THR97

SAP SuccessFactors Onboarding Academy

COURSE OUTLINE

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Course Duration:

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Typographic Conventions

American English is the standard used in this handbook.

The following typographic conventions are also used.

This information is displayed in the instructor's presentation	
Demonstration	
Procedure	
Warning or Caution	
Hint	
Related or Additional Information	
Facilitated Discussion	
User interface control	*Example text*
Window title	*Example text*

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Course Overview

TARGET AUDIENCE

This course is intended for the following audiences:

- Application Consultant
- System Administrator

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UNIT 1 Introducing SAP SuccessFactors Onboarding

Lesson 1: Describing SAP SuccessFactors Onboarding

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the functionality of SAP SuccessFactors Onboarding.

Lesson 2: Defining the Onboarding Process Steps

Lesson Objectives

After completing this lesson, you will be able to:

- Identify the steps in the SAP SuccessFactors Onboarding process.

Lesson 3: Protecting Onboarding Data in SAP SuccessFactors HCM Suite

Lesson Objectives

After completing this lesson, you will be able to:

- Describe data retention management in SAP SuccessFactors Onboarding.

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UNIT 2

Enabling and Configuring SAP SuccessFactors Onboarding in Provisioning

Lesson 1: Activating SAP SuccessFactors Onboarding

Lesson Objectives

After completing this lesson, you will be able to:

- Activate SAP SuccessFactors Onboarding in Provisioning.

Lesson 2: Enabling Features for Document Management

Lesson Objectives

After completing this lesson, you will be able to:

- Activate and Set Up Additional Features for Document Management.

Lesson 3: Scheduling Sync Jobs

Lesson Objectives

After completing this lesson, you will be able to:

- Schedule required jobs in Provisioning for SAP SuccessFactors Onboarding.

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UNIT 3

Assigning Role-Based Permissions in SAP SuccessFactors Onboarding

Lesson 1: Assigning Consultant and Administrator Permissions

Lesson Objectives

After completing this lesson, you will be able to:

- Assign the permissions for SAP SuccessFactors Onboarding consultants and administrators.

Lesson 2: Assigning Task Permissions for Hiring Managers, Recruiters, and Other Participants

Lesson Objectives

After completing this lesson, you will be able to:

- Assign the permissions for SAP SuccessFactors Onboarding tasks.

Lesson 3: Identifying New Hire Permissions

Lesson Objectives

After completing this lesson, you will be able to:

- Identify the preconfigured permissions and assign more permissions for new hires.

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UNIT 4 Initiating the New Hire Onboarding Process

Lesson 1: Initiating Onboarding from SAP SuccessFactors Recruiting

Lesson Objectives

After completing this lesson, you will be able to:

- Initiate the new hire onboarding process from SAP SuccessFactors Recruiting.

Lesson 2: Assigning Permissions to add New Hires to SAP SuccessFactors Onboarding

Lesson Objectives

After completing this lesson, you will be able to:

- Assign permissions to grant access to add a new hire directly into SAP SuccessFactors Onboarding.

Lesson 3: Adding New Hires to SAP SuccessFactors Onboarding

Lesson Objectives

After completing this lesson, you will be able to:

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

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UNIT 5 Defining the SAP SuccessFactors Onboarding Data Model

Lesson 1: Describing the SAP SuccessFactors Onboarding Data Model

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the SAP SuccessFactors Onboarding Data Model.

Lesson 2: Configuring the Onboarding Data Model

Lesson Objectives

After completing this lesson, you will be able to:

- Configure the Onboarding Data Model.

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UNIT 6 Creating SAP SuccessFactors Onboarding Programs

Lesson 1: Creating and Defining Responsible Groups

Lesson Objectives

After completing this lesson, you will be able to:

- Create responsible groups to assign to onboarding tasks.

Lesson 2: Creating Onboarding Programs

Lesson Objectives

After completing this lesson, you will be able to:

- Create onboarding programs and tasks.

Lesson 3: Adding Tasks to an Onboarding Program

Lesson Objectives

After completing this lesson, you will be able to:

- Add tasks to an onboarding program.

Lesson 4: Adding and Scheduling Central Orientation Meetings

Lesson Objectives

After completing this lesson, you will be able to:

- Add and schedule central orientation meetings.

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UNIT 7 Activating and Using Compliance Forms

Lesson 1: Identifying SAP SuccessFactors Onboarding Compliance Forms

Lesson Objectives

After completing this lesson, you will be able to:

- Identify the available compliance forms in SAP SuccessFactors Onboarding.

Lesson 2: Enabling and Configuring Available Compliance Forms

Lesson Objectives

After completing this lesson, you will be able to:

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

Lesson 3: Enabling E-Verify in SAP SuccessFactors Onboarding

Lesson Objectives

After completing this lesson, you will be able to:

- Enable E-Verify in SAP SuccessFactors Onboarding.

Lesson 4: Adding Compliance Forms Using Compliance Form Builder

Lesson Objectives

After completing this lesson, you will be able to:

- Add more compliance forms into the SAP SuccessFactors Onboarding system using the Compliance Form Builder.

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UNIT 8

Creating Custom MDF Objects for Additional Data Collection

Lesson 1: Creating Custom MDF Objects

Lesson Objectives

After completing this lesson, you will be able to:

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

Lesson 2: Defining the Visibility of Custom MDF Objects to New Hires

Lesson Objectives

After completing this lesson, you will be able to:

- Define the visibility of custom MDF objects to new hires during the Additional Data Collection step.

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UNIT 9

Creating Document Templates and Using e-Signature Tools

Lesson 1: Setting Up Document Templates in SAP SuccessFactors Onboarding

Lesson Objectives

After completing this lesson, you will be able to:

- Create a document template to be generated in the Document Flow step of the onboarding process.

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

Lesson Objectives

After completing this lesson, you will be able to:

- Enable and set up e-Signature tools.

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UNIT 10 Using Email Services

Lesson 1: Using Email Services and Preconfigured Email Templates

Lesson Objectives

After completing this lesson, you will be able to:

- Use Email Services in SAP SuccessFactors Onboarding.

Lesson 2: Creating Custom Email Templates

Lesson Objectives

After completing this lesson, you will be able to:

- Customize email templates in Email Services.

Lesson 3: Creating Custom Tokens for Email Content

Lesson Objectives

After completing this lesson, you will be able to:

- Create custom tokens for email subjects and message content.

Lesson 4: Troubleshooting Email Notifications using Email Status in Email Services

Lesson Objectives

After completing this lesson, you will be able to:

- Track all email notifications sent by the system.

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UNIT 11 Managing the Rehire Process

Lesson 1: Describing the Rehire Process in SAP SuccessFactors Onboarding

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the rehire function in the onboarding process.

Lesson 2: Configuring the Rehire Check and Related Permissions

Lesson Objectives

After completing this lesson, you will be able to:

- Configure the Rehire Check with a responsible group.

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UNIT 12

Canceling Onboarding Processes and Triggering No-Show Events

Lesson 1: Canceling Onboarding Processes

Lesson Objectives

After completing this lesson, you will be able to:

- Cancel an onboarding process.

Lesson 2: Triggering a No-Show Event for a New Hire

Lesson Objectives

After completing this lesson, you will be able to:

- Trigger a No-Show event for a new hire.

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UNIT 13

Customizing the Onboarding Process Using Process Variant Manager

Lesson 1: Creating Processes Using Process Variant Manager

Lesson Objectives

After completing this lesson, you will be able to:

- Create custom processes using Process Variant Manager.

Lesson 2: Defining Business Rules for Process Variants

Lesson Objectives

After completing this lesson, you will be able to:

- Create and define business rules for triggering the correct process variant.

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UNIT 14 Using the Internal Hire Process

Lesson 1: Defining the Internal Hire Process

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the internal hire process.

Lesson 2: Setting Up the Internal Hire Process

Lesson Objectives

After completing this lesson, you will be able to:

- Set up the internal hire process.

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UNIT 15

Managing SAP SuccessFactors Home Page for Onboarding

Lesson 1: Managing the Home Page Cards for All Onboarding and Offboarding Participants

Lesson Objectives

After completing this lesson, you will be able to:

- Identify different SAP SuccessFactors home page cards.

Lesson 2: Creating Custom Cards for SAP SuccessFactors Onboarding

Lesson Objectives

After completing this lesson, you will be able to:

- Create custom cards for onboarding.

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UNIT 16 Restarting Onboarding Processes

Lesson 1: Triggering Onboarding Processes Manually

Lesson Objectives

After completing this lesson, you will be able to:

- Trigger an onboarding process restart manually.

Lesson 2: Triggering Onboarding Processes Automatically

Lesson Objectives

After completing this lesson, you will be able to:

- Trigger the onboarding process restart automatically.

Lesson 3: Retaining Data and Managing Email Notifications After a Restart

Lesson Objectives

After completing this lesson, you will be able to:

- Retain data captured and manage notifications after a restart is triggered.

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UNIT 17 Offboarding and Terminating Employees

Lesson 1: Defining and Enabling the Offboarding Process

Lesson Objectives

After completing this lesson, you will be able to:

- Enable the offboarding process.

Lesson 2: Assigning Role-Based Permission for Offboarding

Lesson Objectives

After completing this lesson, you will be able to:

- Assign permissions for the offboarding process.

Lesson 3: Creating Business Rules for the Offboarding Process

Lesson Objectives

After completing this lesson, you will be able to:

- Define business rules for the offboarding process.

Lesson 4: Creating Offboarding Programs

Lesson Objectives

After completing this lesson, you will be able to:

- Create offboarding programs.

Lesson 5: Enabling the Alumni Experience

Lesson Objectives

After completing this lesson, you will be able to:

- Enable the Alumni Experience.

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UNIT 18 Describing SAP SuccessFactors Onboarding Integrations

Lesson 1: Integrating SAP SuccessFactors Onboarding and SAP SuccessFactors Recruiting

Lesson Objectives

After completing this lesson, you will be able to:

- Describe SAP SuccessFactors Onboarding and SAP SuccessFactors Recruiting integration.

Lesson 2: Integrating SAP SuccessFactors Onboarding and SAP SuccessFactors Learning

Lesson Objectives

After completing this lesson, you will be able to:

- Describe SAP SuccessFactors Onboarding and SAP SuccessFactors Learning integration.

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

Lesson Objectives

After completing this lesson, you will be able to:

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

Lesson 4: Integrating SAP SuccessFactors Onboarding with an External HRIS

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the integration of an external HRIS with SAP SuccessFactors Onboarding.

Lesson 5: Integrating SAP SuccessFactors Onboarding with an External ATS

Lesson Objectives

After completing this lesson, you will be able to:

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- Describe the integration of an external ATS with SAP SuccessFactors Onboarding.

Lesson 6: Integrating SAP SuccessFactors Onboarding and SAP SuccessFactors Work Zone

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the integration of SAP SuccessFactors Onboarding and SAP SuccessFactors Work Zone.

Lesson 7: Integrating SAP SuccessFactors Onboarding and SAP Identity Authentication Service (IAS)

Lesson Objectives

After completing this lesson, you will be able to:

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

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UNIT 19

Creating SAP SuccessFactors Onboarding Reports

Lesson 1: Creating Story Reports with SAP SuccessFactors Onboarding Data

Lesson Objectives

After completing this lesson, you will be able to:

- Create Story Reports with SAP SuccessFactors Onboarding data.

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UNIT 20 Succeeding as a Consultant

Lesson 1: Locating Relevant Resources and Tools

Lesson Objectives

After completing this lesson, you will be able to:

- Access available resources and tools to support SAP SuccessFactors solutions.

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