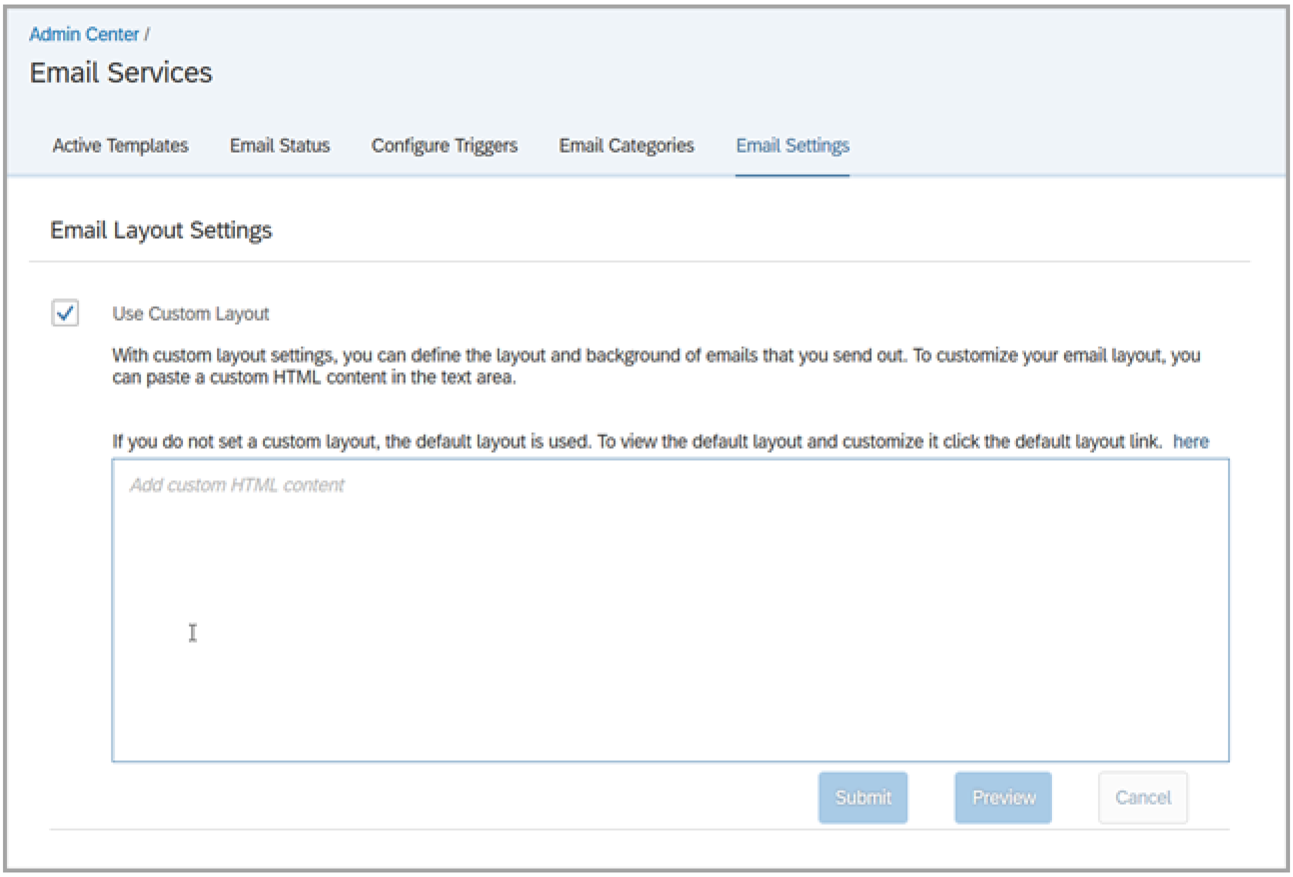
1. Go to *Admin Center*.
2. In the *Tools Search* field, enter **Email Services**. Access the tool by clicking the search result.
3. Under *Email Categories* tab, you can see a list of email categories available in the system.
   - To edit an existing email category, click *Edit* under the *Action* column.
   - To create an email category, click *New Category*.
   - To apply a filter criteria, click *Filter.*
   - To apply a sort criteria, click *Sort.*

Customizing the Email Layout of All Emails

You can modify the existing or default email layout of all emails from Email Services. The default layout is this:



To configure or modify the email layout, you will need to configure the settings in HTML. You will need to save the HTML file and upload it to the system.



1. Go to *Admin Center* → *Email Services* → *Email Settings*.
2. Choose *Use Custom Layout.*
3. Upload or paste your HTML code for the new email layout into the box provided.
4. Choose *Submit* to save the new email layout. You can also preview the email layout before saving it.

Attaching Documents to Email Templates

Email Services have the feature to attach documents to email templates. You have the ability to attach both a Static and Dynamic Document. A Static Document content will remain unchanged while a Dynamic Document will contain customized content for a new hire or offboardee that will depend on what was collected in the onboarding and offboarding processes. Attaching a document to an email will require defining a business rule to which you will be identifying the condition and for which email template it will be for.

To configure the business rule to attach documents to an email:

1. Type Configure *Business Rules* on the *Action Search* bar and select *Configure Business Rules* from the search results to open the *Business Rules Admin* tool.
2. To create a new business rule, click (+) *plus* button or icon.

3. Select *Add Dynamic Documents as Email Attachments* or *Add Static Documents as Email Attachments* rule scenario under Email Services category.
4. Enter a value for *Rule Name*, *Rule ID* and select a *Start Date*.
5. Select the *Email Category* from the drop-down menu. The business rule will apply to the selected **Email Category**.
6. Click *Continue* to create a business rule. The business rule base object is automatically selected as per the base object of the email category.
7. Define the *If* condition. For defining the business rule, all the objects and properties associated with the base object are available.
8. Based on the outcome of the If condition, define the *Then* condition by setting or identifying the document you want to attach to the email. Choose the *Form Data 1* group when setting/identifying the *Document Template* as that is currently where all configured Document Templates reside.
9. Click *Save*.

Unsubscribing from Email Notifications

To be able to unsubscribe from email notifications, your company setting should be configured to allow recipients to unsubscribe from email notifications.

To configure the company setting:

1. Go to *Admin Center* → *Company System and Logo Settings*.
2. Under *Company System Setting*, verify if the option *This option allows a company-wide setting on whether users will receive Email notifications is unchecked.*

Email Services in Onboarding provides an option to unsubscribe from email notifications any time. With each email generated by the system, there will be a link included in the email footer to unsubscribe. Once you unsubscribe, all subsequent emails are stopped, including reminders and emails from other templates.

1. As an email recipient, click the *unsubscribe here* link in your notification email. This will redirect you to the account settings page of the SAP SuccessFactors HCM Suite.
2. In *Notifications* section, select *Read messages in the system*.
3. Click *Save Notification*.

	Note: If you wish to subscribe to email notifications again, go to *Options* → *Notifications* from your user profile menu on the *Home* page. Select *Send emails to me* and click *Save Notification*.

Checking Unsubscribed Recipients of Email Notifications

1. As an admin, go to *Admin Center*.
2. In the *Tools Search* field, enter **Email Services**. Access the tool by clicking the search result.

3. In *Email Services* configuration page, click the *Email Status* tab. Under the *Unsubscribed Recipient* column, you can view who has unsubscribed from email notifications.

Lesson Summary

The goal of this lesson is to gain in-depth knowledge of configuring and managing email services in Onboarding.

You should now 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 and category
- Customize the Email Layout of Email Templates
- Attach documents to emails
- Unsubscribe from Email Notifications

Unit Wrap-Up

In this unit, you covered:

- Lesson 7-1 – Configuring and Managing Email Services

You should now 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 and category
- Customize the Email Layout of Email Templates
- Attach documents to emails
- Unsubscribe from Email Notifications

Unit 8 – SAP SuccessFactors Onboarding and Recruiting Integration

Unit Objectives

This unit contains two lessons:

- Lesson 8-1 – Integrating SAP SuccessFactors Onboarding and Recruiting
- Lesson 8-2 – Data Mapping

Upon completing this unit, you will be able to:

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

Lesson 8-1 – Integrating SAP SuccessFactors Onboarding and Recruiting

Lesson Overview

The goal of this lesson is to understand the integration of SAP SuccessFactors Onboarding and SAP SuccessFactors Recruiting.

Lesson Objective

- Describe how to integrate SAP SuccessFactors Onboarding and SAP SuccessFactors Recruiting

Integration of Recruiting Systems with Onboarding

Onboarding is an extensible solution with a wide application scope. Whether you are using SAP SuccessFactors Recruiting Management or an external Application Tracking System, you can integrate Onboarding with a minimal impact on your existing system functions.

Although Onboarding has inbuilt compatibility to work with SAP SuccessFactors Recruiting Management, integration with external Application Tracking Systems is also possible using APIs available in Employee Central and SAP SuccessFactors HCM Suite.

	Note: If you intend to use Single Sign On (SSO) method with Onboarding, enable the *Single Sign-On (SSO) Settings* → *Partial Organization* SSO option in Provisioning.

	Note: As a customer, you do not have access to Provisioning. To complete tasks in Provisioning, contact your Implementation Partner. If you are no longer working with an Implementation Partner, contact SAP Cloud Support.

Integration of SAP SuccessFactors Recruiting Management with Onboarding

Onboarding is compatible with SAP SuccessFactors Recruiting Management by default. After Onboarding is configured, you can initiate the onboarding process for a given candidate by taking the Initiate Onboarding action from your Recruiting Management application.

	Note: In *Admin Center* → *Manage Permission Roles*, ensure that you have [Role] → Permission → *User Permission* → *Recruiting Permissions* → *Onboarding Initiate Permission enabled*.

In the Application Status Configuration page, check if there is one Hirable and one Hired status in the In-Progress Statuses group. For all other statuses, which includes inactive statuses (if any), check if the Hirable Options setting is set to None.

	Note: You should onboard a candidate in the Hirable status. Once the onboarding is complete, the status is changed to Hired. If you configure the applicant status in any other way, you will face issues during the onboarding process as there cannot be more than one Hirable or Hired status.

Once onboarding is initiated, a portlet appears in Recruiting Management where you can see details about who initiated the onboarding request.

Lesson Summary

The goal of this lesson is to understand the integration of SAP SuccessFactors Onboarding and SAP SuccessFactors Recruiting.

You should now be able to:

- Describe how to integrate SAP SuccessFactors Onboarding and SAP SuccessFactors Recruiting

Lesson 8-2 – Data Mapping

Lesson Overview

The goal of this lesson is to understand how data mapping occurs with the Employee Central entities.

Lesson Objective

- Map Employee Central to Recruiting fields

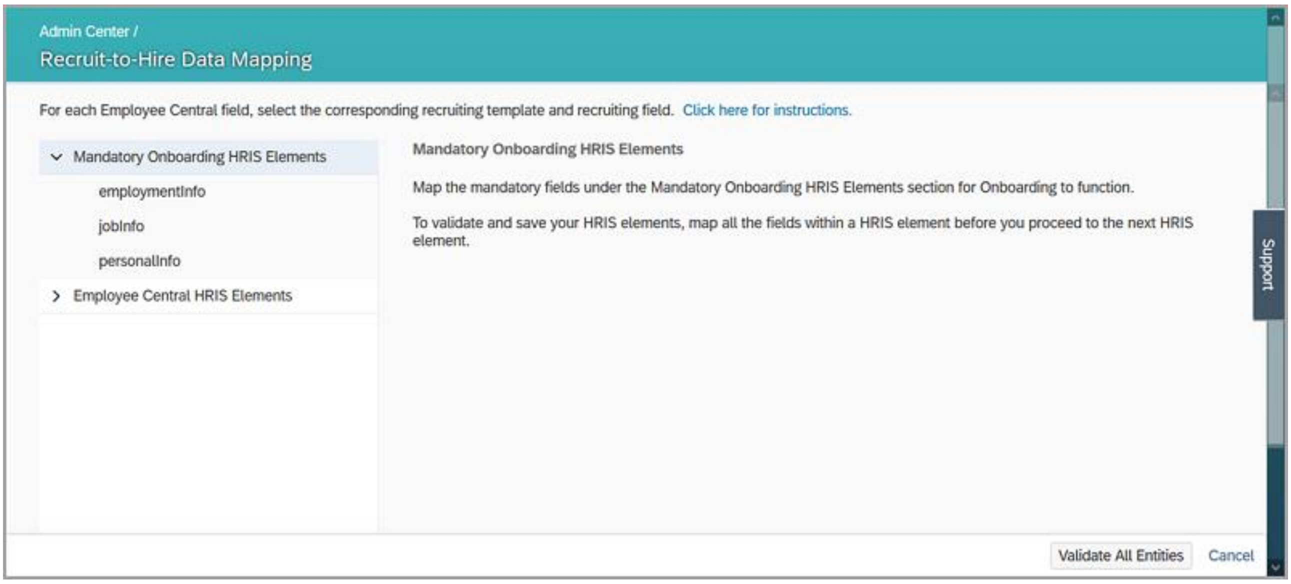
Mapping Data from Recruiting Management with Employee Central Entities

Prerequisites:

- You have access to *Admin Center* → *Recruit-to-Hire Data Mapping* page. This is one of the Role-Based permissions you have assigned to the admin role from the permissions lesson.
- Employee Central is configured in your system and all the fields required for data mapping are available in the Succession Data Model. For more information about Succession Data Model, see the **Related Information** section.
- Recruiting Templates are configured in your system.

The Recruit-to-Hire Data Mapping tool is composed of two sections that easily identifies mandatory and optional fields in order to successfully initiate Onboarding from Recruiting Management.

- **Mandatory Onboarding HRIS Elements**: All the mandatory fields, which are required for successful initiation of Onboarding, and allows the Onboarding process to work as a whole are listed here.
- **Employee Central HRIS Elements**: All the other mandatory or nonmandatory fields based on your Business Configuration UI (BCUI) that are set in Employee Central Succession Data Model are listed here.



	Note: Onboarding supports the following recruiting templates: • Job Requisition Template • Candidate Application Template • Job Offer Template

Procedure – Map mandatory fields between Recruiting Management and Employee Central

1. Search for *Recruit-to-Hire Data Mapping* from the *Action Search* bar.
2. Select *Recruit-to-Hire Data Mapping* from the search results to open the tool.
3. Under *Mandatory Onboarding HRIS Elements*, map ALL fields on the listed HRIS Elements.
    - employmentInfo
    - jobInfo
    - peronsalInfo
4. Click *Validate* and *Save* for each group of fields per HRIS Element you are mapping.

Once the mapping is complete, data collected during the **Recruiting** process can pass to the new hire's employee record in **Employee Central**.

Lesson Summary

The goal of this lesson is to understand how data mapping occurs with the Employee Central entities.

You should now be able to:

- Map Employee Central to Recruiting fields

Unit Wrap-Up

In this unit, you covered:

- Lesson 8-1 – Integrating SAP SuccessFactors Onboarding and Recruiting
- Lesson 8-2 – Data Mapping

You should now be able to:

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

Unit 9 – Compliance Settings for Onboarding

Unit Objectives

This unit contains three lessons:

- Lesson 9-1 – Identifying the available Compliance Forms in Onboarding
- Lesson 9-2 – Identifying necessary Role-Based Permissions for Compliance Settings
- Lesson 9-3 – Configuring Compliance Settings in Onboarding

Upon completing this unit, you will be able to:

- Identify the purpose of compliance forms in the onboarding process
- Identify the available compliance forms in Onboarding
- Assign the necessary permissions for compliance settings in Onboarding
- Enable the available compliance forms in Onboarding

Lesson 9-1 – Identifying the available Compliance Forms in Onboarding

Lesson Overview

The goal of this lesson is to understand the purpose of compliance forms in the onboarding process and identify the available compliance forms in Onboarding

Lesson Objective

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

Compliance Forms

Compliance forms are a critical part of the Onboarding process. Therefore, a cloud- based compliance form solution is required as part of the Onboarding solution to ease the management of compliance forms for the users. As the Onboarding system continues to evolve, additional compliance settings and forms will be added for different countries.

The compliance forms for United Kingdom, Australia and the United States for employment process are now available in Onboarding. As an admin, you can enable and disable these forms as part of the compliance settings of Onboarding.

- United Kingdom Forms
    - Starter checklist
- Australia Forms

    - Superannuation Standard choice form
    - Tax file umber declaration
- United States of America Forms
    - I-9
    - W4
    - State Withholding Forms
    - Standard Forms

	Note: If the Compliance Settings are not available in Admin Center, there could be 2 reasons for it: • Permissions are not provided especially for the administrator. You will be learning this on the next lesson. • The process flows need to be updated through the BPE tool for updating process flows. This is accessible through Admin Center > Onboarding or simply type *Update Process Flows for Onboarding 2.0 and Offboarding 2.0* on the "Action Search" bar.

Available Compliance Forms for Onboarding

The compliance forms help you collect the required data and adhere to government regulations during the onboarding process for new hires.

Country	State/Province	Form ID	Form Title
Australia	-	-	Superannuation Standard choice form
Australia	-	-	Tax File Number Declaration

Country	State/Province	Form ID	Form Title
United Kingdom	-	-	Starter checklist
United States	-	USCIS Form I-9	USCIS Form I-9 /Employment Eligibility Verification **Note:** The I-9 feature has restricted availability currently. This functionality must be reviewed by your HR/Legal team before being used in the production environment.
United States	Alabama	State Form A4	Employee's Withholding Exemption Certificate
United States	Alabama	State Form A4 (Spanish version)	Certificado para todo Empleado de Exención de Retencion de Ingresos para Pago de Impuestos
United States	Alabama	State Form A4-MS	Nonresident Military Spouse Withholding Tax Exemption Certificate
United States	Arizona	State Form A-4	Employee's Arizona Withholding Percentage Election & instructions
United States	Arkansas	State Form AR4EC	Employee's Withholding Exemption Certificate
United States	Arkansas	State Form ARW-4MS	Annual Withholding Tax Exemption Certificate For Military Spouse
United States	California	State Form DE 4	Employee's Withholding Allowance Certificate

Country	State/Province	Form ID	Form Title
United States	Connecticut	State Form CT-W4	Employee's Withholding Certificate
United States	Delaware	State Form W-4	Employee's Withholding Allowance Certificate
United States	District of Columbia	State Form D-4	D-4 DC Withholding Allowance Certificate
United States	District of Columbia	State Form D-4A	D-4A Certificate of Nonresidence in the District of Columbia
United States	Georgia	State Form G-4	Employee's Withholding Allowance Certificate
United States	Hawaii	State Form HW-4	Employee's Withholding Allowance and Status Certificate
United States	Idaho	State Form ID W-4	Employee’s Withholding Allowance Certificate
United States	Illinois	State Form IL-W-4	Employee's Illinois Withholding Allowance Certificate
United States	Indiana	State Form WH-4	Employee's Withholding Exemption and County Status Certificate
United States	Iowa	State Form IA W-4	Employee Withholding Allowance Certificate
United States	Iowa	State Form IA W-4 (Spanish version)	Certificado de exenciones para retenciones del empleado
United States	Kansas	State Form K-4	Kansas Employee’s Withholding Allowance Certificate
United States	Kentucky	State Form K-4	Kentucky's Withholding Certificate

Country	State/Province	Form ID	Form Title
United States	Louisiana	State Form L-4	Employee's Withholding Allowance Certificate
United States	Maine	Form W-4ME	Employee's Maine Withholding Allowance Certificate
United States	Maryland	State Form MW507	Employee's Maryland Withholding Exemption Certificate
United States	Maryland	State Form MW507M	Exemption from Maryland Withholding Tax for a Qualified Civilian Spouse of a U. S. Armed Forces Servicemember
United States	Massachusetts	State Form M-4	Massachusetts Employee's Withholding Exemption Certificate
United States	Michigan	State Form MI-W4	Employee's Michigan Withholding Exemption Certificate
United States	Minnesota	State Form W-4MN	Employee's Withholding Allowance Certificate
United States	Mississippi	State Form 89-350	Mississippi Employee's Withholding Exemption Certificate
United States	Missouri	State Form MO W-4	Employee's Withholding Allowance Certificate
United States	Montana	State Form MW-4	Montana Employee’s Withholding Allowance and Exemption Certificate

Country	State/Province	Form ID	Form Title
United States	Nebraska	State Form W-4N	Employee’s Nebraska Withholding Allowance Certificate
United States	New Jersey	State Form NJ-W4	Employee's Withholding Allowance Certificate
United States	New Jersey	State Form NJ-165	Employee's Certificate of Nonresidence in New Jersey
United States	New York	State Form IT-2104	Employee's Withholding Allowance Certificate
United States	New York	State Form IT-2104-E	Certificate of Exemption Withholding (includes Military Spouses)
United States	North Carolina	State Form NC-4	Employee's Withholding Allowance Certificate
United States	North Carolina	State Form NC-4EZ	Employee’s Withholding Allowance Certificate
United States	Ohio	State Form IT 4	Employee's Withholding Exemption Certificate
United States	Oklahoma	State Form OW-9-MSE	Annual Withholding Tax Exemption Certification for Military Spouse
United States	Oklahoma	State Form OK-W-4	Employee’s Withholding Allowance Certificate
United States	Oregon	State Form OR-W-4	Oregon Employee’s Withholding Statement and Exemption Certificate
United States	Oregon	State Form OR-W-4 (Spanish version)	Certificado de Declaración de Retención y

Country	State/Province	Form ID	Form Title
			Exoneración de Oregon
United States	Puerto Rico	State Form 499 R-4.1	Withholding Exemption Certificate
United States	Puerto Rico	State Form 499 R-4	Certificado de Exencion para la Retencion
United States	Rhode Island	State Form RI W-4	Employee's Withholding Allowance Certificate
United States	South Carolina	State Form SC W-4	Employee’s Withholding Allowance Certificate
United States	Vermont	State Form W-4VT	Employee’s Withholding Allowance Certificate
United States	Virginia	State Form VA-4	Employee's Virginia Income Tax Withholding Exemption Certificate
United States	West Virginia	State Form WV/IT-104	West Virginia Employee's Withholding Exemption Certificate
United States	West Virginia	State Form WV/IT-104R	West Virginia Certificate of Nonresidence (page 2 of IT-104)
United States	Wisconsin	State Form WT-4	Employee's Wisconsin Withholding Exemption Certificate/New Hire Reporting

Lesson Summary

The goal of this lesson is to understand the purpose of compliance forms in the onboarding process and identify the available compliance forms in Onboarding

You should now be able to:

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

Lesson 9-2 – Identifying necessary Role-Based Permissions for Compliance Settings

Lesson Overview

The goal of this lesson is to identify the necessary role-based permissions that need to be assigned to the different users in Onboarding

Lesson Objective

- Assign the necessary permissions for compliance settings in Onboarding

Role-Based Permissions for Compliance Settings, Forms and Data

There are newly created MDF objects in the SAP SuccessFactors system for the purpose of the compliance features of Onboarding. With this, object permissions have been added in Role-Based Permissions.

For onboarding participants such as hiring managers and the recruiting or HR team, we may need to assign user type of permissions for them to access compliance data or monitor the completion of the compliance forms.

Category: Onboarding 2.0 or Offboarding 2.0 Object Permissions

- ONB2AssignedComplianceForm

Category: Compliance Object Permissions

- AssignedComplianceForm
- ComplianceDocumentFlow
- ComplianceFormData
- ComplianceProcess
- ComplianceUserData

The administrator is a very important role for the compliance process features in Onboarding because he/she will be managing the compliance settings for the company. The administrator will have the ability to modify the setup of the compliance settings in the system especially that certain compliance forms will have additional settings due to the purpose of the said forms with different applicability for every employee in a company in a particular country.

Category: Onboarding 2.0 or Offboarding 2.0 Admin Object Permissions

- ComplianceConfiguration – This is the main permission for the compliance settings of Onboarding.
- AustraliaSuperannuationConfig – This is an additional administrator object permission needed as the Australia Superannuation form can have different variations for different employees to which an employer can propose different superannuation funds.

Procedure – Assign compliance configurations settings to the Administrator

1. Search for *Manage Permission Roles* from the *Action Search* bar.
2. Select *Manage Permission Roles* from the search results to open the *Permission Role List* page.
3. Select your “Onboarding Admin” role.
4. Select *Permission*….
5. Navigate to *Administrator Permissions* and select ALL compliance admin object permissions.
6. Select *Done* and *Save Changes*.

Exercise – Assign compliance configurations settings to the Administrator

1. Search for *Manage Permission Roles* from the *Action Search* bar.
2. Select *Manage Permission Roles* from the search results to open the *Permission Role List* page.
3. Select your “Onboarding Admin” role.
4. Select *Permission*….
5. Navigate to *Administrator Permissions* and select *Onboarding 2.0 or Offboarding 2.0 Admin Object Permissions*.
6. Select *View* and *Edit* for:
   a) AustraliaSuperannuationConfig
   b) ComplianceConfiguration
7. Select *Done*.
8. Select *Save Changes*.

This modifies the permissions for the Onboarding Administrator to include the access to configuring compliance forms United Kingdom and Australia.

Lesson Summary

The goal of this lesson is to identify the necessary role-based permissions that need to be assigned to the different users in Onboarding.

You should now be able to:

- Assign the necessary permissions for compliance settings in Onboarding

Lesson 9-3 – Configuring Compliance Settings in Onboarding

Lesson Overview

The goal of this lesson is to enable and configure compliance forms for United Kingdom and Australia.

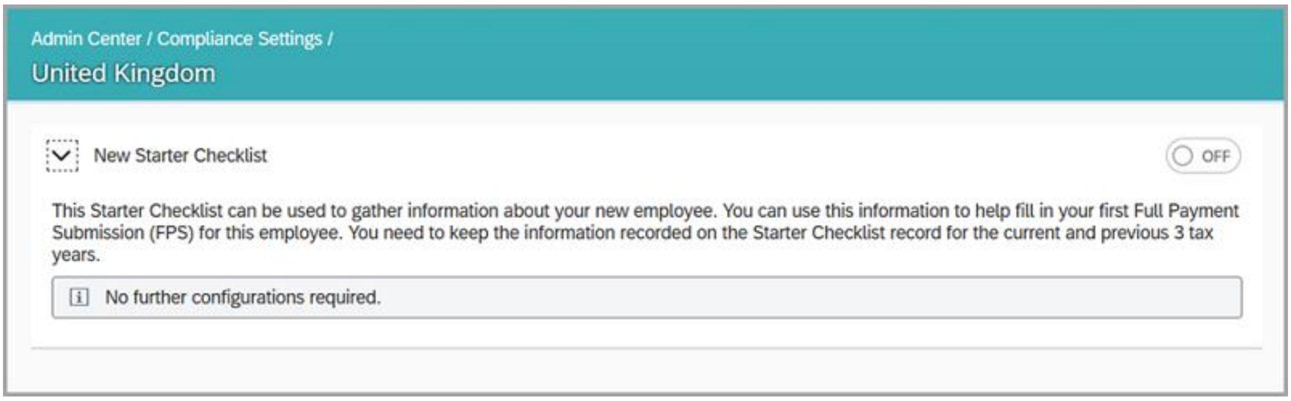
Lesson Objective

- Enable the available compliance forms in Onboarding

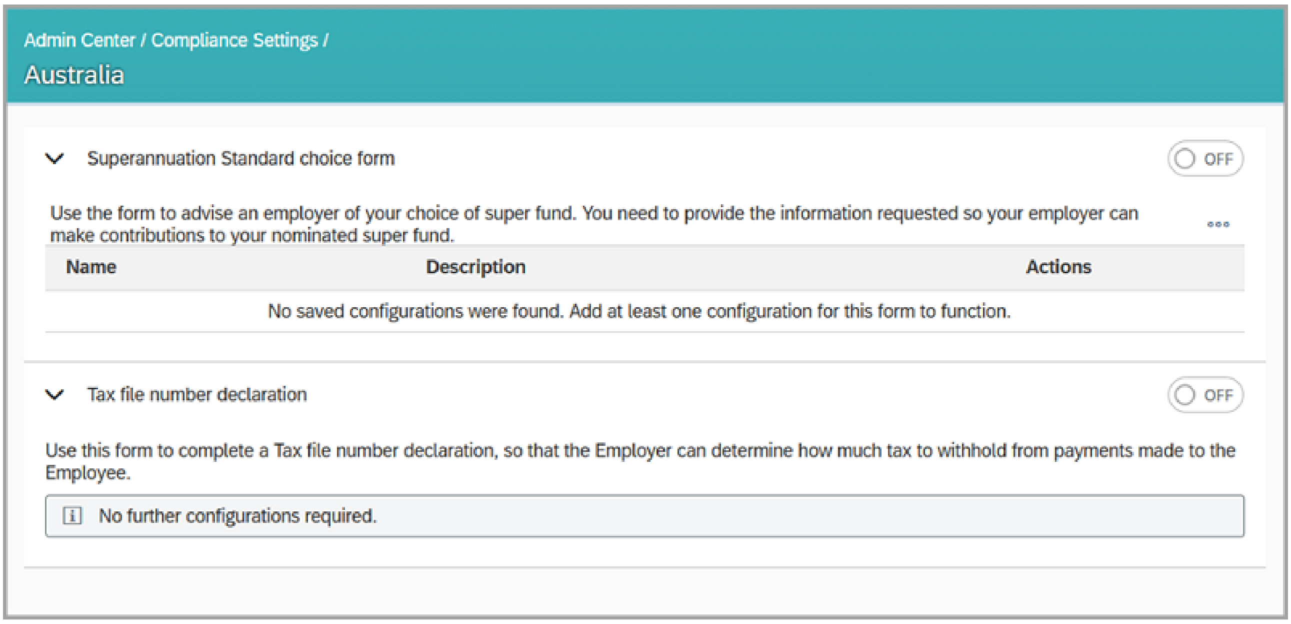
Compliance Settings

It is easy to enable compliance features in Onboarding. The settings are easily accessible in Admin Center. The general principle with the compliance features of Onboarding 2.0 is they are preconfigured and we mainly just need to enable the features. Most of these settings, like the content of compliance forms, are and will be maintained by SAP. Depending on the compliance requirements for certain countries, further configurations are available to specific compliance features.

For United Kingdom compliance settings, no further configurations are required except enabling the “Starter Checklist” form.



For Australia compliance settings, one form is non-configurable and the other is configurable to a certain extent as this can really be modified as part of the employment process in Australia.



Procedure – Enable the United Kingdom Compliance Form

1. Search for *Compliance Settings* from the *Action Search* bar.
2. Select *Compliance Settings* from the search results to open the *Compliance Settings* page.
3. Select *United Kingdom*.
4. Click the *ON/OFF* switch for the *New Starter Checklist* form which is currently on *OFF* position.

Procedure – Enable the Australia Compliance Forms

1. Search for *Compliance Settings* from the *Action Search* bar.
2. Select *Compliance Settings* from the search results to open the *Compliance Settings* page.
3. Select *Australia*.
4. Click the *ON/OFF* switch for the *Tax file number declaration* form which is currently on *OFF* position.
5. Click the *3-dots* button below the ON/OFF switch of the *Superannuation Standard choice form* and select *Add New Configuration*.
6. Fill up the details (especially the mandatory fields) for the first and default *Superannuation Standard choice form*.
7. Select *Save* to save the first configuration or version of the *Superannuation Standard Choice form*. You can create multiple configurations or version of the form and define business rules for which one is selected for specific new hires.
8. Click the *ON/OFF* switch for the *Superannuation Standard choice form* which is currently on *OFF* position.

Lesson Summary

The goal of this lesson is to enable and configure compliance forms for United Kingdom and Australia.

You should now be able to:

- Enable the available compliance forms in Onboarding

Unit Wrap-Up

In this unit, you covered:

- Lesson 9-1 – Identifying the available Compliance Forms in Onboarding
- Lesson 9-2 – Identifying necessary Role-Based Permissions for Compliance Settings
- Lesson 9-3 – Configuring Compliance Settings in Onboarding

You should now be able to:

- Identify the purpose of compliance forms in the onboarding process
- Identify the available compliance forms in Onboarding
- Assign the necessary permissions for compliance settings in Onboarding
- Enable the available compliance forms in Onboarding

Unit 10 - Offboarding and Termination of Employees

Unit Objectives

This unit contains four lessons:

- Lesson 10-1 – Defining the Offboarding Process
- Lesson 10-2 – Defining Role-Based Permissions for the Offboarding Process
- Lesson 10-3 – Defining Business Rules for the Offboarding Process
- Lesson 10-4 – Creating and Initiating an Offboarding Program

Upon completing this unit, you will be able to:

- Describe the Offboarding process
- Identify the prerequisites for enabling Offboarding
- Enable Offboarding
- Identify Role-Based permissions required for Offboarding
- Assign Role-Based permissions for Offboarding
- Identify different business rules for Offboarding process
- Define business rules for Offboarding process
- Define the Offboarding program
- Define a business rule for selecting an Offboarding program
- Initiate the Offboarding process

Lesson 10-1 – Defining the Offboarding Process

Lesson Overview

After completing this lesson, you will be able to:

Lesson Objective

- Describe the Offboarding process

Offboarding Process Overview

Offboarding allows you to set up a seamless exit process for employees leaving the company. This can also be referred to as the termination process of an employee in a company. Termination can be voluntary (such as, a resignation), involuntary (a layoff or dismissal), or a result of retirement. Offboarding gathers all termination-related information and triggers time-sensitive activities, including:

- Conducting meetings with the Offboardee
- Creating and tracking knowledge transfer task by Offboardee to existing employees

- Tracking the company assets possessed by the Offboardee
- Notifying peers about Offboardee's exit
- Activities related to Offboarding paperwork. For example, review of information by the manager and the Offboardee.

Offboarding can be implemented together with Onboarding or it can be a stand-alone product within the SAP SuccessFactors HCM Suite.

Lesson Summary

You should now be able to:

- Describe the Offboarding process

Lesson 10-2 – Defining Role-Based Permissions for the Offboarding Process

Lesson Overview

After completing this lesson, you will be able to:

Lesson Objective

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

Role-Based Permissions for Offboarding

After enabling Offboarding, user groups who will be performing specific tasks for the offboarding process will need to be identified/created. Common users involved in an offboarding process are the manager and the offboardee. Other users may need to be involved, such as the security and IT team depending on the policies and procedures of the organization. The system administrator will also need access specific to configuring changes in the system, especially for incorporating changes in the company's offboarding process.

Most of the Offboarding permissions required for the manager (hiring manager), administrator, and offboardee have already been identified in the previous lessons as permissions for Onboarding as well. Remember that there are a lot of shared features between the two systems which can be configured for each or both the onboarding and offboarding processes.

Offboarding Specific Permissions

Role	Permission Group/Category	Permission Name	Description
Admin	Onboarding 2.0 or Off-boarding 2.0 Admin Object Permissions	View & Edit access to ONB2OffboardingActivitiesConfig	Allows access to configure Offboarding programs.
View & Edit access to ONB2ResponsibilityConfig	Allows you to assign responsible roles for the offboarding activities in your system.		
View & Edit access to Document Template	Allows you to manage form templates.		
Manage Onboarding 2.0 or Offboarding 2.0	Permission to Cancel Offboarding	Allows role to cancel Offboarding process.	
Administrate Onboarding 2.0 or Offboarding 2.0 content	Allows you to manage Offboarding content including configuration settings and document templates.		
Configure Email Framework Permissions	Configure Email Categories	Email category represents a certain email template group, such as the Buddy Category.	
Configure Email Triggers	Triggers can be applied as rules for sending emails. For example, Buddy Assignment Cancellation Trigger: Notify the assigned buddy that the task has been reassigned to a different colleague.		
Configure Email Templates	Email Template provides a specific email form generated by certain conditions and rules.		

Role	Permission Group/Category	Permission Name	Description
Configure Audit Trail	This allows you to display a list of emails sent by the system. The Actions you can take include: View Email, Resend, and Display Details.		
Allow Resend Emails	This allows you to trigger new reminder emails and complete or edit the To and CC fields.		
Email Framework Object Permissions	Email Message	Provides access necessary for managing email messages sent by the system.	
Email Reminder State	Provides access necessary for managing email reminders to be sent to the New Hire/Employee. These objects track an email's reminder status and its last sent time stamp.		
Email Template	Provides access necessary for managing email forms (or templates) present in the system.		
Email Trigger	Provides access necessary for managing email rules used for sending different types of emails to the New Hire/Employee.		

Role	Permission Group/Category	Permission Name	Description
Email Trigger Category	Provides access necessary for managing categories of emails that are triggered by the system.		
Metadata Framework	Configure Business Rules	Allows you to configure the business rules associated with your onboarding programs.	
Manager, Offboardee and other offboarding process participants	Onboarding 2.0 or Off-boarding 2.0 Object Permissions	Asset Task	Allows access to asset collection tasks.
ONB2KnowledgeTransferPlanActivity	Allows access to create knowledge transfer plans.		
ONB2KnowledgeTransferTaskActivity	Allows access to knowledge transfer plan task.		
Meeting Task	Allows access to scheduled message/s for offboarding process.		
ONB2Process	Enables participants to close Onboarding process flow.		
ONB2ProcessTrigger	Enables participants to trigger Onboarding and Offboarding process flow.		
Equipment Type	Allows participants to identify the type of equipment to be returned.		
Equipment Type Value	Allows participants to identify the exact equipment to be		

Role	Permission Group/Category	Permission Name	Description
	returned based on the type.		
Document Flow	Allows participants to view/edit paperwork status in the offboarding process.		
Document Data	Allows participants to view/edit data on documents in the offboarding process.		
ONB2ScheduledMessageActivity	Allows participants to write a farewell message to an offboardee and an announcement message to coworkers.		
Manage Onboarding 2.0 or Offboarding 2.0	Permission to Cancel Offboarding	Allows role to cancel Offboarding process.	

Procedure - To Assign Role-Based Permissions for Offboarding

Assign additional permissions specific to the Offboarding 2.0 process.

1. Enter Manage Permission Roles on the Action Search bar and select Manage Permission Roles on the search results.
2. Select each of the Offboarding roles listed in the table above and assign the permissions.
3. Click *Done*.
4. Click *Save* Changes to save your changes and assign the permissions.
5. Log out from the system and log back in to refresh the system and check permissions have been updated for the roles.

Exercise - Assign Permissions for Offboarding

Business Example

As part of the offboarding process and configurations, we need to provide necessary permissions for the Offboarding administrator and all participants in the offboarding process. Every key role participating in the offboarding process will need permission/s to act on certain tasks for an offboardee.

On completion of this exercise, you will be able to:

- Assign offboarding permissions to the managers and the offboarding administrator.

1. Log in to your assigned SAP SuccessFactors instance, as Emily Clark (admin) or HR Administrator (sfadmin).
2. Enter *Manage Permission Roles* in the *Action Search* bar.
3. Choose *Manage Permission Roles* from the search results.
4. Create an *Offboarding Admin* role.
    a) Choose + *Create New*.
    b) Enter **Offboarding Admin** for the *Role Name*.
    c) Choose *Permission*….
    d) Navigate to *Administrator Permissions* → *Manage Onboarding 2.0 or Offboarding 2.0*.
    e) Select *Permission to Cancel Offboarding*.
    f) Navigate to *Administrator Permissions* → *Onboarding 2.0 or Offboarding 2.0 Admin Object Permissions*.
    g) Select "***View***" and "***Edit***" for *ONB2OffboardingActivitiesConfig*.

	Note: The previous Onboarding Admin role you have created has the other necessary permissions needed for an Offboarding Administrator. You are only adding the permissions specific to Offboarding to the existing Onboarding Administrators.

    h) Choose *Add…* and assign the role to the existing Onboarding 2.0 admin group (Make sure this group has Emily Clark or HR Administrator).
    i) Choose *Done* after selecting the group.
    j) Choose *Save Changes* to save the new Offboarding Admin role.
5. Choose the **Hiring Managers** role that you have created for Onboarding.

    a) Choose *Permission*….
    b) Navigate to *Administrator Permissions* → *Manage Onboarding 2.0 or Offboarding 2.0*.
    c) Select *Permission to Cancel Offboarding*.
    d) Navigate to *User Permissions* → *Onboarding 2.0 or Offboarding 2.0 Object Permissions*.
    e) Select "***View***" and "***Edit***" for the following:
        - Asset Task
        - ONB2KnowledgeTransferPlanActivity
        - ONB2KnowledgeTransferTaskActivity
        - ONB2ScheduledMessageActivity
6. Choose *Done*.

7. Choose *Save Changes*.
8. Create an *Offboarding Admin* role.
    a) Choose + *Create New*.
    b) Enter **Offboardee Role** for the *Role Name*.
    c) Choose *Permission*….
    d) Navigate to *User Permissions* → *Onboarding 2.0 or Offboarding 2.0 Object Permissions*.
    e) Select "***View***" for the following:
        - Asset Task
        - ONB2KnowledgeTransferPlanActivity
        - ONB2KnowledgeTransferTaskActivity
        - ONB2ScheduledMessageActivity
9. Choose *Done*.
10. Choose *Save Changes*.
11. Log-out from the system and log back in to refresh the permissions.

Lesson Summary

You should now be able to:

- Identify Role-Based permissions required for Offboarding 2.0
- Assign Role-Based permissions for Offboarding 2.0

Lesson 10-3 – Defining Business Rules for the Offboarding Process

Lesson Overview

After completing this lesson, you will be able to:

Lesson Objective

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

Business Rules for Offboarding

The Offboarding process for employees can be initiated from Employee Central.

> Termination is the more common terminology used for the process in Employee Central.

For the Offboarding process to be initiated, a business rule needs to be configured. Multiple termination reasons can be configured for the business rule or also set as always true, which triggers Offboarding process for any of the termination reasons. The business rule can be based on any field belonging to job information or employment details.

Other business rules can also be defined depending on the exact Offboarding process of the organization:

- A rule for when the Offboardee needs to complete a data review
- A rule for when the Manager needs to complete a data review
- A rule for a specific Offboarding program needs to be initiated in which it will contain specific tasks that will need to be completed by specific users in the offboarding process.

Procedure - To Define a Business Rule for Initiating Offboarding

1. Enter *Configure Business Rules* on the *Action Search* bar.
2. Select *Configure Business Rules* from the search results and the *Business Rules Admin* page should open.
3. Click the *Plus* button to create a new rule. The *Configure Business Rules* page will open.
4. Select *Onboarding 2.0.* This will show the list of scenario categories that can be used for creating business rules for *Onboarding 2.0 and Offboarding.*
5. Select the *Initiate Offboarding Configuration* scenario.
6. Enter a *Rule Name, Rule ID,* and select a *Startdate*. The *Rule ID* automatically picks up the value entered in the Rule Name but you can change it if desired.
7. Click *Continue*. The business rule configuration page opens.
8. Define the business rule as per the requirement.
9. Click *Save* to save the business rule for initiating the *Offboarding* process.

Procedure - To Define a Business Rule for Manager Data Review for Offboarding

When the Offboarding process is initiated for an employee, the manager can view and edit some of the Offboardee's information like personal information, job information, and employment information. The manager's task to review this information is activated only when the ONB2_OFB_ManagerReviewCheck is evaluated to true by the Offboarding process.

ONB2_OFB_ManagerReviewCheck is a business rule that is created and pre-defined automatically when Offboarding is enabled in the SAP SuccessFactors system. This business rule will need to be modified if manager data review is not always required during the offboarding process for an offboardee.

1. Enter *Configure Business Rules* on the *Action Search* bar.
2. Select *Configure Business Rules* from the search results and the *Business Rules Admin* page should open.

3. Enter *ONB2_OFB_ManagerReviewCheck* in the *Search box* and then click Go. The *ONB2_OFB_ManagerReviewCheck* appears in the search result.
4. Click *ONB2_OFB_ManagerReviewCheck* under *Rule Name*.
5. Point to *Take Action* and select *Make Correction* to modify the business rule.
6. Define the business rule as per the requirement.
7. Click *Save* to save the business rule changes.

Procedure - To Define a Business Rule for Offboardee Data Review

When the Offboarding process is initiated for an employee, the offboardee can also view and edit some of the his/her information like personal information, job information, and employment information. The offboardee's task to review this information is activated only when the ONB2_OFB_EmployeeReviewCheck is evaluated to true by the Offboarding process.

ONB2_OFB_EmployeeReviewCheck is a business rule that is created and pre-defined automatically when Offboarding (2.0) is enabled in the SAP SuccessFactors system. It will need to be modified depending on an organization's requirement.

1. Enter *Configure Business Rules* on the *Action Search* bar.
2. Select *Configure Business Rules* from the search results and the *Business Rules Admin* page should open.
3. Enter *ONB2_OFB_EmployeeReviewCheck* in the *Search box* and then click *Go*. The *ONB2_OFB_EmployeeReviewCheck* appears in the search result.
4. Click *ONB2_OFB_EmployeeReviewCheck* under Rule Name.
5. Point to *Take Action* and select *Make Correction* to modify the business rule.
6. Define the business rule as per the requirement.
7. Click *Save* to save the business rule changes.

Exercise - Configure Business Rules for Offboarding

Business Example

Depending on the offboarding process of a company, we will need to define certain business rules for specific offboarding tasks and events plus when the Offboarding process is initiated.

On completion of this exercise, you will be able to:

- Create a business rule to trigger/initiate the offboarding process.
- Define the business rule for when a manager data review is required in the offboarding process.
- Define the business rule for when an offboardee data review is required in the offboarding process.
    1. Log in to your assigned SAP SuccessFactors instance, as Emily Clark (admin) or HR Administrator (sfadmin).

2. Enter *Configure Business Rules* in the *Action Search* bar.
3. Choose *Configure Business Rules* from the results and the *Business Rules Admin* page opens.
4. Create a business rule for initiating the offboarding process.
    a) Choose + *(Plus)* to *Create New Rule*.
    b) Select *Initiate Offboarding Configuration* from the *Onboarding 2.0* section.
    c) Enter **Initiate Offboarding** for the *Role Name*. **Initiate_Offboarding** will populate on the *Rule ID*.
    d) *Start Date* field will have **01/01/1900**. Don't change this.
    e) Choose *Continue*.
    f) Select ***Always True*** from the *If* section.
    g) Choose *Save* to create and save the business rule.

> Note: Setting the business rule for initiating offboarding to "Always True" means that for every termination event in the system, Offboarding will be initiated.

5. Choose *Business Rules Admin* to go back to the *Business Rules Admin* page.
6. Enter **ONB2_OFB** on the *Search* box. All business rules with "OFB" on the rule name will show on the results.
7. Choose *ONB2_OFB_ManagerReviewCheck* by clicking on the name ***ONB2_OFB_ManagerReviewCheck***.
8. Verify that the two "**If**"statements are configured:
    • Process.processtype is equal to Offboarding
    • Process.targetDate is on or before 01/01/1900
9. Choose *Business Rules Admin* to go back to the *Business Rules Admin* page.
10. Enter **ONB2_OFB** on the *Search* box. All business rules with "OFB" on the rule name will show on the results.
11. Choose *ONB2_OFB_EmployeeReviewCheck* by clicking on the name ***ONB2_OFB_EmployeeReviewCheck***.
12. Verify that the "**If**"statement is configured as:
    • Process.processtype is equal to Offboarding

> Note: For the purpose of training, we did not modify the ***ONB2_OFB_ManagerReviewCheck & ONB2_OFB_EmployeeReviewCheck*** business rules to make sure we see the data review for both the manager and offboardee in the offboarding process.

13. Choose *Business Rules Admin* to go back to the *Business Rules Admin* page.

Lesson Summary

You should now be able to:

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

Lesson 10-4 – Creating and Initiating an Offboarding Program

Lesson Overview

After completing this lesson, you will be able to:

Lesson Objective

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

The Offboarding Program

Similar to Onboarding, you can define Offboarding programs too.

What is an Offboarding Program?

An offboarding program is a set of tasks that will need to be done for an employee who is exiting the organization. Some examples can include a meeting (exit interview) with an HR Representative or Manager, collection of assets (or equipment) and setting a plan for knowledge transfer for a replacement of the offboardee's role in the team or organization.

Prerequisites

- *ONB2OffboardingActivitiesConfig* object permission must be provided the administrator.
- Responsible groups must be created for the users who will be involved in the process.

Pre-Defined Offboarding Tasks

- Knowledge Transfer Task
- Meeting Activity
- Sending a Farewell message to the Offboardee
- Announcing the Employee's (Offboardee) exit from the company, to the team by the manager
- Collecting Offboardee assets

Procedure - To Create an Offboarding Program

1. Enter *Manage Onboarding 2.0 and Offboarding 2.0 Tasks* on the *Action Search* bar.
2. Select *Manage Onboarding 2.0 and Offboarding 2.0 Tasks* from the search results and the *Manage Onboarding 2.0 and Offboarding 2.0 Tasks* page opens.
3. Select the *Offboarding Programs* tab.
4. Choose + *New Program* to create a new offboarding program.
5. Enter an *ID* and a *Program Name* for the new offboarding program.
6. Choose + *Add Task*.
7. Add and define the tasks you would like to add to the offboarding program.
8. Click *Submit* to save the offboarding program.

Task	Description
Write Farewell Message	Allows a participant to compose a farewell message. A standard farewell message can be configured by the offboarding administrator and be assigned to a specific responsible group such as the manager.
Announce Termination to Coworkers	Similar to the farewell message, this allows a participant to create an announcement message to coworkers about for the offboardee.
Create Knowledge Transfer Plan	Allows a participant to create a knowledge transfer plan. This can be very important for a team who will need an immediate replacement for the employee leaving the team.
Schedule Meetings	Allows a participant to schedule a meeting especially with the offboardee to discuss important items before leaving the organization.
Manage Assets	Allow participants to identify equipment that need to be returned be the offboardee and also track the process.

Exercise - Create a Default Offboarding Program

Business Example

Depending on the offboarding process of a company, multiple offboarding programs or sets of tasks may be needed depending on the employee leaving the organization. This is sometimes the differences of tasks depending on the locations of the company.

On completion of this exercise, you will be able to:

- Create a default offboarding program that applies to most employees.
- Add all offboarding tasks available to the default offboarding program.

    1. Log in to your assigned SAP SuccessFactors instance, as Emily Clark (admin) or HR Administrator (sfadmin).

2. Enter *Manage Onboarding 2.0 and Offboarding 2.0 Tasks* in the *Action Search* bar.
3. Choose *Manage Onboarding 2.0 and Offboarding 2.0 Tasks* from the results and the *Manage Onboarding 2.0 and Offboarding 2.0 Tasks* page opens.
4. Choose + *New Program* to create a new offboarding program.
    a) Enter **DEFAULTOFFBOARDING** for the *ID*.
    b) Enter **Default Offboarding Program** of the *Program Name*.
    c) Enter **This is the default offboarding program for most employees**. for the *Brief Description*.
    d) Choose + *Add Task*.
    e) Add ALL THE TASKS available into the default offboarding program.

Procedure - To Define a Business Rule for an Offboarding Program

As you can create multiple Offboarding programs, where each program has its own set of tasks or activities, you can define a rule such that you can select the required program for your Offboarding process.

1. Enter *Configure Business Rules* on the *Action Search* bar.
2. Select *Configure Business Rules* from the search results and the *Business Rules Admin* page should open.
3. Click the + *(Plus)* button to create a new rule. The *Configure Business Rules* page will open.
4. Select Onboarding 2.0. This will show the list of scenario categories that can be used for creating business rules for Onboarding 2.0 and Offboarding 2.0.
5. Choose the *Select Offboarding Task Configuration* scenario.
6. Enter a Rule Name, Rule ID, and select a Start date. The Rule ID automatically picks up the value entered in the Rule Name but you can change it if desired.
7. Click Continue. The business rule configuration page opens.
8. Define the business rule as per the requirement.
9. Click Save to save the business rule for the selection of an Offboarding 2.0 program for the Offboarding 2.0 process.

Exercise - Configure Business Rules for Offboarding

Business Example

Depending on the offboarding process of a company, we will need to define certain business rules for specific offboarding tasks that are included in an offboarding program. Certain offboarding tasks may only be applicable for specific employees when they go through the process.

On completion of this exercise, you will be able to:

- Create a business rule that selects an offboarding program based on a condition. For the purpose of training, you will be creating a business rule that will always initiate the default offboarding program you have created from the previous exercise.
    1. Log in to your assigned SAP SuccessFactors instance, as Emily Clark (admin) or HR Administrator (sfadmin).
    2. Enter *Configure Business Rules* in the *Action Search* bar.
    3. Choose *Configure Business Rules* from the results and the *Business Rules Admin* page opens.
    4. Create a business rule for initiating the onboarding process.
        a) Choose + *(Plus)* to *Create New Rule*.
        b) Choose *Select Offboarding task Configuration* from the *Onboarding 2.0* section.
        c) Enter **Offboarding Program** for the *Role Name*. **Offboarding_Program** will populate on the *Rule ID*.
        d) *Start Date* field will have **01/01/1900**. Don’t change this.
        e) Choose *Continue*.
        f) Select ***Always True*** from the *If* section.
        g) Choose *Set* →*Process.offboardingActivitesConfig* →*to be equal to* →*Value* →*General/Default Offboarding Program* on the *Then* section.
        h) Choose *Save* to save and create the new business rule.

	Note: You can create as many Offboarding programs as you may like and define different business rules for each that will depend on which offboarding program is applicable for an offboardee.

Procedure - To Initiate the Offboarding process

To initiate the Offboarding 2.0 process, you must terminate the employee from Employee Central.

1. Enter the name of the Employee (Offboardee) on the *Action Search* bar.
2. Point your cursor on the employee's name from the search results. A dialog box appears for the employee's details.
3. Click *Take Action* and select *Terminate*.
4. Enter the *Termination Date*, select the *Termination Reason* and fill all the other applicable details.
5. Click *Save*.

Lesson Summary

You should now be able to:

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

Unit Wrap-Up

In this unit, you covered:

- Lesson 10-1 – Defining the Offboarding Process
- Lesson 10-2 – Defining Role-Based Permissions for the Offboarding Process
- Lesson 10-3 – Defining Business Rules for the Offboarding Process
- Lesson 10-4 – Creating and Initiating an Offboarding Program

You should now be able to:

- Describe the Offboarding process
- Identify the prerequisites for enabling Offboarding
- Enable Offboarding
- Identify Role-Based permissions required for Offboarding
- Assign Role-Based permissions for Offboarding
- Identify different business rules for Offboarding process
- Define business rules for Offboarding process
- Define the Offboarding program
- Define a business rule for selecting an Offboarding program
- Initiate the Offboarding process