Implementation Guide **INTERNAL**

SAP SuccessFactors Onboarding
Document Version: Q3 2016 – September 2

Onboarding

Configuring and Setting Up Onboarding

Content

What's New in This Guide?

Q3 2016 Release

Table 1: The following table summarizes changes to this guide for the Q3 2016 release

What's New	Description	More Info
September 2		
Added a section describing how to set up a regular Corporate Structure import		How to Create a Regular Corporate Structure Relations Import [page 100]
August 5		
Users can configure Crossboarding with Employee Central to use Hiring Manager Activities only		How to Configure Crossboarding with Employee Central [page 339] How to Configure Crossboarding with Hiring Manager Activities [page 340]
Users can now configure DocuSign for remote signing	Updated configuration instructions for DocuSign to include choices for remote signing.	How to Enable DocuSign for Onboarding [page 275]
Onboarding now publishes Intelligent Services events for Onboarding and Off-boarding step completion		Published Events for Step Completion [page 344] How to Enable Events for Step Completion [page 345]

Q2 2016 Release

Table 2: The following table summarizes changes to this guide for the Q2 2016 release

What's New	Description	More Info
New Onboarding elements available for localization		Localization in Onboarding [page 67]
There is a new scheduled job available for offboarding.	Added details on how to configure the `CreateOffboardingActivityJob`	How to Configure Offboarding [page 121]

What's New	Description	More Info
Added instructions enabled the new re-send notification option..	You can choose to resend a notification if a new hire's state date changes..	How to Create a Notification [page 219]
Added instructions for Business Rule Driven Hiring Manager Activities.	Using Business Rules, you can configure different Hiring Manager Activities for dfferent employee groups.	Business Rule-Driven New Hire Activities [page 250]
Added information about new DocuSign features		DocuSign for Onboarding [page 275]
Added instructions for sending multiple National ID values to Employee Central..		How to Configure Repeating Fields [page 315]
Added a new table describing Onboarding UI fields and their Employee Central field name mapping.		Onboarding to Employee Central UI Field Mapping Guide [page 326]
Added instructions for configuring the new Direct Deposit with Employee Central feature.		Direct Deposit with Employee Central [page 331]

Q1 2016 Release

Table 3: The following table summarizes changes to this guide for the Q1 2016 release

What's New	Description	More Info
Updated instructions for requesting new account provisioning.		Request New Account Provisioning [page 25]
Updated instructions for requesting SFTP for new accounts.		Request SFTP for New Accounts [page 25]
Added instructions for configuring external FTP and SFTP.	Onboarding now supports scheduled imports and exports to external FTP and SFTP folders.	How to Configure External FTP and SFTP [page 27]
Added information about resetting the default admin password	You can reset the default system user password in Super Admin.	Managing Passwords in Onboarding [page 31]
Added screenshots and additional information about Onboarding roles.		What are Onboarding Roles? [page 73]
Added additional screenshots and information about creating groups in Onboarding.		How to Create a Group [page 76]

What's New	Description	More Info
Added a section detailing the role-based permissions that affect Onboarding.		Role-Based Permissions for Onboarding [page 84]
Updated instructions for creating a standard export.		Create a Standard Export [page 101]
Updated instructions for creating a custom export.		Create a Custom Export [page 103]
Added additional custom validator examples that feature Javascript.	Onboarding now supports Javascript in custom validators.	How to Add a Custom Validator [page 172]
Added information about the special characters picklists support.	SF HCM picklists now support special characters.	How to Map Picklists and Lookups Using Panel Designer [page 174]
Added information about supported tokens for the Default Welcome message.	The Hiring Manager activities Default Welcome Message template now supports tokens.	Default Welcome Message [page 247]
Added instructions for adding goals to Hiring Manager Activities.	Onboarding now supports integration with Goal Management for the Hiring Manager activities.	How to Configure Hiring Manager Activities [page 241]
Updated instructions for creating a customer process.	Onboarding now supports custom processes for offboarding, crossboarding, and global custom processes.	How to Create a Custom Process [page 254] How to Import a New Hire to a Custom Process [page 255]
Added section about DocuSign.	Onboarding now supports DocuSign for e-signing forms.	DocuSign for Onboarding [page 275]
Added section about the new Work Queue user interface.	Onboarding has a new Work Queue UI that customers can enable.	Work Queue Refresh [page 280]

Q4 2015 Release

Table 4: The following table summarizes changes to this guide for the Q4 2015 release

What's News	Description	More Info
Added new information about Self-Service Account Options	Included details for an option that requires users to enter a four-digit PIN, and an option that appends the user's SSN to PDF forms	

What's News	Description	More Info
Added details about User Creation	Included scenario information about candidates created from the *Process* tab.	User Creation [page 88]
Added details about the Permission Sync report.	Users cannot create System Administrator users using the Permission Sync.	Create Permission Sync Report [page 105]
Added additional information about configuring E-Verify.	You can configure E-Verify to trigger at different levels.	How to Configure E-Verify [page 135]
Added new section for Document Purge.	You can delete documents on a configured schedule using Document Purge.	Document Purge [page 152]
Added new section for Import/Export of Panels.	You can import or export panels from Panel Designer.	How to Import and Export Panels [page 182]
Added new section for Ad Hoc Reporting.	You can use Ad Hoc Reporting to create reports about Hiring Manager Activities data.	AdHoc Reporting [page 249]
Added new section for Standard Compliance Forms.	You can configure standard compliance forms for the UK, Australia, India, and Canada.	Standard Compliance Forms [page 271]
Added details to Localization in Onboarding section.	You can localize additional Onboarding elements using the dropdown menu.	Localization in Onboarding [page 67]
Added details to I-9 Reverification section.	I-9 reverification has a new trigger.	I-9 Reverification [page 133]

1 Introduction

1.1 What is Onboarding?

SuccessFactors Onboarding enables new hires to hit the ground running with more strategic activities. It allows managers to connect, inform, and empower new hires with the right tools, content, and connections even before their first day on the job to start driving business results faster.

What are the main capabilities of SF Onboarding?

SuccessFactors Onboarding enables organizations to efficiently and quickly turn new hires into engaged, empowered, and productive employees by:

- Guiding all constituents (new hire, hiring manager, HR, IT and so on) through key onboarding activities
- Connecting new hires with the right people and relevant content even before their first day
- Developing new hires rapidly, enabling them to contribute quickly

What are the main features of SF Onboarding?

The main Onboarding features include:

- Intuitive task management
- Flexible workflows
- Provisioning, management of legal and corporate forms
- Connecting development and learning activities to onboarding
- Socialization of the new hire

What is a default process?

SF onboarding manages new employee activities using three process steps:

- **PostHire Verification Step**
  In this step, the Corporate Representative either confirms or enters information regarding the New Employee's job information, such as where the new hire will work, salary, or provisioning. If the new hire activity is started from applicant tracking (such as in Rx), then the data is prepopulated from the new hire XML

and the Corporate Representative confirms and/or changes the data as needed. If the new hire activity is started manually, then the Corporate Representative enters this initial information.

- **New Employee Step**
  At this step, the New Employee enters personal information not collected in the application process such governmental tax forms, direct deposit, emergency contact information, policies and procedures
- **Orientation Step**
  Both the Corporate Representative and New Employee enter information into this wizard. In the US this would be used for Section 2 of the Form I-9. Another example would be where certification information is required, such as proof of receiving a teaching, legal or medical degree.

Calculating the DueDate for process steps

- Post Hire Verification: DueDate is the HireDate plus five days
- New Employee Step: When the Orientation date is entered, the DueDue is the Date of Orientation. If the Orientation date is not entered, the DueDate is the PosteHire Verification completion date, plus 14 days.
- Orientation Step: When the Orientation date is entered, the DueDate is the date of Orientation plus three days. If the Orientation date is not entered, the DueDue is the New Employee Step date of completion plus 14 days.
- For Notifications, the DueDate is generated from the *Due By* field.

1.2 Known Behavior

- Customers cannot use their own Identity Provider (IdP). If they use their own IdP, the new hire will not have access to the Onboarding system before the first day in the job.
- Users can access to everything they have been granted permissions for in the SAP SuccessFactors HCM Suite (such as the org chart or goals) upon upload. This access is not effective dated. As a best practice we recommend that organizations include a non-disclosure agreement (NDA) in Onboarding as part of the paperwork completed prior to uploading users to Onboarding.
- **Demo systems**: Once you launch the paperwork process for a new hire, it expires after three days in the demo environment. Therefore, we will provide 6 candidates in each instance that you can use for demos; every master will have a new set of new hires.
- Onboarding will time out after 60 minutes of inactivity. The SAP SuccessFactors HCM suite may have a different setting. Best practice is to have the SAP SuccessFactors time out set to 60 minute or less time out with inactivity. This option in Onboarding is not configurable.
- When you add a System logo in *Super Admin* > *Account* > *Account logo*, you cannot delete the logo. If you do not want a logo to appear, you can upload a blank file.

1.3 Onboarding Prerequisites

Additional features must be enabled to run Onboarding.

- Employee Profile
  For more information, see https://confluence.successfactors.com/display/PRODINFO/Employee+Profile

  Recommendation

  Including a photo for every employee is recommended.

- V12 UI and V12 Home Page
- Role Based Permissions
  Onboarding is not available to customers who do not have RBP enabled.
- Enable the following settings in *Provisioning* > *Company Settings*
  - *Enable Generic Objects*
  - *Project Teams*

1.4 Integration with other Modules

Onboarding can be enhanced with the integration of other SAP SuccessFactors HCM modules.

You can integrate these modules and features with the application:

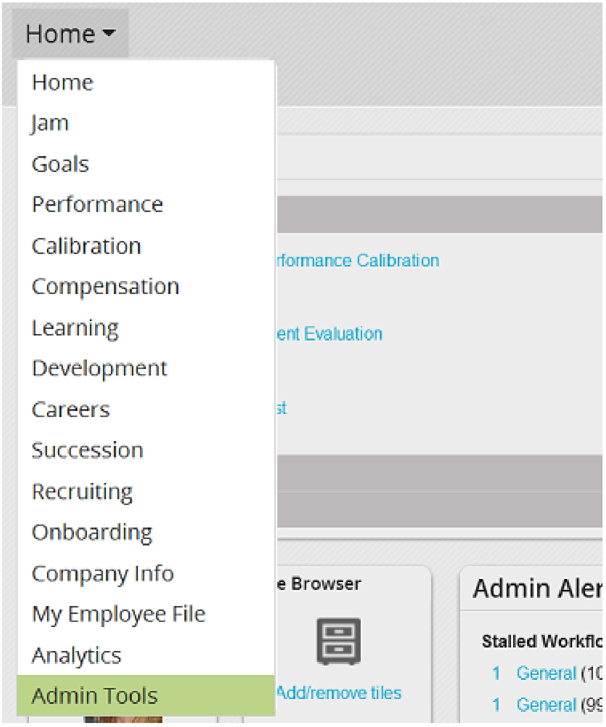
- Employee Central
- Recruiting Management
- Learning Management Solution (LMS)
  If LMS is enabled in Provisioning, the new hire's assigned classes automatically display in the Learning section of SAP SuccessFactors HCM. No further configuration is required.
- Jam
  If Jam is enabled in Provisioning, the new hire's assigned groups automatically display in Onboarding.

1.5 Configuration and Administration Tools for Onboarding Setup

Different tools and systems are required to configure and maintain Onboarding. This section provides an overview of the tools and how to access them.

SAP SuccessFactors HCM Admin Tools

Access the Admin Tools section from the main menu in the SAP SuccessFactors application.



Configure the V12 Home Page, Role Based Permissions and mobile settings using Admin Center.

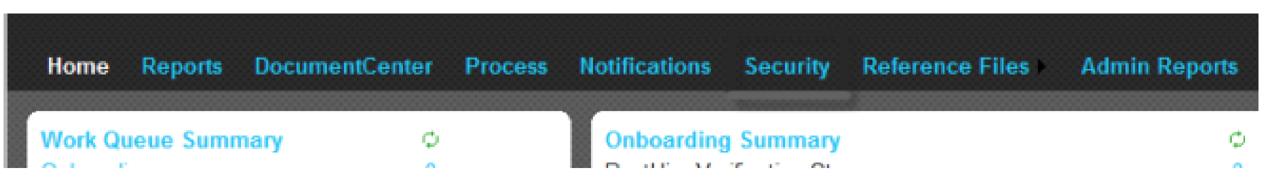
Users can access major Onboarding configuration options from this menu, including:

- Manage Employee Portal
- Manage Onboarding Notifications
- Manage Onboarding Security Settings
- Manage Onboarding Settings
- Manage Onboarding Reference Files

Links for these configuration options only appear for users with the appropriate permissions. For example, if a user does not have permissions to edit Security Settings, that link will not appear.

SAP SuccessFactors HCM Onboarding

Access Onboarding from the main menu of the SAP SuccessFactors HCM application. Anyone with admin rights can see administrative menu items.

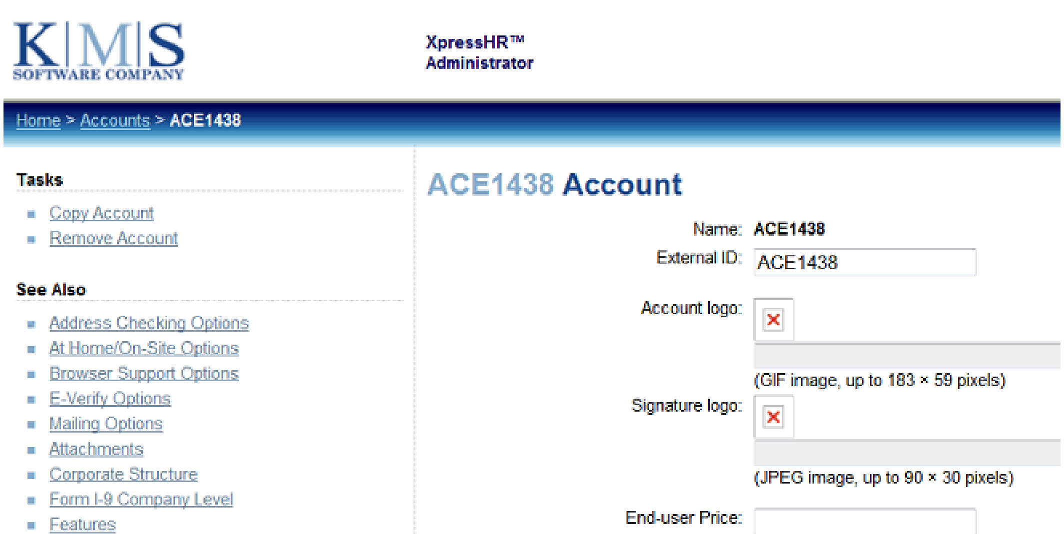


Provisioning

In the Provisioning tool, you enable the features for the complete SAP SuccessFactors HCM platform including Onboarding. Provisioning is only available internally (not for customers).

Super Admin

The Super Admin tool is a legacy Onboarding tool which is only accessible internally (not for customers). Some company settings are only accessibly through Super Admin. The URL to access SuperAdmin depends on the instance's data center.



Related Information

Required URLs for Onboarding Configuration [page 19]

1.6 Required URLs for Onboarding Configuration

Different URLs are required at different points in the Onboarding confguration process. These URLs also vary by data center and environment. Select the proper URL for your configuration.

Table 5: DC4 URLs for Onboarding Configuraiton

URL Type	DC4 - Stage	DC4 - Production	DC4 - Stage Sales	DC4 - Sales (Hardware)
KMS URL	https://stage-onboarding4.successfactors.com/ONB	https://onboarding4.successfactors.com/ON	https://stage-onboarding4.successfactors.com/ONBSALES	https://sales-onboarding4.successfactors.com/ONBSALES/
KMS Admin URL	https://stage-onboarding4.successfactors.com/ONB	https://onboarding4.successfactors.com/ONB/administrator/default.aspx	https://stage-onboarding4.successfactors.com/ONBSALES/administrator/default.aspx	https://sales-onboarding4.successfactors.com/ONBSALES/Administrator/
Employee Portal URL	https://ep-stage-onboarding4.successfactors.com/ONB/ONBQA	https://ep-onboarding4.successfactors.com/ONB/ONBPROD	https://ep-stage-onboarding4.successfactors.com/ONBSALES/acesn8	https://ep-sales-onboarding4.successfactors.com/ONBSALES/ONBDC4Sales
SuccessFactors HCM URL	https://stage-performancemanager4.successfactors.com/login	https://performancemanager4.successfactors.com/login	https://sales-demo4.successfactors.com/login	https://sales-demo4.successfactors.com/login
Provisioning URL	https://stage-performancemanager4.successfactors.com/provisioning_companies	https://performancemanager4.successfactors.com/provisioning_companies	https://sales-demo4.successfactors.com/provisioning_login	N/A
Assertion Consumer Service URL	https://stage-onboarding4.successfactors.com/ONB/SSO/SAML20/AssertionConsumerService.aspx	https://onboarding4.successfactors.com/ONB/SSO/SAML20/AssertionConsumerService.aspx	N/A	N/A
Logout URL	https://stage-onboarding4.successfactors.com/logout	https://onboarding4.successfactors.com/logout	N/A	N/A
Audience URL	https://stage-onboarding4.successfactors.com/ONB/SSO/SAML20/AssertionConsumerService.aspx	https://onboarding4.successfactors.com/ONB/SSO/SAML20/AssertionConsumerService.aspx		

Table 6: DC8 URLs for Onboarding Configuration

URL Type	DC8 - Production	DC8 - Stage ONBPREM-SALES	DC8 - Stage ONBPREM
KMS URL	https://onboarding8.successfactors.com/ONBPREM	https://stage-onboarding8.successfactors.com/ONBPREMSALES	https://stage-onboarding8.successfactors.com/ONBPREM
KMS Admin URL	https://onboarding8.successfactors.com/ONBPREM/Administrator/	https://stage-onboarding8.successfactors.com/ONBPREMSALES/Administrator/	https://stage-onboarding8.successfactors.com/ONBPREM/Administrator/
Employee Portal URL	https://ep-onboarding8.successfactors.com/ONBPREM/ONBQA2	https://ep-stage-onboarding8.successfactors.com/ONBPREMSALES/ONBDC8Sales	https://ep-stage-onboarding8.successfactors.com/ONBPREM/ONBDC8Stage
SuccessFactors HCM URL	https://performancemanager8.successfactors.com/login	href="https://pmsales-demo8.successfactors.com/login	https://performancemanager8.successfactors.com/login
Provisioning URL	https://performancemanager8.successfactors.com/provisioning_companies	https://pmsales-demo8.successfactors.com/provisioning_companies	https://performancemanager8.successfactors.com/provisioning_companies
Assertion Consumer Service URL	https://onboarding8.successfactors.com/ONBPREM/SSO/SAML20/AssertionConsumerService.aspx	https://stage-onboarding8.successfactors.com/ONBPREM/SSO/SAML20/AssertionConsumerService.aspx	https://onboarding8.successfactors.com/ONBPREM/SSO/SAML20/AssertionConsumerService.aspx
Logout URL	https://onboarding8.successfactors.com/logout	https://stage-onboarding8.successfactors.com/logout	N/A
Audience URL	https://onboarding8.successfactors.com/ONB/SSO/SAML20/AssertionConsumerService.aspx	href="https://stage-onboarding8.successfactors.com/ONB/SSO/SAML20/AssertionConsumerService.aspx	

Table 7: DC10 URLs for Onboarding Configuration

URL Type	DC10 - Production	DC10 - Stage
KMS URL	https://onboarding10.successfactors.com/ONBPREM/	https://stage-onboarding10.successfactors.com/ONBPREM
KMS Admin URL	https://onboarding10.successfactors.com/ONBPREM/Administrator/	https://stage-onboarding10.successfactors.com/ONBPREM/Administrator/
Employee Portal URL	https://ep-onboarding10.successfactors.com/ONBPREM/ONBDC10/	https://ep-stage-onboarding10.successfactors.com/ONBPREM/ONBDC10A
SuccessFactors HCM URL	https://performancemanager10.successfactors.com/login	https://performancemanager10.successfactors.com/login
Provisioning URL	https://performancemanager10.successfactors.com/provisioning_login	N/A

URL Type	DC10 - Production	DC10 - Stage
Assertion Consumer Service URL	https://onboarding10.successfactors.com/ONB/SSO/SAML20/AssertionConsumerService.aspx	https://stage-onboarding10.successfactors.com/ONB/SSO/SAML20/AssertionConsumerService.aspx
Logout URL	https://onboarding10.successfactors.com/logout	html" href="https://stage-onboarding10.successfactors.com/logout
Audience URL	https://onboarding10.successfactors.com/ONB/SSO/SAML20/AssertionConsumerService.aspx	https://stage-onboarding10.successfactors.com/ONB/SSO/SAML20/AssertionConsumerService.aspx

Table 8: DC12 URLs for Onboarding Configuration

URL Type	DC 12 Production	DC 12 Stage
KMS URL	https://onboarding12.successfactors.com/ONB/	https://stage-onboarding12.successfactors.com/ONB/
KMS Admin URL	https://onboarding12.successfactors.com/ONB/Administrator/	https://stage-onboarding12.successfactors.com/ONB/Administrator/
Employee Portal URL	https://ep-onboarding12.successfactors.com/ONB/ONBDC12/	https://ep-stage-onboarding12.successfactors.com/onb/%5Baccountname%5D/
SuccessFactors HCM URL	https://performancemanager5.successfactors.eu/login	https://performancemanager5.successfactors.eu/login
Provisioning URL	https://performancemanager5.successfactors.eu/provisioning_login	N/A

Table 9: DC2 URLs for Onboarding Configuration

URL Type	DC 2 Production	DC 2 Stage
KMS URL	https://onboarding2.sapsf.eu/ONBPREM	https://onboarding2preview.sapsf.eu/ONBPREM/
KMS Admin URL	https://onboarding2.sapsf.eu/ONBPREM/Administrator	https://onboarding2preview.sapsf.eu/ONBPREM/administrator
SuccessFactors HCM URL	https://performancemanager.successfactors.eu/login	N/A
Provisioning URL	https://performancemanager.successfactors.eu/provisioning_login	N/A

Related Information

Request SFTP for New Accounts [page 25]

2 Configuring Provisioning Settings

2.1 Enable Onboarding and Additional Features in Provisioning

Prerequisites

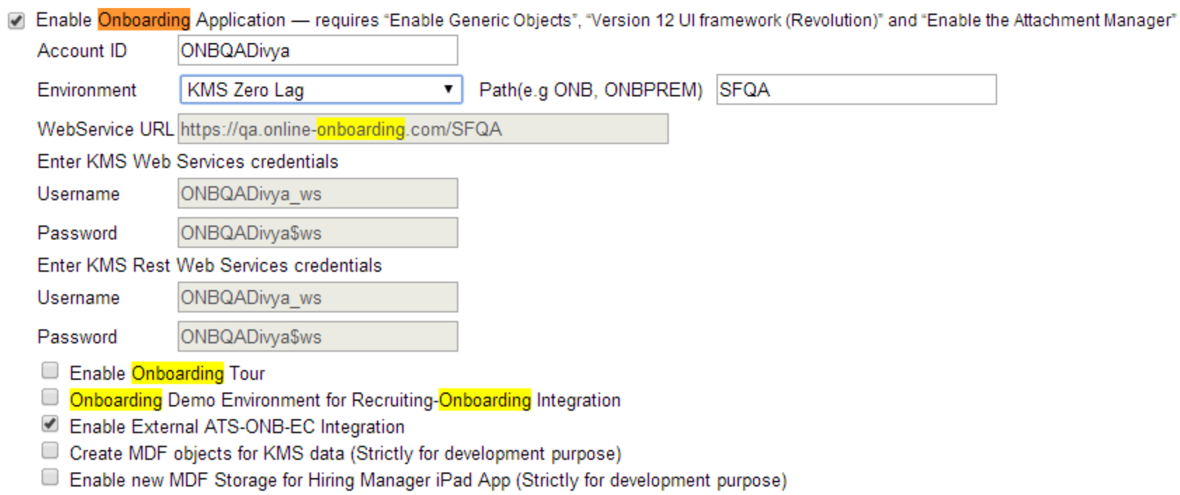
Before configuring Provisioning settings, you must have access to Onboarding Super Admin.

Procedure

1. Log on to Provisioning and select the appropriate company.
2. Under *Edit Company Settings*, choose *Company Settings*.
3. Select *Enable Onboarding Application* and enter the following mandatory data:
   - Account ID: Your Onboarding Company ID as it is displayed in Provisioning. This ID is case sensitive.
   - Environment
     - Select the appropriate environment from the dropdown menu. This prepopulates the required URLs for the instance.

       > **Note**
       >
       > The credentials entered here must match those configured in *Super Admin* > *Service Logins*. These credentials are usually automatically generated, but for Preview instances they must be entered manually.

     Each project should have a separate folder in SFTP. SFTP folders are configured by SuccessFactors Operations, and cannot be set up independently.
   - Path: This is part of the URL construction. Use **ONB** for clients in DC4 or DC12 and **ONBPREM** for clients in DC8 or DC12.



4. Check *Enable External ATS-ONB-EC Integration*.
5. Enable the following **mandatory** features by selecting the appropriate checkboxes:
   - Enable Generic Objects (also known as MDF)
   - Version 12 UI Framework
   - Profile V12 and Enable Public Profile
   - Ad hoc Report Builder and the Employee Profile report
   - Role-Based Permission
6. Enable the following **optional** features by selecting the appropriate checkboxes:
   - *Enable Jam Integration* > *Enable Mobile Access*
     This is a prerequisite to enable the use of the Onboarding mobile app for new hires.
   - Enable Media Service Features
     These features are a prerequisite for the Pronounce My Name function.
     Demo systems: Always enable Media Services Features for demo systems.
   - Enable Dependents Management

Related Information

Required URLs for Onboarding Configuration [page 19]

2.2 Create an Admin Account

An Admin Account for SAP SuccessFactors HCM is required for configuring some elements of the Onboarding module. The Admin Account gives you access to Admin Center and SAP SuccessFactors HCM applications.

Context

Procedure

1. Navigate to *Provisioning* > *Company Settings*.
2. Locate the Admin account fields toward the bottom of the page.
3. Enter the information for the Admin Account, following a standard naming convention that provides information about the instance associated with the account.

Table 10: Admin Account Naming Convention

Field	Recommendation
Username	Use **`admin`** followed by the user's first and last initial. For example, for user John Doe, the username is **`adminjd`**
Password	Use the instance ID as part of the password and preface or append a unique combination of letter, number, and a special character. Your password should be eights characters, contain mixed case letters, a number, and a special character. For example, if the instance ID is ACE218, a password might be ACE218$q.
First Name	Specify the appropriate first name
Last Name	Specify the appropriate last name. For clarity in display and to differentiate support accounts from live client accounts, consider appending (SF) to the end of the name.
E-mail	Use your work e-mail address. SAP SuccessFactors HCM user account email addresses do not need to be unique; multiple accounts can be set up with a single e-mail address.

3 Initial Technical Configuration

3.1 Request New Account Provisioning

When creating a new implementation, you must request a new account be created in SuperAdmin. Users with access to the account will also be created and provisioned.

Create a JIRA ticket with the following information:

- Project: NCC (New Company Creation)
- Issue Type: Task
- Priority: P3/P4
- Summary: New Account Provisioning Request for <Customer Name>
- Description: Please Create ONB account or provide details if already provisioned.
    - Data Center: DC4/8/10/12/2
    - Environment: Production, Preview, Staging, QA Landscape, Training, SalesDemo
    - Company Name: <Customer Name>
    - Onboarding Account name = <SuccessFactors HCM Production Instance> For Sales Please Provide Preferred Instance Name
    - Enable Doc Center and Employee Portal for Above Account
    - Grant access to the following user ID's:
    - Login:
    - Name: First Name, Last Name
    - Email Address

3.2 Request SFTP for New Accounts

For new implementations, you must request creation of a new SFTP folder.

Create a JIRA ticket with the following information. Replace the information in brackets with the customer's information. Also, make sure that you correctly indicate which datacenter the customer's instance is in. Choose from among the available datacenters.

- Project: CO Service Requests (COSR)
- Issue Type: SFTP Account creation
- Priority: P3/P4
- Summary: Create SFTP Account for ONB Customer [Customer Name]
- Description: Please Create SFTP folder for ONB Customer. Details as follows:

- Data Center: DC4/8/10/12/2
- Company Name: [Customer Company Name]
- Onboarding Account Name: [ONB account name]
- Requestor's Email Address : (Credentials will be sent to this address)

3.2.1 SFTP for Onboarding

The SSH file transfer protocol (also known as Secure FTP and SFTP) is a computing network protocol for accessing and managing files on remote file systems. SFTP also allows file transfers between hosts. Unlike standard file transfer protocol (FTP), SFTP encrypts both commands and data, preventing passwords and sensitive information from being transmitted over a network. SFTP clients use SSH to access, manage, and transfer files.

SFTP clients are functionally similar to FTP clients, but they use different protocols. Consequently, you cannot use standard FTP clients to connect to SFTP servers, nor can you use clients that support only SFTP to connect to FTP servers. Graphical clients are available for SFTP, or you can use it from the command line. For Onboarding, the SFTP protocol is Port 22, and the HTTPS protocol is Port 443.

The server must have a public/private key pair. That key is used for the tunnel, so a server uses the same key pair for all applicative protocols.

A client may have a public/private key pair if it wishes to be authenticated based on that key; this is all about client authentication, i.e. about how the server will make sure that it is talking to the right client. Password-based authentication and key-based authentication are the two most common methods (some servers are configured to require both). By definition, only the key-based authentication requires that the client stores and uses a key pair of its own.

For SSH communication, SuccessFactors professional services implements customer keys for the SFTP server, and the client implements the SuccessFactors key in their environment. When logging in to the SF SFTP server, you see the following structure: /

- \- FEED
- \- Incoming
- \- ONB
- \- Outgoing
- \- WFA

Use /ONB for for SFTP Communication and sync jobs.

Within Onboarding, there are separate paths for /ONB/inbound and /ONB/outbound. The Onboarding application only picks up data from /ONB/inbound and /ONB/outbound by default, If new folders are created, the default configuration should be updated. Test folders can be created manually for the Stage environment, but the Stage configuration must be updated to include the new test folders.

3.2.2 How to Configure External FTP and SFTP

You can configure any of the available Onboarding imports or exports with an external FTP server.

Procedure

1. Navigate to *Super Admin* > *Activate Features* and select the import or export you would like to configure, for example the *NewHireDataExportFeature*.
2. In the *Method* field select **FTP** or **SFTP**.
3. Enter the relevant account information. These credentials come from the external FTP or SFTP account.
    - *Host Name*
    - *Folder*
    - *Login*
    - *Password*

    > Note
    >
    > You must use the passive mode when configuring external FTP or SFTP.
4. Click *Test Connection* to test the connection to the designated folder.

3.3 Configure At Home / On-Site Options

Configure whether new hires are allowed to do their paperwork at home or on-site.

Context

> Note
>
> **Tool: Super Admin**

Procedure

1. Select your account from the SF Accounts list.
2. Under *See Also*, select *At Home/On-Site Options*.
3. Select *At Home* and click *Update*.

3.4 Activate Features

Before working with an Onboarding instance, a number of features must be enabled and configured in SuperAdmin.

Procedure

1. Under *See Also*, click *Features*.

   ECTQA04 Features

Feature	Description	Status
SF_PaperWorkDone_Message	This feature enables sending PaperWorkDone message to BizX after NES is completed by new-hire.	Inactive
BizX Integration		
SF_BizX_Connection	Sets BizX instance connection information.	Active
SF_Goal_Management	This feature enables panels for Goal Management system.	Active
SF_MDF_Integration	Stores panel data in MDF objects.	Active
SF_Notifications	This feature enables sending messages to BizX.	Active
Integrations		
DocCenterStandardExportFeature	This feature enables Document Center Standard Export.	Inactive
Foundation Import	This feature enables foundation data synchronization between XpressHR and SuccessFactors.	Active
NewHireDataExportFeature	This feature enables New Hire Data Export feature.	Active
Misc		
Orientation Manager	This feature enables panel to set a manager for the Orientation.	Inactive
Portals		
SFQA_DocumentCenter	DocumentCenter.	Active
SFQA_EmployeePortal	Employee portal.	Active
Standard Forms		
KMS_8850Form	This feature enables KMS 8850 Panel and Form.	Active
KMS_DirectDepositForm	This feature enables KMS Direct Deposit Panel and Form.	Active
KMS_EmergencyContactForm	This feature enables KMS Emergency Contact Panel and Form.	Active
KMS_NewEmployeeEeoInformationForm	This feature enables KMS New Employee EEO Information Panel.	Active
KMS_NewEmployeeSummaryForm	This feature enables KMS New Employee Summary Form.	Active
KMS_PayCard	This feature enables Pay Card Panel and Form.	Inactive
KMS_PoliciesList	This feature enables KMS Policies List Panel.	Active
KMS_UniformForm	This feature enables KMS Uniform Panel and Form.	Inactive
SF_DrugTest_BGCheck_Education	This feature enables Drug Test, Background Check and Education panels.	Active
US Compliance		

2. Activate the following features:

Table 11:

Feature	Description
SF_BizX_Connection	Choose the appropriate URL for the database and environment from the dropwdown menu. This populates the oAuth and web services URLs. If you choose the *Other* option from the dropdown, you need to manually enter the environment-specific oAuth and web services URLs. You can leave the *oData service URL* field blank. Enter the instance name of your SAP SuccessFactors HCM Onboarding instance. The instance name should exactly match the instance name in Provisioning, and is case sensitive. If no instance name is specified here, the system assumes that the Onboarding instance name is the same as the account name. The account name is then used for sending the PaperWorkDone message which fails if the account name does not match the instance name. The username entered in the *API Authentication User*should be an SF HCM user and is used to authenticate the user in SF HCM for retrieving and sending data. It's best to add a user with SF HCM admin access who is unlikely to be deleted. You can create an admin user explicitly for this purpose. Once the feature is activated, if you need to make changes you must deactivate the feature, make changes, then reactivate it.
SF_Notifications	Enables the sending of messages to the SuccessFactors HCM application.Available notifications: CandidateCreate message to SuccessFactors HCM once new hire is created. PostPHV message to SuccessFactors HCM after PHV is completed. PaperWorkDone message to SuccessFactors HCM after NES is completed by new-hire. Notifications can be enabled/disabled individually by checking/unchecking the corresponding checkbox.
KMS_PoliciesList	
SF_DocumentCenter	
SF_EmployeePortal	In the *Portal Template* field, keep the default *SF Employe Portal*.
Foundation Import	The FTP folder path is the location where SuccessFactors HCM foundation data reports (users, divisions, locations, departments) are transferred to so they can be loaded to Onboarding.

Feature	Description
SF_DrugTest_BGCheck_Education	Keep the default settings for background test, drug check and education.
SF_PaperWorkDone_Message	For sending *Paperwork Done* messages This notification is required for the Employee Central and SAP ERP integrations.

3.4.1 Disable/Enable I-9 and Withholding

Customers can choose to activate I-9 and other forms and associate them with specific process steps. This feature is only available for sites built after June 2014.

Procedure

1. Navigate to *Super Admin* and click *Features*.
2. Select the *New Hire Personal Information Feature*.
3. Choose a process to activate the feature from the *Processes* bar on the left. Click *Activate*.
4. Enable the *I9 Feature*, *SWH Feature*, and/or *W4 Feature.* Associate each of these features with a process and click *Activate.*

   These features are typically only relevant for companies operating in the US. If a customer does not need these features, they can be disabled in the same manner. It is best practice to activate SWH and W4. Some of the SWH state panels are dependent on W4 information.
5. When you return to the *Features* screen, you will see the features labeled as *Active.*

3.5 How to Create PGP-Encrypted Files

Users can add PGP encryption to files imported or exported from Onboarding.

Context

For export files, the user uploads the customer or third party public key. The system then uses that key to encrypt the file before it is exported. The file can only be decrypted with the corresponding private key.

For import files, the user generates a public key, then provides the public key to the customer or third party, who uses it to encrypt files intended for import. The system decrypts the file with the corresponding private key.

Note

When a user generates a public key in the UI, a new corresponding private key is generated, and the old one is overwritten. You cannot decrypt files encrypted with the old key once the private key is overwritten.

Procedure

1. Navigate to *Super Admin* > *PGPKey*
    a. You can either download the generated key, or remove it.
    - To generate a SuccessFactors public key, select an *Encryption Mode* (RSA or DSA) and choose *Generate Key*. You can either download the generated key, or remove it.
    - To upload a customer's public key, choose a file with a .pub extension to upload, then select *Import Key*.
2. For exports, configure the export settings.
    a. Navigate to *Super Admin* > *Features* and choose the feature you would like to enable encryption for, for example *NewHireDataImportFeature*.
    b. Select *Enable Encryption*. Enter the *Public Key to Encrypt*. If you enable *UAT Mode*, the user receives both encrypted and source files.
3. For imports, configure the import settings.
    a. Navigate to *Super Admin* > *Features* > *FoundationImport*.
    b. Select *Enable Decryption*.

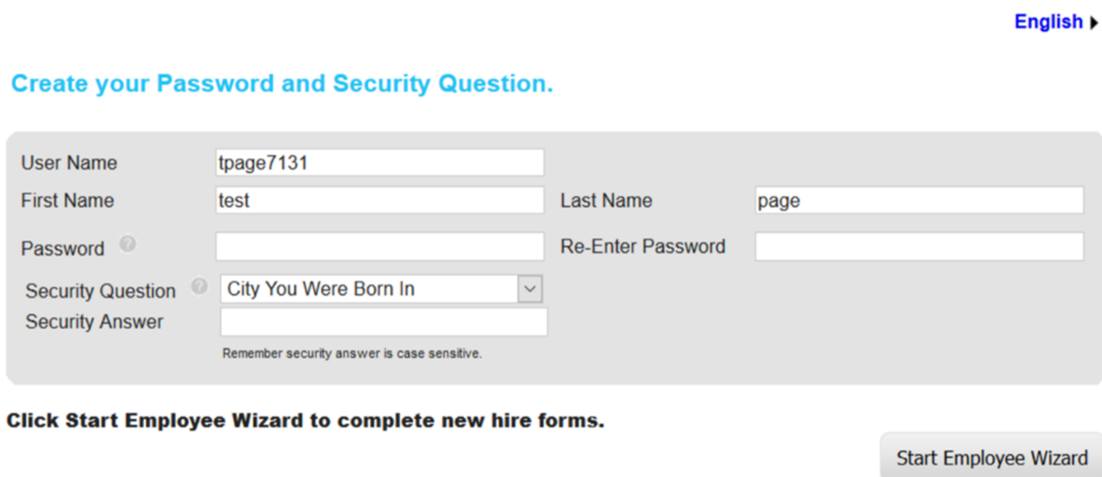
3.6 Managing Passwords in Onboarding

The behavior described in the section relates to passwords for the Onboarding application for corporate users or new hires, not the user's password for SuccessFactors HCM.

- The minimum password length for Onboarding passwords is eight characters.
- When a user is locked out of their account because of failed login attempts, the default lockout period for sites created after June 2015 is three hours. To configure the lockout period for a custom time frame, or for sites created before June 2015, navigate to *Super Admin* > *Account Options* > *Security.UserUnlockTime*. A value of 0 means the account lockout period is not in use.
- When enabled, a user can use a password reset link sent via e-mail only once. Once the user clicks the link, they must request a new one to rest their password if required. To enable this feature, navigate to *Super Admin* > *Account Options* > *RecoverPasswordByMail* and set the value to `true`. Also in *Account Options* find the *Security.PasswordRecoveryMode* option value to `PasswordInEmail`.
- A user can only attempt to answer their security question three times. After three attempts, the user cannot attempt to answer the security question again for one hour.
- A customer can choose to have the system prompt users to update their password if they are using a password that no longer complies with the site's password rules. To enable this feature, navigate to *Super*

Admin > *Account Options* > *Security.EnforcePasswordPolicy* . Setting this value to `Yes` prompts the user to update a non-compliant password. A value of `No` will not prompt the user. By default this value is set to `Yes`.

- The first time a user enters an automatically created password, they will be asked to create a new password. The first time a user enters a reset password they will be asked to create a new password.
- The system default password for corporate users can be updated by navigating to *Super Admin* > *Account Options* > *Security.DefaultPassword* .
- Once a user has completed the Password Panel, they should click *Start New Employee Wizard* to proceed to the next step in the process.



3.7 Activate E-Verify in QA Mode

You can activate the E-Verify option in a way that it simulates the E-Verify checks, but actually does not connect to E-Verify. Only use this for pre-production or demo instances.

Context

E-Verify should only be activated for customers who operate in the United States.

Procedure

1. In *Super Admin* > *See Also* , click *E-Verify Options*.
2. For *Account Type*, select *Test Account*.
3. Click *Update*.

3.8 Self-Service Account Options

Self-service tools enable internal users and partners to configure SAP SuccessFactors HCM Onboarding customer sites.

The self-service options are accessed by navigating to *Super Admin* > *Accounts.* Select the appropriate customer account, then chose *Account Options.*

These keys are available

Table 12:

Name	Default Value	Description
Integration.UIE.TreatAgencyConsultantAsTemp		If parameter value is true, in the import from UIE for newhire, with `Hire Type = 'agency'` or `'consultant'`, the HrDataKey `Job Type` is set to `TEMPORARY`.
CollectorBO.DaysToUpdateWebHire		For the import of candidates from UIE, if the new hire was created more than `DaysToUpdateWebHire` days ago, a new new hire record is created with a new `WebHireId`, or else the data will be updated.
CollectorBO.IsWebHireIdUnique		Is the `WebHireID` unique when synchronizing in CollectorBO.
HRDataService.SyncUser.CheckExistenceOfEmail		Enables a check for `Email` when importing users. If the value is empty then the service will generate an error . Disabled by default. Applies to users (not new hire activity).
HRDataService.SyncUser.CheckExistenceOfFirstName		Enables a check for `FirstName` when importing users. If the value is empty then the service will generate an error . Disabled by default. Applies to users (not new hire activity).
HRDataService.SyncUser.CheckExistenceOfLastName		Enables a check for `LastName` when importing users. If the value is empty then the service will generate an error . Disabled by default. Applies to users (not new hire activity).

Name	Default Value	Description
HRDataService.SyncUser.CheckExistenceOfLevel2		Enables a check for `Level2` when importing users. If the value is empty then the service will generate an error . Disabled by default. Applies to users (not new hire activity).
HRDataService.SyncUser.CheckExistenceOfLevel3		Enables a check for `Level3` when importing users. If the value is empty then the service will generate an error . Disabled by default. Applies to users (not new hire activity).
HRDataService.SyncUser.CheckExistenceOfUserType		Enables a check for `UserType` when importing users. If the value is empty then the service will generate an error . Disabled by default. Applies to users (not new hire activity).
HRDataService.SyncUser.CheckLevel2InDB		Checks for the availability of imported Level 2 code in the corporate structure. If values are not empty, the system checks against the database and if the value is empty in the database it sends an error. Disabled by default.
HRDataService.SyncUser.CheckLevel3InDB		Checks for the availability of imported Level 3 code in the corporate structure. If values are not empty, the system checks against the database and if the value is empty in the database it sends an error. Disabled by default.
HRDataService.SyncUser.PreserveUserOrgUnits	False	When set to true, the system will not update the corporate structure when new values are found on the user import file.
HRDataService.SyncUser.UpdateOnly	False	If true, new users cannot be created using the SyncUsers web service. Only updates to existing users are allowed. If a user does not exist in the database, they will not be created.
HRDataService.SyncUser.UseFirstNameLastNameAsUserId	False	If true, the `userId` parameter of the SyncUsers web service is ignored and **`{First Name}`** **`{Last Name}`** is used instead
Federal_I9_Id_Panel.DisableStartDate		Activates ReadOnly for the `StartDate` textbox on the Federal_I9_Id panel.

Name	Default Value	Description
Security.PasswordRecoveryHoursToExpire		The number of hours for which the password recovery link is valid.
Security.PasswordRecoveryMode		Defines the password restore mode, either by e-mail or restored on the screen. The value defaults to e-mail.
EmailToResetPasswordsForUsersThatNotHaveE-mail		Enables e-mail to reset passwords for users who have no e-mail address. Only needed if all users do not have e-mail.
EnableNotificationAttachmentsSecurity		When set to **`True`**, users can access forms attached to notifications, when they have full access rights or the notification. When set to **`False`**, all users with access to the notification activity on the dashboard can see documents, without a separate security settings.
I9UseManagerLevel	true	When set to **`True`**, restricts the availability of documents in the Document Repository by levels of the Corporate Structure, which allows users to control access to the Document Center by corporate structure. When set to **`False`** you cannot control access using the corporate structure.
LoginIsEmail		When set to **`True`**, the employee e-mail address is used as a login.
Wizard.EmployeeResetPasswordMode		Indicates how to display links for the `EmployeeSignerLoginForm`for the Forgot Password option.
Wizard.HidePasswordRecovery	false	When set to **`True`**, this setting hides the password recovery function on the `SignerLoginForm` page.
Wizard.ManagerResetPasswordMode		Controls how links to the `ManagerSignerLoginForm` application entry are displayed on the Forgot Password page.
Wizard.TranslatorResetPasswordMode		Controls how links to the `TranslatorSignerLoginForm` are displayed on the Forgot Password page.

Name	Default Value	Description
WQ.AllowUpdateAssignTo	true	Disables re-assignment logic after step completion.
MailMessenger		E-mail address notifications are sent from. By default, this is set to **`no-reply.{accountname}@online-onboarding.com`** The {accountname} parameter is replaced with the customer account name when the account is created. Do not change the parameter after the @ sign, as this can cause issues. This parameter will vary based on data center.
MailMessengerName	Successfactors Onboarding	Controls the name displayed in the `From` field on notification e-mails.
SMTPServer		SMTP server address
ApplicantSubmitButtonEnabled	Disabled	Controls the display of the *Submit All Documents* button on the print package page. The only applies to the applicant process, not Onboarding.
ShowPoweredTitleFlag		When set to **`True`** shows the *XpressHR powered by KMS* label in the UI.
DirectDeposit.AllowNotListed	true	When set to **`True`** allows users to enter their bank routing number and name manually for KMS direct deposit if the bank is not listed.
Wizard.HideLanguageDDL		When set to **`True`**, hides the localization dropdown menu on wizards.
Wizard.HideStepCalculation		When set to **`True`**, hides step progress in a wizard, for example *Step 10 of 15*. Instead of the step progress, the user's name is shown.
Wizard.PlaceNESCompleted	CHOICE	When set to **`CHOICE`**, the At Home/At Site question displays on the Standard_NewHireSetup panel. When set to **`ATHOME`**, the question does not display and the new hire is always considered at home. When set to **`ATSITE`**, the question does not display and

Name	Default Value	Description
Wizard.ShowIsRemoteEmployee	CHOICE	Determines the display of the question *Is the new hire a remote employee?* on the Standard_NewHireSetup panel. When set to **`CHOICE`**, the question displays. When set to **`Remote`**, the question assumes new hires are remote. When set to **`NOTREMOTE`**, the question assumes new hires are not remote.
Security.AdditionalSecurityValidation		Adds additional, customer-specific security checks.
WorkQueue.Columns.Location.ApplyCapitalization	True	When set to **`True`**, capitalizes each word in the Location column of the work queue. capitalizes Apply capitalization to kolonke (column) Locations in Work Queue (by default True). Makes first letter capital in each word for Location column on the work queue.
CollectorBO.EnableAddressPunctuation		When set to **`True`**, filters any non-alphanumeric characters from the address field.
Delegate.HideLevels		Customer-specific configuration that hides a column on delegate panels.
EmployeeListSynchronized		When set to **`True`**, the Standard_NewHireSetup panel appears for re-hires. Once the Standard_NewHiresSetup panel is created in panel designer, this step is invalid.
CitiGroup.ApplicantStartWizard.NoOverrideSteps		Customer-specific configuration for Forms on Demand. `AppConfigBO.StartedWizard` and `AppConfigBO.StartedWizardReview` are already set in `WizardManager.StartWizard().`

Name	Default Value	Description
GenericUsersMode		When set to **True**, allows the system to introduce a manager who will sign documents on the *ManagerSignerLoginForm*. Also updates the e-sign login page to require users to identify themselves in order to sign documents. Displays additional fields on the e-sign page to support this. You must use a real name to sign a form.
HideFormProcessInAdminUI		
HideNotificationProcess	False	When set to **True**, hides the *Notification Processes* option in the Work Queue Summary.
HRDataService.SyncUsersMethod.EnableUserExternalIdUniquenessCheck	True	When set to **True**, enable the user external ID uniqueness check in the `HRDataService SyncUsers` method. No two users can have the same external ID.
ManualReassign.AllowedUsers	ASSIGNEDUSERS	When reassign is enabled, this setting controls what users are available when selecting reassignment. **ASSIGNEDUSERS** makes only users assigned to specified activity available. **ALLUSERS** makes all users available for reassignment.
ManualReassign.ReassignAccordingStepPermissions	True	When set to **True**, only users who have execute permissions on a step can see the reassign link. Otherwise, all users can see the link. .
NES.RedirectToSignPageIfDocumentsExist	True	
PrintPackage.RequiredPressSubmitButtonToSubmitDocuments		When set to **True**, requires users to click the *Submit All Documents* button to complete the process.
RecoveryPassword.ShowUserName	true	When set to **True**, displays the name of the user after clicking the *Forgot Password*link. Otherwise, no user name displays.
ReportableProcesses		By default, this field is empty and all active processes can be used to generate admin reports. To limit the processes available for admin reports, list them here, separated by commas.

Name	Default Value	Description
ShowNewHireName	False	When set to **False**, *Employee Forms* displays above the form name. When set to **True**, the new hire's name displays instead of *Employee Forms*.
ShowReviewControlUpLineButtons	True	When set to **True**, the *Next*, *Back*, and *Cancel*buttons display on the upper part of the Review page. Otherwise, the upper buttons are hidden, but are still shown in the lower part of the page.
ShowSearchWorkQueueFlag	False	When set to **True**, this setting hides the *Search* option on the Onboarding Dashboard.
ShowUserDelegateLookup	True	When set to **True**, the user delegate field is displayed in the user profile. Otherwise, you cannot see the delegate field in the profile, and the section is removed from the user profile.
SignEmpFormsOnSiteQuest		
SignPage.ExternalSignForm.EnableManagerAuthentification		When set to **True**, this setting enables a pass-through on the ExternalSignForm. Customer-specific setting.
SignPage.ExternalSignForm.EnableSessionClean		When set to **True**, clears a user's session when the Signature Page is loaded. Customer-specific setting.
SignPage.ShowManagerTitle	True	When set to **True**, displays the Manager Title field on the corporate user e-sign login page.
SignPage.ShowStopBeforePrintPackage		
SignPage.ThankYouAfterSubmitAllDocs	False	When set to **True**, after a user clicks *Submit All Documents*, they are not redirected, and will not see a thank you page, unless they accessed the process from outside of SuccessFactors HCM. When set to **False**, no thank you page displays.
SSO.ForceUserToChangePasswordOnFirstLogon.WithoutEnterPrevPassword	False	When set to **True**, in instances using SSO the user does not have to enter a password, which forces the user to change their password on their first login.

Name	Default Value	Description
Standart_NewHireSetup_Panel.HideHireDate	False	When set to **True**, the *Hire Date* panel is hidden during the standard new hire setup.
StartDate.RangeValidationEnabled	True	When set to **True**, the system verifies that the new hire's start date is between the current date minus three days plus 30 days. Not verifying the start date puts I-9 compliance at risk.
StartDateUpperLimit	30	Determines an upper limit for the Start Date number of days after the current date. For example, when set to **30**, the start date must be three days less than the current date, plus 30. Changing this number puts I-9 compliance at risk.
SubmitButtonEnabled	False	When set to **True**, users can click *Submit All Documents*, without first clicking *Print* on the print package.
W4CheckForCitizenship		When set to **True**, then the following parameters are set: `CitizenshipStatus = A`, `MaritalStatus = S`, and `TotalAllow = 1`.
Wizard.ApplicantHidePrintButton		When set to **True**, hides the *Print* button on the application process.
Wizard.CleanEmailOnSite	True	When set to **True**, removes the e-mail field when a user selects the OnSite option. When set to **False**, the e-mail field still displays so the user can enter information on the PHV step.
Wizard.CO_DocumentUploadingShowQuestion	True	When set to **True**, displays the question *Were you able to scan the document(s)?* on the Colorado I-9 Documentation Upload panel.
Wizard.EnableEmployeeEmailOnSignPage	False	When set to **True**, asks the new hire for their e-mail address on the employee e-sigh login page.
Wizard.GenericUsersEnabled		Allows the user to select a manager who will sign documents on the `ManagerSignerLoginForm`.Generic User mode must be enabled to use this setting.
Wizard.HideEEOPreferedName		Do not use. Due to changes in the panel this setting has no effect.

Name	Default Value	Description
Wizard.HideI9Sec1Doesthefollowingstatement-Question		When set to **True**, hides the question *Does the following statement reflect your citizenship status and your proof to work in the United States?*.
Wizard.HideManagerKeyboardWarning		Do not use. Applies to an outdated function.
Wizard.HideMyProfile	false	When set to **True**, the *My Profile* link is hidden on the Onboarding Dashboard.
Wizard.HideOrientationDateLine	false	When set to **True**, hides the *Orientation Date* and Time fields on Standard New Hire Setup Panel
Wizard.HidePrintButton		
Wizard.I9_DocumentUploadingShowQuestion	False	When set to **True**, shows the question *Were you able to scan the document(s)?* on the I- 9 Documentation Upload panel
Wizard.I9AgeLimit	14	The number entered is the minimum hiring age for the new hire. The system will check the *Date of Birth* field on the panel against this number.
Wizard.ShowManagerI9QuestionsOnNewEm-ployeeStep	false	When set to **True**, displays the questions *Does the employee have the proof of eligibility documents with him/her today?* on the New Employee Step.
Wizard.ShowWOTCQuestions		
Wizard.ValidateI9AdmissionOrAlienNumber	True	When set to **True**, the panel validates that either the Alien or Admissions number are entered on the *Aliens Authorized to Work* panel of the New Employee Step.
WorkStatePlaceIsRefLocations		
WQ.HideSyncNewHire	True	Do not use. Applied to an inactive integration.
WQ.Monitoring.DisableHRCorpStructure	False	
WQ.Monitoring.NamedUserViewAllNotifications	False	When set to **True**, named users can view all activity notifications.

Name	Default Value	Description
JobDetailPanel.StandardHourField.DigitsAfterDot	0	When set to more than 0, users can enter numbers with the specified number of decimal digits in the *Standard Hours* field of the *JobDetail* panel. Not valid with standard Panel Designer panels.
InputToXmlData.RequiredKeys		Do not use. No longer valid.
RestoreDataByApplicantProcess		When set to **`True`**, attempts to download a user's data from a completed New Hire process during the application. Do not use, as the application process is not handled in Onboarding at this time.
Integration.DefaultGroupName		The default group name, which includes members who have been imported from a sync.
Integration.UpdateHRDataOnImport		When set to **`False`**, when doing a user import, records that match an existing `HRDataID` will not be updated.
ApplicationIsBasedOnOnboarding	False	Do not use. This setting is not relevant to the current Onboarding configuration.
Integration.ExecuteAssignToOnImport	False	When set to **`True`**, if a new activity is created from an imort the manager designated in the import file is ignored, and the system attempts to calculate the maager based on security settings. Controls if re-assignment logic executed when new activity is created from import.
Security.DefaultPassword	Password_321	The default password when importing users. This applies to all users created with an import feed. (does not apply to client admin sysop).
DefaultSecurityQuestion	Favorite Sports Team	Default Security Question
HideParentWindow		When set to **`True`**, when you open a Wizard, the main window is hidden behind the Wizard. .
DocCenter.UploadDocument.FilterByProcess		
Integration.UpdateUsersPasswordOnImport	False	When set to **`False`**, the system ignore passwords in the user import file. When set to **`True`**, when you import existing users, the passwords in the import file are honored.

Name	Default Value	Description
Security.DefaultUserId	admin	The default user name. If the system cannot fide a suitable Hiring Manager, new hires are assigned to this user. To change, enter the user ID of the desired user.
ApplicantPageIsMultiProcess		Do not use, as Onboarding does not handle the application process.
ApplicantSignFormsPage.BeforeSign.ShowHomeButton		Do not use, as Onboarding does not handle the application process.
ApplicantSignFormsPage.ShowHomeButton		Do not use, as Onboarding does not handle the application process.
AutoStep		When set to **`True`**, immediately after clicking on the *Submit Review*link, the wizard starts . This allows you to continue the process without going into the Work Queue.
CheckTerminatedOrNot		When set to **`True`**, if a process is started manually the status of the employee is checked to see if they have been terminated.
DeveloperVersion	False	When set to **`True`**, displays additional information in the user interface. Specifically, allows uses to view forms without starting the signature step. This setting can impact the speed of the site when processing activities. Must be set to **`False`** in all production instances.
HideGlanceButton		When set to **`True`**, hides the *Glance* buttons on the Work Queue. This setting is duplicated in *Security* > *Groups*.
HideSignatureType		Do not use. This setting is no longer valid.
SignEmpFormsFollowNewEmployeeStep		When set to **`True`**, the employee does not see the prompt asking them to sign the form at the end of the New Employee Step. .
UseWorkStateKeyForWithholdingMapping	False	When set to **`True`**, the new hire's work state is determined from an imort field on the new hire activity. When set to **`False`**, work state is calculated based on the location in the Corporate Structure.
USI9NonCompliancyFormGroupCodeFormCode		

Name	Default Value	Description
WizardWindowHeight		Determines the height of wizard panels in pixels.
WizardWindowWidth		Determines the width of wizard panel in pixels.
InitialCompletePage		User is redirected to this URL after completing the PHV step. If the value is blank, the user is redirected to the Dashboard.
OrientationCompletePage		User is redirected to this URL after completing the Orientation Step. If the value is blank, the user is redirected to the Dashboard.
DefaultSecurityAnswer	clippers	Default Security Answer
AllowCancelProcess		When set to **True**, users can cancel a process by clicking the *Cancel* button on the Manage Employee page. Updates the record to `All Documents Submitted` without actually completing the process.
HideEmpIDColumnFromWQ		When set to **True**, the `EmpID`column is hidden from the Work Queue.
HideUserControlsTab	False	When set to **True**, hides the *User Controls* tab.
HRDataWizard.ShowModalSignPage	True	When set to **True**, shows the signature page in a modal window for the HRDataWizard
SendMailPDF		Do not use. No longer applies to Onboarding configuration.
ShowAssignToWorkQueueFlag	False	When set to **True**, displays the pop-up menu to assign an operation to the Work Queue.
ShowCompanyFilters	False	When set to **True**, adds an additional filter for `Company Name` on the *Assign Users to Groups* page.
HRStaffEMail		Deprecated
NetworkStaffEMail		Deprecated
FacilitiesEMail		Deprecated
UpperCaseManagerTitleOnSignPage	True	When set to **True**, displays the manager title in all case on the e-sign login page.

Name	Default Value	Description
Wizard.HideProvisioning		When set to **`True`**, hides *Provisioning* items in the reference file dropdown menu.
Wizard.HideUniforms		When set to **`True`**, hides *Uniforms* on the reference file drop down
Wizard.HideBanks		When set to **`True`**, hides *Banks* on the reference file drop down.
Wizard.DisableAutoStart	True	When set to **`True`**, E-Verify starts based on the configuration of the E-Verify step in the corporate structure.
SignPage.ShowSignDocsOnApplicantPageForUn-signed	True	When set to **`True`**, diplays the *Sign Documents* button on any unsigned New Employee Steps with forms for print or employee signature.
SkipPrintFormsForManager	False	When set to **`True`**, hides the print package from the manager.
Applicant.AllowToCompleteSecondApplicationAf-terFirst		Applies to application process only
ApplicantPageBtnGoPortalShow		Applies to application process only
Wizard.WotcParticipateQuestionVisible		When set to **`True`**, displays the question *Do you want to participate in WOTC?* to the new hire. Should not be used, as clients should cre-ate their own custom panel with language about WOTC.
Wizard.ShowManagerI9StopPanel		Do not use. Applies to an I-9 proc-ess that is no longer used.
I9ReverificationSection3	True	Controls a value on I-9 panels that impacts reverification
72HoursWaitPeriodForI9		Controls a value on I-9 3 business day panels that impacts compli-ance.
72HoursReassignI9Form	False	Controls a value on I-9 3 business day panels that impacts compli-ance.
Signature.Type		Allows using different signature types on the e-sign page, for exam-ple, ink pad or biometric pads.
Signature.AllowRedirectAfterFirstStep	False	When set to **`False`**, a user is not forwarded to the signature page af-ter the PHV step.

Name	Default Value	Description
Signature.NESSignatureForStandardProcessesOnly	False	When set to **`True`**, remove the signature step after the employee or new hire step in all processes other than custom processes.
HRDataService.GetActivityStatusMethodMode		Deprecated.
Security.ApplicantPage.AdditionalSecurityValidation.IncorrectValidationCode		Do not use. Applies to application process.
Security.AdditionalSecurityValidationMode		When no value is entered, no additional security validation is performed.
ApplicantPage.AdditionalSecurityValidation.HideMsgHeader		Do not use. Applies to application process
ApplicantPage.AdditionalSecurityValidation.HideUserName		Do not use. Applies to application process
EVerify.ManualProcessName	XpressHR	The name of the manual process for E-Verify on the E-Verify panel.
HRDataService.SyncUser.DeleteGroupsBeforeUpdate	False	When set to **`True`**, when an existing user is synced, the user is removed from all groups.
HRDataService.SyncUser.DeleteAssignedNamedUserTypesBeforeUpdate	False	When set to **`True`**, if an existing user is synced, all named user types for the user are deleted.
Federal_I9_Id_Panel.DisableSSNField	False	When set to **`True`**, new hires cannot edit their Social Security Number field.
Federal_I9_Panel.DisableSSNReceipt	False	When set to **`True`**, the new cannot select the Social Security Number receipt as an option on the I-9 panel.
Federal_I9_Panel.DisableDocumentReceipts	False	When set to **`True`**, the receipt logic is disabled on noncompliance panels.
Standard_NewHireSetup_Panel.DisableStartDateValidation	False	When set to **`True`**, the start date field is not validated on the I-9 compliance panel.
HideSSNOnPdfForms		When set to **`True`**, hides the new hire's Social Security Number on forms.
DirectDeposit.ShowPriority		Do not use. This setting applies to a deprecated configuration.
SignPage.HideCorrectData	False	When set to **`True`**, removes the *Correct Data* tab on the e-signature pages.

Name	Default Value	Description
Wizard.FlatWizardShowCloseButton	False	When set to **`False`**, remove the *Close* button from the wizards.
ApplicantPage.ShowMessageIfActivityIsHidden		Do not use. Applies to the application process only
Integration.PostDataConfigurationPath		Full file name with path to the configuration of Post Foundation Data.
UpdateUser.ChangeAllActivities	False	When set to **`True`**, True all activities assigned to a user are updated with e-mail information from the user import file.
MailQueueFailedReportRecipient		Do not use. Applies to an outdated configuration.
AddressCheckingIsRequired		Do not use. Applies to an outdated configuration.
CheckCityStateZipOnly		Do not use. Applies to an outdated configuration.
StandardPhysicalAddressCountries		Do not use. Applies to an outdated configuration.
Integration.UpdateHRDataOnImportOnlyOnPHV	False	When set to **`True`**, HRData is updated from import only if there is activity on the PHV.
Integration.UseExternalIdToUpdateHRData	True	When set to **`True`**, the system attempts to restore the HRDataID from the external ID.
Integration.ValidateDateOfBirth	True	When set to **`True`**, date of birth is validated in the hard coded format mm/dd/yyyy.
RecoverPasswordByMail	True	When set to **`True`**, users can recover their password via e-mail.
Security.EnableNESThroughSSO	True	When set to **`False`**, you cannot initiate the eSignature wizard until the new employee has completed the Onboarding wizard.
Security.UserProfileDelegateEditable	False	When set to **`True`**, the *Delegate* field in the User Profile is editable.
Security.UserProfileTitleEditable	False	When set to **`True`**, the *Title* field in the User Profile is editable.
Wizards.ShowSaveButton	False	When set to **`True`**, shows the *Save* button on the wizard page.
ActivityWizardPage.Status2.NotCompleted.Message		The message that displays on the control that closes the wizard on the second step of the process.

Name	Default Value	Description
ApplicantPage.HeaderNewEmployeeSsoMessage	Please remember your User Name and temporary Password provided to you below. You will need to know this password to sign forms during the process.	Do not use. Legacy setting.
Calendar.OffDays	[1,0,0,0,0,0,0]	Do not use. Legacy setting.
DefaultAssignee		Determines the assignee for a process, if an assignee not defined.
EnableFormProcessRelatedForms	False	Enable the Related Forms for Form Process.
EVerify.FederalContractor	False	When set to **`True`**, indicates employer is a federal contractor for E-Verify.
I9OutOfComplianceOptions.ChangeStartDate	True	When set to **`True`**, enables the *Change Start Date* section on the I-9 Out of Compliance panel.
I9OutOfComplianceOptions.NotChangeStartDate	True	When set to **`True`**, enables the *Continue with Currect Start Date* section on the I-9 Out of Compliance panel.
I9OutOfComplianceOptions.SuspendEmployment	True	When set to **`True`**, enables the *Suspend Employment* section on the I-9 Out of Compliance panel.
I9OutOfComplianceOptions.TerminateEmployment	True	When set to **`True`**, enables the *Terminate Employment* section on the I-9 Out of Compliance panel.
Integration.AllowUseUIECollector	True	Do not use. Legacy setting.
MyFormsPage.ShowAllForms	False	When set to **`True`**, creates a two-step FOD process.
SignPage.EmployeeLogin.HideEmployeeSSN	False	When set to **`True`**, hides employee SSN on the Signature login page.
W4AdditionalAmountAllowFraction	True	When set to **`True`**, the value in the *Amount* field of the W4 should be a whole integer without fractions or decimals.
WTPA.PayRateDecimals_{0}	2	Determines the number of decimal places allowed for the pay rate for NY and CA WTPA.
WTPA.PayRateFormat_ {0}	{0:0.00}	Determines the format of decimal places allowed for the pay rate for NY and CA WTPA
WTPA.SemiMonthlyHours_{0}	80	Semi Monthly Hours for NY and CA WTPA

Name	Default Value	Description
XpresssHR.MyFormsPage.AllowSelectOnlyOne-Form	False	
XpresssHR.NotificationRecipient.FilterLockedUs-ers	False	When set to **True**, shows locked users in Notification recipients
StandardFormsURL	~/PDF	URL for the account's standard forms.
Integration.LastSyncDate		Shows the last import date, when the integration type is `pull`. By default, returns the date of the last import minus one month.
Integration.TimeShift	24	Number of hours subtracted from the value of `Integration.LastSyncDate` to determine the date and time used to select new hire records during synchronization.
CollectorBO.EnableInternalNewHires		Import of candidates from UIE. Used in CollectorBO to determine the new hire update type.
PDFProducer.CertificateStore		Usually, `XpressHR`. Stores the certificates created when signing pdf forms for each employee.
PDFProducer.DefaultSignImage		The full path to the image used for signatures on forms.
PDFProducer.PDFTemplateConfig		The full path to the file description available in account form libraries .
PDFProducer.PDFTemplateStore		Absolute path to the root directory of the form library. Parameter value is used when calculating the path to the libraries that are speci-fied by a relative path in the config-uration file
EnforcePasswordsToIncludeOneLowercaseLetter		When set to **True**,password must contain one alphabetic character in lowercase.
EnforcePasswordsToIncludeOneNumber		When set to **True**,password must contain one number in lowercase.
EnforcePasswordsToIncludeOneSymbol		When set to **True**,password must contain one special character.
EnforcePasswordsToIncludeOneUppercaseLetter		When set to **True**,password must contain one alphabetic character in upper case.
ForceUserToChangePasswordOnFirstLogon		Obliges the user to change the password at the first login
maxPasswordLength		The maximum password length

Name	Default Value	Description
minRequiredPasswordLength		The minimum length of the password
NumberofCriteria		The minimum number of criteria (one symbol, one lowercase letter, one uppercase letter, one number) which must be satisfied in the password .
NumberOfSecurityQuestions	1	Number of secret questions for password recovery.
PasswordExpirationInDays		Password expiration period (in days). After this period, the application should not allow the user to login without changing the password.
PasswordHistorySecurityKeepLast5	true	Do not use.
ProvidePasswordSecurity		When set to **True**, uses the current account complexity.
Security.MaxInvalidPasswordAttempts		Number of failed login attempts after which the user is locked out.
Wizard.OnBlurEventHandler		Action for the `OnBlur` event of the wizard's text box
Integration.DateShift	30	The date shift for the begin date of the integration range
AutoMapPDFField		When set to *True*, enables the automatc mapping of PDF forms when they are updated via the web interface.
ClassAliases		Class Name aliases used for the hiding the real class names on panels.
CreateFormsAfterOrientation	False	When set to **True**, creates forms after the Orientation step, if forms are missing or the New Employee Step is empty.
CreateFormsOnAnyServer		When set to **True**,you can generate forms on any server (DB02/DB02 etc)
DocumentRepository.HideDepartmentColumn		When set to **True**, hides a column in the document repository
DocumentRepository.HideDistrictColumn		When set to **True**, hides a column in the document repository
DocumentRepository.HideJobTitleColumn		When set to **True**, hides a column in the document repository

Name	Default Value	Description
DocumentRepository.HideSSNColumn	false	When set to **True**, hides a column in the document repository
EEOReportsStore		Path to the reports generated using the EEO Reports
EmployeePortal		Employee Portal URL
EVerify.CalculateByOrgUnits	false	If true, the ClientID calculated by OrgUnit Relations.
AddTicketToTheBlackList		
EVerify.FormCodesForResign	US I9; I9 REMOTE	List of values separated by a semicolon indicating forms that need to be resigned after data is modified during E-Verify.
FAQURL		URL to page FAQ. If the parameter is empty, then a link to thethe main menu of the application appears.
HideSynchronizeAll		This key is used to display the *Synchronize All* button in the Work Queue
I9VerificationLevel		Determines the level that indicates the work state during the I-9 process.
LoginGeneratorName		Fully qualified class name (`AssemblyQualifiedName`) generator login.
LogoFileDirectory		Absolute path to the directory containing the logo files.
LogoutURL		URL (in the form ~ `/Logout.aspx`) indicates where the user is redirected when clicking the *Logout* link.
LogoutWarning	false	Show message *Are you sure you want to log out?* on logout
SessionExpiration.EnableClientDetectInactivity		When set to **True**, includes an observation sessions on the client which will end the session due to inactivity.
SessionTicketTimeout		Lifetime (in seconds) of the security token.
ShowExtendedGroupSecurity		When set to **True**, shows advanced settings for the security group
SupportURL		URL that links to support.
Theme		Designates the location of the theme folder.

Name	Default Value	Description
UseShortCheckboxMapping		Shows what value will be mapped from checkboxes.
Wizard.ValidatorRegEx.Address	[^{\.,?!\'\";:()-_}]+	Regular expression for the validation of the address line
Wizard.ValidatorRegEx.AddressJS	[^{.,?!' + String.fromCharCode(39) + ' ' + String.fromCharCode(34) + ';:\\() -_}]+	JavaScript regular expression for the validation of the Address line
Wizard.ValidatorRegEx.FirstName	[a-zA-Z-]+	Regular expression for the validation of the first name
Wizard.ValidatorRegEx.LastName	[a-zA-Z-\'\`]+	Regular expression for the validation of the last name
Wizard.ValidatorRegEx.MiddleName	[a-zA-Z\.-]+	Regular expression for the validation of the middle name
WizardsConfig		Name of the configuration file. The path is relative.
XMLFiles		The full path to the folder where you are in the XML which describes the processes , wizards , filters, etc.
InputToXmlData		XSLT list of files to process the incoming XML.
XmlDataToOutput		List of XSLT files used to convert HRData when exporting via webservice.
BasicPilot.SubmittersPhoneNbr		Phone number for feedback.
BasicPilotClientCompanyId		Company identifier in the e-Verify system
BasicPilotInitOnSubmitDocuments		When set to **`True`**, verification is performed after *Submit Documents* is completed on the main process.
BasicPilotLogonId		Login to access the web service DHS
BasicPilotURL		Web Service Address DHS
Integration.UseUIECollector		When set to **`True`**, uses the old class CollectorBO new hire to import from external systems.
ApplicantSignFormsPageUseThankYou		Used on ApplicantSignForms-Page.ascx
Wizard.DateFormatRegEx		Regular expression to validate the date in the proper format .
IntranetURL	Empty string	Used for setting options .

Name	Default Value	Description
SettingsReportFile		File name to save the report settings. The path is relative to XMLFiles
UI.NESAfterSignControl		Contains the name of UserControl, which is reflected after all the documents are signed .
UI.NESBeforeSignControl		Contains the name of UserControl which is reflected if the documents are not signed yet .
UI.PrintControl		Contains name User Control to display on the Print Package
DesktopModules	~ / DesktopModules	Address (URL) directory with control panels (for local account).
BasicPilotPswd.		Password to access the web service from DHS
Integration.ConfigurationPath		Absolute path to the directory with configuration files for integration
UIEWebServicesURL	https://recruiter.webhire.com/uiewebservices/uiewebservices.asmx	URL of the web service eRecruiter (UIE).
PDFProducer.EmptyPDF		Path to the file Empty.pdf. File is used to create a digital signature
DevAccountsStore		System record. Do not edit.
AttachFilesDirectory		Absolute path to the directory containing the attached files
DesktopModulesStore		Absolute path to the directory panels DesktopModules - total for the site
PDFStorePath		Full directory path to the PDF account.
ProvisionTypesStore		Sets the path to the directory where lie Provision Type, used this account
Signatures		Full path where images are created signatures CIC
XMLTPrintTemplateFiles		The full path to the directory containing the XSLT files to generate reports
MailSendingDisabled		System record. Do not edit.
BX.Urls.Base		System record. Do not edit.
BX.Urls.HomePostfix		System record. Do not edit.
BX.Urls.HomePageParameterName		System record. Do not edit.
BX.Account.Name		System record. Do not edit.

Name	Default Value	Description
EmployeePortal.SSOAuthFromApplicantPage	False	When set to false the employee must use their password to access the employee portal after the paperwork has been signed.
CacheTimeout		System record. Do not edit.
DateFormat	MDY	Date Format for the Onboarding Date picker control. Not used for Panel Designer. Panel designer uses settings of the selected Locale.
DateSeparator	/	Day, month, and year separator for the Onboarding Date picker control. Not used for Panel Designer. Panel designer uses settings of the selected Locale.
PDFProducer.CertificateName		Certificate name for signature in the `PRDProducer`.
DocCenter.ClientSiteUrl		System record. Do not edit.
DocCenter.Domain		System record. Do not edit.
DocCenter.Password		System record. Do not edit.
DocCenter.ServiceUrl		System record. Do not edit.
DocCenter.UserName		System record. Do not edit.
Integration.GetNewhireRecordConfigurationPath		System record. Do not edit.
Integration.HRDataPipelineDescription		System record. Do not edit.
Integration.RefFilesSyncJobCustomServicesConfiguration		System record. Do not edit.
Integration.TimeToAdd		System record. Do not edit.
PreventIFrameForLoginPage		System record. Do not edit.
Security.AllowThreeOrMoreConsecutiveCharactersInPassword		System record. Do not edit.
Security.AllowThreeOrMoreSameCharactersInPassword		System record. Do not edit.
Security.ExcelDownloadingWarningMessage		System record. Do not edit.
Security.SAML20.EnableSSOInIFrame		System record. Do not edit.
Security.SAML20.IdP.LoginPageURL		System record. Do not edit.
ShowAllAccountsCheckbox		System record. Do not edit.
VirtualForms.Enabled		System record. Do not edit.
Wizard.DateFormatRegExJS		System record. Do not edit.
Wizards.DisableAutoSave		System record. Do not edit.
WQPage		System record. Do not edit.

Name	Default Value	Description
Applicant.StartControl		System record. Do not edit.
BasicPilotLogonId_Old		System record. Do not edit.
DocumentRepository.HideLocationColumn		System record. Do not edit.
EVerify.Certification	false	System record. Do not edit.
Integration.ValidatorPath		System record. Do not edit.
MailQueueFailedLastSearch		System record. Do not edit.
ReportProcessStepsLastUpdate		System record. Do not edit.
SessionTimeoutURL		System record. Do not edit.
Wizard.FlatWizardStartPoints		System record. Do not edit.
Wizard.ValidatorRegEx.Email		System record. Do not edit.
Wizard.ValidatorRegExJS_Filter.FirstName		System record. Do not edit.
Wizard.ValidatorRegExJS_Filter.LastName		System record. Do not edit.
Wizard.ValidatorRegExJS_Filter.MiddleName		System record. Do not edit.
WQ.DateIndexFieldFormat		System record. Do not edit.
WQ.LimitForPreCalcRequests		System record. Do not edit.
WQ.SaveNullValueToIndexField		System record. Do not edit.
WQ.UseKiewitRequests		System record. Do not edit.
WQ.UseOptimizedSearch		System record. Do not edit.
WQ.UsePreCalculatedRequests		System record. Do not edit.
ApplicantPage.EnterYourPasswordInstructionText		Instruction on Applicant Page under the *Enter your Password* prompt.
Integration.ErrorMessageRecipient		E-mail address where integration error messages are sent for new hire imports.
InstructionsForPasswordCreation		Message that displays to the user if the new password entered it does not satisfy the complexity of the password set in the system.
Applicant.PasswordHint		Sets the help text that appears on the top create Password Applicant process.
PasswordFailedRecoveryMessage	Your password cannot be recovered. Please, contact your HR Representative or Site Administrator for assistance.	Message that is displayed when an attempt to recover the password fails.

Name	Default Value	Description
Wizard.EmployeePasswordHintMessage		Hint for what the password should be when first created. This parameter is used when `Wizard.EmployeeResetPasswordMode = CUSTOM`.
Wizard.EmployeeResetPasswordCustomMessage		Password prompt for a password recovery . This parameter is used when `Wizard.EmployeeResetPasswordMode = CUSTOM`.
Wizard.ManagerPasswordHintMessage		Hint for what the password should be when first created. This parameter is used when `Wizard.EmployeeResetPasswordMode = CUSTOM`.
Wizard.ManagerResetPasswordCustomMessage		Password prompt for a password recovery . This parameter is used when `Wizard.EmployeeResetPasswordMode = CUSTOM`.
Wizard.TranslatorPasswordHintMessage		A hint for what the password should be when it is created.Displayed when `Wizard.TranslatorResetPasswordMode` is 'CUSTOM'
Wizard.TranslatorResetPasswordCustomMessage		Password prompt for a password recovery translator to sign page. Displayed when `Wizard.TranslatorResetPasswordMode` is 'CUSTOM'
Applicant.AfterSignPageThankYou		Text on `StartFOD.ascx`, which appears after the signed form .
ApplicantPageAllSignedThankYouMessage	Congratulations, you have signed all forms.	The text on the control `ThankYou.ascx`
ApplicantPageBtnGoPortalText	Go To Employee Portal	Go To Employee Portal
ApplicantPageBtnStartWizardText	Start Employee Wizard	Start Employee Wizard
ApplicantPageNotSignedMessage	Congratulations, you have completed the first step.	The text on the panel `ApplicantSignFormsPage.ascx` and control `ThankYou.ascx`
ApplicantPageSignMessage	Press the "Sign Forms" button if you would like to sign the employee forms now.	Instructions on the Thank You page that appears after the New Employee Step.

Name	Default Value	Description
ApplicantPageStartWizardMessage	Click Start Employee Wizard to complete new hire forms.	Message to begin the new hire forms on the Applicant Start Wizard and Applicant Portal Start Wizard.
ApplicantPageThankYouMessage	This ends the employee session. Give keyboard back to the company representative.	Thank you message on the Applicant page.
ApplicantPageThankYouMessage1		Thank you message on the Applicant page.
ApplicantPageThankYouMessage2		Thank you message on the Applicant page.
ApplicantPageThankYouMsgWhenAllSigned		Thank you message when all forms have been signed on the Applicant page.
ApplicantPageThankYouMsgWhenAllSigned2		Thank you message when all forms have been signed on the Applicant page.
ApplicantPageThankYouMsgWhenAllSigned3		Thank you message when all forms have been signed on the Applicant page.
CompanyName		Text in the panel header
DisplayClickToSignmMessage		The text of the inscription on the sign page. If no text is entered, then the inscription is blank. .
I9BringDocumentsNote	Please remember to bring original, unexpired documents with you on your first day of employment.	Instructions on the I-9 panel to bring all documents.
LoginPage.FailedAttemptMessage	Your login attempt was not successful. Please try again.	Unsuccessful login message.
LoginPage.UserIsLockedOutMessage	Your login attempt was not successful. Please try again.	Message for locked out users.
RemoteApplicantPageAllSignedMessage	Congratulations, you have signed all forms. You now have three days from your start date to fax or mail your I-9.	Message for remote hires when they have signed all forms.
RemoteApplicantPageNotSignedMessage	Congratulations, you have completed the first step. Please, click the Sign Forms button to start signing.	Message for remote hires when they have unsigned forms.

Name	Default Value	Description
SignPage.EmployeeWelcomeText	Enter the Password and its Confirmation (if required) and click "Submit". The list of documents you need to sign will be displayed. Click the "Click to Sign" button to place your electronic signature on the document. A check mark will appear next to the form you have electronically signed. Each form will be automatically presented for your review and signature.	Message on the control `EmployeeSignerLoginForm`
SignPage.ThankYouText	You have completed the Signature Step. Thank you!	Text on the SignPage after the user clicks *Submit All Documents*.
SignPageStopPageControlLinkMessage	Go to sign forms.	Link text for the StopPageControl.
SignPageStopPageControlMessage	The employee must now sign the forms.	Message to for the StopPageControl.
Wizard.PrintPackageMessage	All your forms have been signed. Documents are ready to be printed and submitted. Select "Print" to print your documents. Then click "Submit All Documents" to complete the process.	The text that appears on the print package after signature.
Wizard.PrintPackageMessageAlt		Continued text for the `Wizard.PrintPackageMessage`.
Wizard.PrintPackageMessageForNewEmployee	All your forms have been signed. Documents are ready to be printed and submitted. Select "Print" to print your documents. Then click "Submit All Documents" to complete the process.	The text that appears on the print package after signing for NES.
Wizard.RemoteEmployeeAddress	xxxxxxxxxxxxxxxxxxxxx xxxxxxxxxxxxxxxxxxxxx xxxxxxxxxx, xx, xxxxx	Address on I9-Instructions for remote hires.
Wizard.RemoteEmployeeFax	xxx-xxx-xxxx	Phone number on I9-Instructions for remote hires.
Security.PasswordRecoveryVerbiage	It may take a few minutes for it to arrive in your Inbox. So please be patient. Do not click “Forgot Password” again as another password will be sent.	The password recovery page success message.
Security.PasswordRecoveryVerbiageResetLink	Instructions to reset your password have been sent to your email address.	The first sentence of the password recovery success message (if user clicks the link in the e-mail).
Security.PasswordRecoveryVerbiageSentEmail	Your password has been sent to your email address.	The first sentence of the password recovery success message (if the password is sent in the e-mail)

Name	Default Value	Description
ApplicantSecurityQuestionAndAnswerMessage	Please select your security question and write down the answer	Security Question and Answer message
AttentionUsersText		Text that displays in the left of the *Support* link on the main page of the application.
NavBarMessage	Welcome, {0}	The text on the navigation bar
SignPage.EmployeeWelcomeHeaderText	Welcome to the electronic signature step. At this step you will sign all of your paperwork. Please acknowledge your agreement to use electronic signature technology by clicking the agreement below.	Specifies the introductory text on `EmployeeSignerLoginForm`.
SignPage.ManagerLogin.PasswordLabel	Password	Name of the text field for entering a manager password.
SignPageManagerStopPageControlLinkMessage	Go to sign forms.	Text links to the stop page for the manager signature step.
SignPageManagerStopPageControlMessage	Must {0} now sign the forms.	Message for the manager on the stop-page of signature.
SignPageTranslatorStopPageControlMessage	The translator must now sign the forms.	Message on the stop-page of the translator's signature
StartControl.Message	Welcome to the first step in onboarding your new hire. Click "Start" to begin the process.	Language on the standard start control
Wizard.CorpRepresentativeTitle	Corporate Representative	Title on the page where a company representative enters a signature.
ApplicantSignFormsPageManagerMsg	Please, give keyboard back to the company representative.	Signature on the `ApplicantSignFormsPage`
ApplicantSignFormsPageManagerMsg2		Signature on the `ApplicantSignFormsPage`
WorkQueueOnSiteStatusText	(On-Site)	Text for the *On-Site* status in the Work Queue.
ActivityWizardPage.Status1.NotCompleted.Message	Posthire Verification step was not completed. You need to complete before continue.	This message is displayed for the process on the ActivityWizard Signature Step when the first process step is unfinished.
ActivityWizardPage.Status3.Completed.Message	Orientation step is successfully finished. Click on the eSignature wizard link to start the signature step.	This message is displayed for the process on the ActivityWizard Signature Step where the third process step is finished.
ActivityWizardPage.Status3.NotCompleted.Message	Orientation step was not completed. You need to complete before continue.	This message is displayed for the process on the ActivityWizard Signature Step where the third process step is unfinished.

Name	Default Value	Description
ActivityWizardPage.StatusSigned.Message	The activity has been completed. All documents have been signed.	This message is displayed for the process on the ActivityWizard Signature Step if the form is signed.
ActivityWizardPage.StatusUnsigned.Message	Signature step was not completed. You need to complete before continue.	This message is displayed for the process on the ActivityWizard Signature Step if the form is unsigned.
ApplicantWelcomeHeaderText		Specifies the header text at the top of the applicant page.
DelegatePanel.Instructions	Please enter first letters of either the first name or last name of the person. Then select the person from the pop-up menu and click the 'Assign' button.	User panel for delegation (DelegateHiringManager, DelegateRecruiter)
DelegatePanel.SubTitle	You are responsible for this activity. If you cannot complete it, please re-assign it. You can re-assign to one person or multiple people.	Subtitle for delegate panels (DelegateHiringManager, DelegateRecruiter)
EmployeeTitle	Employee	Name of new hire.
HRDataWizardPageStatus2Message	Cannot initiate eSignature Wizard: the applicant has not completed the Onboarding Wizard. Please launch this wizard again after the Onboarding Wizard is complete.	Panel message for the *HRDataStartWizard*
RefTables.Departments.Title		Plural title for level 4 for the of the corporate structure
RefTables.Departments.TitleDDL		Singular title for level 4 for the of the corporate structure
RefTables.Districts.Title		Plural title for level 2 for the of the corporate structure
RefTables.Districts.TitleDDL		Singular title for level 2 for the of the corporate structure
RefTables.Divisions.Title		Plural title for level 1 for the of the corporate structure
RefTables.Divisions.TitleDDL		Singular title for level 2 for the of the corporate structure
RefTables.Locations.Title		Plural title for level 3 for the of the corporate structure
RefTables.Locations.TitleDDL		Singular title for level 3 for the of the corporate structure
RefTables.Positions.Title		Plural title for level 5 for the of the corporate structure
RefTables.Positions.TitleDDL		Singular title for level 5 for the of the corporate structure

Name	Default Value	Description
RefTables.Provisioning.Title		Singular title to select Provisioning for the corporate structure
RefTables.Provisioning.TitleDDL		Plural title to select Provisioning for the corporate structure
RefTables.Uniforms.Title		Singular title to indicate uniforms for the corporate structure
RefTables.Uniforms.TitleDDL		Plural title to indicate uniforms for the corporate structure
PoweredTitleText		Application Title
SignPage.ManagerWelcomeHeaderText		Specifies the introductory text on the *ManagerSignerLoginForm*
SignPage.TranslatorWelcomeHeaderText		Specifies the introductory text on the *TranslatorSignerLoginForm*
SiteTitle	XpressHR Onboarding	Title of the browser window for a customer account
WordManagerOnLogin		Text panel for `ManagerSignerLoginForm.ascx`
Security.ApplicantPage.AdditionalSecurityValidationText	For security purposes, please input your Date of Birth and your Zip Code in the following format: MMDDYYYYZZZZZ. For example: DOB: 4/7/1970 Zip Code: 12345-6789, then 0407197012345.	Legacy. Replaced by Onboarding Localization.
Security.ApplicantPage.CreatePasswordInfoText	Create a Password - You will need a password to electronically sign your documents and in the event you need to log back into Onboarding.	Legacy. Replaced by Onboarding Localization.
Applicant.Instructions		Legacy. Replaced by Onboarding Localization.
ApplicantInstruction1	Please enter your email address and password to apply for a job.	Legacy. Replaced by Onboarding Localization.
ApplicantInstruction2	If you have not already registered, please click the link to register.	Legacy. Replaced by Onboarding Localization.
ApplicantPage.MessageIfActivityIsHidden	Your on-boarding process has been canceled.	Legacy. Replaced by Onboarding Localization.
ApplicantPage.MessageIfProcessIsStopped	The process has been stopped.	Legacy. Replaced by Onboarding Localization.
ApplicantPage.TemporaryPassword.IfBlankMessage	If the temporary PIN field is blank, please contact the System Administrator during regular business hours for assistance.	Legacy. Replaced by Onboarding Localization.
ApplicantWelcomeMessage	Welcome. The next panels are for the new hire to complete.	Legacy. Replaced by Onboarding Localization.

Name	Default Value	Description
ClientI9Instructions		Legacy. Replaced by Onboarding Localization.
ClientManagerI9Instructions		Legacy. Replaced by Onboarding Localization.
I9CitizenshipStatusCorrectPanel.ClientInstriction		Legacy. Replaced by Onboarding Localization.
LoginPage.AccountIsLockedMessage	You cannot login while account is being under maintenance. Please try later.	Legacy. Replaced by Onboarding Localization.
LoginPage.Message		Legacy. Replaced by Onboarding Localization.
NotificationWizard.NotCompletedMessage	This wizard has not been completed. Please return later to complete.	Legacy. Replaced by Onboarding Localization.
NotificationWizard.ProcessStoppedMessage	The process has been stopped.	Legacy. Replaced by Onboarding Localization.
RehireStopPanel.Message		Legacy. Replaced by Onboarding Localization.
RehireStopPanel.MessageAboutActiveEmployeeStatus		Legacy. Replaced by Onboarding Localization.
SignPage.72HoursProcessStartedText	Since the I-9 proof of eligibility to work in the US is not present today, please have the employee go home and bring in their I-9 proof of eligibility to work in the US. When you have this you can log back in to complete the On-boarding process. The employee has 72 hours to bring this information into you.	Legacy. Replaced by Onboarding Localization.
SignPage.EmployeeLogin.ForgotPasswordLinkText	Forgot Password	Legacy. Replaced by Onboarding Localization.
SignPage.EmployeeLogin.PasswordLabelText	Password	Legacy. Replaced by Onboarding Localization.
SignPage.EmployeeSsnLabelText	Employee SSN	Legacy. Replaced by Onboarding Localization.
SignPage.ManagerLogin.CustomTitle		Legacy. Replaced by Onboarding Localization.
SignPage.ManagerLogin.ForgotPasswordCustomText		Legacy. Replaced by Onboarding Localization.

Name	Default Value	Description
SignPage.ManagerWelcomeHeaderText	Please, enter your password. After you key in your password, click the "Submit" button. Afterwards the list of forms will be displayed that require your signature. The first form will automatically be displayed. Click the "Click to Sign" button. A check mark will appear near the form you have electronically signed and the next form will be displayed for signature. Continue the process until all forms are signed.	Legacy. Replaced by Onboarding Localization.
SignPage.TranslatorWelcomeHeaderText	Please, enter your password. After you key in your password, click the "Submit" button. Afterwards the list of forms will be displayed that require your signature. The first form will automatically be displayed. Click the "Click to Sign" button. A check mark will appear near the form you have electronically signed and the next form will be displayed. Continue the process until all forms are signed.	Legacy. Replaced by Onboarding Localization.
SignPageTranslatorStopPageControlLinkMessage	Go to sign forms.	Legacy. Replaced by Onboarding Localization.
Wizard.SubmitAllDocumentsButtonText	"Submit My Application" or "Submit All Documents"	Legacy. Replaced by Onboarding Localization.
Applicant.LoginPage.DisableIfStepChanged	False	When set to `True`, shows message on ApplicantLogin page *Your activity is in the process of being updated. Please try again later or contact @CONTACT@ for assistance.* if the activity goes back one step.
BX.OAuth.Secret		Access token used for data exchange between SuccessFactors HCM and Onboarding.
BX.Urls.EmployeePage.Activities		SuccessFactors HCM deep links. Default configuration can be change using the SuccessFactors HCM Connection feature.
BX.Urls.EmployeePage.Info		SuccessFactors HCM deep links. Default configuration can be change using the SuccessFactors HCM Connection feature.

Name	Default Value	Description
BX.Urls.EmployeePage.Paperwork		SuccessFactors HCM deep links. Default configuration can be change using the SuccessFactors HCM Connection feature.
BX.Urls.ManagerHomePage		SuccessFactors HCM deep links. Default configuration can be change using the SuccessFactors HCM Connection feature.
BX.Urls.NewHireHomePage		SuccessFactors HCM deep links. Default configuration can be change using the SuccessFactors HCM Connection feature.
DocCenter.AuthenticationServiceUrl		DocCenter authentication web service URL
DocCenter.UploaderUserName	sysop	DocCenter user LoginName for the user who will upload documents.
Integration.HRDataOffboardingPipelineLocation		Import offboarding pipeline location in account folder
Offboarding.RequirePasswordCreationForExistingUsers	False	When set to `True`, when employees receive the e-mail to complete the Employee step in Offboarding they are prompted to create a password.
PDFFiles.UseSsnAsPrefixForNewFiles	True	When set to `True`, when PDF forms are created, the users' Social Security number is added to the file name as an identifier.
Picklist.CacheTimeSpan	0:0:0:0	Picklist cache duration
PicklistCacheInvalidationTime	returned DateTime min value	Picklist cache invalidation time
Security.EnableInteractiveLogin	Off	When set to `On`, users are redirected to SuccessFactors HCM.
Security.EnforcePasswordPolicy	No	When set to `Yes`, users with passwords that do not meet the site's password rules will be prompted to update their password.
Security.PublicKeyStorage		Used for PGP cryptography. This key converts from the base 64 string in the byte array.
Security.SAML20.Audience		Used to create the SSO connection for the SF HCM integration.
Security.SAML20.Instant.Verify		Used to create the SSO connection for the SF HCM integration.
Security.SAML20.Issuer.Name		Used to create the SSO connection for the SF HCM integration.

Name	Default Value	Description
Security.SAML20.Signature.Verify		Used to create the SSO connection for the SF HCM integration.
Security.SAML20.X509Certificate.Issuer		Used to create the SSO connection for the SF HCM integration.
Security.SAML20.X509Certificate.SerialNumber		Used to create the SSO connection for the SF HCM integration.
Security.SAML20.X509Certificate.Verify		Used to create the SSO connection for the SF HCM integration.
Security.SecretKeyStorage		Used for PGP cryptography. This key converts from the base 64 string in the byte array.
Security.UserUnlockTime	0	Number of seconds a user is locked our for when entering an incorrect password.
ServerSideValidationEnabled	true	When set to **`True`**, enables server validation of the mandatory fields in custom places.
WizardPage.ServerSideValidationEnabled	False	When set to **`True`**, enables server validation of the mandatory fields on wizard page.
WorkQueue.Refresh.Disabled	False	When set to **`True`**, enables the new Work Queue and the *Try new Work Queue* button.
AllowChangeInternalHireFlag	False	When set to **`True`**, allows users to change the internal hire flag.
Applicant	~/ApplicantPage.aspx	Address of the applicant page
BasicPilot.SubmittersPhoneNbrExtension		Used to set E-Verify connections (PROD or STAGE)
BasicPilotPswd		Used to set E-Verify connections (PROD or STAGE)
BasicPilotPswd.EVWS9356		Used to set E-Verify connections (PROD or STAGE)
BasicPilotPswd.YPAR1722		Used to set E-Verify connections (PROD or STAGE)
BasicPilotUrl	https://test.vis-dhs.com/WebSer-vice/EmployerWebService.asmx	Used to set E-Verify connections (PROD or STAGE)
DocCenterUploaderJob.DeleteDocs	False	When set to **`fales`**, users cannot deleted temporary PDF files from the DocCenter temporary director.
EmployeeID.IsSSN	True	When set to **`True`**, the Employee ID is created as the new hire's So-cial Security number.

Name	Default Value	Description
EmployeeID.RegEx	^\d{9}$	Regular Expression that dictates the pattern of the Employee ID.
EmployeeID.Required	True	When set to **`True`**, Employee ID is required.
OrgUnitNameInvalidCharacters		Characters listed here are not allowed in the org structure.
PDFStore		PDF files stored on the Disk Drive
VOCache.Timestamp		Process VO cache timestamp
WQ.UseCache	True	When set to **`True`**, enables Work Queue caching
AllowUpdatesForSignedActivities	False	When set to **`True`**, allows updates for SIGNED activities in the *UpdateProcessData* for the existing activity pipeline
ApplicantPage.UseLegacyFlow	False	When set to **`True`**, the applicant page uses the legacy workflow.

4 Localization in Onboarding

Once languages are made available for a customer instance, key areas of Onboarding are available for translation.

The following items can be translated using the translation dropdown menu:

- Panels – All template panels and any client configured panels. Existing non-template and non-editable compliance panels are not translatable
- Notifications created in languages other than English
- The Onboarding Dashboard
- E-signature login page
- All values in dropdown lists, including empty values and *Select* text.
- Click to sign page
- Password page
- Logo Settings
- Logo Collection (All buttons in tool box)
- Password Security
- Manage Employees (All buttons on tool box)
- Data Dictionary (All buttons in tool box)
- Data Lists (All buttons on tool box)
- Panels (All buttons on tool box)
- Reports
- Admin Reports
- Reference Files
- Security

Note

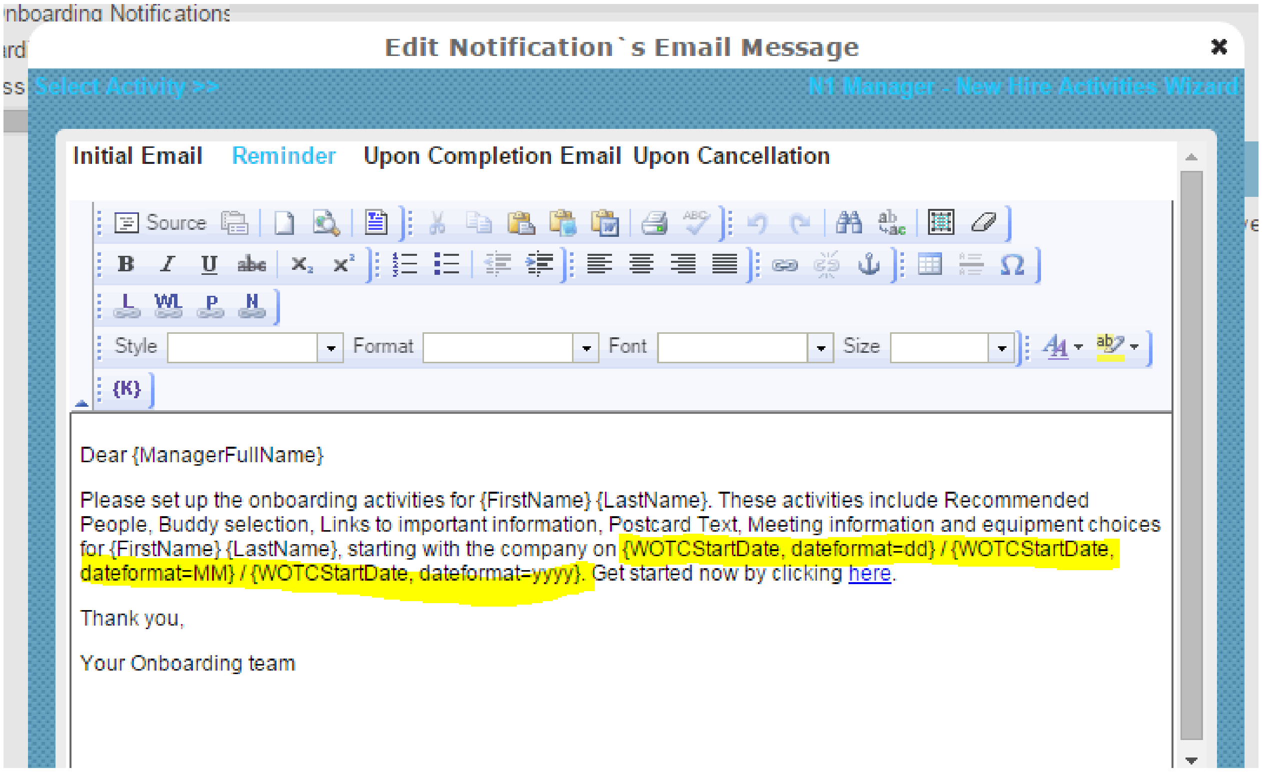
Once locales are enabled, panels can only be edited via XML. If you want to enable multiple locales, it is best practice to create the panels in Panel Designer first, then enable the locales.

To enable a site for localization, navigate to *Super Admin* > *Processes* > *Common Process Options* and enable the *Enable Language Option* checkbox.

To make languages available for translation, navigate to *Super Admin* > *Locales* > *Add Locales*, and select the locale code and locale name for any locales the customers wants available for translation.

To customize the date format that appears in panels, navigate to *Super Admin* > *Locales* choose an enabled locale, and click *Edit*. On this screen, you can customize different date formats for the locale. When you chose this locale on a notification or panel, the date displays in the supplied format.

To create custom date formats in notifications, navigate to *SuccessFactors HCM* > *Onboarding* > *Notifications* and select a notification then click *Edit* For the date you would like to customize, enter the date key, followed by the desired date format. For example, to customize the WOTC start date, enter **`{WOTCStartDate, dateformat=dd} / {WOTCStartDate, dateformat=MM} / {WOTCStartDate, dateformat=yyyy}`**.



Once configured, these locales populate the dropdown that allows users to localize panels, the e-sign login page, e-signature page, the password security panel, and the Onboarding Dashboard. When created a notification using Onboarding Admin, users can choose a locale from these available locations.

Related Information

[How to Localize and Customize Panels [page 181]](#)
[How to Customize the Employee Portal Password Panel [page 302]](#)

4.1 Example Localization Scenario

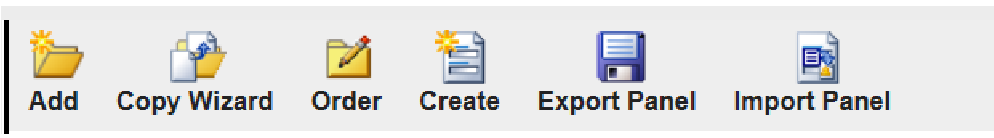
Context

This example scenario shows the German localization of a three-panel (Welcome, Basic Data, and Emergency Information) New Employee Step.

> **Note**
>
> Once locales are enabled, panels can only be edited via XML. If you want to enable multiple locales, it is best practice to create the panels in Panel Designer first, then enable the locales.

Procedure

1. Navigate to *SuccessFactors HCM* > *Onboarding* > *Settings* > *Panels*.
2. For the example scenario, we're concerned with panels in the New Employee Step. So expand the *New Employee Step* panel set, then click *Panels*.



3. Select *Export Translations* to export a local XML file with definition information for panel elements.
4. Open the file with an XML editor, and add location specific tags for the desired locale. In the example below, the code added is inside the `<de-DE>` tags.

Sample Code

```
<Item>
        <Group>PH - basic data</Group>
        <Wizard>NewEmployee</Wizard>
        <Label>Label_1.Title</Label>
        <en-US>Basic Data</en-US>
        <de-DE>Grundaaten</de-DE>
        <DBG/>
    </Item>
    <Item>
        <Group>PH - basic data</Group>
        <Wizard>NewEmployee</Wizard>
        <Label>Label_2.Title</Label>
        <en-US>Name</en-US>
        <de-DE>Name</de-DE>
        <DBG/>
    </Item>
    <Item>
        <Group>PH - basic data</Group>
        <Wizard>NewEmployee</Wizard>
        <Label>TextBox_14.Title</Label>
        <en-US>First Name:</en-US>
        <de-DE>Vorname:</de-DE>
        <DBG/>
    </Item>
```

You can localize any label on the panel, including error messages.

5. Navigate to *SuccessFactors HCM* > *Onboarding* > *Settings* > *Panels*.
6. For the example scenario, we're concerned with panels in the New Employee Step. So expand the *New Employee Step* panel set, then click *Panels*.
7. Select *Import Translations*, then upload your newly edited XML file.

8. Date locales on panels are driven by the localized date formats configured in *Super Admin* > *Locales*. Choose one of the enabled locales, then select *Edit* to customize date formats for the locale.
9. To view these date formats on the panel, start the process in *Preview* mode, then change the locale of the panel at the top.
10. Picklists defined as SF HCM picklists are also automatically translated based on the selected locale of the panel in *Preview* mode.
11. To localize the date format of notifications, navigate to *SuccessFactors HCM* > *Onboarding* > *Notifications* and select a notification then click *Edit* For the date you would like to customize, enter the date key, followed by the desired date format. For example, to customize the WOTC start date, enter **`{WOTCStartDate, dateformat=dd} / {WOTCStartDate, dateformat=MM} / {WOTCStartDate, dateformat=yyyy}`**.

Related Information

How to Localize and Customize Panels [page 181]

4.2 How to Localize Compliance Panels

You can create localized text for compliant panels, like those for the I-9 process.

Context

To localize compliance panels, you need to overwrite the text strings in the related resource files. You can translate panels by adding locale-specific strings to the resource files.

Procedure

1. Navigate to *Super Admin* > *Import/Export Settings* > *LocalizationResources* > *Export File*.
2. Choose *Submit*.
3. Locate the data keys for the text strings you would like to translate.
    a. If you do not know the name of the field you would like to customize or localize, navigate to *Super Admin* > *Locales* > *Add Locale* and select the *Debug Locale* from the dropdown list. Click *Submit*.
    b. Once you have enabled the Debug locale, begin the process containing the panel you would like to customize, in the debug locale. In the debug locale, all field names display. Note the names of fields you want to customize on the desired panels or pages.
    c. The `L` or `G` before the data key identifies the string as a local or global resource, and indicates which section of the LocalizationResources file to update, either `<LocalResources>` or `<GlobalResources>`.

4. Add the translated text to the `[CDATA]` element of the data key. In this example, the text of the welcome header of the signature panel will change to the value in the `[CDATA]` element.

```
<LocalResources>
        <Locale name="en_US">
        <Data key="lblWelcomeHeader.Text"
path="XPressHR.UserControls.App_LocaleResources.EmployeeSignerLoginForm.ascx.reso
urces">
            <Value>
            <![CDATA[Welcome to the eSig step, where you will sign your
paperwork electronically]]>
            </Value>
        </Data>
        </Locale>
        </LocaleResources>
```

5. You can also navigate to *Super Admin* > *Account Options* to customize some of the text on compliance panels. For example, the key `XPressHRClientI9Instructions` updates the default instructions on the I-9 panel telling users where to call with questions.

Related Information

How to Localize and Customize Panels [page 181]
Self-Service Account Options [page 33]

5 Setting up Permissions

Configure Onboarding and Role-Based Permissions to grant users access to different parts of the Onboarding application.

To use Onboarding, you must configure permissions in both the Onboarding application and SuccessFactors HCM Role-Based Permissions. Once you have configured these two permission types, the user and permission syncs allow the two different permission configuration to work together. Both Onboarding and SAP SuccessFactors HCM have security groups and roles to control permissions and user access.

> **Note**
>
> Role Based Permissions are required for Onboarding.

Table 13: Comparison of the authorization concepts in Onboarding and SAP SuccessFactors HCM

Onboarding	SAP SuccessFactors HCM
There are ten fixed roles. Customers cannot add new custom roles.	There are no predefined roles. Customers can create any number of roles.
A role has specific access permissions, which define what parts users who have this role can see and control.	A role has specific access permissions based on the system access users have and the users they are allowed to see.
Groups of users are named individuals belonging to a group.	Groups of users are named individuals assigned to a group based on business logic or assigned individually.
A user can belong to more than one group.	A user can belong to more than one group.
A group can be assigned to a one role only.	A group can belong to more than one role

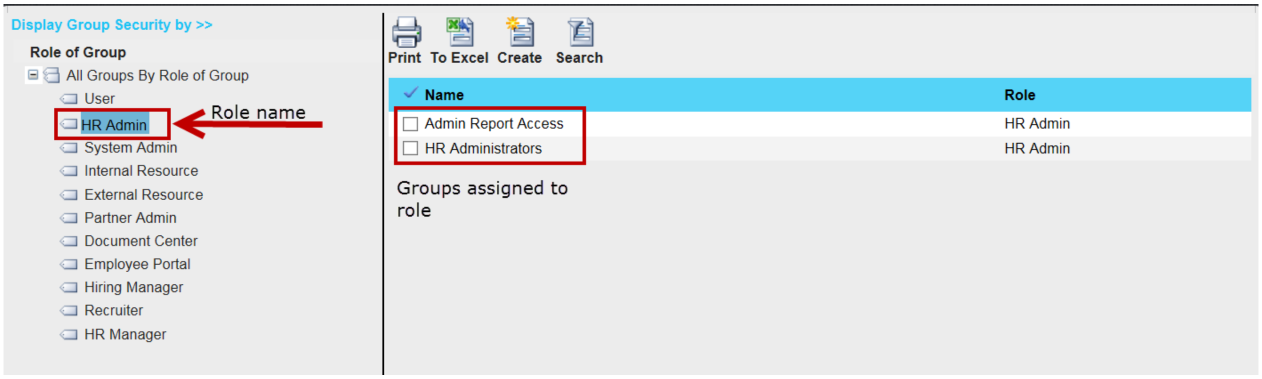
> **Note**
>
> RBP Roles in SuccessFactors HCM must named identically to Onboarding security groups. This includes case and spacing. You cannot create additional Onboarding Security Groups. Instead, create or updates RBP groups to correspond to the Onboarding groups.

Permissions in Onboarding consist of three parts: Onboarding groups, Onboarding roles, and RBP roles:

- Onboarding groups are where Onboarding-specific permissions are set, for example which actions in Onboarding a user has permissions for. Users are assigned to Onboarding groups.
- Onboarding roles are assigned to an Onboarding group. These roles determine what specific Onboarding features the group has access to. Each Onboarding role can only be assigned one Onboarding group. You cannot combine distinct roles like Doc Center and Employee Portal. If you need a user to have the permissions of multiple roles, they must be placed in multiple groups. Onboarding roles are NOT adjustable or customizable
- Roles in role-based permissions give general access to Onboarding or other general features in SuccessFactors HCM.

5.1 What are Onboarding Roles?

An Onboarding role is assigned to an Onboarding group. There are ten role types that can be assigned. Each of these role types refers to a specific responsibility within Onboarding. Administration users cannot create Roles. This task would be done by the Professional Services Technical Team.



Roles with access to complete an entire process

Groups assigned to any of the following roles can perform any of steps in the new hire workflow (PostHire Verification, New Employee, Orientation and Signature), monitor onboarding activities, and receive notifications to perform certain onboarding tasks:

- User
  A User is someone who can onboard a new employee and monitor onboarding tasks. For example, an HR Generalist in the corporate division can be assigned to onboard employees in a different division. A user group must have specific people assigned to the group, similar to Windows™ security. Additionally, every person who has used Onboarding , including new employees who have completed the onboarding process, can be found under the *Users* tab in the *Security* section.
- Hiring Manager
  A Hiring Manager is someone who can onboard a new employee, monitor onboarding, and receive notifications. The Hiring Manager is a named user, meaning Onboarding automatically assigns an activity based on the ID on the new hire record. Group security can be setup so that an Onboarding activity can be assigned based on the name of the Hiring Manager that is included in the new employee record created by the ATS vendor, or entered in the PostHire Verification step.

  > **Note**
  >
  > By default, the PHV step is assigned to the Hiring Manager named user. To change this you must update the named user options in Super Admin.

- Recruiter
  A Recruiter is someone who can onboard a new employee, monitor onboarding, and receive notifications. The Recruiter is a named user, meaning Onboarding automatically assigns an activity based on the ID in the new hire record. Group security can be setup so that an Onboarding activity can be assigned based on the name of the recruiter that is included in the new employee record created by the ATS vendor, or entered in the PostHire Verification step.

Roles with access to complete an entire process have the following permissions:

- Activity Permissions: Configurable permission to execute an activity under certain conditions, e.g., location, gender, age, start date, etc.
- Activity Steps Permissions: Configurable permission to execute any or all steps of a process.
- Monitoring Permissions: Configurable permission to monitor an activity under certain conditions, for example, location, gender, age, start date, etc.
- Monitoring Steps Permissions: Configurable permission to monitor steps of a process.
- Document Permission: Selectable permission to view documents from Work Queue.

Roles with access to complete certain assigned activities within a process

Groups assigned to perform one of the following roles can receive notifications to perform certain onboarding tasks. They cannot perform any of the new hire steps.

- Internal
  Internal Resources are resources within the company that are assigned activities that need to be done in order to complete the new employee's Onboarding. For example, IT for technology provisioning, or Payroll for employee pay. Internal resources cannot be assigned to execute new hire steps. They can only view activities assigned to them in their own Work Queue; no hiring permissions are available.
- External
  External Resources are resources outside the company that are assigned activities that need to be done in order to complete the activities needed to onboard a new employee, such as business cards and uniforms. External resources cannot be assigned to execute new hire steps. They can only view activities assigned to them in their own Work Queue; no hiring permissions are available.

Roles with access to the Document Center

- Document Center
  This role has permissions for viewing, saving, removing and uploading documents in the Document Center, as well as viewing and/or updating indexes, viewing the document audit and re-indexing documents.

Roles with access to the Employee Portal

- Employee Portal
  The Employee Portal Group contains users with access to the Employee Portal administration.

Roles with access to administer the application

There are two types of administrator roles that can be assigned:

- HR Admin
  HR admins are responsible for maintaining the notifications, security, reference files, and certain account settings . This role is typically reserved for customer administrators.
- Partner Admin
  Partner admins are responsible for managing the accounts, maintaining the notifications, security, and reference files that govern the operations of Onboarding . This role is reserved for Onboarding Principal Consultants and Professional Services Partners.

Roles with access to configure Onboarding settings

- System Admin
  The System Admin group contains users with access to manage Onboarding settings such as wizards, user controls, HR Data, PDF forms properties, configuration settings. This role is reserved for SuccessFactors Engineering.

  > **Note**
  >
  > Do not manually add users to the System Admin group, and do not repurpose this group. If any users in the permission sync are assigned to this group, the sync will fail.

Related Information

Named Users [page 75]

5.1.1 Named Users

Context

There are three default "named user" groups in the Onboarding system: Hiring Manager, Recruiting, and HR Manager. A named user is specified on the job requisition as associated with a specific hire. If the named user role is the only role a user belongs to, then the user only sees those activities in the Work Queue for which they are a named user.

Users are named on the Job Requisition and assigned to these named user groups after the import. You can also add a field to the Post Hire Verification step, and selecting a user to associate with the hire. To view these users, navigate to *Super Admin* > *Named User Types*. To assign a named user to a step in a process:

Procedure

1. Navigate to *Super Admin* > *Named User Types* to view the named user groups in the system. Click *Add Named User Type* to add new named users. You can also select the existing named user groups and change the *Title* of the named user group.
2. Under *Super Admin* > *Processes*, select the process you want to assign named users to, for example the Post Hire Verification step of Onboarding.
3. Select *Assign Options*
   a. To specify a named user group, select *Key* in the *Mode* column.
   b. Enter the corresponding key in the *Value* column. This value corresponds to the key for the named user group found in *Super Admin* > *Named User Types*. Surround the key with curly braces, for example {Recruitier}.
   c. Select *Auto* in the *Mode* column to follow the default step assignment logic.
   d. Select *None* in the *Mode* column if the step should not be reassigned at any time.
4. Navigate to *SuccessFactors HCM* > *Onboarding* > *Settings* > *Groups* and select the desired role.
5. Click *Assign*, then choose *Onboarding Activity Steps Permission.*
6. Grant permissions for the desired step.

5.2 What are Groups and Group Permissions?

Group permissions determine the actions available for a user within the application. By adding users to a specific group, administrators can restrict the activities of different types of users on a per-application basis. Group membership controls who can access Onboarding and what actions can be performed.

For users responsible for on-boarding processes, group permissions determine in whose queue an activity is placed. For example, when a new hire is transferred from an applicant tracking system (ATS) to Onboarding, the new employee can be placed in the Hiring Manager's queue or an HR generalist's queue.

For users responsible for administration of the site, permissions define the access to the administrative units. For example, an administrator can have certain access to manage reference files, account settings and admin reports.

5.2.1 How to Create a Group

Procedure

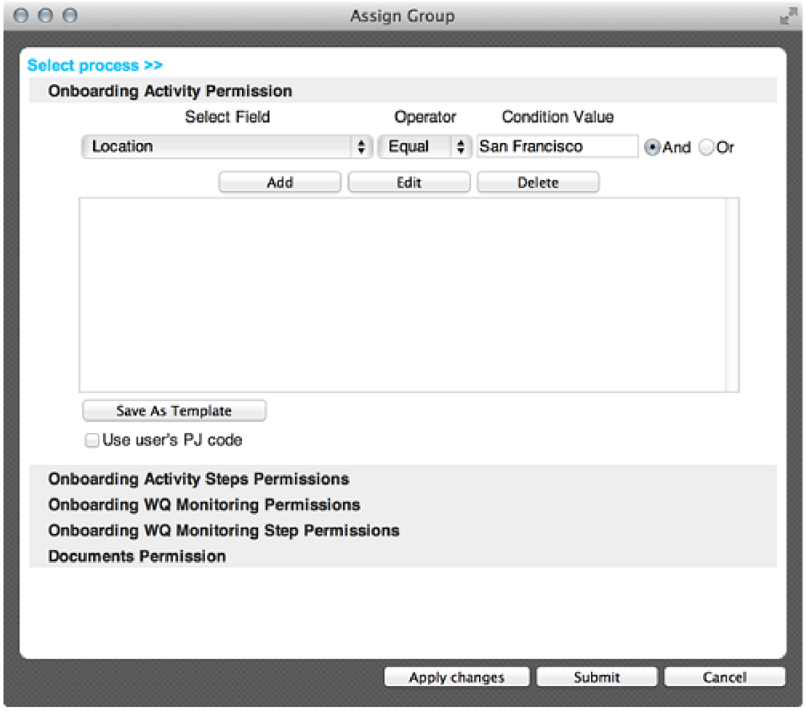
1. Go to *SuccessFactors HCM* > *Onboarding* > *Security* > *Group* and click *Create*.
2. In the *Create Group* window, enter the name of the group. The name can be any alpha-numeric word or words. For clarity and ease of management, the group name should correspond to the group's identity or function.

3. From the *Role* dropdown list, select a role type.
4. Select additional functions for users of this group:
   - Allow view glance
     Allows users to view the data entered through the process steps.
   - Allow delete HRData
     Allows users to delete an activity from the Work Queue.
   - Allow restart/edit steps
     Allows users to restart or edit a step that has been completed. On the Onboarding Dashboard, the user can click an icon under *Restart* to restart the last completed step for a candidate. You cannot send users back to a previous step, but can only restart the most recently completed step.

     > **Note**
     >
     > Step restart is not available for E-Verify processes.

   - Report Permissions
     Allows users to create and view reports.
   - Reassign Activity
     Allows users to re-assign an activity to any other user(s) from Work Queue.
5. If you do not need to assign permissions, click *Create* which completes the group creation.

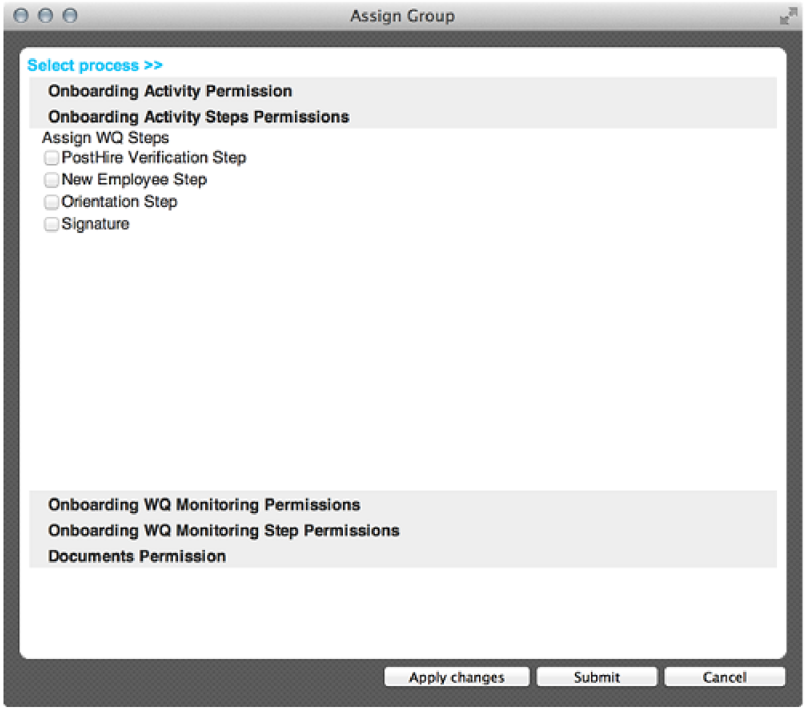
   If you need to assign Activity, Monitoring, or Document permissions, click *Create and Assign* and proceed as with the following steps.
6. Click *Select Process*, then choose the process from the dropdown list. The available permissions are based on the selected role and process.
   a. Click *Assign Activity Permissions*.
   b. Create the activity permission assignment formula based on the customer's requirements:
      - Field: A field in the Onboarding database.
      - Operator: The operator can be *Equal* or *Not Equal* to a certain condition value.
      - Condition Value: Any line containing alphanumeric or other symbols, by which the condition may be activated.
   c. Click *Add*.
   d. If required, specify further fields and conditions and select the *And* or *Or* operator to link them to the previous.



If you want to edit a condition, select it in the list of conditions and click *Edit*. Edit the condition's parameters and click *Add*.

e. You can save the formula as a template by clicking *Save as Template*.
f. If the customer is using PJ codes (position/job codes) that need to be used for activity permissions, select *Use user's PJ code*.
g. If the configuration is complete, click *Submit* to save the changes and close the window. If additional configuration is needed, click *Apply Changes* button to save the changes and keep the *Assign Group* window open.

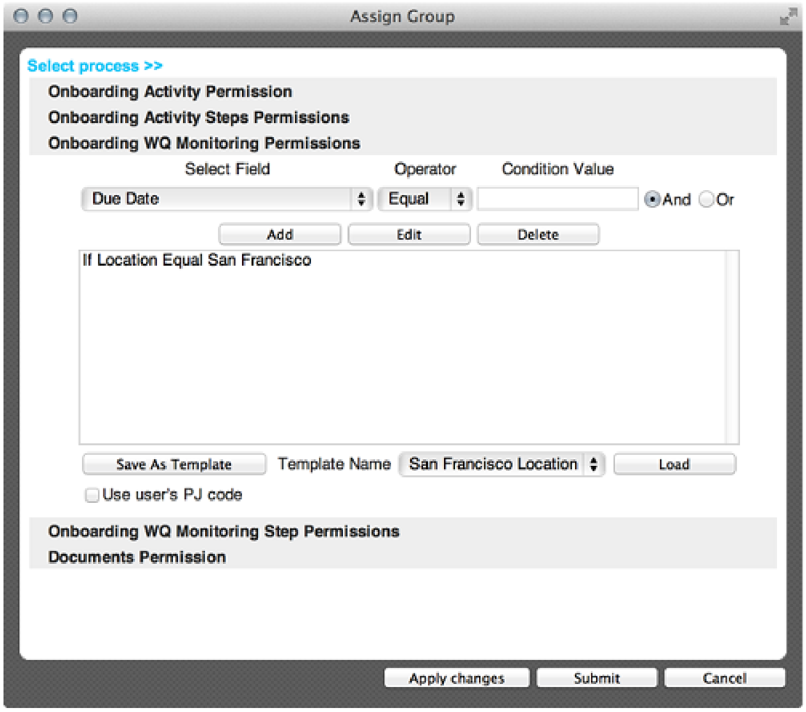
7. To define the activity steps permission:
   a. Select *Activity Steps Permissions*.
   b. Select the workflow steps. The steps vary based on the process selected.



c. To save the changes and close the window, click *Submit*. To save the changes and keep the *Assign Group* window open, click *Apply Changes*.

8. If you want the group to monitor the work queues of other groups, make the following settings:
   a. Select *WQ Monitoring Permissions*.
   b. Create the assignment formula based on the customer's requirements:
      - Field: A field in the Onboarding database.
      - Operator: The operator can be *Equal* or *Not Equal* to a certain condition value.
      - Condition Value: Any line containing alphanumeric or other symbols, by which the condition may be activated.
   c. Click *Add*.
   d. If required, specify further fields and conditions and select the *And* or *Or* operator to link them to the previous.

      In the example below, the group will be responsible only for new hires that are not in Company 2222.



e. You can save the formula as a template by clicking *Save as Template*.
f. If the customer is using PJ codes (position/job codes) that need to be used for activity permissions, select *Use user's PJ code*.
g. To save the changes and close the window, click *Submit*. To save the changes and keep the *Assign Group* window open, click *Apply Changes*.

9. Define which work queue steps the group members will be allowed to monitor:
   a. Select *WQ Monitoring Step Permissions*.
   b. Select the work queue steps.
   c. To save the changes and close the window, click *Submit*. To save the changes and keep the *Assign Group* window open, click *Apply Changes*.
10. Determine if this group will have access to the documents in the Work Queue
    a. Select *Documents Permission*.
    b. Select the *View Activity Documents* checkbox.
    c. Click *Apply Changes*.
11. When all permissions are assigned, click *Submit*.

5.2.2 Assigning Users to Groups

Once groups and users are established in Onboarding, users can be assigned to groups. Group assignment determines the degree of access to Onboarding appropriate to the user's position and duties. In order for a user to have access to Onboarding, the user must be assigned to a group.

There is a nightly sync from SuccessFactors HCM to Onboarding that will provide the user mapping for all roles, including the Onboarding permissions. Therefore, the Assign Groups to Users functionality is generally used to stage users for testing and scripted demos, or to assign group permissions to external resources that will not have access to SuccessFactors HCM.

> **Note**
>
> If you modify the permissions for a user in SuccessFactors HCM (as opposed to one created manually in Onboarding), the changes will be overwritten by the nightly sync.

There are two ways to assign users to groups:

- You can assign multiple users to one group using *Assign Users to Groups*
- You can assign one user to multiple groups using *Assign Groups to Users*

5.2.2.1 How to Assign Multiple Users to a Group

Context

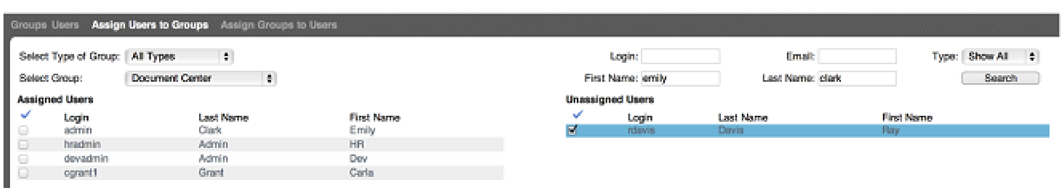
> **Note**
>
> **Tool: SuccessFactors Onboarding Administration**

Procedure

1. Under *Security*, select *Assign Users to Groups*.
2. Select the type of group and the group.

   > **Note**
   >
   > The roles Hiring Manager, Recruiter, and HR Manager are not included in the *Select Type of Group* dropdown list. You can assign users to these groups only by checking the appropriate check box when you create a user.

   All users assigned to the group will be displayed in the *Assigned Users* panel. All unassigned users will be displayed in the *Unassigned Users* panel
3. On the *Unassigned Users* panel, select the appropriate users.

4. Click the arrow button to move them to the *Assigned Users* panel

   To remove users from a group, select the users in the *Assigned Users* panel and then click the right-pointing arrow button to remove the user from the group.

> **Note**
>
> The permissions are changed immediately. There is no “save” function.

5.2.2.2 How to Assign an User to One or Multiple Groups

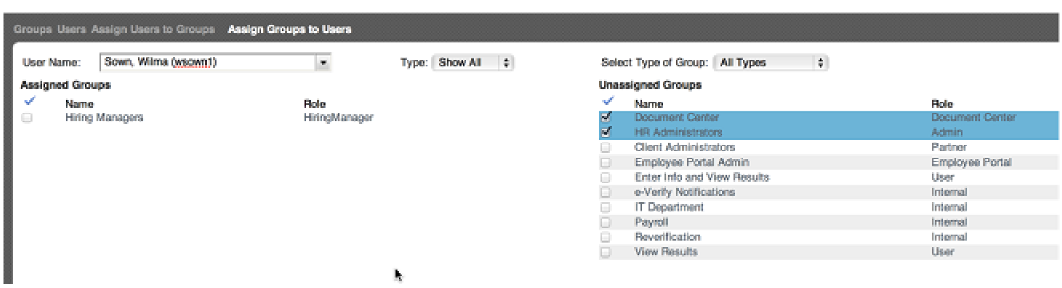
Context

> **Note**
>
> **Tool: SuccessFactors Onboarding Administration**

Procedure

1. Under *Security*, select *Assign Groups to Users*.
2. Enter the user name and users matching the criteria will be displayed. Select the desired user.

   All groups assigned to the user will be displayed in the *Assigned Groups* list. All groups not assigned to the user will be displayed in the *Unassigned Groups* list.
3. In the *Unassigned Groups* list, select the checkbox(es) next to the group name(s).



4. Click the left-pointing arrow button to move the groups to the *Assigned Groups* list.

   To remove groups from a User’s security profile, select the checkbox(es) next to the *Assigned Groups* name(s) and then click the right-pointing arrow button.

> **Note**
>
> The permissions are changed immediately. There is no “save” function.

5.3 About Users

Under *Security* > *Users* administrators can establish the Onboarding List of Users and enter the attributes that describe their user profiles.

The list of users displays the following information:

- **Login**: Onboarding User Name

  > **Note**
  >
  > You cannot use commas or other special characters in the *Login* field.

- **Last Name, First Name, Email**: Identification and contact information
- **Creation Date**: Date the user was created
- **Last Login Date**: Last date the user was logged in to Onboarding
- **External ID**: ID used to link user to an external system
- **Relations Number**: Number of relations added to the user from the corporate structure
- **Is Locked Out**: Login locked out status

The login is created automatically for new employees during the Onboarding process and can be edited as needed.

5.4 Enable Role-Based Permissions

Role-Based Permissions (RBP) drive the roles for Onboarding regarding permissions for new hires and corporate users.

Context

> **Note**
>
> After enabling Role-Based Permissions, make sure to configure a user sync.

Procedure

1. To enable Role-Based Permissions, log on to Provisioning and choose the company´s instance.
2. Under *Company Settings*, select the check box for *Role-Based Permission*.

Related Information

How to Configure a Delta User Sync [page 92]
How to Create a User Sync Report [page 94]

5.5 Role-Based Permissions for Onboarding

Table 14:

RBP Permission	Result
On/Offboarding	
Manage Onboarding Permission	Allows the user to view the Onboarding or On/Offboarding tab in the main SuccessFactors HCM menu. Also allows access to the Onboarding application work queue.
Manage field mapping tool for Employee Central	Grants the user access to the *Field Mapping tool for Onboarding/Offboarding EC Integration*in Admin Center. This tool allows the user to define field mappings for the integration.
Manage Onboarding additional content	Grants the user access to the *Configure new hire activity planning process*, *Maintain Central Orientation Meetings*, and *Maintain Lists of Items to Bring* features in Admin Center.
Recruiting Permissions	
Onboarding Initiate Permission	Allows the user to initiate onboarding for a candidate in RCM. After Onboarding is successfully initiated, an Onboarding activity is created for the candidate in Onboarding.
Onboarding Update Permission	Allows the user to update the Onboarding activity for customers using Recruiting Management - Verifications Inc. integration. **Note** This permission is not relevant for SuccessFactors HCM Onboarding.
Manage Recruiting	
Manage Onboarding Templates	Allows the user to add or edit Recruiting e-mail templates for Onboarding.

RBP Permission	Result
Setup Onboarding Integration	Allows the user to define field mappings for the RCM entity templates: Job Requisition, Job Offer, and Job Application. If a customer is using Intelligent Services, it also allows options for propagating RCM updates to Onboarding, and reassigning on-going Onboarding activities.
General User Permissions (not specific to Onboarding)	
User Login	
Live Profile Access	
Jam Access	
Mobile Access	

5.6 Set up Permissions for Admin, HR, and Corporate Users

Context

> **Note**
>
> The appropriate RBP groups or roles may already exist, particularly Hiring Manager and Recruiting roles for customers using Recruiting. Discuss how to re-use the existing roles for Onboarding.

Procedure

1. Log on to SAP SuccessFactors HCM as an admin user.
2. Create the permission group:
    a. Go to *Admin Tools* and in the *Manage Employees* portlet choose *Set User Permissions* > *Manage Permission Groups*.
    b. Click *Create New*.
    c. Enter a group name which describes the purpose of this group.
    d. In the *Choose Group Members* section, click the *Pick a Category* dropdown menu and select *User Name*.
    e. Select the admin, HR, and corporate users who need permissions for Onboarding and click *Done*.
3. Create three permission roles and assign each to the group you have just created:

4. In the *Manage Employees* portlet, choose ▶ *Set User Permission* ▶ *Manage Permission Roles* ▶.
5. Click *Create New*.
6. In the *Role Name* field, type a name describing of what the role allows you to do and enter a meaningful description in the *Description* field.

> **Note**
>
> When configuring permissions, the role name in SuccessFactors HCM must match the group name in legacy Onboarding.

7. In the *Permission Settings* section, click *Permission*.
8. Select the permission:
   - For the first permission role, click *Manage On/Offboarding* on the left, select *Manage onboarding permission* and click *Done*.
   - Second permission role: Click *Recruiting Permissions* on the left, select *Onboarding Initiate Permission* and click *Done*.
   - Third permission role: Click *Manage Recruiting* on the left, select *Setup Onboarding Integration*, and click *Done*.
9. In the *Grant this role to* section, click *Add*.
10. From the *Grant role to* drop-down list, select *Permission Group* and select the group you just have created.
11. Click *Done* and *Save Changes*.

5.7 Set up Permissions for New Hires

In production operation, as soon as the user import is complete, new hires are notified that users and credentials for logging into Onboarding have been created for them. To ensure new hires have access to a pre-start date Home page, you have to create a new hire group and a new hire role.

Procedure

1. Log on to SuccessFactors HCM as a an admin user and choose *Admin Tools*.
2. Create the New Hire group:
   a. In the *Set User Permissions* portlet, choose *Manage Permission Groups*.
   b. Enter **`New Hires`** as group name.
   c. Add conditions for the group membership in the *Choose Group Membership* section.
   d. Under *Active Group Membership*, click *Update* to check that your new hires are members of the New Hires group.
   e. To complete the process, click *Done*.
3. Create the New Hires role and grant it to the New Hires group:
   a. In the *Set User Permissions* portlet, choose *Manage Permission Roles*.
   b. Click *Create New* and enter **`New Hires`** as role name.

c. In the *Permission Settings* section, click *Permission*.
d. Under *General User Permission*, select *User Login*, *Live Profile Access* and *Jam Access*.

   If you want to enable the use of the Onboarding mobile app for new hires, in addition add one of the following permissions:
   - Mobile To-Do List Access
   - Mobile Organization Chart Access
   - Mobile Touchbase Access
   - Mobile Goals Access

   This ensures that the new hire can access the Mobile option under *Options* which is necessary to activate a mobile device.
e. If customers have LMS integrated in their instance and want to provide a New Hire curriculum, select *Learning* and then *Learning Access Permission*.

   > **Note**
   >
   > Demo systems: You should connect SF Onboarding to a Learning/Jam/Recruiting/EC instance. If your salesdemo instance is not integrated to Learning or Jam, your staged new hire will not see information in those portlets when they start, and the hiring manager will not be able to select recommended Jam groups for the new hire.
f. Click *Done* and then under *Grant this role to*, select *Add*.
g. From the *Grant role to* drop down list, select *Permission Group*.
h. Click *Select* and select New Hires from the list, then click *Done*.
i. Click *Done* again and click *Save Changes*.

6 User Creation

Onboarding has two types of users - new hires and employees. Employees can be a hiring manager, HR administrator, or other employee of the customer. New hires are users moving through the Onboarding process. Once Onboarding is complete, they become employees.

Upload the User Import File to SuccessFactors HCM before any other processes can occur. This file contains all the data for existing employees.

After uploading the User Import File and running the OnStartDate job (if the customer is not using Employee Central), configure the User Sync report. Before running the User Sync report, permissions must be correctly configured for all users. When configuring permissions, the role name in SuccessFactors HCM must match the group name in legacy Onboarding. The User Sync report aligns user IDs between the SuccessFactors Onboarding system and the legacy Onboarding system.

New Hire User Creation Scenarios

- **With Recruiting Management and Employee Central•**
  - User clicks the *Initiate Onboarding* button on the application
  - This automatically creates the Onboarding record. The OnboardingCandidateInfo MDF object is created in in SAP SuccessFactors HCM and associated with the candidate applicant ID.
  - After the corporate user completes the Post-Hire Verification step, and the New Employee Step is completed by the new hire, the Paperwork Done notifications triggers Employee Central to pick up the new hire record.
  - The corporate user loads the Employee Central PreHire page, automatically triggering Employee Central to pull the Onboarding record.
  - The corporate user completes the Employee Central record, automatically creating the Employee Profile and passing the Employee ID to Onboarding and Recruiting Management. The OnboardingCandidateInfo object updates to include the User ID (employee number).

  > **Recommendation**
  >
  > The OnStartDate job is not required for this scenario.

  > **Note**
  >
  > If a candidate is a former employee of the company, Employee Central compares the candidate's first name and last name, and Social Security number, as well as date of birth or other parameters to the company's previous employees. If there is a match, Employee Central sends the rehire's previous ID to Onboarding. Any old activities with a matching user ID are deleted, and the new Onboarding activity is updated with the user ID. Rehires do not require additional configuration.

- **With Recruiting Management and a Third-Party HRIS**
  - User clicks the *Initiate Onboarding* button on the application

    - This automatically creates the Onboarding record and OnboardingCandidateInfo MDF object is created in SAP SuccessFactors HCM, with the candidate an applicant ID.
    - The corporate user completes the Post-Hire Verification step, and the new hire completes the New Employee Step
    - Run the standard export, or wait for the scheduled standard export job to run. This sends the new hire record to the HRIS and the HRIS record is completed. The HRIS does not need to send the employee number back to Onboarding. It should only be sent to SuccessFactors HCM via the user import/update file.
    - The HRIS sends the user import/update file nightly to SAP SuccessFactors HCM with all employees/users, including the new hire records. This file is separate from the Onboarding file.
    - A new hire sees the home page tile immediately after creation of their Employee Profile inSAP SuccessFactors HCM via the update file. There is no permission or flag corresponding to the ability to view the home page tiles.
    - If you would like new hires to have pre-state date access, you can set the `IsOnboardingUser` flag for only new hires in the user update file, and use role-based permissions to define a group of users with limited access to the system. Inclusion in this group can be driven by the flag.
    - You can also allow the user to see whatever is available pre-day 1 automatically.
    - Schedule and run the OnStartDate job before the User Sync. This job updates the OnboardingCandidateInfor object with the UserID.
- **With Third-Party ATS and HRIS (Stand alone Onboarding)**
    - The ATS sends the new hire file to Onboarding via the standard import.

    > **Recommendation**
    >
    > The Standard New Hire Import can be set up in one of two ways. If the customer is sending an HRXML formatted file, it can be passed to Onboarding using the Onboarding Web Services. This requires setup of the web services on the customer side. If the customer is not using an HRXML formatted file, navigate to *Super Admin* > *Import/Export Settings* > *Integration* > *HRXML.ImportNewHire* Download the .xlt file and perform a transformation so the file can be submitted in an HRXML format. Then use the Onboarding WebServices to pass the file to Onboarding. The standard new hire import cannot be encrypted. Encrypting the import requires a custom integration.

    - Once the new hire file is sent to Onboarding, the new hire record is created, and a candidate create notification is triggered in SAP SuccessFactors HCM, creating the OnboardingCandidateInfo MDF object. Completing the first panel of the PHV step triggers the candidate create notification. The candidate create notification and OnboardingCanddiateInfo object are also created if the user is created via the Onboarding *Process* tab.
    - The corporate user completes the Post-Hire Verification step, and the new hire completes the New Employee Step
    - Run the standard export, or wait for the scheduled standard export job to run. This sends the new hire record to the HRIS and the HRIS record is completed. The HRIS does not need to send the employee number back to Onboarding. It should only be sent to SuccessFactors HCM via the user import/update file.
    - The HRIS sends the user import/update file nightly to SAP SuccessFactors HCM with all employees/users, including the new hire records. This file is separate from the Onboarding file.
    - A new hire sees the home page tile immediately after creation of their Employee Profile in SAP SuccessFactors HCM via the update file. There is no permission or flag corresponding to the ability to view the home page tiles.

- If you would like new hires to have pre-state date access, you can set the `IsOnboardingUser` flag for only new hires in the user update file, and use role-based permissions to define a group of users with limited access to the system. Inclusion in this group can be driven by the flag.
- You can also allow the user to see whatever is available pre-day 1 automatically.
- Schedule and run the OnStartDate job before the User Sync. This job updates the OnboardingCandidateInfor object with the UserID.
-

Related Information

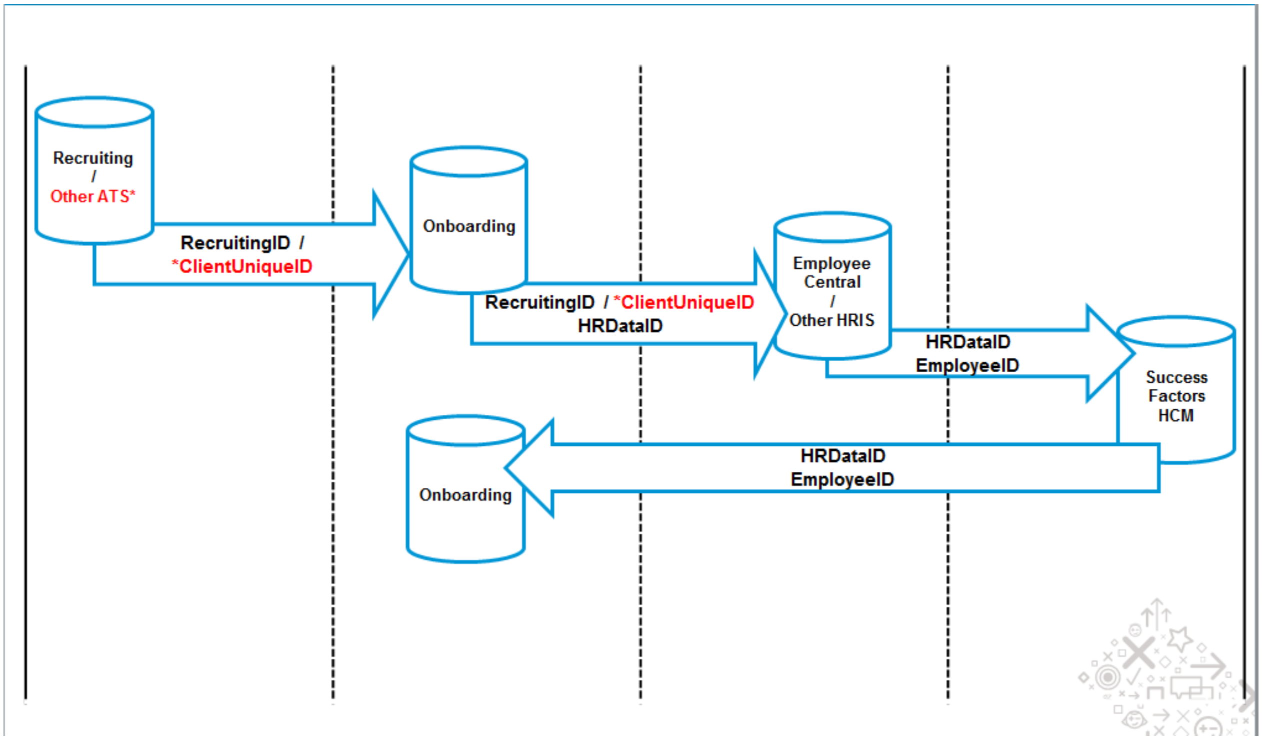
https://mysp.successfactors.com/productcentral/PSDocuments/Pre%20Day%201%20Suite%20Access_Current%20State.pdf

6.1 About User Sync

User Sync reports are required to configure Onboarding. The User Sync report must run and complete before beginning the Permission Sync report.

> **Note**
>
> After February 2015, best practice is to use the Delta User Sync report to sync users to Onboarding.

As user data pass through the system, the label of the user ID changes. The following diagram illustrates those changes.



There are three different unique data ID keys:

- Recruiting ID or Client ID - Unique number generated by the recruiting system or ATS to identify the new hire
- HRData ID – Unique number generated by Onboarding to identify the new hire activity
- Employee ID – Unique number generated by Employee Central or the client's HRIS to identify the new employee

6.1.1 How to Sync Field Names

Before creating the user sync report, you must ensure that field names are synchronized between the SAP SuccessFactors HCM suite and Onboarding.

Procedure

1. Navigate to *Super Admin* > *Import/Export Settings* > *FoundationImportFieldMapping*.
2. Click *Export File* > *Submit* and open the file.
3. The resulting XML file contains naming information for each field. To change the name of the field, update the `value` element of each `import` tag. For example:

```
<Import name="SuccessFactorsUserImport">
         <Field key="@UserSysId@" value="User Sys ID"/>
     <Field key="@FirstName@" value="First Name"/>
     <Field key="@MiddleName@" value="Middle Name"/>
         <Field key="@LastName@" value="Last Name"/>
         <Field key="@Email@" value="Email"/>
            <Field key="@Country@" value="Country"/>
         <Field key="@LocalDivision@" value="Local Division"/>
            <Field key="@Department@" value="Department"/>
     <Field key="@Location@" value="Location"/>
         <Field key="@StartDateIfApplicable@" value="Start Date (if applicable)"/
>
     <Field key="@LockedOut@" value="Status"/>
         <Field key="@ManagerUserSysID@" value="Manager User Sys ID"/>
         <Field key="@HRManagerUserSysID@" value="HR Manager User Sys ID"/>
    </Import>
```

4. Save the file locally, then navigate to *Super Admin* > *Import/Export* > *FoundationImportFieldMapping* and click *Import File*.
5. Choose the updated file and click *Submit*.
6. Navigate to *Super Admin* > *Import/Export* > *FoundationImport*.
7. Click *Export File* > *Submit* and open the file.
8. Adjust the resulting XML.

```
   <FoundationImportConfiguration id="SuccessFactorsUserImport">
        <ImportType>UsersInfoOnly</ImportType>
        <FileMask>{AccountName}_User*.csv</FileMask>
        <HasHeader>Yes</HasHeader>
        <Delimiter>,</Delimiter>
        <ImportXslt>ImportUsers.xslt</ImportXslt>
        <DataTable>
```

```
            <Field name="@UserSysId@" type="String" index="yes"/>
            <Field name="@FirstName@" type="String"/>
            <Field name="@MiddleName@" type="String"/>
            <Field name="@LastName@" type="String"/>
            <Field name="@Email@" type="String"/>
            <Field name="@Country@" type="String"/>
            <Field name="@LocalDivision@" type="String"/>
            <Field name="@Department@" type="String"/>
            <Field name="@Location@" type="String"/>
            <Field name="@StartDateIfApplicable@" type="String"/>
            <Field name="@LockedOut@" type="String"/>
            <Field name="@ManagerUserSysID@" type="String"/>
            <Field name="@HRManagerUserSysID@" type="String"/>
        </DataTable>
    </FoundationImportConfiguration>
```

9. Save the file locally.
10. Navigate to *Super Admin* > *Import/Export* > *FoundationImport* > *Import File*.
11. Choose the updated file and click *Submit*.

6.2 How to Configure a Delta User Sync

The Delta User Sync Report processes a full user export on its first run, and only new users and user updates on subsequent uploads. This improves overall performance, especially for customers with a large number of users.

Context

The Delta User Sync is the recommended process for importing users to Onboarding. Customers who implemented Onboarding before February 2015 must perform additional configuration steps.

Procedure

1. To convert a customer instance created before February 2015, navigate to *Super Admin* > *Import/Export Settings* > *Foundation Import*. Export the*FoundationImport* file. For instances created after February 2015, proceed to step 2.
   a. In the*FoundationImport* file, add the following code before the `</FoundationImportConfiguration>` line to add a new data table.

```
<FoundationImportConfiguration id="SuccessFactorsDeltaUserImport">
    <ImportType>UsersInfoOnly</ImportType>
    <FileMask>{AccountName}_Delta_User*.csv</FileMask>
    <HasHeader>Yes</HasHeader>
    <UseDiff>No</UseDiff>
    <Delimiter>,</Delimiter>
    <ImportXslt>ImportDeltaUsers.xslt</ImportXslt>
    <BizXDeltaContent>Yes</BizXDeltaContent>
    <DataTable>
        <Field name="@UserSysId@" type="String" index="yes"/>
```

```
        <Field name="@FirstName@" type="String"/>
        <Field name="@MiddleName@" type="String"/>
        <Field name="@LastName@" type="String"/>
        <Field name="@Email@" type="String"/>
        <Field name="@Country@" type="String"/>
        <Field name="@LocalDivision@" type="String"/>
        <Field name="@Department@" type="String"/>
        <Field name="@Location@" type="String"/>
        <Field name="@StartDateIfApplicable@" type="String"/>
        <Field name="@Status@" type="String"/>
        <Field name="@ManagerUserSysID@" type="String"/>
        <Field name="@HRManagerUserSysID@" type="String"/>
    </DataTable>
</FoundationImportConfiguration>
```

b. Navigate to *Super Admin* > *Import/Export* > *FoundationImportFieldMapping*. Export the *FoundationImportFieldMapping* file.

c. In the FoundationImportFieldMapping file, add the following code before the </FoundationImportFieldMapping> line to add a new foundation import configuration.

```
<Import name="SuccessFactorsDeltaUserImport">
                <Field key="@UserSysId@" value="USERID"/>
                <Field key="@FirstName@" value="FIRSTNAME"/>
            <Field key="@MiddleName@" value="MI"/>
                <Field key="@LastName@" value="LASTNAME"/>
                <Field key="@Email@" value="EMAIL"/>
        <Field key="@Country@" value="COUNTRY"/>
        <Field key="@LocalDivision@" value="DIVISION"/>
        <Field key="@Department@" value="DEPARTMENT"/>
        <Field key="@Location@" value="LOCATION"/>
        <Field key="@StartDateIfApplicable@"     value="HIREDATE"/>
        <Field key="@Status@" value="STATUS"/>
        <Field key="@ManagerUserSysID@" value="MANAGER"/>
        <Field key="@HRManagerUserSysID@" value="HR"/>
    </Import>
```

d. Navigate to *Super Admin* > *Import/Export Settings* > *ImportDeltaUsers* > *Export File* > *Submit*.

a. Add the following code between `</LoginName>` and `</XHRUser>`

```
<IsLockedOut>
<xsl:choose>
<xsl:when test="./csvcolumn[@name = '@LockedOut@']='inactive'">
<xsl:text>TRUE
</xsl:text>
</xsl:when>
<xsl:otherwise>
<xsl:text>FALSE
</xsl:text>
</xsl:otherwise>
</xsl:choose>
</IsLockedOut>
```

b. Re-import the file by navigating to *Super Admin* > *Import/Export Settings* > *ImportDeltaUsers* > *Import File*.

2. Navigate to *Provisioning* > > *Create New Job*.
3. Enter a descriptive name for the job, and select *Delta Employees Export* from the *Job Type* field.
4. Enter the *File Name* in the following format **`<Account_Name>_Delta_User_Sync.csv`**. Note that the file name is case sensitive and must match this format exactly. The case for the account name must match the company name as displayed in Provisioning. You can also find this account name by navigating to *Super Admin* and selecting the account, then copying the value in the *Name* field.

5. Fill out the rest of the required scheduled job fields and click *Create*.
6. Under *Actions* select *Submit*. Then, under *Actions*, click *Run it Now* to perform the initial run of the job.

Related Information

Schedule Synchronization Jobs [page 106]

6.3 How to Create a User Sync Report

It is best practice to configure the Delta User Sync job rather than a User Sync Report.

Procedure

1. Log on to SAP SuccessFactors HCM Onboarding as an admin user and choose *Analytics* > *Reporting* > *Ad Hoc Reports*
2. Click *Create New Report*.
3. Under *Report Definition Type*, select *Employee Profile*. Click *Create*.
4. On the *General Info* tab, enter a meaningful name such as 'User Sync' or 'ONBOARDING-UserSync'.
5. On the *People* tab, click *Refine Criteria*, select *Other Filters* under *Team Reporting Type*, enable *Include inactive users*and click *OK*.
6. On the *Columns* tab, click *Select Columns*.
7. Select the columns:
   From *Employee Information*, select:
   - User SysID
   - First Name
   - Middle Name
   - Last Name
   - E-Mail
   - Hire Date
   - Division
   - Department
   - Location
   - Country
   - Status

   From the *Manager Information* list, select 'Manager User Sys ID'.

   From the *HR Manager Information* list, select 'HR Manager User Sys ID'.
8. Click *Finished* and then *Save*.

9. Click *Generate* to create the report, and check that all employees including the new hires appear in the User Sync report.

6.4 Pre-Day 1 User Creation

Customers who want to grant Pre-Day 1 access for new hires may also want to assign new hires a temporary user ID.

To create a temporary user ID for new hires, navigate to *Provisioning* > *Company Settings* > *Enable Pre-Day 1 Experience for new hires.* This allows the user import file to accept the *OnboardingID* field.

When the user is created, the user is assigned an HRData ID. To view this ID, navigate to *SuccessFactors HCM* > *Onboarding* > *Settings* > *Manage Employees*.

Customers who are not using an integration with SuccessFactors Employee Central must map the HRDataID field to their HRIS, and from the HRIS to SuccessFactors HCM. Add this field to the standard data export from Onboarding to the HRIS, and include the OnboardingID field on the user import from the HRIS to SuccessFactors HCM. The HRDataID populates the OnboardingID field in SuccessFactors HCM.

After completion of the PHV step,the new Hire activity is triggered and new hires are assigned the temporary SuccessFactors HCM ID. To control this ID, navigate to *SuccessFactors HCM* > *Admin Tools* > *Company Settings* > *Company System and Logo Settings*. The *Next Person ID Assigned* field dictates the ID assigned to the next candidate who's New Hire activity is triggered.

After the new hire's start date, the user import process uses the *OnboardingID* field to associate the temporary ID with the employee ID.

The default login method for SuccessFactors HCM users is password. When a user is imported from client data to SuccessFactors HCM and updated to Employee, the login method updates to the setting assigned by the client. If a customer is using SSO, the default login method updates to SSO.

Related Information

Create a Standard Export [page 101]
User Creation [page 88]

7 Synchronizing User, Permission, and Foundation Data

To transfer the existing user data from SuccessFactors Onboarding into the Onboarding system, sync the data using Ad Hoc reports. These reports are only for data of existing SuccessFactors HCM Suite users – like currently employees, hiring managers or HR personnel. New Hires are managed separately.

There are three reports required to synchronize data between the systems, in an exact order: User Import File, User Sync, and Permission Sync. A fourth job, OnStartDate, is only required for customers not integrated with Employee Central, and must be run after the User Sync. The OnStartDate job and User Import File are scheduled jobs configured and managed in Provisioning.

The Permission Sync report synchronizes the roles and permissions for users between the legacy Onboarding system and the SuccessFactors HCM Onboarding application.

> **Note**
>
> Before performing any account syncs, make sure the `WOTCStartDate` field is being captured. Onboarding is hard-wired to use this field as the Hire Date for new employees. This field is captured in the *Start Date* field on the standard panel *SAP_Standard_NewHire_Setup*, which is part of the PHV step. If the customer is not using this panel, it must be captured on a custom panel, using the `WOTCStartDate` data key. This field can also be captured in Recruiting and mapping to Onboarding, but the Recruiting field must be mapped to `WOTCStartDate`.

The Foundation Data (or Corporate Structure) Sync is optional. Synching Foundation Data for US-based Onboarding is generally not useful, since it does not require the level of detail required for populating and presenting compliance forms. For demo systems and international Onboarding, syncing this information can be useful for setting up the account.

> **Note**
>
> Demo systems to not require separate sync configuration. Demo systems are preloaded with test data and syncs are preconfigured. .

Related Information

Creating and Updating Foundation Data [page 351]

7.1 Create the OnStartDate Job

The OnStartDate job links the Onboarding user record with the employee record in SuccessFactors HCM. The OnStartDate job is not required if the customer is using Employee Central. The OnStartDate job runs nightly at a configured time and must be completed before the User Sync and Permission Sync reports can run.

Context

The OnStartDate job picks up any users who meet either of two conditions. In these conditions, the creation date corresponds to completion date of the New Employee Step. The Hire Date corresponds to the `WOTCStartDate`. The value of X is defined when configured the OnStartDate job, in the *Job Parameters* field.

- Users created within X number of days from the day the job runs. For example, the date the job runs minus the creation date is less than X days.
- Users whose hire date is in the future and last modified is within X days from the date the job runs. For example, Hire Date is greater than or equal to the date the job runs, and the date the job runs minus the last modified date is less than X days.

Once the relevant users are picked up by the job, each user ID is checked against the existing SuccessFactors HCM CandidateInfoObject userID field. If the user is already present, the record is skipped and not updated.

If the user is not present, the user's first name, last name, date of birth (where present), and user ID are sent to Onboarding. The system searches Onboarding based on the data passed, and fetches the existing user record. Onboarding updates the user's `Employelogin` key with the Onboarding user ID, then sends the `KMSUserID` field value to SuccessFactors HCM.

Using the `KMSUserid`, the system checks all CandidateInfoObjects, matches the user ID with the corresponding object, and updates the object with the user ID.

In instances where the customer has Recruiting Management, the Recruiting user record is updated with the user ID, and the candidate is moved to *Hireable* to *Hired* status.

Procedure

1. Navigate to *Provisioning* > *Manage Scheduled Jobs* > *Create new Job*.
2. Enter the following job details:
   - Job Name: **`OnStartDate`** or something similar that allows you to identify the job.
   - Job Owner: Select an administrative user
   - Job Type: Select **`OnStartDateStatusChange`**
   - Job Parameters: This number corresponds to a number of days before the current date. The job will pick up any new hires from this time period. For example, if this is set to three, the job will pick up any new hires from the previous three days.
   - Occurrence: Select **`Daily.`** Choose a time for the job to run. This job must run before the User Sync and Permission Sync reports can begin.

- Start Date: Enter the current date and a time in the future

7.2 How to Create a Regular Foundation Data Import

The Foundation Data import supports data population on panels, as well as multi-process configurations. Foundation data import is required for all production instances.

Procedure

1. The customer generates the Foundation Data import file from their HRIS or Employee Central.

   Sample Foundation Import XSLT

```
<?xml version="1.0" encoding="utf-8"?>
<xsl:stylesheet version="1.0" xmlns:xsl="http://www.w3.org/1999/XSL/Transform"
xmlns:msxsl="urn:schemas-microsoft-com:xslt" exclude-result-prefixes="msxsl"
xmlns="http://online-onboarding.com/Users.xsd">
  <xsl:output method="xml" omit-xml-declaration="yes" indent="no" />
  <xsl:param name="Action" />

  <xsl:template match='/'>
    <Package xmlns="http://online-onboarding.com/Schemas/ReferenceFiles.xsd">
      <xsl:element name="Items">
        <xsl:attribute name="Action">
          <xsl:value-of select="$Action"/>
        </xsl:attribute>
        <xsl:attribute name="Class">Position</xsl:attribute>
        <xsl:apply-templates select="//csvline"/>
      </xsl:element>
    </Package>
  </xsl:template>
  <xsl:template match='//csvline'>
    <xsl:element name='Item'  xmlns="http://online-onboarding.com/Schemas/
ReferenceFiles.xsd">
      <xsl:element name='ClientID'>
        <xsl:value-of select="./csvcolumn[@name = '@ClientID@']"/>
      </xsl:element>
      <xsl:element name='OrgLevel'>3</xsl:element>
      <xsl:element name='Name'>
        <xsl:value-of select="./csvcolumn[@name = '@Name@']"/>
      </xsl:element>
      <xsl:element name='Properties'  xmlns="http://online-onboarding.com/
Schemas/ReferenceFiles.xsd">
        <xsl:element name='Property'  xmlns="http://online-onboarding.com/
Schemas/ReferenceFiles.xsd">
            <xsl:element name='Name'>Country</xsl:element>
            <xsl:element name='Value'>
                <xsl:value-of select="./csvcolumn[@name = '@Country@']"/>
            </xsl:element>
        </xsl:element>
        <xsl:element name='Property'  xmlns="http://online-onboarding.com/
Schemas/ReferenceFiles.xsd">
            <xsl:element name='Name'>State</xsl:element>
            <xsl:element name='Value'>
                <xsl:value-of select="./csvcolumn[@name = '@State@']"/>
            </xsl:element>
        </xsl:element>
```

```
        <xsl:element name='Property'  xmlns="http://online-onboarding.com/
Schemas/ReferenceFiles.xsd">
            <xsl:element name='Name'>TaxNumber</xsl:element>
            <xsl:element name='Value'>
                <xsl:value-of select="./csvcolumn[@name = '@TaxNumber@']"/>
            </xsl:element>
        </xsl:element>
      </xsl:element>
    </xsl:element>
  </xsl:template>
</xsl:stylesheet>
```

2. The number of properties and their properties can be modified in the XSLT file.

Sample FoundationImport

```
     <FoundationImportConfiguration id="SuccessFactorsDepartment">
         <ImportType>CorpStructure</ImportType>
         <FileMask>{AccountName}_Department*.csv</FileMask>
         <HasHeader>Yes</HasHeader>
         <Delimiter>,</Delimiter>
         <ImportXslt>ImportDepartment.xslt</ImportXslt>
         <DataTable>
                 <Field name="@ClientID@" type="String"/>
                 <Field name="@Name@" type="String"/>
     <Field name="@Country@" type="String"/>
     <Field name="@State@" type="String"/>
     <Field name="@TaxNumber@" type="String"/>
         </DataTable>
     </FoundationImportConfiguration>
```

Sample FoundationImportFieldMapping XSLT

```
<Import name="SuccessFactorsDepartment">
        <Field key="@ClientID@" value="ClientID"/>
        <Field key="@Name@" value="Name"/>
        <Field key="@Country@" value="Country"/>
        <Field key="@State@" value="State"/>
        <Field key="@TaxNumber@" value="Tax Number"/>
    </Import>
```

3. Once you have the properly formatted XSLT file, navigate to *Super Admin* > *Features* > *Foundation Import*
4. Enter the name of the destination SFTP folder in the *Folder Name on SFTP site* field.
5. Enter a file path in the *Folder Path* field. The path should be in the format `<ftp_rootpath>\<ftp_username>\inbound\<ftp_foldername>`
   a. The `<ftp_rootpath>` is **`Y:\ONB`** for all instances
   b. `<ftp_username>` should match the customer username.
   c. `<ftp_foldername>` should match the folder name given in the *Folder Name on SFTP site*field.

`Y:\ONB\ftp_onb_qa1\inbound\import`

7.2.1 How to Create a Regular Corporate Structure Relations Import

Corporate Structure data helps populate information on panels. For the best results, sync the Foundation Data and Corporate Structure data.

Context

If during the Onboarding process, a user selects a company location in the United States, only associated values for the US locations should display. Or, if they select a company branch, they should only see departments for that branch. Syncing the Foundation Data and Corporate Structure ensure these relationships are maintained.

Procedure

1. The customer generates the Corporate Structure Relations import file from their HRIS or Employee Central.

   Sample Corporate Structure Relations XSLT

   Sample Code

```
<?xml version="1.0" encoding="utf-8"?>
<xsl:stylesheet version="1.0" xmlns:xsl="http://www.w3.org/1999/XSL/Transform"
xmlns:msxsl="urn:schemas-microsoft-com:xslt" exclude-result-prefixes="msxsl"
xmlns="http://online-onboarding.com/Users.xsd">
    <xsl:output method="xml" omit-xml-declaration="yes" indent="no" />
    <xsl:param name="Action" />
    <xsl:template match='/'>
        <Package xmlns="http://online-onboarding.com/Schemas/
ReferenceFiles.xsd">
            <xsl:element name="Relations">
                <xsl:attribute name="Action">
                    <xsl:value-of select="$Action"/>
                </xsl:attribute>
                <xsl:apply-templates select="//csvline"/>
            </xsl:element>
        </Package>
    </xsl:template>
    <xsl:template match='//csvline'>
        <xsl:element name='Relation'  xmlns="http://online-onboarding.com/
Schemas/ReferenceFiles.xsd">
            <xsl:element name='ChildID'>
                <xsl:value-of select="./csvcolumn[@name = '@ChildID@']"/>
            </xsl:element>
            <xsl:element name='ChildOrgLevel'>
                <xsl:value-of select="./csvcolumn[@name = '@ChildOrgLevel@']"/>
            </xsl:element>
            <xsl:element name='ParentID'>
                <xsl:value-of select="./csvcolumn[@name = '@ParentID@']"/>
            </xsl:element>
            <xsl:element name='ParentOrgLevel'>
                <xsl:value-of select="./csvcolumn[@name =
'@ParentOrgLevel@']"/>
            </xsl:element>
        </xsl:element>
```

```
    </xsl:template>
</xsl:stylesheet>
```

2. Once you have the properly formatted XSLT file, navigate to *Super Admin* > *Features* > *Foundation Import*.
3. Enter the name of the destination SFTP folder in the *Folder Name on SFTP site* field.
4. Enter a file path in the *Folder Path* field. The path should be in the format `<ftp_rootpath>\<ftp_username>\inbound\<ftp_foldername>`
    a. The `<ftp_rootpath>` is **`Y:\ONB`** for all instances
    b. `<ftp_username>` should match the customer username.
    c. `<ftp_foldername>` should match the folder name given in the *Folder Name on SFTP site*field.

    `Y:\ONB\ftp_onb_qa1\inbound\import`
5. In the *Schedule* menu, select a time for the import job to run.

    > Note
    >
    > Make sure to leave enough time between the Foundation Data Import and the Corporate Struture Relations import. The Foundation Data import must finish running before the Corporate Structure import begins. For smaller files, this can be as little as one hour, but for larger imports the process can take several hours. Make sure to run a test import before finalizing the schedule.
6. Click *Activate* to schedule the import.

7.3 Create a Standard Export

Use the Standard Export to export new hire data to the HRIS when the Employee Central integration is not configured.

Context

The Standard Export can either be run on demand, or set to run on a recurring schedule. The Standard Export only exports records for users who have completed the Orientation step.

If a customer is not using the Orientation Step, or wants to use a different trigger point, they should configure a custom export.

Procedure

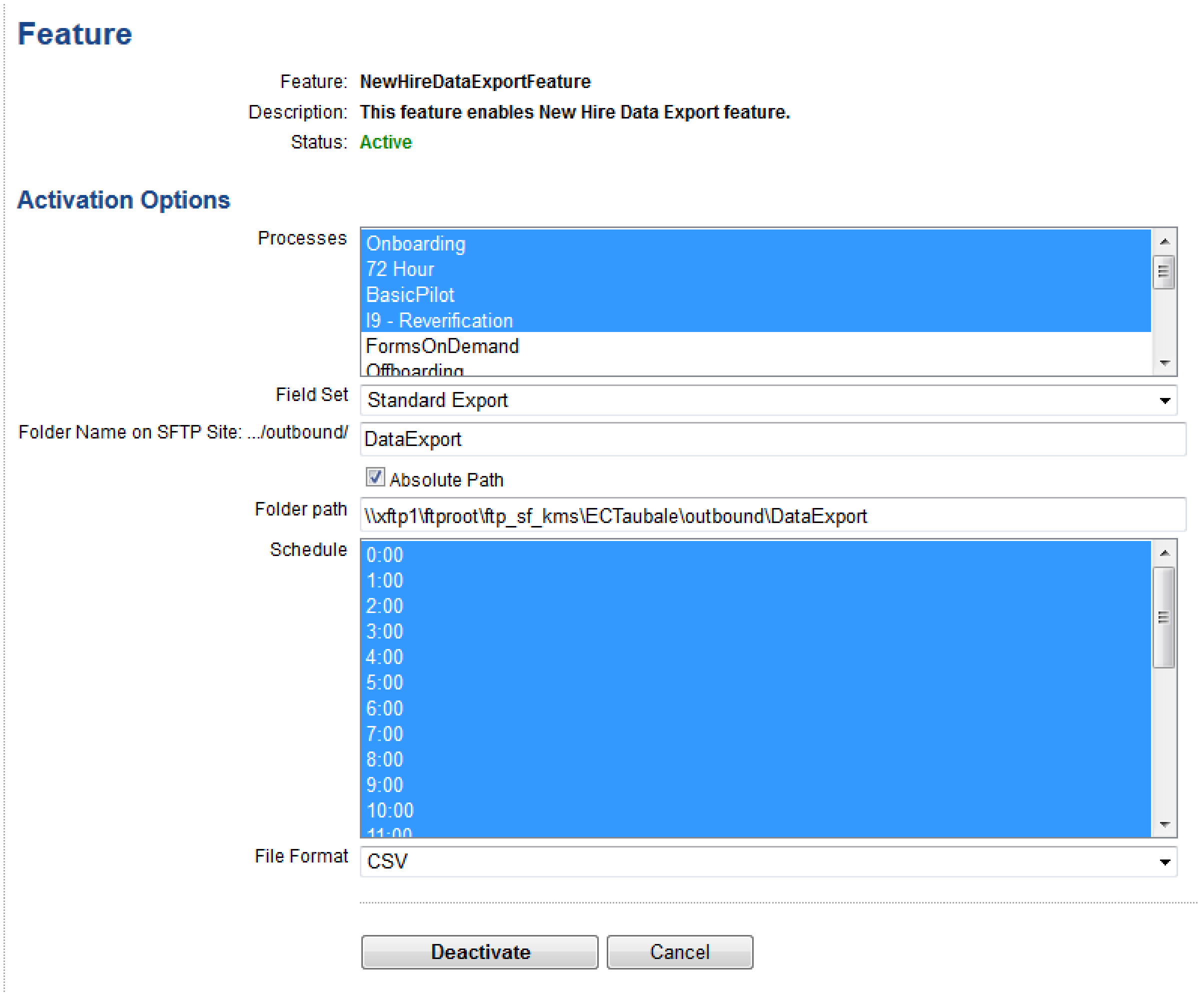
1. Select the fields you want included in the export by navigating to SAP SuccessFactors HCM Onboarding, then selecting *Onboarding* > *Settings* > *Data Dictionary* > .

2. In the *Integration* folder, select *StandardExport.*
3. Select the required fields for the export and click the *Fields* folder at the top of the pane.
4. In the pop-up window, select **Integrations** as the namespace and **StandardExport** as the tag.
5. Move fields from the *Available fields* menu on the left to the *Fields attached to the tag* menu on the right, using the arrow buttons.
6. To export the file on demand, navigate to *Super Admin* > *Integration* > *Import/Export Settings* > *Export NewHireDataExport*

   You can export this file in .csv or .xml format. Choose the appropriate file option in Super Admin.

   > **Note**
   >
   > If you add a field to the Standard Export, make sure that field is captured in the appropriate step, or the related column appears as blank in the export. This can affect the display of other, populated columns in the export, or cause data to shift into the wrong column.

7. To set up a recurring scheduled export, navigate to *SuperAdmin* > *Features* > *NewHireDataExport feature.*
8. Enter a name for the folder on the SFTP site, a time for the scheduled export, and select the file format (.csv or .xml). Click **Activate**.
9. You can configure multiple new hire exports associated with specific processes, or several processes. This can be useful for global companies, and different processes may have different data export needs. To configure this, when you navigate to *Super Admin* > *Features* > *NewHireDataExport* select multiple processes relevant for the implementation.



7.4 Create a Custom Export

Use the custom export to trigger a user data export at any point in the Onboarding process other than the completion of the Orientation step.

Context

You can configure multiple customer exports, each with a trigger at a different point in the Onboarding process. For example, you can configure an export for both the start and completion of the Post-Hire Verification step.

Procedure

1. To create a custom set of fields for a custom export, navigate to *SuccessFactors HCM* > *Onboarding* > *Settings* > *Data Dictionary*.
2. Click the *Integration* folder, then click *New Tag*.
3. Enter a name for the custom tag, and make sure it's creating in the *Integrations* namespace.

> **Note**
>
> You can configure multiple customer-specific tags per instance.

4. Click on the newly created tag, then click *Fields*. Move the desired field from the *Available Fields* column to the *Fields Attached to Tag* column.
5. Navigate to *Super Admin* > *select Account* > *Processes.*
6. Select a process and the step to edit, or select the step directly from the *Processes* screen.
7. Select *Assign Actions* > *Add Action* and define the action properties.
   a. In the *Name* field, select `SelectCustomStatus`
   b. Chose an *Execution Type.* Execution type defines when the action is executed. There are three options.
      - **OnStart:** The action is executed when Onboarding activity is advanced to the step.
      - **OnFinish:** The action is executed when the step is completed.
      - **OnWizardStart:** The action is executed when the wizard is opened by a user.
   c. In the *Filter* field, you can define criteria used to decide if the action should be executed.
   d. In the *Parameters* field, only one parameter should be defined. A status with the name specified in the *Key* field and the value specified in the *Value* field will be created when the action is executed.
8. The newly created action is displayed in the list. To edit the action, click its name in the list.

> **Recommendation**
>
> Once you have configured a trigger status for the custom exports, you must activate a feature to process the custom status at regular intervals. One job processes and exports all activities with configured custom status triggers, based on the status of the activity.

9. Navigate to *Features* > *CustomNewHireExportFeature*. Select the times when you would like to process the custom status triggers.
10. Click *Add Export.* Enter the *Custom Status Name, Custom Status Value, Field Set,* the folder name on the SFTP site, and the file format. Custom status trigger only supports .xml and .csv files.

    The *Field Set* option is populated by the Data Dictionary Integrations namespace.

> **Note**
>
> If you add a field to the Custom Export and associate it with a particular step, make sure that field is captured in the appropriate step, or the related column appears as blank in the export. This can affect the display of other, populated columns in the export, or cause data to shift into the wrong column.

11. To create custom header, select the *Use custom headers* checkbox, then enter your custom header separated by commans in the *Headers* text box.

12. Enter a custom file name format, if desired in the *File name format* field. The default file name format is `NH-{accountname}-{timestamp}.{file-format }`.
13. Click *Activate.*

7.5 Create Permission Sync Report

Create a report which provides the user mapping for all roles which include the Manage Onboarding permission.

Prerequisites

Prerequisites:

- The RBP Permission to User Report is enabled in Provisioning.
- You have the permission to run this report on the entire population.
- The User Sync report must be completed before beginning the Security Sync report

Context

You cannot add System Administrator roles using the Permission Sync. If any System Admin roles are assigned using the Permission Sync, the sync will fail. To filter out any users who may be assigned this role, navigate to *SuccessFactors HCM* > *Reports* > *Ad Hoc Reports* > *ONB Permission Sync*. From the drop-down menu, select *Edit*. Select the *Filters* tab, then choose *Refine Critera*. Select *Role Name* from the *Filters* list. Choose the *By Rule* tab, then click *Add New Rule*. Select *Not Equal* from the first drop-down, and *System Administrator* from the second. Click *Done*.

Procedure

1. Log on to SAP SuccessFactors HCM Onboarding instance as admin user and choose *Analytics* > *Reporting* > *Ad Hoc Reports*.
2. Click *Create New Report* and select a report type.
3. Under *Report Definition type*, select *RBP Permission to User Report*, the click *Create*.
4. In the *General* tab,
5. Click *Columns*, than *Select Columns* and select *User ID* and *Role Name*. Ensure that you select *User ID* and not *UserName.* Click *Finished*.

   The role created in SuccessFactors HCM Onboarding must match the RBP Group name in SuccessFactors HCM Onboarding.

> **Note**
>
> You may have to page through the available column options to find *User ID*.

> **Note**
>
> If the *User ID* column is not available, you must add it to the data mode.
>
> ```
> <standard-element id="userId" required="false" matrix-filter="false">
>     <label>User ID</label>
>   </standard-element>
> ```

6. Click *Filters*, than *Refine Criteria*.
7. As filter, select *Permission*.
8. On the *Define Permission Filter* screen, select *By My Selection* and select *Manage Onboarding Permission*. You may need to scroll through the available pages to find the appropriate permission. Click *Finished*.
9. Click *Save*.

7.6 Schedule Synchronization Jobs

Create a recurring job for each report you have created to pull the new hire, manager, and HR user data over to the Onboarding web services connected with the SF Onboarding instance.

Procedure

1. Log on to Provisioning and select the company.
2. Under *Managing Job Scheduler*, click *Manage Scheduled Jobs*.
3. For each sync report you created, schedule a job as follows:
   a. Click *Create New Job*.
   b. Make the following entries:

      > **Note**
      >
      > The entries for the individual jobs only differ with regard to the Job Name and File Name.

      > **Note**
      >
      > The OnStartDate job must run before the User Sync, or an error will occur.

Table 15:

Field or checkbox	Entry or action
Job Name	Enter a descriptive name, for example **`Onboarding Compliance User Sync`**.
Job Owner	Enter the Onboarding admin user. For the User Sync job, this user should match the user running the Ad Hoc report. During the cutover to a customer, this user should also be updated to a client user that will not be deactivated.
Job Type	Select *Ad Hoc Report Export* from the list. This will populate additional fields to fill out.
Job Parameters - Report ID	Select the name of your User Sync report.
Job Parameters - Report Format	Select *CSV*.
File Available in FTP	Select the checkbox.
Host Address	Enter the data center appropriate URL, for example **`ftp.online-onboarding.com:22`**
FTP Login	Obtain the FTP login from the Operations team, for example **`ftp_sf_kms`**
FTP Password	Obtain the FTP password from the Operations team, for example **`Siy5@HbdT!`**
FTP Passive Mode	Do not select.
SFTP Protocol	Select the checkbox. Click *Test Connection*. If the connection test fails, check that the FTP credentials are correct. If it still fails, please contact DemoOps.
File Path	Enter **`/inbound`** for production instances. For demo instances, use **`/test/inbound`**

Field or checkbox	Entry or action
File Name	Enter an appropriate file name according to the following naming convention: ○ Permission Sync: <case sensitive Company ID>_Permission_Sync.csv ○ User Sync: <case sensitive Company ID>_User_Sync.csv These sync reports are optional and for demo instances only. ○ Division Sync: <case sensitive Company ID>_Division_Sync.csv ○ Department Sync: <case sensitive Company ID>_Department_Sync.csv ○ Location Sync: <case sensitive Company ID>_Location_Sync.csv **Example** ACEIN0019_User_Sync.csv or ace6g6_User_Sync.csv **Note** _Permission_Sync, _User_Sync, _Division_Sync, _Department_Sync, and Location_Sync are case sensitive. In addition, do not abbreviate these terms. Otherwise, the Onboarding web services will not recognize the file names.
Date Format	Select yyyymmdd. This data format will be appended to the file name.
File Encryption	Leave *None*.
Occurrence	Recurring
Recurring Pattern	Daily; select 0 (12AM) and 0 minutes
Start Date	Schedule to start on the current day (date format: mm/dd/yyyy) along with desired hour, minutes and AM/PM.
End date	Leave blank.
Additional email recipients	Change to your e-mail address so you receive the notifications.
Send Email when job starts	Select.

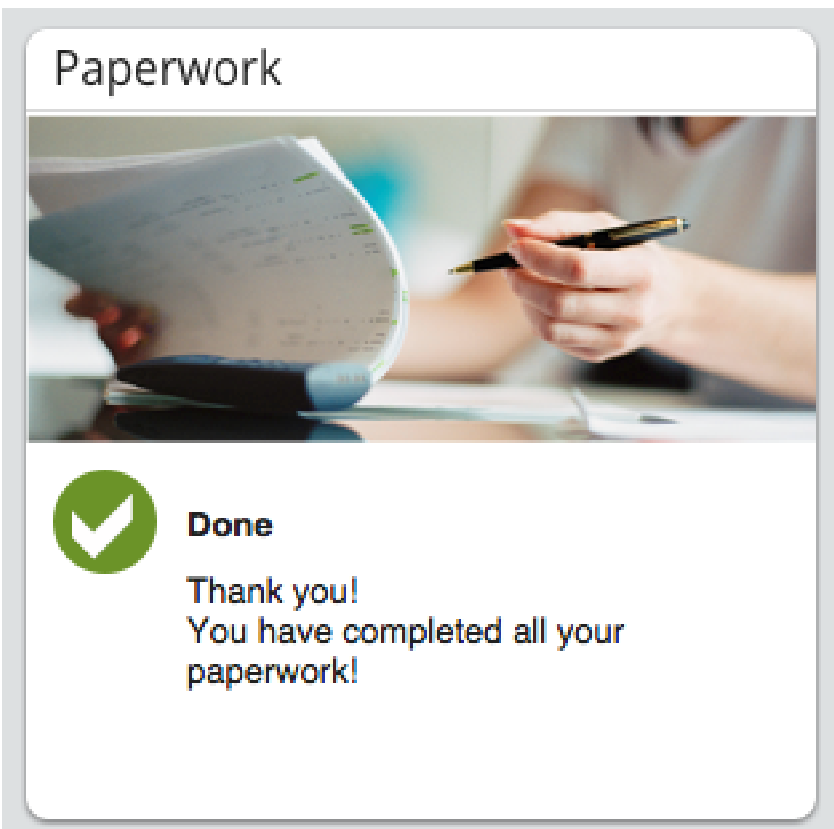
c. Click *Create*.

4. Back on the main Managing Scheduled Jobs page, schedule the jobs to run now to sync your user data to Onboarding. The Onboarding web services need 5 to 10 minutes to pull over the data. For each job:
   a. Under *Actions*, select *Submit*.
   b. Again under *Actions*, select *Run it Now*.

8 Onboarding Tiles on the SuccessFactors HCM Homepage

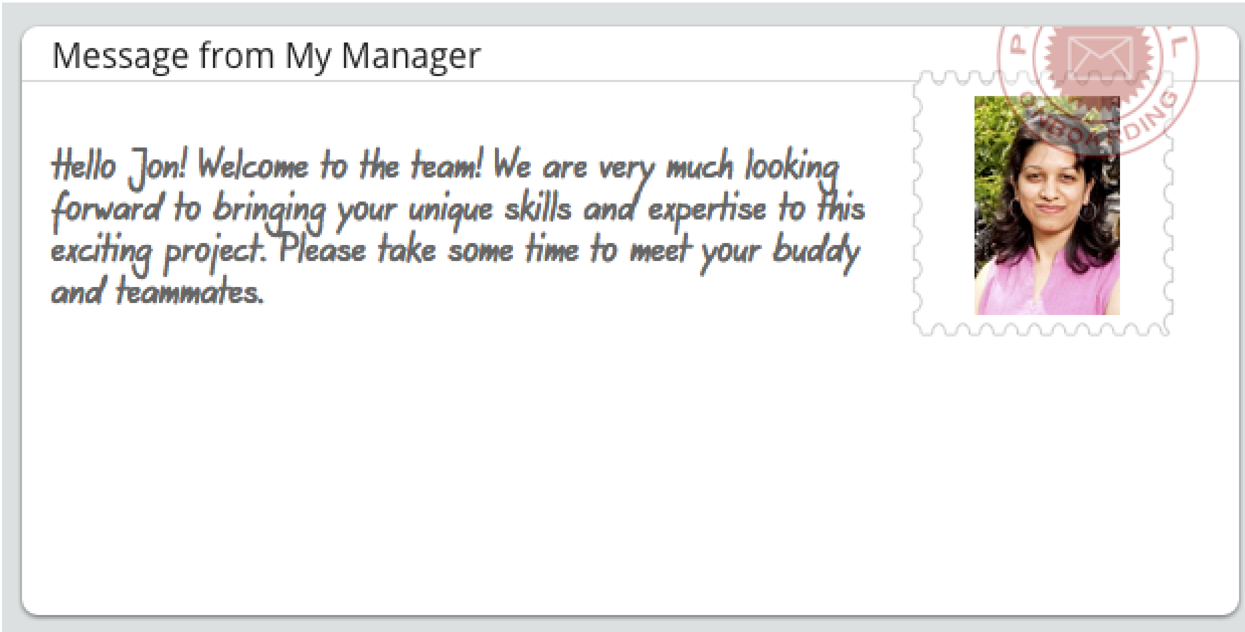
Paperwork Tile

It is not enough for a new hire to see a ToDo if they haven't completed all their paperwork. They need assurance that it is complete, even when everything is done. The paperwork tile notifies them that either they still have open items (to which they can click through) or that everything is done.



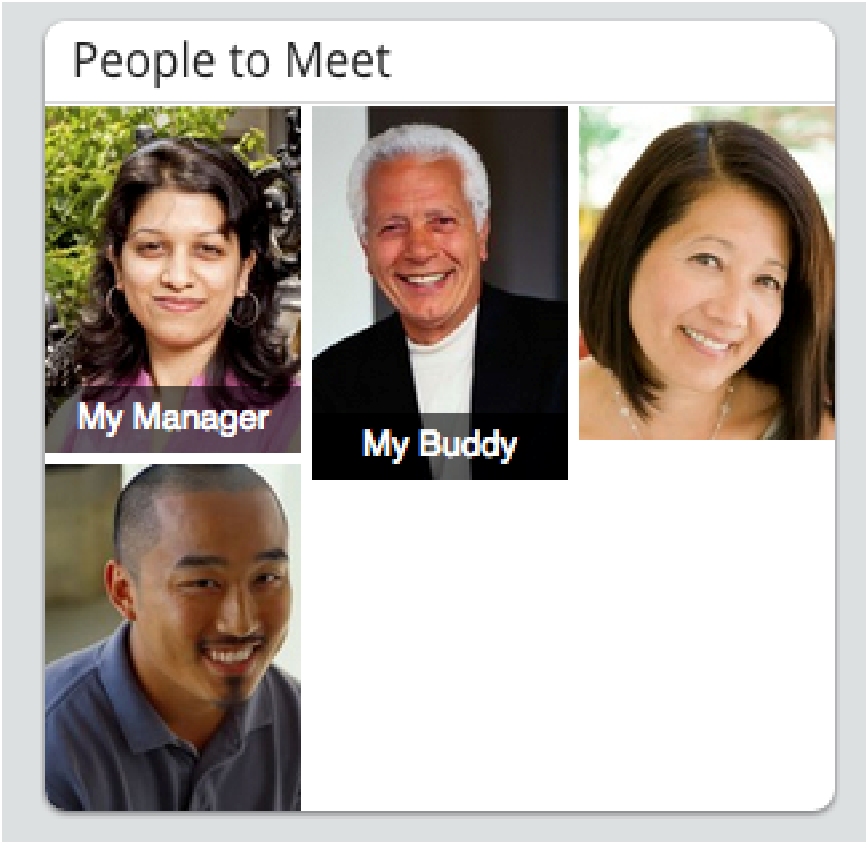
Welcome Message from Hiring Manager

As part of the Hiring Manager's new hire planning process, they write a welcome message to the new hire which appears in a special tile on the homepage. The type is specifically styled in an informal 'postcard' and handwriting style.



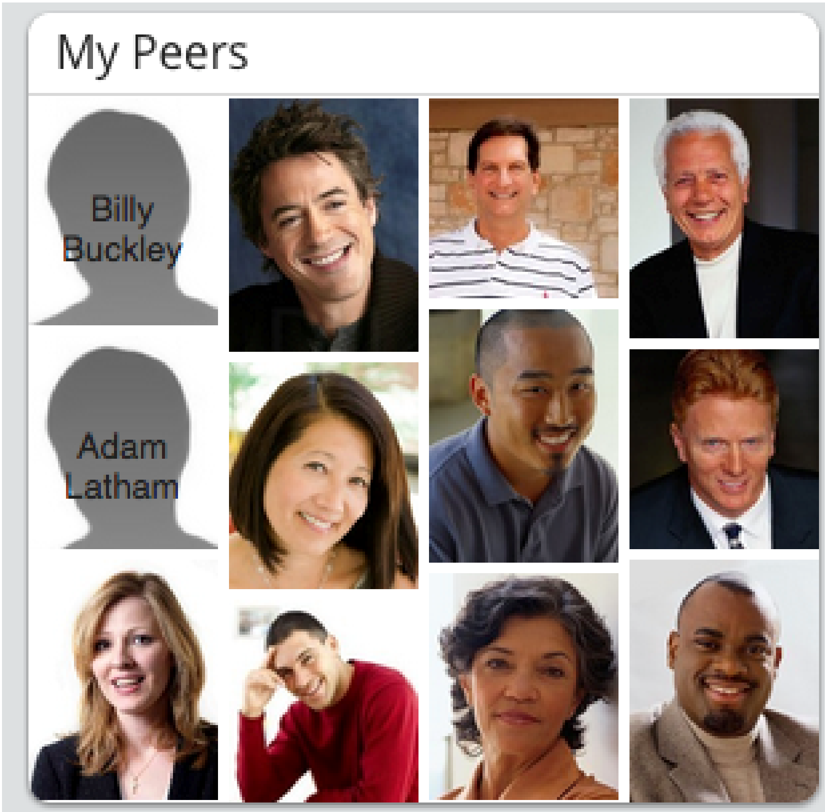
Buddy, Recommended People, and reason for recommendation

As part of the Hiring Manager's new hire planning process, they assign a buddy and recommend people for the new hire to meet. These are displayed in a tile on the homepage called *People to Meet*. Clicking on a person reveals their profile information as well as the custom 'reason for recommendation' that the hiring manager entered.



My Peers

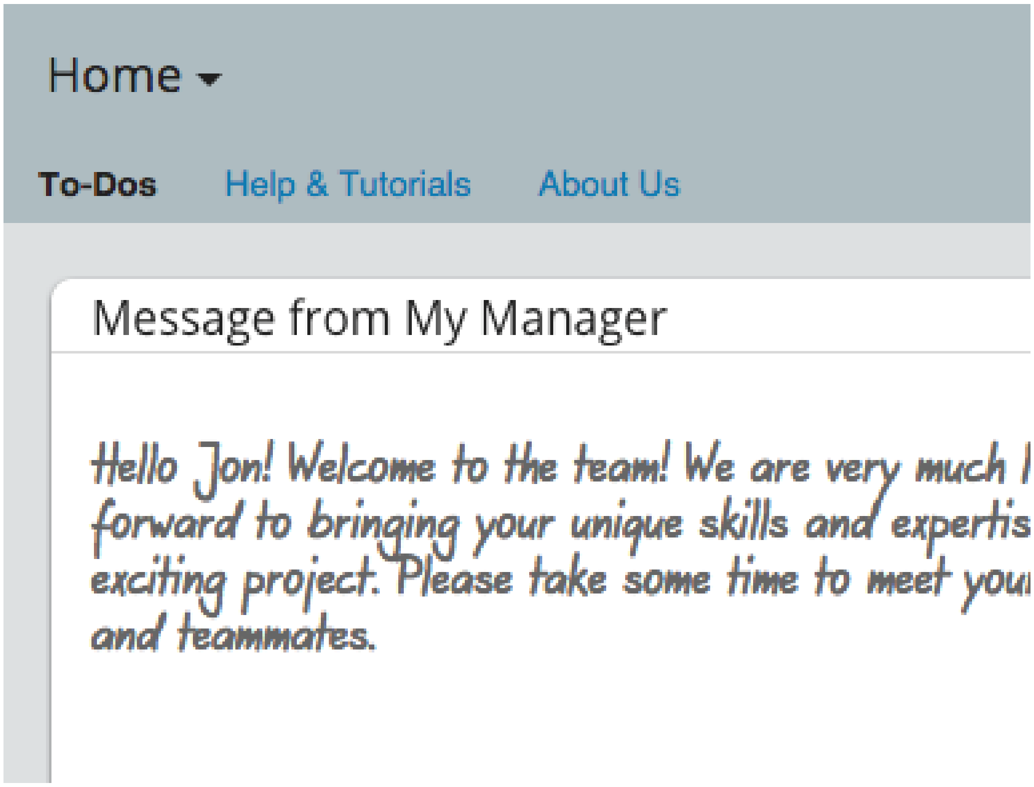
This is similar to the *My Team* tile. It displays the new hire's teammates at the peer level, rather than the direct report level. .



Employee Portal

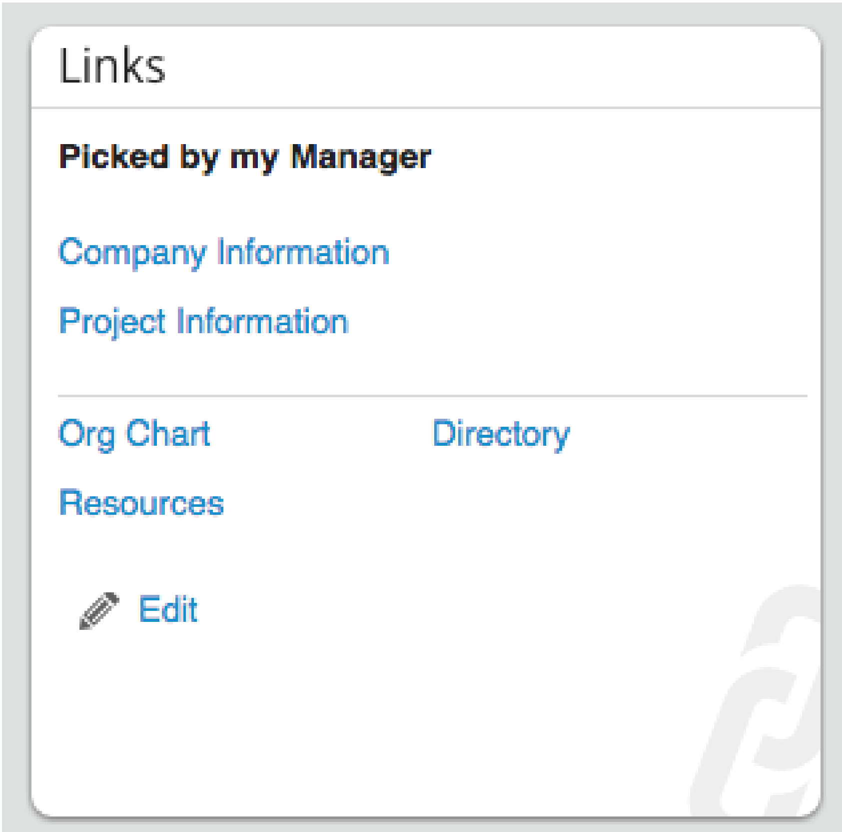
Many customers use a Sharepoint-based Web site to provide role-based information and documents to new hires (for example, benefits information, filtered by role). You can add a custom tile with a link to the Employee Portal.

Navigate to *Admin Center* > *Manage Home Page* > *Add Custom Tile*. Use the menus to add information for the tile, including a background image. Enter the Employee Portal URL in the *Navigation* menu.



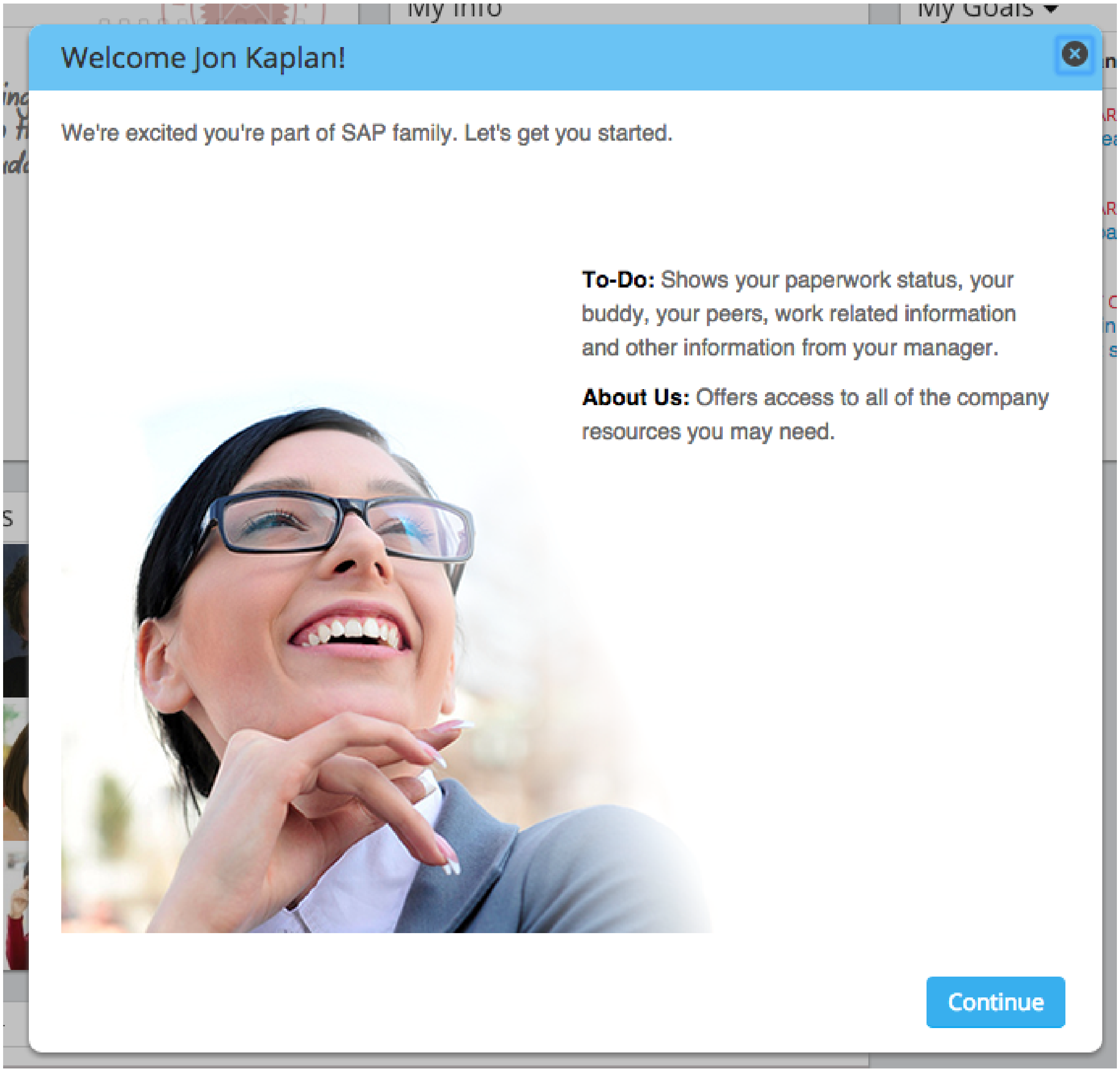
Links

As part of the Hiring Manager's new hire planning process, they provide links for their new hire to read. These links display in the *Links* homepage tile under the heading *Picked by my Manager*.



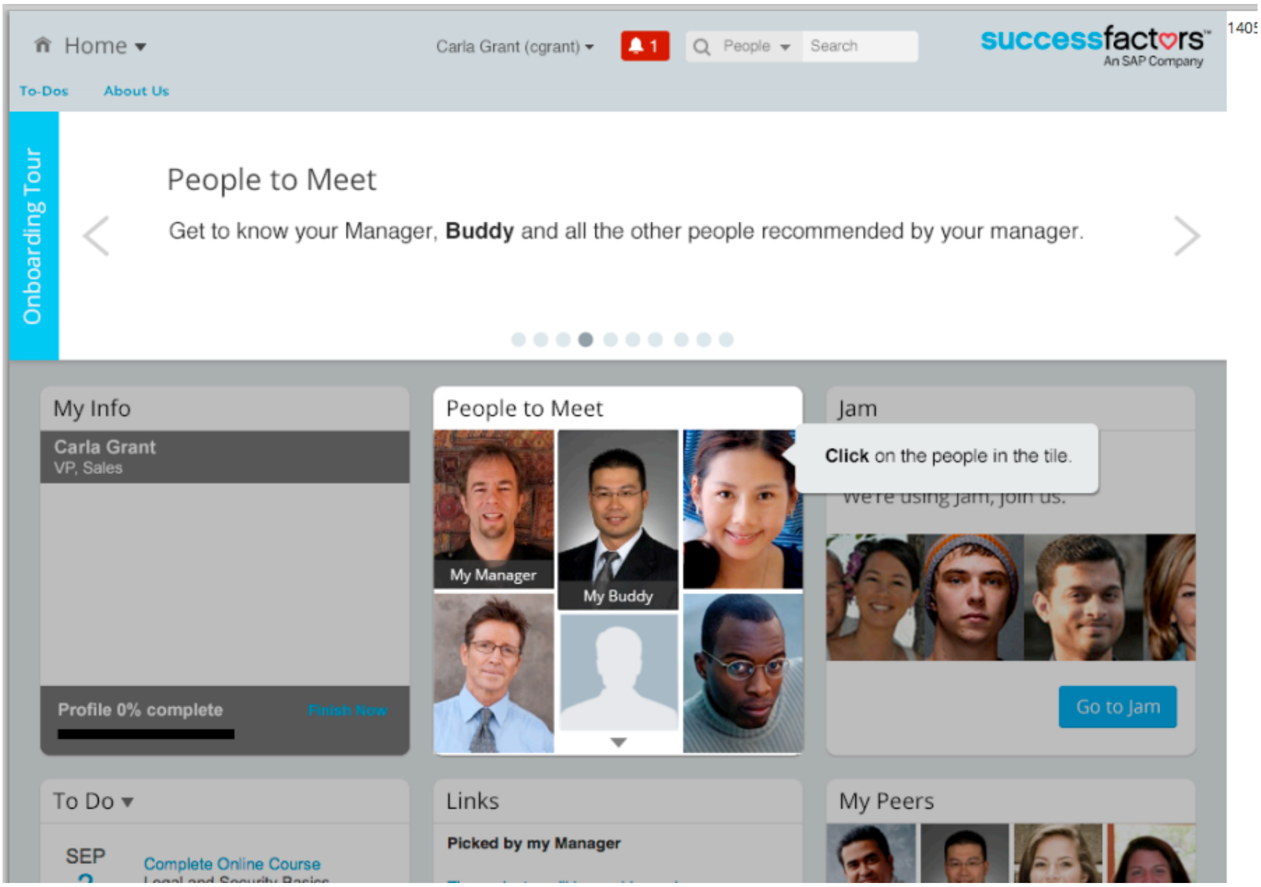
Create Your Profile Wizard

The new hire is presented with a profile wizard the first time they access the homepage. This also orients them to the things they need to pay attention to (ToDos, the About Us Page)



Homepage Tour

This Onboarding Homepage tour appears for the first 30 days of a new hire with a company, and displays as a carousel across the top of the page that allows the new hire to learn about the different parts of the page. When on a slide, the rest of the homepage is grayed out except for the tile it is referring to. The tour points out all of the other Onboarding tiles, certain tiles for other features (like Jam), paperwork status, manager postcard, and can be customized to add slides.



8.1 How to Troubleshoot the Onboarding Tile Display

After loading a new hire into SuccessFactors HCM, a Paperwork or New Hire tile should appear for the new hire. These tiles display on creation of the new hire's profile in SuccessFactors HCM.

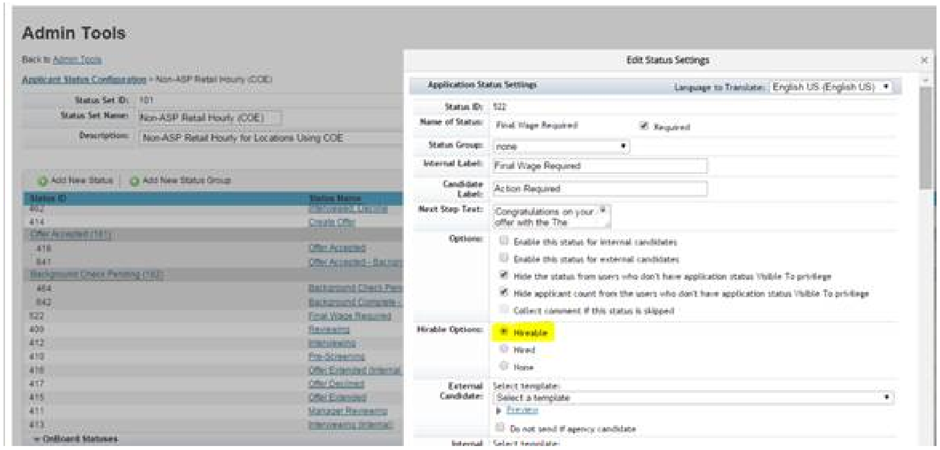
Context

Follow these steps to troubleshoot the display of Onboarding-related homepage tiles.

Procedure

1. When the new hire is uploaded into SuccessFactors HCM, the new hire user ID must be unique. For rehires, the user id is the same as the existing user id, but the hire date in the import should be in the future.
2. Check that the OnStartDate job ran successfully, by navigating to *Provisioning* > *Manage Scheduled Jobs* > *Monitor Jobs*.

3. Check the Application Status Set. Configure one *Hireable* and one *Hired* status in the In Progress status set. For all other statuses, set the *Hireable Options* setting to **`None`**. The candidate should be onboarded in the *Hireable* status, and then in the *Hired* status once onboarding is complete. Set the *Hireable Options* for any inactive statuses to **`None`**.



> **Note**
>
> If you configure the Application Stats Set in any other way the new hire tiles will fail. This can also affect other parts of Onboarding. You cannot have more than one Hired and one Hirable status.

4. If the Onboarding Tour is not displaying, check the following:
    - The start date sent upon completion of the PHV step must be populated. If the start date is blank, or greater than 90 days in the past, the Tour will not display.
    - The Onboarding Tour is enabled in Provisioning
    - The new hire has RBP permissions for the TourPath MDF object

    The Welcome and Paperwork tiles do not display when the Onboarding Tour is configured.
5. If the Buddy, Recommended People, Links, or other manager-initiated tiles do not appear, make sure that the Hiring Manager Activities are completed first.
6. If the ToDo tile for a given Onboarding activity is not displaying, you can check on the back end status of the activity by navigating to *Admin Center* > *Manage Data* and look up the OnboardingProcess object for the hire's name. Set the object to **`active`** to restore the tile, and to **`inactive`** to remove it.

Related Information

Hiring Manager Activities [page 236]
How to Configure the Onboarding Home Page Tour [page 119]

8.2 How to Configure the Display Time for Tiles and the About Us Tab

You can determine how long Onboarding tiles are displayed to a new hire. After the period you specified is over, the tile will be suggested for removal in the *Tile Removal* dialog. The new hire can then choose to select the tile for removal or leave them on the home page. The same applies to the *About Us* tab.

Context

> **Note**
>
> **Tool: SuccessFactors Onboarding Admin Tools**

You can define a display period for the following tiles:

- People to Meet
- Message from My manager
- Paperwork

Procedure

1. Go to *Admin Tools*, and choose *Company Settings* > *Manage V12 Home Page*.
2. Under *Active Dates*, enter the days until the tiles will be suggested for removal.

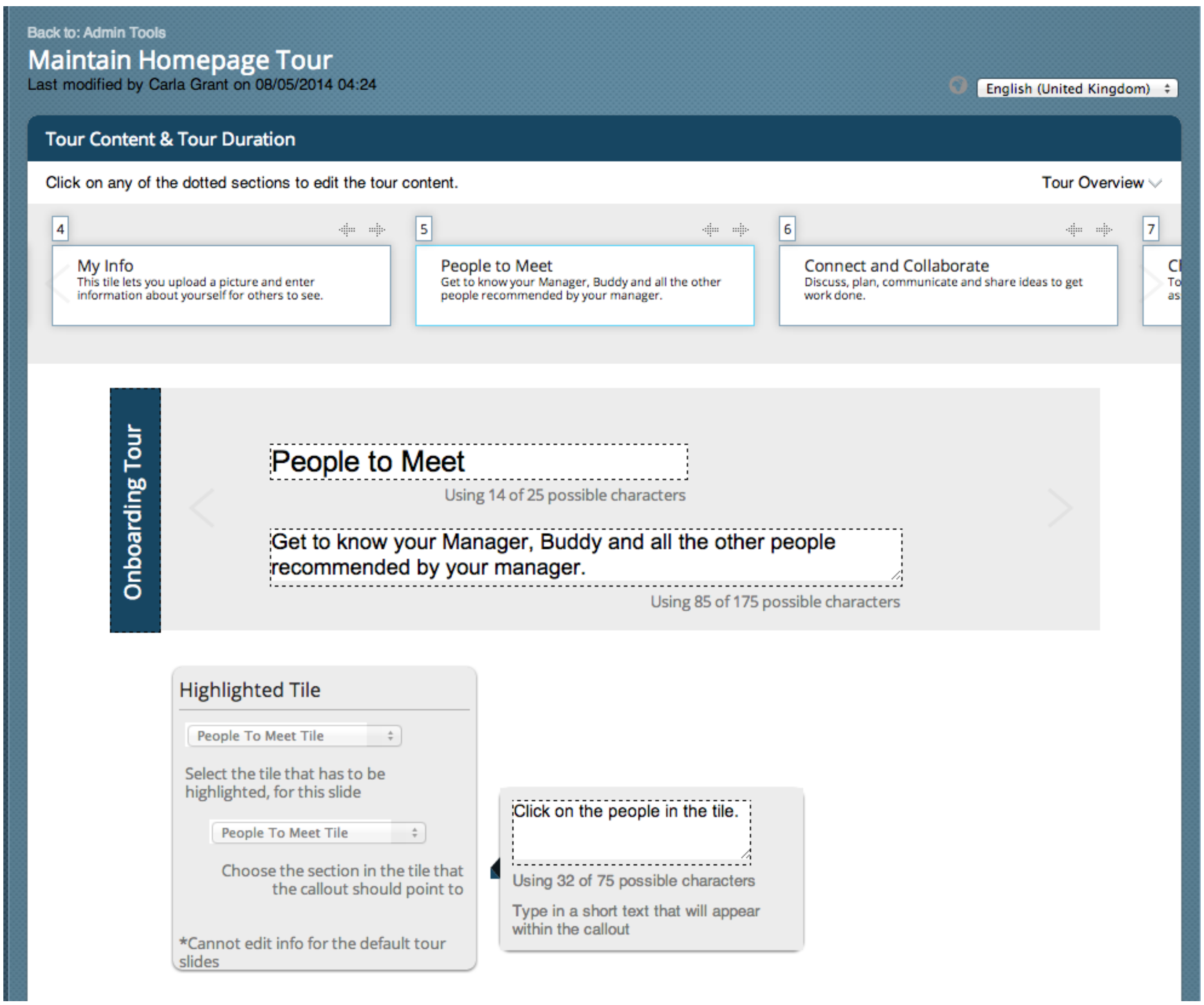
   At the end of the list of tiles, you can set then period for the *About Us* tab.

   You can enter any positive integer up to 999. „Start Date + 0“ would mean a tile is never shown.

8.3 How to Configure the Onboarding Home Page Tour

The Onboarding Home page tour walks new hires through the sometimes overwhelming content presented to them.

Context



Procedure

1. Navigate to Manage Security > *Manage Permission Roles*
   a. Select an existing role or createa new role to grant Onboarding Tour permissions.

b. In the selected role, navigate to *Miscellaneous Permissions* > *TourPath.* Select *View* and *Edit.*

2. Navigate toSAP SuccessFactors HCM Admin Tools *Manage Security* > *Manage Permission Groups*. Create a new group for the New Hires who should see the home page tour (for example, tourNewHires.
3. Under *Manage Security* > *Manage Permission Roles* create a new role (for example, onbTour).
   a. Click *Add Permissions* then navigate to *Miscellaneous Permissions* > *Tour Path* and selet *View.*
   b. In the *Grant this role to...* section, click *Add.*
   c. In section 1: *Define whom you want to grant this role permission to*select the role created in step three (the role with both *View* and *Edit* permissions.
   d. In section 2: *Specify the target population for the other objects* select `All`.
4. To edit the default Onboarding Tour, navigate to *Admin Tools* > *Manage Onboarding* > *Edit Tour.*
   a. Select the desired slide to edit from the carousel.
   b. Sections surrounded by a dotted line indicate content available for editing.
   c. Set a length of time for the tour to be active under *Define Tour Duration*. This is required for all slides and will always be in the format of Start Date + a specified number of days.
5. Configure custom text in multiple languages by selecting a language from the dropdown menu in the upper right.
6. To createa new custom slide from a blank template, click *Add Slide.*

Recommendation

If the Homepage Tour is not displaying, check that you have assigned the correct permissions to the employee or new hire group. You can also check the validity range for the tour. If the new hire's start date is too far in the past, the Tour may have expired.

Recommendation

If you do not see the Homepage Tour configuration link in the Admin UI, check that the Tour Edit permission is assigned to the appropriate administrator(s) group.

9 Offboarding

During the Offboarding process, an employee completes and signs paperwork, and notifies additional resources who need to complete tasks for Offboarding.

Offboarding allows a company to process employee terminations and de-provisioning. Whether the termination is voluntary (that is, a resignation), or involuntary (a layoff or dismissal), Offboarding gathers all termination-related information and triggers time-sensitive actions like conducting exit interviews, or notifying payroll and benefits partners.

Customers can implement Offboarding together with Onboarding, or as a stand-alone product within SuccessFactors HCM. Offboarding can also be integrated with Employee Central, the EC module is not required for Offboarding.

Offboarding uses three data entry wizard steps:

- **Initiation Step** – The Corporate Representative initiates the Offboarding process and enters information regarding the termination in this step.
- **Employee Step** – The employee enters or verifies termination-related information in this step.
- **Exit Interview** – The Corporate Representative and employee enter termination-related information requiring the input from both in this step. For example, equipment to return, or an exit interview checklist.

9.1 How to Configure Offboarding

Offboarding can be configured alongside Onboarding, or as a stand-alone feature.

Prerequisites

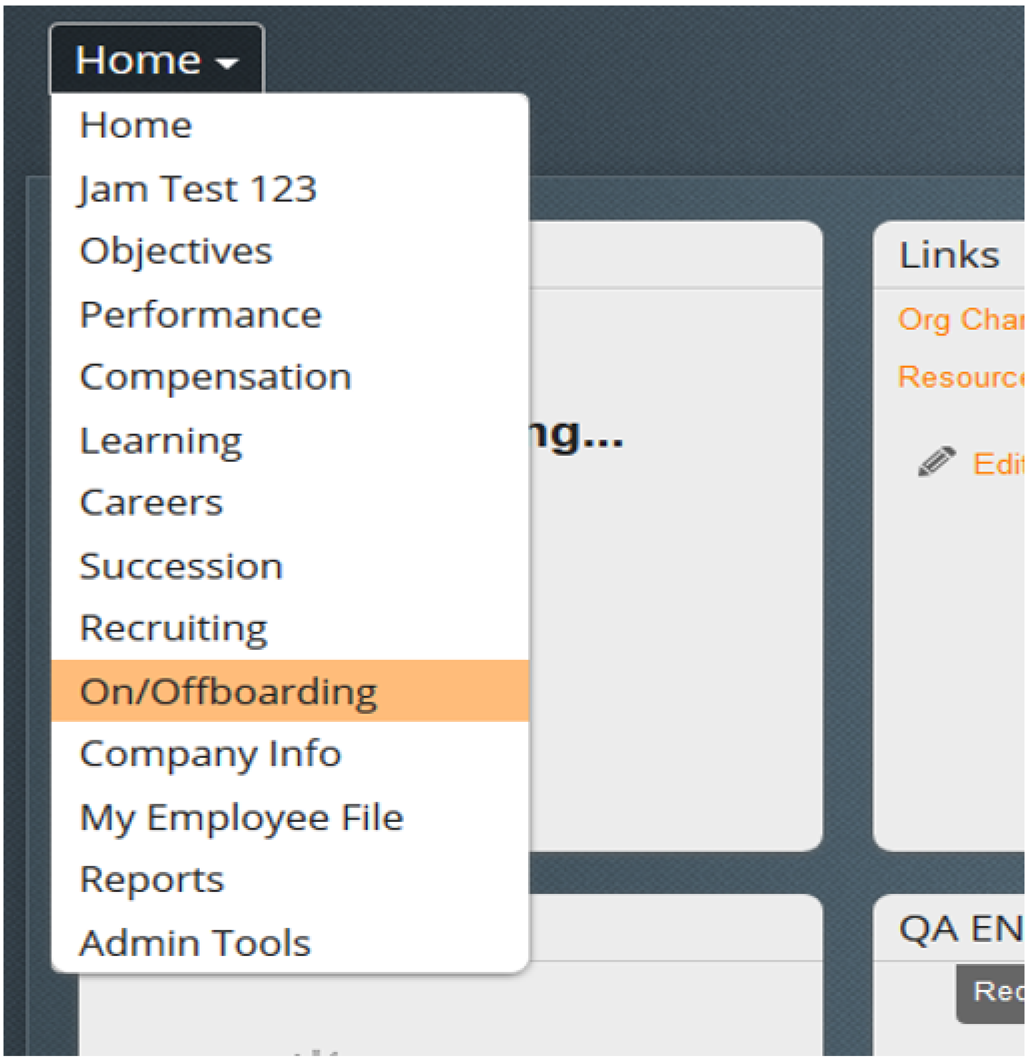
If the customer is using Offboarding with Employee Central, and wants to use business rules to control Offboarding eligibility, check that the *RuleType* object is available by navigating to *SuccesFactors HCM* > *Admin Tools* > *Configure Object Definitions* then select *Picklist* from the first dropdown in the search bar, and enter *RuleType* in the second dropdown. If the object is not already configured, select *Picklist* from the *Create New* dropdown, then enter *RuleType* in the *Code* field. Then click *Save*.

> **Note**
>
> Customers using Offboarding need to configure the Termination Event in Employee Central. Please contact the Employee Central product team for further configuration details.

Procedure

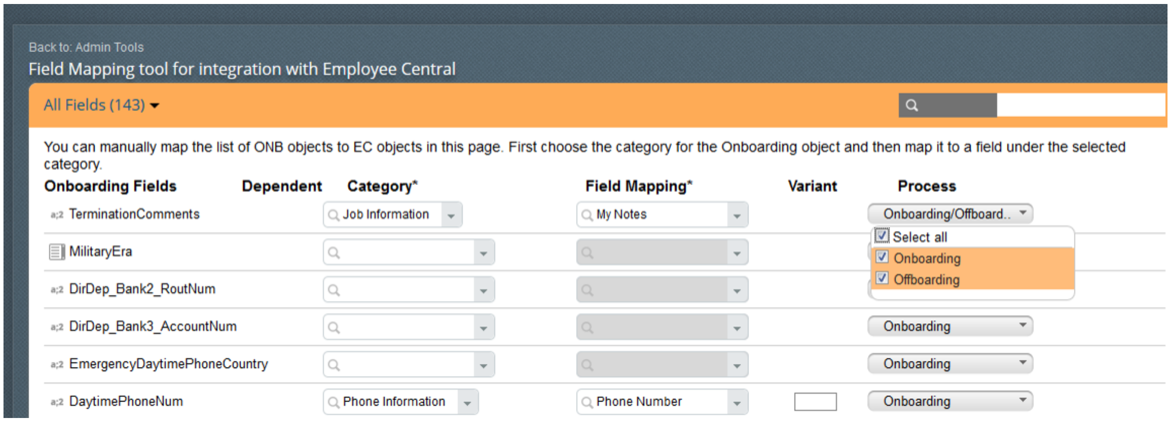
1. Navigate to ▶ *Provisioning* ▶ *Company Settings* ▶ *Enable Offboarding Application* ▶
2. If desired, grant Offboarding permissions to certain user roles. Navigate to ▶ *SuccessFactors HCM* ▶ *Admin Tools* ▶ *Manage Employees* ▶ *Set User Permissions* ▶ *Manage User Roles* ▶ and create a new role or select an existing role. Choose *Manage On/Offboarding* and grant the *Manage offboarding* permission.

   When Offboarding is enabled, users with the appropriate permissions will see a new menu item *On/Offboarding* in the main SuccessFactors HCM navigation. Users without Offboarding permissions will only see *Onboarding* in the main menu. Permissions for Onboarding cannot be explicitly granted.

3. Navigate to ▶ *Super Admin* ▶ *Processes* ▶ *Offboarding* ▶.
4. Click *Enable*. You can edit the steps, conditions, and due dates of the Offboarding Process as you would any other.
5. If using an Employee Central integration, navigate to ▶ *SuccessFactors HCM* ▶ *Admin Tools* ▶ *On/Offboarding* ▶ *Field mapping tool for Onboarding/Offboarding EC Integration.* ▶
6. Map the Onboarding objects to the Employee Central objects.

a. Choose a category for the Onboarding object, then map it to a field for the selected category. When Offboarding is enabled, choose a process to map the field to in the *Process* column. Objects mapped to the *Onboarding* process only transfer during the Onboarding process. Objects mapped to the *Offboarding* process only transfer during the Offboarding process. Objects mapped to both transfer during either process.



7. To restrict Offboarding to certain company locations or departments, navigate to *SuccessFactors HCM* > *Admin Tools* > *Configure Business Rules*. Define a Business Rule to define the department or location for employees to be offboarded.
8. Configure the Offboarding scheduled job. Navigate to *Provisioning* > *Manage Scheduled Jobs* > *Create New Job*

> **Note**
>
> Only configure the Offboarding scheduled job if you are seeing performance issues related to the Service Event Bus.

This job automatically creates the Offboarding activity for the relevant users. If an existing `OffboardingUserInfo` object is found with a matching user ID and termination date, the user is not processed by the job.

9. Enter the following job details:
   - Job Name: **`Offboarding`** or something similar that allows you to identify the job.
   - Job Owner: Select an administrative user
   - Job Type: Select **`CreateOffboardingActivity`**
   - Job Parameters: You can configure this job to work in one of two ways. *No of days for the job to pick up terminated users for re-run* will pick up users for Offboarding who are terminated before the specified number of days. *List of terminated User IDs* offboards only specific terminated users, based on their SuccessFactors HCM user ID.
   - Occurrence: Select **`Daily.`** Choose a time for the job to run.
   - Start Date: Enter the current date and a time in the future

Related Information

Process Steps [page 258]

9.2 Offboarding Candidates

Offboarding is initiated in Employee Central or a customer's HRIS, then a corresponding activity is created in SuccessFactors HCM.

When Onboarding and Offboarding are configured in the same instance, the menu selection for the application appears as *On/Offboarding* in SuccessFactors HCM for users with the appropriate permissions. If the customer has stand alone Offboarding configured, the menu displays as *Offboarding.* If the customer has Offboarding enabled, but a user does not have Offboarding permissions, they will see the menu as *Onboarding*.

To initiate offboarding, a corporate representative enters the employee's termination information either in Employee Central or an HRIS. This creates a corresponding Offboarding activity, which the user sees in the Work Queue under *Offboarding.*

Users can also manually initiate Offboarding by navigating to *SuccessFactors HCM* > *On/Offboarding* > *Processess* and entering a search string in the *Simply search for employees to be offboarded* search field. Users can also perform more detailed searched based on employee details. Once you have found the approriate user, click *Initiate*.

To mass upload users for offboarding, navigate to *SuccessFactors HCM* > *Onboarding* > *Settings* > *Manage Employees* > *Offboarding Mass Import XML*. To create an XML template to work with, download and save this file. Then, make the required changes and upload it to the same location.

Users can also use the Onboarding API to import employees to be offboarded in instances not integrated with Employee Central.

Related Information

Onboarding API Reference

9.3 Offboarding and Employee Central

When a user is terminated in Employee Central, an Offboarding activity is created for the user. The activity is only created if the terminated user is eligible for Offboarding.

Data mapping from EC to Offboarding is supported for all data types including string, number, boolean, date, user lookup, and SF HCM BizX picklist. If creation of the Offboarding activity fails, the terminated user's manager receives an email with the reason for the failture.

In order for the Offboarding activity to be created, the user terminated must have a user record in On/Offboarding, and the `FirstName` and `LastName` fields must be mapped to the Offboarding process.

Related Information

[How to Configure Offboarding [page 121]](#)
[Business Rules and Offboarding [page 125]](#)

9.3.1 Updating Data in Employee Central after Offboarding

For customers using Offboarding with Employee Central, if certain user data changes during Offboarding, these changes are sent to Employee Central for update.

Sending data to Employee Central at the end of Offboarding is supported for certain entities.

- Personal Information
- Home Address
- Email Information
- Phone Information

In order to send updated data to Employee Central at the end of Offobarding, the field `LastWorkingDay` must be mapped to the Onboarding process. This field is used as the effective date for updating the Employee Central data. It is best practive to set this field to read-only, as changes can cause data errors.

To enable this data writeback, navigate to *Super Admin* > *Features* > *SF_Notifications* and enable the *Offboarding FinishStep message* .

9.3.2 Business Rules and Offboarding

Terminating a user in Employee Central triggers the Offboarding activity. Creation of Offboarding activities can be limited to certain groups of users by using business rules.

Business rules are a way to add application logic to determine the outcome of a change made to particular data in the system. Rules follow the logic 'If this data is changed in a certain way, then the system reacts in this way.'

When Offboarding is enabled in Provisioning, a default business rule is created for Offboarding eligibility. Before enabling Offboarding, navigate to *SuccesFactors HCM* > *Admin Tools* > *Configure Object Definitions* then select *Picklist* from the search bar, and select *RuleType* > *Insert New Record*

The default Offboarding business rule only evalutes if a user is eligible for Offboarding. The default rule is always true, and the base object of the rule is the `personalInfo` EC object. The `OffboardingRuleType` is created as part of the rule creation. Customers can modify this default rule to limit Offboarding to certain groups of users.

When a user is terminated, the business rule is evaluated for the user, and if the evaluation results are true, the offboarding activity is created. If no offboarding rule is found, the user becomes eligible by default.

Related Information

Configuring Business Rules in SuccessFactors

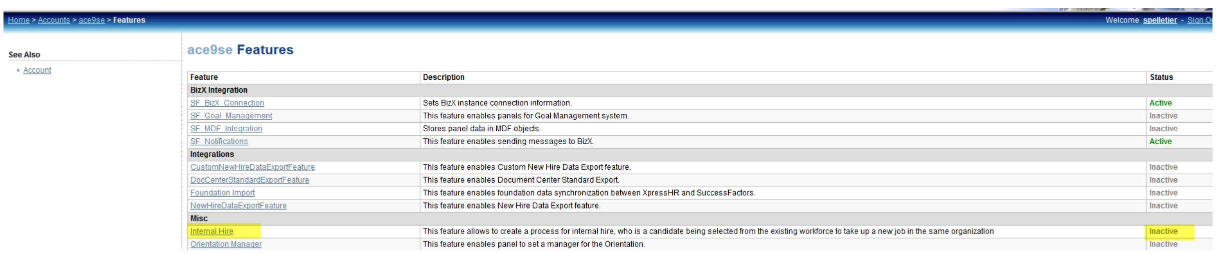
How to Configure Offboarding [page 121]

10 Crossboarding

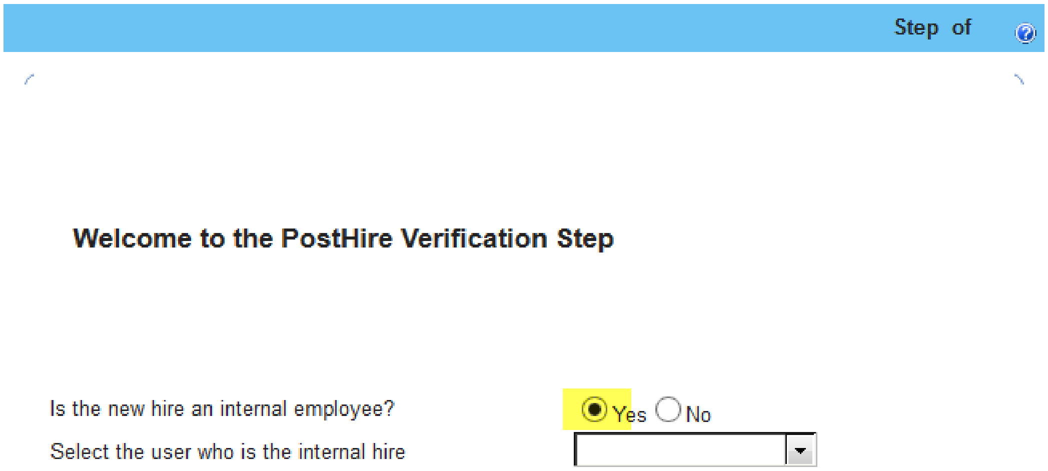
10.1 How to Configure Crossboarding

Procedure

1. Navigate to *Super Admin* > *Features* and activate the *Internal Hire* feature.



2. Activating this feature allows you to direct internal hires to a custom process and enable a panel in the Post Hire Verification step asking if a new hire is internal. This panel only displays for candidates who are not passed from Recruiting Management to Onboarding, if the `InternalHire` field is not populated. To populate this field, in the import from the External ATS, the value for`InternalHire` should be set to true, and the `EmployeeLogin` field should be set to the *LoginName* of the internal hire user. If these fields are not specified in the import, the internal hire selection can be made via the Internal Hire panel.



3. You can now direct new hires with an `InternalHire` value of `true` to a custom process.
4. To filter Onboarding panels for internal hires, set an advanced condition on the panels **`InternalHire NotEqual true`**. This hides the panels from internal hires.
5. When a candidate is passed from Onboarding to Employee Central, the *isInternalHire* flag is set on the OnboardingCandidateInfo object. This flag is set when the candidate is created in Onboarding.

Related Information

How to Import a New Hire to a Custom Process [page 255]

11 Integration with SAP ERP

The Onboarding integration with SAP ERP allows customer using SuccessFactors HCM and SAP ERP to pass data between the two systems for onboarding and hiring.

The data flow for the SAP ERP integration begins when candidates are identified for hire, either from SuccessFactors Recruiting or an external ATS. After the onboarding process triggers for these candidates, and Onboarding collects the candidate data, the information is sent to SAP HCM.

> **Note**
>
> The majority of the configuration for the Onboarding-SAP ERP integration is performed in the SAP ERP system. For further details on using SAP ERP, reference the SAP-specific documentation.

This integration requires the following configuration and software:

- SAP HCM
- SAP Netweaver PI
- Enable the Paper Work Done notification in *Super Admin* > *Features* > *SF_Notifications* > *PaperWorkDone message to BizX after NES is completed by new-hire.*.
- Fields to be be transferred to SAP must be included in the Data Dictionary
- The web services credentials for the instance must be properly configured in Provisioning.

> **Note**
>
> This integration does not require engagement with SAP Professional Services, but knowledge of the SAP ERP HCM system is required.

When deciding how to configure your SAP ERP integration, consider when you need to have SAP HCM updated in the hiring process. If a customer does not need to have SAP HCM updated until after the Onboarding process is complete, configure the Onboarding process to trigger from Recruiting. For customer who want their employees to be in SAP HCM early in the process, trigger Onboarding from SAP HCM.

To import the candidate data from SuccessFactors Onboarding to SAP HCM, the candidate must first be designated as `readyToHire`. This flag is set to `yes` when the *PaperWorkDone*notification is sent upon completion of the New Employee Step by the new hire. User records where this flag is set to yes are then imported to SAP HCM.

Data is imported to SAP HCM via a scheduled import configured in the SAP HCM system. This import can be scheduled frequently, but the larger the data set, the slower the report. The recommended import interval is every 30 minutes.

The SAP ERP HCM system pulls all the available captured employee information for the relevant candidates, and then the SAP ERP HCM administrator reviews the information, makes corrections where necessary, and posts the information to the employee master data. Data from SuccessFactors HCM is not automatically written to SAP ERP HCM employee master data because SAP HCM is considered the system of record for employee data.

Administrators can map fields from SuccessFactors to Infotypes in SAP based on business logic. SAP administrators can also create a recurring job for the data replication, and monitor the data replication for errors. If a candidate's data has errors, the administrator can pull the data for just that candidate.

Once the candidate data is updated, there is no communication from SAP ERP HCM to SuccessFactors Onboarding. Onboarding determines updates to the candidate based on data available in SuccessFactors HCM. The recommended implementation is for customer to use the standard employee data integration for replicating new hires as users in SuccessFactors. Customers should not transfer future employees as users, because Onboarding assumes users are not created in SuccessFactors HCM until their hire date. Onboarding has a separate feature that provides limited access to SuccessFactors HCM before the new hire's start date.

Related Information

Integration Scenario for Onboarding Data
Transfer of Employee Data from SuccessFactors Onboarding
Integration Guide for Onboarding Data
Mapping of SuccessFactors Onboarding Fields for Employee Data

11.1 How to Add Fields for SAP Integration

Context

There is no field mapping executed in the Onboardind system for the integration with SAP ERP. However, you must designate which fields are available for the integration using the data dictionary.

Procedure

1. Navigate to *SAP SuccessFactors HCM* > *Onboarding* > *Settings* > *Data Dictionary*.
2. Select the *Integrations* namespace.
3. If a tag for the SAP integration is not part of the *Integrations* namespace, select *New Tag* and enter a name for the new integration tag.
4. Select the SAP intergration tag and then click *Fields*. Add the desired fields to the tag.
5. Select *Close* to save the changes and close the window.
6. Select the SAP integration tag, then click *Export*. Click on the link to download the resulting XML file.
7. In the SAP ERP system, import the file using the *Import DDIC from SuccessFactors Onboarding* report.

➜ Recommendation

If you are not familiar with importing the data dictionary from SuccessFactors Onboarding to SAP ERP HCM, we recommend asking SAP Support to import it for you to ensure that the correct settings are made and the correct XML is provided

Related Information

How to Create a New Tag [page 186]
How to Export Data from the Data Dictionary [page 191]
How to Copy a Field to a Tag [page 189]
Mapping of SuccessFactors Onboarding Fields for Employee Data (SAP Documentation)

12 I-9 and E-Verify

12.1 I-9

Employers must complete Form I-9 each time they hire any person to perform labor or services in the United States in return for wages or other remuneration.

The employee must complete Section 1 of Form I-9 at the time of hire. For the purpose of the I-9, hire means when employment begins in exchange for wages or other remuneration. The corresponding term in SuccessFactors Onboarding is Start Date. Employees may complete Section 1 of Form I-9 before the time of hire, but no earlier than acceptance of the job offer. The hire date in SuccessFactors Onboarding is the day the new hire accepted the offer of employment. This date is not captured on the I-9 form, but is captured in the PHV step in the Hire Date field..

The employer must review the employee's documents and complete Section 2 of Form I-9 within three business days of the day the employee starts work for pay (Start Date). The employee must present an original document or documents that show employment authorization within three business days of the date employment begins

> **Note**
>
> The new hire cannot provide a P.O. Box address on the I-9 Physical Address panel.

If the New Hire does not provide proof of eligibility to work in the United States during the New Hire Onboarding process, the employer can either stop the Onboarding process until the new employee provides the proof, or continue the process without the signed I-9 and allow the new employee three business days to bring in the proof of authorization.

If the employer is out of compliance, the system will display Non-Compliance panels during the Orientation Step. In this case, the corporate representative has four options:

- Suspend the new hire's employment
- Change the new hire's start date
- Do not change the new hire's start date
- Terminate the new hire's employment

Related Information

More information about the Federal I-9

12.1.1 I-9 Reverification

When an employee's authorization documents expire, the employe must reverify the employment authorization no later than the date the employment authorization expires.

> **Note**
>
> I-9 Reverification is dependent on a customer's corporate structure relations to populate data. If the customer is not using the standard corporate structure mapping, they need to deploy a custom panel to create a workaround.

To reverify the employee's authorization, the employer can use Section 3 of the I-9, or use a new Form I-9. If using a new I-9, the employer enters the employee's name in Section 2, completes Section 3, and retains only the second page of the new I-9 with the original.

When a lawful permanent resident presents the arrival portion of Form I-94 or I-94A containing a Temporary I-551 stamp and photograph as a receipt, reverification must be completed before the Temporary I-551 stamp expires (or if the stamp has no expiration date, one year from the date of issue).

During reverification, the employee must present a document that shows current employment authorization. If the employee cannot provide proof of employment authorization, you cannot continue their employment. US citizens and non-citizen nationals never need reverification.

The employer must reverify an employee’s employment authorization on Form I-9 no later than the date that the employee’s employment authorization or employment authorization document expires, whichever is sooner.

Certain citizenship status categories need to be reverified:

- Lawful Permanent Residents
- Refugees and Asylees
- Temporary Protected Status (TPS)
- Exchange Visitors and Students

The Onboarding system will generate an I-9 Reverification activity if one of the work authorization documents associated with the relevant citizenship statuses has an expiration date.

12.2 E-Verify

E-Verify is an online system that compares information from an employe's Form I-9 to US government data to confirm an employment eligibility. E-Verify provides an automate d link to federal databases to help employers determine employment eligibility of new hires and the validity of their Social Security numbers.

After the employee completes their Form I-9, Onboarding transmits the new hire data to the Social Secuity Administration on behalf of the client

The SSA checks the validity of the new hire's Social Security Number, Date of Birth, and Citizenship. For non citizens, the SSA confirms the employee data, then refers to the Department of Homeland Security to verify work authorization according to immigration records.

If neither agency can confirm the new employee's work authorization, the employer receives a *Tentative Non-Confirmation* message. The employee has eight days to contest or resolve this status.

If the employee contests the status, the employe must sign the *Notice of Non-Confirmation*. If the employee does not report to the Social Security Administration to resolve the non-confirmation status, and cannot resolve the status with the SSA or DHS, employment can be terminated without the employee being liable for termination. The employee can work during the eight day period.

The SuccessFactors Onboarding module is integrated to the Department of Homeland Security E-Verfiy system, rendering real-time verification within the ONB tool.

Related Information

More Information about E-Verify

12.2.1 About E-Verify

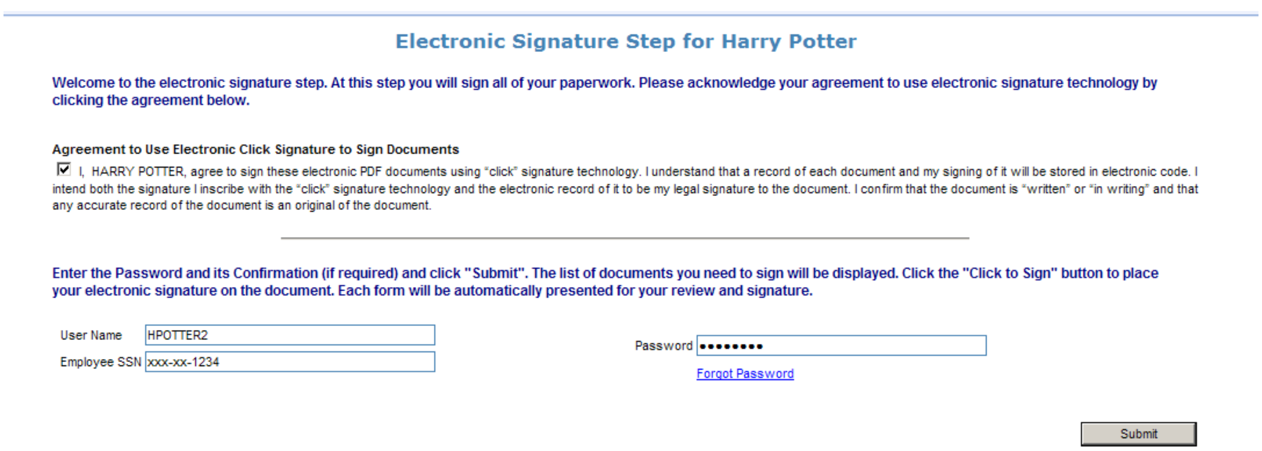
The E-Verify process consists of three steps: Initial Verification, Secondary Verification, Third Verification, and the signature step.

During the Initial Verification step, the employee's identification information is verified and sent to the Department of Homeland Security's E-Verify program. This returns an eligibility statement providing confirmation or tentative non-confirmation of the employee's eligibility to be employed.

Secondary verification is for employee who contest a tentative non-confirmation status by providing final confirmation or non-confirmation of the employee's employment eligibility within three federal government workdays of their request.

Additional processing of the employee's information takes place in the third verification status, in cases where the Department of Homeland Security tentative non-confirmation status is returned within 10 federal government workdays of the original inquiry.

Once the employee's employment eligibility is verified, the hiring manager and the employee sign the employment eligibility forms in the Signature step. The supported forms for this step are the SSA referral letter, the SSA Notice to Employer of Tentative Non-Confirmation, DHS referral letter, and DHS Notice to Employee of Tentative Non-Confirmation.



Electronic Signature Step for Harry Potter

Welcome to the electronic signature step. At this step you will sign all of your paperwork. Please acknowledge your agreement to use electronic signature technology by clicking the agreement below.

Agreement to Use Electronic Click Signature to Sign Documents

☑ I, HARRY POTTER, agree to sign these electronic PDF documents using "click" signature technology. I understand that a record of each document and my signing of it will be stored in electronic code. I intend both the signature I inscribe with the "click" signature technology and the electronic record of it to be my legal signature to the document. I confirm that the document is "written" or "in writing" and that any accurate record of the document is an original of the document.

Enter the Password and its Confirmation (if required) and click "Submit". The list of documents you need to sign will be displayed. Click the "Click to Sign" button to place your electronic signature on the document. Each form will be automatically presented for your review and signature.

User Name HPOTTER2
Employee SSN xxx-xx-1234
Password ••••••••
Forgot Password
Submit

The employer must submit an E-Verify request within three business days of their start day, or the date the employee starts to work for pay. Onboarding accommodates all categories for Overdue Reasons if you fail to submit the E-Verify query within three days, including

- Awaiting Social Security Number
- Technical Problems
- Audit Revealed that New Hire Was Not Run throughE-Verify
- Federal Contractor with E-Verify Clause verifying an existing employee
- Other

In Onboarding, the offer date corresponds to the date the employee accepts the employer's offer of employment. Start date is the date the employee starts work for pay, and the E-Verify hire date is calculated based on when the E-Verify activity is created. The Offer Acceptance date corresponds to the Hire Date in the Onboarding System. If the E-Verify date is less than the Start Date, then the Hire Date is the same as the E-Verify Create Date. If the E-Verify Create Date is equal to or greater than the Start Date, then the E-verify Hire Date is the same as the Start Date.

12.2.2 How to Configure E-Verify

Prerequisites

To activate E-Verify for your Onboarding system, SuccessFactors must create a Memorandum of Understanding (MOU) in order to act as your Employer Agent with the Department of Homeland Security (DHS). An MOU will need to be created for each Federal Employer Identification Number (FEIN) your company uses when hiring employees.

To request an MOU, complete the E-Verify tab of the Configuration Workbook, and email it to e-verifyadmin@successfactors.com. Companies are not allowed to maintain more than one MOU for each FEIN, so if your company has an existing account in E-Verify, it will need to be closed at the time your new Onboarding system goes Live. You should advise the E-Verify Administrator if there will be a need for the company to maintain two E-Verify accounts during the transition to Onboarding to avoid one of the accounts being terminated or rejected due to multiple accounts.

A standard project has four MOUs in scope. Additional MOUs require a change order.

Configuration prerequisites:

- Navigate to *Super Admin* > *E-Verify Options* and enter the *Client Company ID* and select an *Account Type*. The Client Company ID must match the Client Company ID provided by the E-Verify Administrator with the MOU. The default Client Company ID is 123456.

Procedure

1. You can set up E-Verify to trigger on any Corporate Structure level. Navigate to *Super Admin* > *See Also* > *Corporate Structure*.

2. Select the level you want E-Verify to trigger on, then select *See Also* > *Level Properties*.
3. In the *Name* field, enter **`ActivateEverify`**.
4. Enter **`StartEverifyProcess`** in the *Key* field.
5. Navigate to *Super Admin* > *Form I-9 Company Level*. Set the *BasicPilot* and *E-Verify Correct Data*values to *1-Company Level*. The standard Onboarding process should use the level that contains WorkState for the state W4 to trigger properly. BasicPilot which is E-verify should use the level that contains the StartEVerifyProcess key.

Set Form I-9 Company Level:

○ For All Processes

◉ By Each Process

Process Name		Level
CustomProcess1		6 - Job Codes
Onboarding	WorkState is in level 5	5 - Site
72 Hour		5 - Site
BasicPilot	Activate EV is in level 6	6 - Job Codes
I9 - Reverification		5 - Site
FormsOnDemand		5 - Site
Offboarding		5 - Site
E-Verify Correct Data		6 - Job Codes
E-Wage		1 - Legal Entity
Pennsylvania Residency		5 - Site

This setting determines which level of the Corporate Structure E-Verify will look at to determine if E-Verify is enabled.
6. Associate the standard *Onboarding* process with the level containing `WorkState` for the state W-4.
7. Associate the *BasicPilot* process with the level containing the `StartEVerifyProcess` key.
8. Navigate to *Super Admin* > *Features* and enable *I-9 Feature*. You cannot have E-Verify without I-9, so this feature must be enabled.
9. Navigate to *Super Admin* > *Processes*.
10. Enable the Everify and EVerify Correct Data processes, as well as the I-9 3 Business Days and I-9 Reverification processes.

To bypass the E-Verify and I-9 processes, create a custom process for hires who do not need to complete E-Verify/I-9. The usual scenario for this is to have one process for US-based employees and a customer process for international employees.
11. Navigate to *SuccessFactors HCM* > *Onboarding* > *Corporate Structure*. The E-Verify column must read *Yes* and the country name in the Country column must be in all caps and spelled out. For example, **`UNITED STATES OF AMERICA`**. If the country name is not listed in this format, correct the formatting in the data import.

> **Note**
>
> If the E-Verify column is set to *Yes* and the Country column is left blank, E-Verify will trigger. If the E-Verify column is set to *Yes* and the Country contains any country other than the US, E-Verify will not trigger.

Related Information

Onboarding Configuration Workbook

12.2.2.1 E-Verify for Customers with Multiple MOUs

Setting up E-Verify for customers with multiple MOUs requires special configuration.

Procedure

1. Navigate to *Super Admin* > *Corporate Structure* > *Level* > *Level Properties* and add two data keys for Level One of the Coprorate Structure. These keys are **`ActivateEVerify`** and **`EVerifyClientID`**.
2. Navigate to *Super Admin* > *E-Verify Options* and enable the *Calculate Client ID by Corporate Structure* option.
3. Navigate to *SuccessFactors HCM* > *Onboarding* > *Reference Files* > *Corporate Structures* and set the values for the two new keys. `ActivateEVerify` to **`True`** for the companies that should use E-Verify. Set the `EVerifyClientID` to the client company ID from the related MOU.

12.2.3 E-Verify Workflow

Once the Orientation step is complete and all documents are completed and signed, the E-Verify process begins.

When using E-Verify, the Department of Homeland Security can return these statements for the Initial Verification Step.

- Employment Authorized
- SSA Tentative Nonconfirmation
- DHS Tentative Nonconfirmation
- Case Incomplete
- Photo Matching Required

The Onboarding steps after E-Verify depends on the initial verification statement returned by the Department of Homeland Security. The I-9 automatically advances to the next step when you acknowledge the initial verification step by clicking *Next* or *Submit*.

Employment Authorized

The verification process is complete and no further action is required. The results are displayed on screen and an E-Verify Summary form is filed in the Document Center.

Social Security Administration Tentative Nonconfirmation

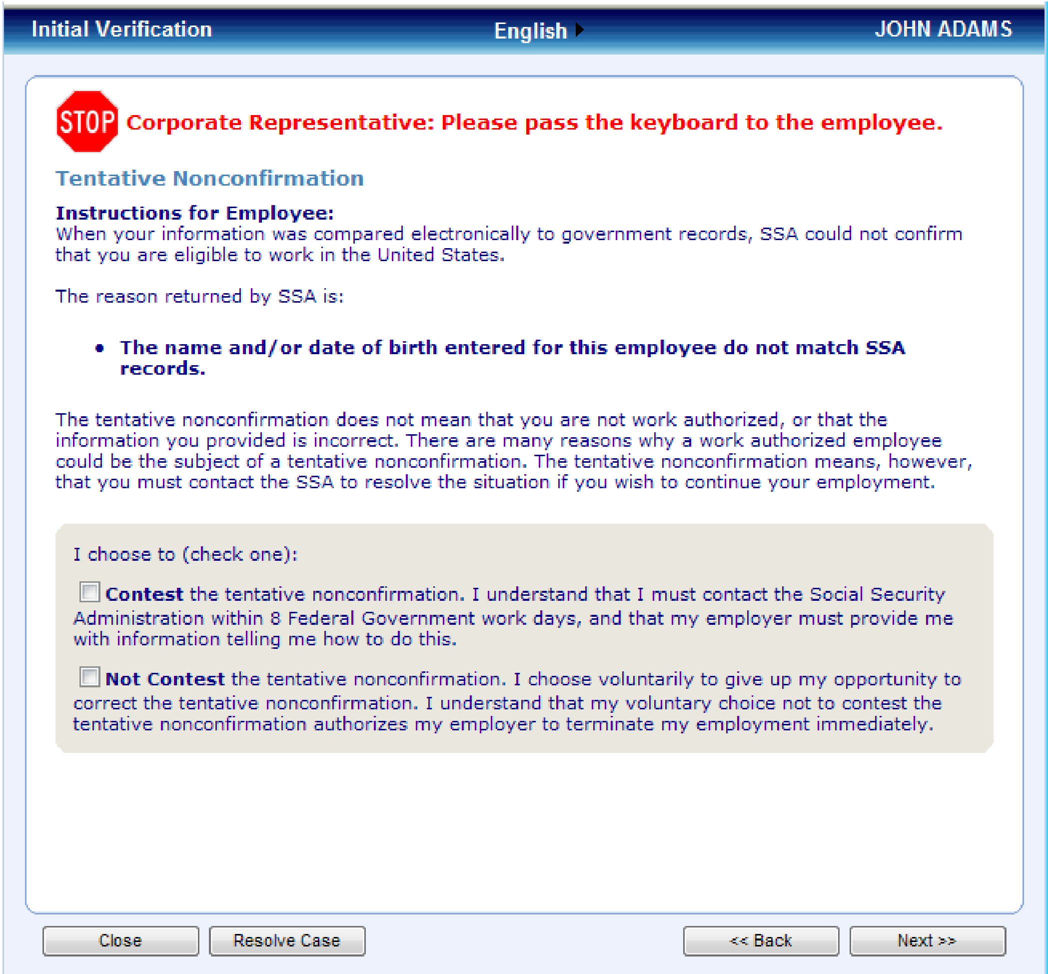
The SSA returns a tentative nonconfirmation statement when the information provided cannot be confirmed with the information in the agency's database, and the agency cannot confirm if the new employee is authorized to work. The corporate representative advises the new hire of the Tentative Nonconfirmation status, and the new hire can contest or not contest.

> **Note**
>
> When the E-Verify feature is set to Test, ONB is not sending any data to the real E-Verify system. Results are fabricated in the STAGE environment. Using different social security numbers will return different result in STAGE.

If the new hire chooses to not contest the status, he or she clicks *No Contest* on the Tentative Nonconfirmation panel. The Corporate Representative then prints and provides confirming No Contest documents to the new hire. The hiring process ends. If the employee does not contest the status, employment can be terminated without the company being civilly liable for the termination.

In this case Onboarding notifies the SSA of the No Contest and files a copy of the signed No Contest document in the Document Center.

If the new hire chooses to contest the status, he or she chooses *Contest* on the Tentative Nonconfirmation panel. The Social Security Administration referral process is initiated. The corporate representative prints and provides the confirming Contest documentation to the new hire. These documents are also stored in the Document Center.



The new hire has eight days to report to the SSA and resolve their status. The Work Queue activity displays *8-DAY SSA REFERRAL* during this period.

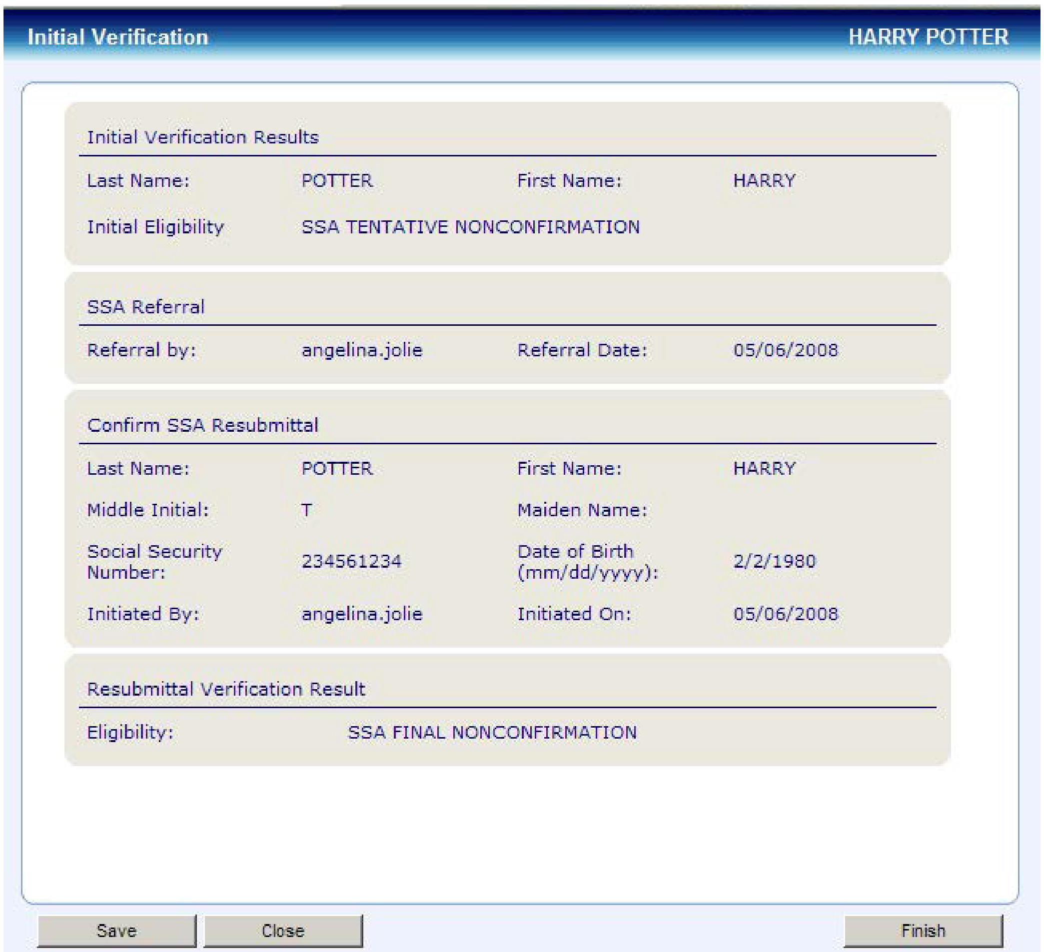
If the new hire is able to resolve the status with the SSA, the New Hire returns to the Coprorate Representative with their information that must be corrected. The Corporate Representative clicks the activity in the Work Queue, modifies the employee information, and clicks *Resubmittal*. This returns one of three statuses:

- *Employment Authorized*
- *SSA Final Nonconfirmation*
- *DHS Verification*

If the new hire does not report to the SSA, on day 10, the agency updates the status of the case to *No Show*. On Day 11, the Corporate Representative can click the activity in the Work Queue and then click *Resubmittal* to get a Final Nonconfirmation status. If the new hire goes to the SSA and the issues is not resolved, the case status is in Continuance. After 11 days, if the case remains in Continuance, the Work Queue status changes from *8-Day Referral* to *In Process*. The case remains in this status until the SSA resolves the case.

Social Security Administration Final Nonconfirmation

The SSA determines the new hire is not eligible to work in the US, either because the New Hire did not report to the SSA within eight days of a Tentative Nonconfirmation or the new hire is not properly authorized to work in the US.



Department of Homeland Security Verification in Process

If the new hire's information matches SSA records, but the SSA cannot verify employment eligibility for a non-US citizen, the system automatically forwards the case to the Department of Homeland Security for verification. The DHS has 10 Federal workdays from the date of a referral to respond to the case. While the DHS reviews the case, the Work Queue activity displays *DHS Verification in Process*. An automatic referral to the DHS can result in three statuses: Employment Authorized, DHS Tentative Nonconfirmation, or Case in Continuance. The DHS Tentative Nonconfirmation status means the new hire's eligibility cannot be verified and the new hire can contest the status or not. For the Case in Continuance status, the DHS needs more than 10 federal workdays to resolve the case. .

Department of Homeland Security Tentative Nonconfirmation

The employee can choose not to contest this status. The new hire selects *No Contest* on the Tentative Nonconfirmation panel, then the corporate representative prints and provides the confirming "No Contest" documents to the new hire. This ends the hiring process. If the employee does not contest the DHS TNC, employment can be terminated without the company being civilly liable for the termination. Onboarding notifies the Department of Homeland Security of the No contest, and files a copy of the signed No Contest document in the Document Center.

If the new hire chooses to contest the status, they select *Contest* from the Tentative Nonconfirmation panel, then the corporate representative prints and provides the confirming Contest documents to the New Hire. The new hire has eight federal work days to contact the Department of Homeland Security via a toll-free phone number. The new hire talks to an Immigration Status Verifier who asks questions in an attempt to resolve the case. The DHS has 10 federal workdays from the data of referral to respond to the case. The DHS response is sent through the E-Verify system. The corporate representative checks the Work Queue for the status of the case. When the case is being resolved, the activity status displayed is *8-Day DHS Referral* while the case is being investigated. The final resolution status displays as either Employment Authorized, DHS Employment Unauthorized, or DHS No Show The DHS No Show status occurs if the new hire does not contact the DHS within eight federal workdays, and if 10 federal workdays have passed since the original referral.

12.2.3.1 E-Verify for Remote Employees

The Remote Employee process is built in to Onboarding, for companies that do not have a local office where employees can have I-9 document verified and electronically signed.

The remote employee process varies during the standard Onboarding steps.

- **PostHire Verification Step**: The Hiring Manager initiates the remote onboarding process after entering the new employee's job information, but selecting `Yes` for the *Is the new hire a remote hire?* on the New Hire Set-Up Information panel.
- **New Employee Step**: The new employee receives an email notification, and logs in to SuccessFactors Onboarding to sign the appropriate documents with E-Signature. These documents are stored in the SuccessFactors Document Repository. The I-9 form must be physically signed by someone designated by the company as an Authorized Representative. The representative then faxes or emails the I-9 form to the corporate office. After the I-9 form is sent, the new employee clicks the link their notification to alert the Hiring Manager that the form has been faxed/mailed. Once the Hiring Manager is notified, the Onboarding process is complete.

Notifications – the interaction between the employee and hiring manager in completing the I-9 Form is supported by email notifications throughout the Remote Employee process starting from the New Employee Step and including E-Verify Process responses.

If the initial verification results return a status of *SSA Tentative NonConfirmation* for a remote employee, the hiring manager clicks the *Notify Employee* button.

If the employee chooses to contest, the Hiring Manager is notified, and clicks the *SSA Tentative Nonconfirmation* activity in the Work Queue. The employee's data is passed to the Signature Step, where the SSA Notice to Employee of Tentative Nonconfirmation and SSA Referral Letter are already signed by the remote employee, and are signed by the hiring manager.

After the forms are signed, the employee must take them to the Social Security Administration within eight days. Once the issue is resolved, the employee faxes the documents to the company and notifies the hiring manager. The Hiring Manager then completes the remote E-Verify process after receiving the notification.

If the employee chooses to not contest the Tentative Nonconfirmation status, the manager is notified when the panel is completed. The Hiring Manager then clicks the *SSA Tentative Nonconfirmation* activity in the Work Queue. The employee's data is passed to the Signature Step, where the SSA Tentative Nonconfirmation has already been signed by the remote employee. The document is signed by the hiring manager, and the Remote E-Verify process is complete. The activity will be saved in the Work Queue as 'completed' with *SSA Tentative Nonconfirmation – Not Contest* status and the form attached.

12.2.4 E-Verify FAQs

Are electronic signatures compliant?

Yes. Per both UETA and E-Sign guidelines, SuccessFactors Onboarding has followed best practices with its click signature signing ceremony and audit trail. SuccessFactors Onboarding has increased the security of the signed documents by encrypting the document itself to limit what can be done with the document and by adding a electronic hash document signature to show if the document has been changed since the original signing.

Can the client reconcile cases directly in the E-Verify site, if they were initially submitted in SuccessFactors?

They should only reconcile SuccessFactors cases in the SuccessFactors HCM Suite, not directly in E-Verify.

13 Business Configuration and Administration

13.1 Introduction to SuccessFactors HCM Onboarding

The administration of SuccessFactors Onboarding is primarily organized under the following menus:

- Notifications: At various steps in the process, notifications can be automatically sent to all internal and external resources for drug testing, background checks, uniforms, facility services, badge creation, and so on.
- Security: The Security section is where the rights of each user with access to SuccessFactors Onboarding are assigned.
- Reference Files: The Reference File section is where the Corporate Structure, Data Lists, Provisioning, Forms, and Banks are maintained.
- Admin Reports: The Admin Reports section is where you can produce Onboarding metrics and security reports.
- Settings: The Settings menu houses the Logos, Password Security, Manage Employees, Data Dictionary, Data Lists, Panels, Forms, Mail Queue and Audit Trail tools.

13.2 Corporate Structure

13.2.1 Why is a Corporate Structure Needed?

When SuccessFactors Onboarding is integrated with an Application Tracking System (ATS), the new hire record may contain the data about where the new hire will work and in what position. However, the corporate structure will be needed for the following reasons:

- There is an ATS but the corporate representatives need to select or change the work location or position.
- There is no ATS and the corporate representatives need to select or change the work location or position.
- To assign activities to a corporate user. This will ensure only the corporate users can see or execute activities for their location or department. A user assigned to a security group with no corporate or other filters could see all activities. Therefore assigning a corporate structure to a user is an important consideration.
- To assign the correct corporate address, federal and state EIN to forms such as the I9, W4, and state withholding.
  If the corporate address for these forms is used, only the “Company” level is needed. If the location address is used, then the “Location” level is needed as well.

13.2.2 What are the Components of the Corporate Structure?

Levels

The corporate structure in Onboarding is delivered with four (4) levels that can be independent of each other. The number of levels is determined during the joint application development sessions with the SuccessFactors Project Team. Once identified and configured, the levels can be configured and managed in the Reference Files section to correspond to your corporate hierarchy. Most often, the corporate structure is imported into Onboarding using an agreed upon, regularly established schedule. Alternatively, the HR Administrator can also maintain the Corporate Structure manually.

Reference File data containing your corporate structure can be auto-synched with ATS or HRIS systems or manually created within Onboarding. The steps to configure the corporate are similar for each level.

Fields and Property Values

Each organizational unit within the corporate structure can have a different set of property values. SuccessFactors Onboarding provides commonly used fields for all organizational units as well as a flexible set of property values. Standard fields are Company, Division, Location, Department and Position. The customer may change the names of these fields to correspond with their company's nomenclature.

Corporate Structure Relations

Organizational levels can be hierarchical, where each level dependent on previous level, non-hierarchical, where all levels are independent of each other; or mixed, which can include both dependent and independent levels.

Example

In this company there are 4 levels in the corporate structure – Region, Division, Location and Department. In a hierarchical structure, Divisions would be associated with a specific Region, Locations would be associated with one specific Division and Departments associated with multiple locations. Once this is configured, users are limited to a set of drop down lists that are filtered where a specific set of values are displayed. When employing a hierarchical structure, therefore, only the Divisions associated with a particular Region will be display in the wizard panels.

When deploying a non-hierarchical structure, the relationship between the structures can be independent from each other, or non-structured. In our former example where the corporate structure included Region, Division, Location, Departments, in a non-hierarchical structure the drop down lists displayed in the wizard panel where you chose Division could display all locations regardless of what Division they are assigned.

13.2.3 How do Customers Design their Corporate Structure?

Customers design their corporate structure by completing the following tasks:

1. Create the base information about the organizational unit (i.e. Name, address, EIN, contact information, whether E-Verify will be activated, etc.).
2. Establish the relationship (if any) between each of the organizational units. (i.e. indicate what locations may be associated with each division.).

> **Note**
>
> PS: The customer will receive a workbook for both tasks.
>
> SC: The foundation data in the sales demo instances includes the Corporate Structure. It does not have relations.

Once the workbook is complete, the SuccessFactors Project Team will configure the Corporate Structure.

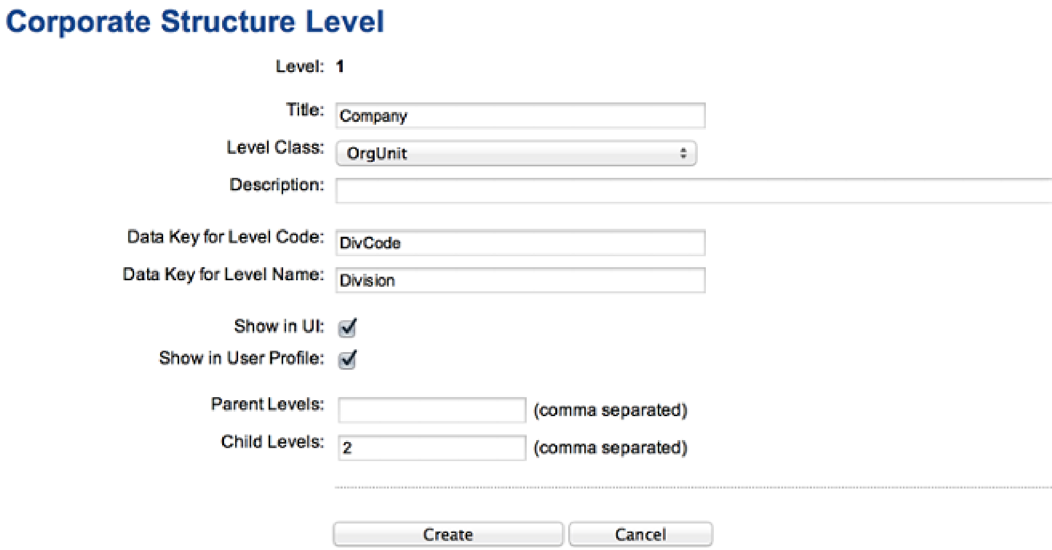
13.2.4 Corporate Structure Configuration in Super Admin

13.2.4.1 How to Add a Corporate Structure Level

Procedure

1. Log on to Super Admin.
2. Find your instance in the SF Accounts list and click the link.
3. Under *See Also*, select *Corporate Structure*.
4. Under *Tasks*, click *Add Level*.
5. Create the new level as follows:
    - *Level*: Enter the level number.
    - *Title*: Enter the title which will appear on the Corporate Structure tab.
    - *Level Class*: Select *OrgUnit*.
    - *Description*: Enter a description of the level, if desired.
    - *Data Key for Level Code*: Enter the data key code that corresponds to the level.
    - *Data Key for Level Name*: Enter the data key name that corresponds to the level.
    - *Show in UI*: Click the check box to display the level in Onboarding.
    - *Show in User Profile*: ???
    - *Parent Levels*: Enter the levels from the workbook, if applicable.

- *Child Levels*: Enter the levels from the workbook, if applicable.



6. Click *Create*.
7. Repeat steps 4 to 6 until all additional levels are configured.

13.2.4.2 How to Edit or Delete a Corporate Structure

Context

> **Note**
>
> **Tool: Super Admin**

Procedure

1. Under *See Also*, select *Corporate Structure*.
2. Select the level you want to edit from the *Corporate Structure Levels* list.

B0218 Corporate Structure Levels

Level	Title	Class	Parents	Children	Description
1	Company	OrgUnit		2	
2	Division	OrgUnit	1	3	
3	Department	OrgUnit	2	4, 5	
4	Location	OrgUnit	3	5	
5	Position	Position	3, 4		

3.
    - To change the level information, change the entries and click *Update*.
    - To delete the level, click *Delete* and confirm the popup.

> **Note**
>
> Do note change the *Data Key for Level Code* or *Data Key for Level Name* fields. These fields are used to populated standard US compliance forms, and changing them affects data population.

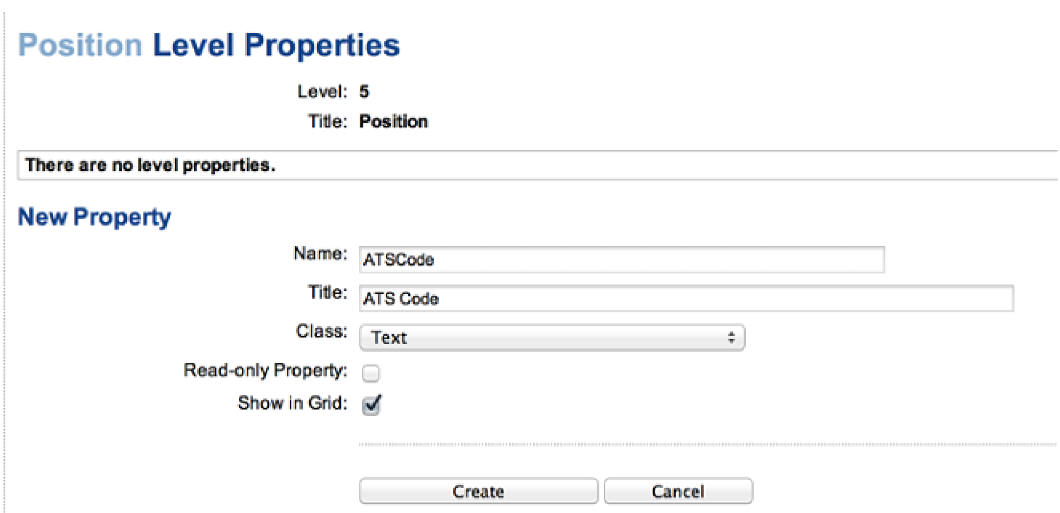
13.2.4.3 How to Create Level Properties

Context

> **Note**
>
> **Tool: Super Admin**

Procedure

1. Under *See Also*, select *Corporate Structure*.
2. Select the level you want to edit from the *Corporate Structure Levels* list.
3. Under *See Also*, select *Level Properties*.
4. Create the level property as follows:
    - Name: Enter the property name, similar to a code (no spaces or special characters allowed).
    - Title: Enter the property title that will display for data entry (no special characters allowed).
    - Class: Select the type of data for the property from the drop down list.
    - Read-only Property: Click the check box if the property is read-only.
    - Show in Grid: Deselect the check box if the property should not be displayed in the Property Levels list.



5. Click *Create*.

   The new level property will display in the *Level Properties* list. A new form displays for additional property creation. Repeat steps 4-5 as needed.

13.2.4.4 How to Delete a Level Property

Context

> **Note**
>
> **Tool: Super Admin**

Procedure

1. Under *See Also*, select *Corporate Structure*.
2. Select the level from the *Corporate Structure Levels* list.
3. Under *See Also*, select *Level Properties*.
4. Click *Delete* for the level property you wish to remove and confirm the popup.

13.2.5 Corporate Structure Configuration in Onboarding

You can view the Corporate Structure under *Reference Files* > *Corporate Structure*. For each level, a tab lists the corresponding unit and the appropriate properties can be viewed or edited whenever necessary.

13.2.5.1 How to Add or Edit an Organization Structure Unit

Context

> **Note**
>
> **Tool: Onboarding Administration**

> **Note**
>
> **PS**: This functionality should only be used for customers with a manually created Corporate Structure.
>
> **SC**: You can edit this information as needed for testing and scripted demos. Note that there is no sync for Corporate Structure.

Procedure

1. On the dashboard, under *Reference Files* select *Corporate Structure*.
2. Select the appropriate level.
3.
    - To add a new unit, click New.
    - To edit a unit, select it from the list and click *Edit*.
4. Enter or chang the unit's attributes in the Organization Structure Unit window:
    - Name: The name of the unit.
    - Level: The level of the unit (this field is "read only" for informational purposes if you are editing a unit).
    - Client ID: This value must be unique; typically this code matches the one in the customer's HRIS.
5. Select a property and enter a new value:
    - Address: The legal address of the level.
    - ATS Code: The code assigned in the customer's Applicant Tracking System.
    - City: The level's legal city.
    - Company: The company of the level; used for customers with multiple companies/entities.
    - Contact Phone: The legal phone number for the level.
    - Country: The legal country for the level. This is one of the fields that can trigger US compliance functionality.
    - EIN: Employer Identification Number is required when using forms such as the 8850, Federal W-4 or state withholding forms that must include an EIN (US only)

      > **Note**
      >
      > The EIN can be entered only for the units in the 1st level of the corporate structure.
    - E-Verify: Indicates if the E-Verify process will be activated for this unit; blank is the same as "No" (US only).
    - Federal Contractor: Indicates if the unit is subject to the Federal Acquisition Regulation (FAR) rule for Federal Contractors (US only).
    - Logo: This is for customers who are using different logos for different entities. The name of the logo in the Logo Collection will be entered here.
    - State: The legal state, province, etc. for the level.
    - Tax Number: The tax number needed for certain state withholding forms (CA, GA, HI, MO) (US only).
    - Zip: The legal zip code or postal code for the level.
6. Click *Submit*.

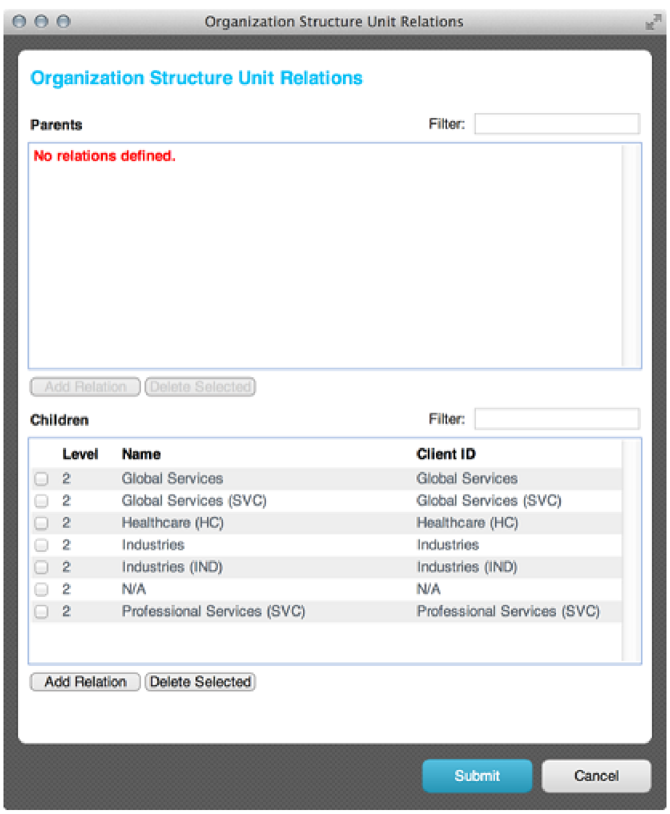
13.2.5.2 How to Create Corporate Structure Relations

Context

> **Note**
>
> **Tool: SuccessFactors Onboarding Administration**

Procedure

1. On the dashboard, under *Reference Files* select *Corporate Structure*.
2. Select the appropriate level.
3. Select a unit from the list.
4. Click *Relations*.



5. Click *Add Relations* in the *Parents* or *Children* section and then select the organization structure unit:
   a. Select the Level.
   b. Enter the first few letters of the unit name into the *Name of the Unit* field and click *Search*.

    c. Select the unit from the results.
    d. Click the *Select* button.
6. Repeat step 5 as needed.
7. Click *Submit*.

13.2.5.3 How to Remove Corporate Structure Relations

Context

> **Note**
>
> **Tool: SuccessFactors Onboarding Administration**

Procedure

1. On the dashboard, under *Reference Files* select *Corporate Structure*.
2. Select the appropriate level.
3. Select a unit from the list.
4. Click *Relations*.
5. Click the check box(es) next to the relation(s) you want to delete.
6. Click *Delete Selected*.

13.3 Document Center

The Document Center is a storage solution for complete and signed documents, for customers who do not have their own document storage, or want a separate storage solution for Onboarding compliance documents.

Access the Document Center from SAP SuccessFactors HCM *Onboarding* > *Document Center.* Using the simple search, you can search the Document Center for documents by name, or by the first or last name of the associated candidate.

Documents are saved in the Document Center at the end of the Onboarding process and remain until purged. The) Document Center cannot be used to store documents from other SAP SuccessFactors modules, only documents from the Onboarding process

The Advanced Search allows users to conduct a more details search, on document fields, operators, and condition values. You can also save these searches as templates to use in the future

13.3.1 Bulk Upload and Download

Users can upload and download documents in bulk from the Document Center.

To upload documents in bulk, click *Bulk Upload* under *SuccessFactors HCM* > *Onboarding* > *Document Center*. Here you can upload multiple documents at once. Along with the documents, upload a .csv index file, containing the following fields, separated by a comma

- physical file name
- Document Center internal field name
- field title
- field value
- field data type

Select the files, then click *Upload.* After uploading all documents, click *Next.* On the next screen, you can edit the index field from the .csv file by double clicking on the index field, entering a new value, and clicking *Enter.* Once you have finished updating the fields, click *Update indices* and *Finish.*

For a full listing of field definitions and a template .csv index file, click *Instructions* in the *Bulk Upload* window.

In the Document Center, you can also download all the documents associated with a new hire, by searching for the user, then clicking *Bulk Download.* You can also use this feature to download all documents of the same type, or meeting other criteria by using the advance search section. This bulk download through the UI will only download a maximum of 100 documents, and is intended as a one-off download.

Default system forms are text searchable, but those added by users are not searchable automatically. Users can choose to make the forms searchable at the time of upload. When Onboarding documents are exported some personal information, including document type and employee ID, can be added in the index file.

Using the Onboarding API, you can create a scheduled bulk download job to run at regular intervals. Refer to the Onboarding API documentation for a full list of the metadata available for each document type.

Related Information

Onboarding REST API details for Bulk Upload and Download

13.3.2 Document Purge

Customers who configure Document Purge can automatically delete documents on a scheduled basis according to company policy.

Some compliance forms, like the Form I-9 must be retained for a minimum period. After the mandated retention period has expired, customers can delete the forms.

The Document Purge job runs four times per day. Please wait 24 hours for scheduled deletion to appear in the Onboarding system.

13.3.2.1 How to Configure Document Purge

To use Document Purge, you must enable the feature and then configure rules to control the document delete process.

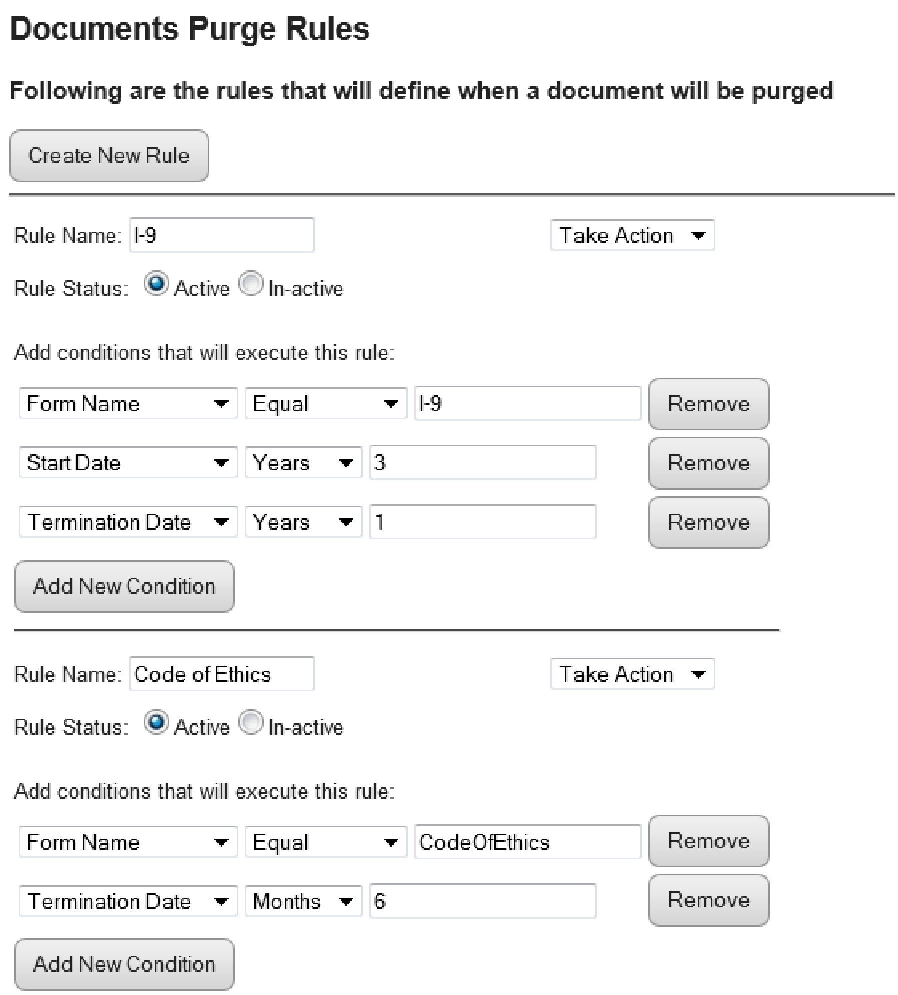
Context

The Document Purge menu option only appears for users in the HR Admin security group with the proper permissions.

Procedure

1. To grant *Document Purge* menu permissions to HR Admin users, navigate to *Onboarding* > *Security* > *HR Admin* and click on the desired group name.
2. Click *Edit*, then select *Other Properties* and enable the *Document Purge* checkbox.
3. To configure Document Purge rules, navigate to *Onboarding* > *Settings* > *Document Purge*.
4. Select *Create New Rule*.
5. Add a name for the rule, and select *Active* in the *Rule Status* field.
6. Select *Add New Condition*. You must enter at least two conditions, one specifying the form name, and another related to a date.

   All conditions must be satisfied in order to delete a document. The "AND" operator is used between conditions. If "OR" conditions are needed, configure multiple rules for the same Form Name.



7. Click *Save*.

> **Note**
>
> The Document Purge is a complete delete. Once documents have been deleted via Document Purge, they cannot be retrieved. Make sure your rules for Document Purge are configured and tested carefully.

13.4 Security

13.4.1 How to Create a Group

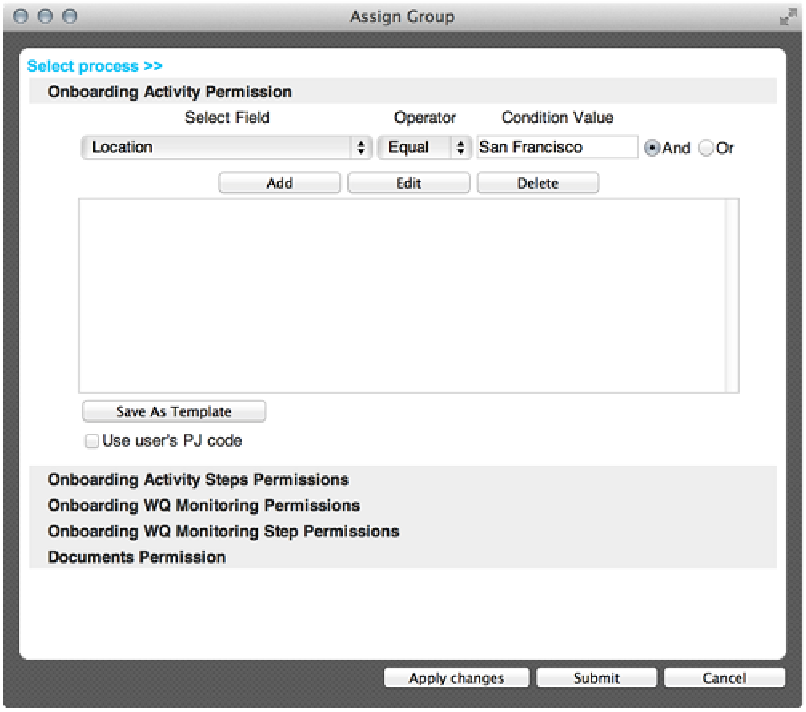
Procedure

1. Go to *SuccessFactors HCM* > *Onboarding* > *Security* > *Group* and click *Create*.
2. In the *Create Group* window, enter the name of the group. The name can be any alpha-numeric word or words. For clarity and ease of management, the group name should correspond to the group's identity or function.
3. From the *Role* dropdown list, select a role type.
4. Select additional functions for users of this group:
   - Allow view glance
     Allows users to view the data entered through the process steps.
   - Allow delete HRData
     Allows users to delete an activity from the Work Queue.
   - Allow restart/edit steps
     Allows users to restart or edit a step that has been completed. On the Onboarding Dashboard, the user can click an icon under *Restart* to restart the last completed step for a candidate. You cannot send users back to a previous step, but can only restart the most recently completed step.

     > **Note**
     >
     > Step restart is not available for E-Verify processes.

   - Report Permissions
     Allows users to create and view reports.
   - Reassign Activity
     Allows users to re-assign an activity to any other user(s) from Work Queue.
5. If you do not need to assign permissions, click *Create* which completes the group creation.

   If you need to assign Activity, Monitoring, or Document permissions, click *Create and Assign* and proceed as with the following steps.
6. Click *Select Process*, then choose the process from the dropdown list. The available permissions are based on the selected role and process.
   a. Click *Assign Activity Permissions*.
   b. Create the activity permission assignment formula based on the customer's requirements:
      - Field: A field in the Onboarding database.
      - Operator: The operator can be *Equal* or *Not Equal* to a certain condition value.
      - Condition Value: Any line containing alphanumeric or other symbols, by which the condition may be activated.
   c. Click *Add*.
   d. If required, specify further fields and conditions and select the *And* or *Or* operator to link them to the previous.



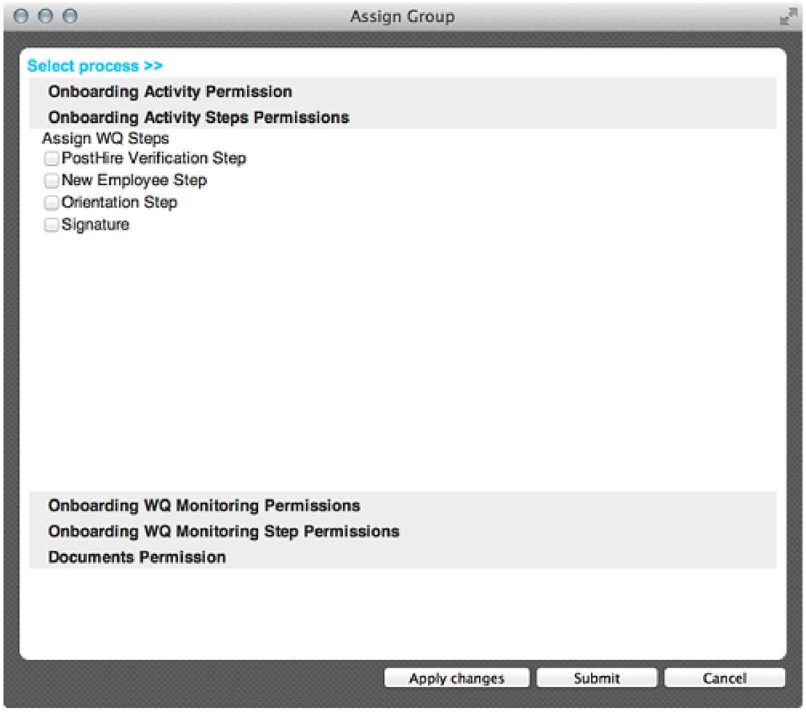
If you want to edit a condition, select it in the list of conditions and click *Edit*. Edit the condition's parameters and click *Add*.

e. You can save the formula as a template by clicking *Save as Template*.

f. If the customer is using PJ codes (position/job codes) that need to be used for activity permissions, select *Use user's PJ code*.

g. If the configuration is complete, click *Submit* to save the changes and close the window. If additional configuration is needed, click *Apply Changes* button to save the changes and keep the *Assign Group* window open.

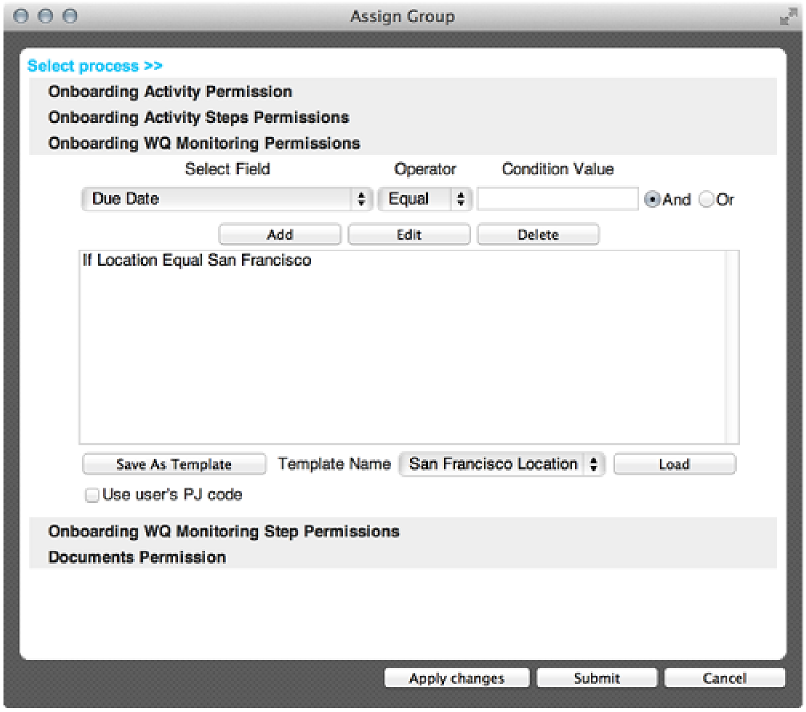
7. To define the activity steps permission:
   a. Select *Activity Steps Permissions*.
   b. Select the workflow steps. The steps vary based on the process selected.



c. To save the changes and close the window, click *Submit*. To save the changes and keep the *Assign Group* window open, click *Apply Changes*.

8. If you want the group to monitor the work queues of other groups, make the following settings:
   a. Select *WQ Monitoring Permissions*.
   b. Create the assignment formula based on the customer's requirements:
      - Field: A field in the Onboarding database.
      - Operator: The operator can be *Equal* or *Not Equal* to a certain condition value.
      - Condition Value: Any line containing alphanumeric or other symbols, by which the condition may be activated.
   c. Click *Add*.
   d. If required, specify further fields and conditions and select the *And* or *Or* operator to link them to the previous.

      In the example below, the group will be responsible only for new hires that are not in Company 2222.



e. You can save the formula as a template by clicking *Save as Template*.
f. If the customer is using PJ codes (position/job codes) that need to be used for activity permissions, select *Use user's PJ code*.
g. To save the changes and close the window, click *Submit*. To save the changes and keep the *Assign Group* window open, click *Apply Changes*.

9. Define which work queue steps the group members will be allowed to monitor:
   a. Select *WQ Monitoring Step Permissions*.
   b. Select the work queue steps.
   c. To save the changes and close the window, click *Submit*. To save the changes and keep the *Assign Group* window open, click *Apply Changes*.
10. Determine if this group will have access to the documents in the Work Queue
   a. Select *Documents Permission*.
   b. Select the *View Activity Documents* checkbox.
   c. Click *Apply Changes*.
11. When all permissions are assigned, click *Submit*.

13.4.2 How to Edit User Data

Since user data is synced nightly from SuccessFactors HCM, SuccessFactors should remain the system of record for any changes. However, Solutions Consultants who need to stage employee information for scripted demos might need to modify the user data directly in Onboarding based on the customer's requirements.

Context

> **Note**
>
> **Tool: SuccessFactors Onboarding Administration**

Procedure

1. Under *Security*, select the *Users* tab.
2. Select the desired user and click the *Edit*.
3. Add or modify the desired information. Note that the Login cannot be modified.
    - *First Name:* Populated from SucessFactors HCM and/or Onboarding
    - *Middle Name*: Populated from SuccessFactors HCM and/or Onboarding
    - *Last Name*: Populated from SuccessFactors HCM and/or Onboarding
    - *Email*: Populated from SuccessFactors HCM and/or Onboarding
    - *Title*: Populated from SuccessFactors HCM and/or Onboarding
    - *PJCode*: This is the user's Position Job Code. It is an additional alpha-numeric security condition. It is used to determine activity permissions of a specific process that will be assigned to users. Populated from SuccessFactors HCM and/or Onboarding
    - *External Id*: This is an alpha-numeric identifier of the Onboarding user with the user in another system such as the ATS.
    - *Delegate*: This delegates rights and permissions to execute activities within the system to another user. If you selected a delegate, select one of two types of delegation:
        - Permanent: Selected delegatee will have rights and permissions to execute the user's functions permanently
        - Temporary: Selected delegatee will have rights and permissions to execute the user's functions temporary within the frames of defined period From and To.
    - *User role*: Assign the appropriate user role:
        - Hiring Manager: User is automatically assigned to all groups with Hiring Manager role.
        - Recruiter: User is automatically assigned to all groups with Recruiter role.
        - HR Manager: User is automatically assigned to all groups with **HR Manager** role.
        - Monitor: User is able to monitor all Onboarding processes.
        - Employee: User is an employee who has been onboarded or is the process of being onboarded
        - Lock Out User: Indicates if the user has been locked out of Onboarding due to multiple failed login attempts.

4. Click *Update* button.

13.4.3 How to Delete a User

Context

> ℹ Note
>
> **Tool: SuccessFactors Onboarding Administration**

PS: This function would most likely only be used during testing, if at all.

SC: This function would most likely be used to remove users that were only created for a particular scenario for a scripted demo.

Procedure

1. Select the user from the list of users.
2. Click *Delete*.
3. Click *OK* in the delete confirmation message.

13.4.4 How to View User Relations Based on the Corporate Structure

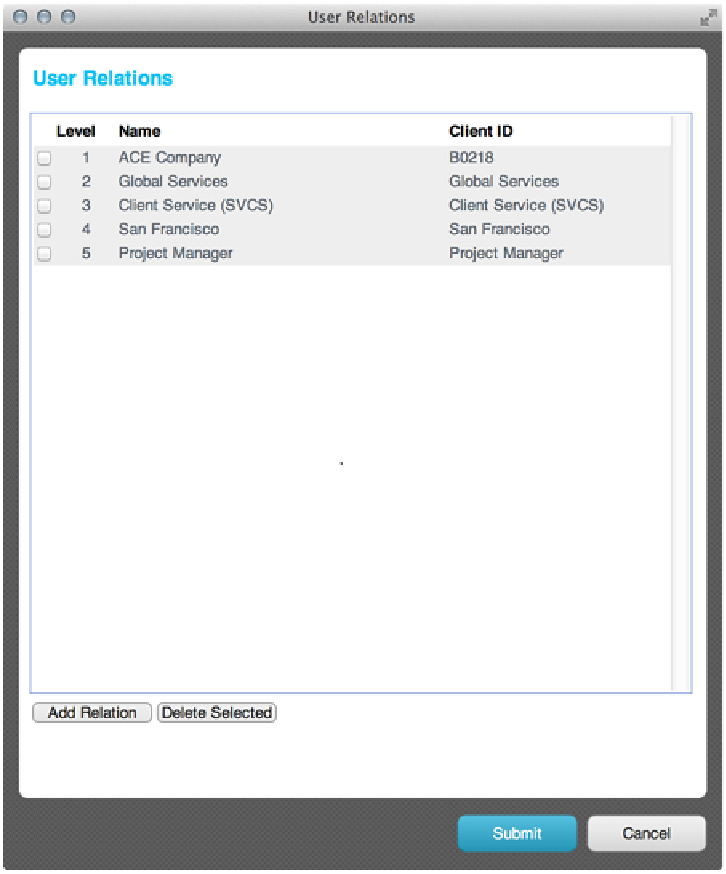
Customers can choose to have user security based on Corporate Structure – the hierarchy of their organization. If this is the case, the Relations between the hierarchy levels will automatically populate from the Corporate Structure.

Context

> ℹ Note
>
> **Tool: SuccessFactors Onboarding Administration**

Procedure

1. Select the user from the list of users.
2. Click *Relations*.
3. View the user's relations from the Corporate Structure.



13.4.5 How to Add or Delete Relations

Context

> **Note**
>
> **Tool: SuccessFactors Onboarding Administration**

PS: Since this information will populate automatically you will not use this functionality.

SC: Since this information will populate automatically, it is unlikely that you will need to change it for a scripted demo. However, it is possible to do so in case a relation change for a single user is required for your scenario to work.

Procedure

1. Select a user from the list of users.
2. Click *Relations*.
3. To add a relation:
    a. Click *Add Relations*.
    b. In the *Select Organization Structure* window select the level of corporate structure from the dropdown list.
    c. Click *Search* and select the desired option from the result list.
    d. Repeat these steps until all relations are defined for the user.
    e. Click *Submit* to save all of the changes and return to the list of users.
4. To delete a relation:
    a. Click the check box next to the relation that you want to remove.
    b. Click *Delete Relation*.
    c. Click *Submit* to save all of the changes and return to the list of users.

13.4.6 User Login Access

Users can gain access to Onboarding by entering Account, User Name and Password on the Onboarding login page, or via Single Sign On (SSO) by using a link on the corporate intranet site. By using custom attributes in the User profile you can control the access point. For example, a user can be granted permission to access Onboarding via login page, SSO string or both.

There are two attributes that determine which login process will be allowed:

- Login.SSO.Enabled
  This allows access from the corporate Intranet site using Single Sign On.
- Login.Interactive.Enabled
  This allows access from the Onboarding site.

The default value to allow access is “1”. When the value is “0”, the related Login (SSO or Interactive) is disabled. If SSO is used, these attributes are automatically added to the User profile.

13.4.7 How to Reset a User's Password

Context

This functionality should only be used for users who are staged for testing or scripted demos, or for external resources that do not have access to SuccessFactors HCM. Password management for corporate users should always be performed in SuccessFactors HCM.

Procedure

1. Select the user whose password is to be reset.
2. If the user is locked out, click *Edit*, deselect *Lock out user* and click the *Submit*.
3. Click *Reset Password*.
4. Enter new password.
5. Click *Reset*. The user password is reset.
6. Click *Close* on the confirmation message.
   When the user logs in they will be prompted to update their login credentials.

13.4.8 Assigning Users to Groups

Once groups and users are established in Onboarding, users can be assigned to groups. Group assignment determines the degree of access to Onboarding appropriate to the user's position and duties. In order for a user to have access to Onboarding, the user must be assigned to a group.

There is a nightly sync from SuccessFactors HCM to Onboarding that will provide the user mapping for all roles, including the Onboarding permissions. Therefore, the Assign Groups to Users functionality is generally used to stage users for testing and scripted demos, or to assign group permissions to external resources that will not have access to SuccessFactors HCM.

> **Note**
>
> If you modify the permissions for a user in SuccessFactors HCM (as opposed to one created manually in Onboarding), the changes will be overwritten by the nightly sync.

There are two ways to assign users to groups:

- You can assign multiple users to one group using *Assign Users to Groups*
- You can assign one user to multiple groups using *Assign Groups to Users*

13.4.8.1 How to Assign Multiple Users to a Group

Context

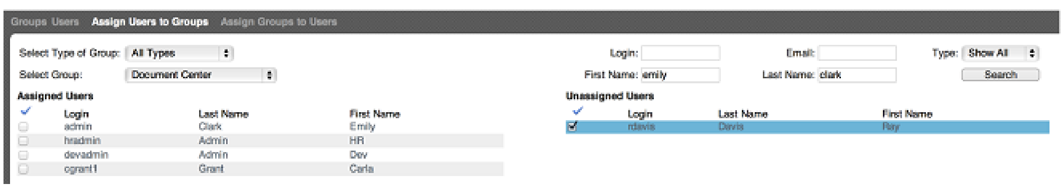
> **Note**
>
> **Tool: SuccessFactors Onboarding Administration**

Procedure

1. Under *Security*, select *Assign Users to Groups*.
2. Select the type of group and the group.

   > **Note**
   >
   > The roles Hiring Manager, Recruiter, and HR Manager are not included in the *Select Type of Group* dropdown list. You can assign users to these groups only by checking the appropriate check box when you create a user.

   All users assigned to the group will be displayed in the *Assigned Users* panel. All unassigned users will be displayed in the *Unassigned Users* panel
3. On the *Unassigned Users* panel, select the appropriate users.

4. Click the arrow button to move them to the *Assigned Users* panel

   To remove users from a group, select the users in the *Assigned Users* panel and then click the right-pointing arrow button to remove the user from the group.

   > **Note**
   >
   > The permissions are changed immediately. There is no “save” function.

13.4.8.2 How to Assign an User to One or Multiple Groups

Context

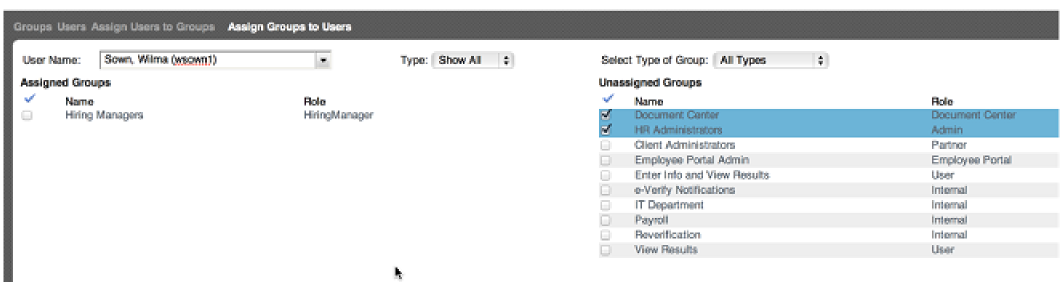
ℹ Note

Tool: SuccessFactors Onboarding Administration

Procedure

1. Under *Security*, select *Assign Groups to Users*.
2. Enter the user name and users matching the criteria will be displayed. Select the desired user.

   All groups assigned to the user will be displayed in the *Assigned Groups* list. All groups not assigned to the user will be displayed in the *Unassigned Groups* list.
3. In the *Unassigned Groups* list, select the checkbox(es) next to the group name(s).



4. Click the left-pointing arrow button to move the groups to the *Assigned Groups* list.

   To remove groups from a User's security profile, select the checkbox(es) next to the *Assigned Groups* name(s) and then click the right-pointing arrow button.

   ℹ Note

   The permissions are changed immediately. There is no "save" function.

13.4.9 Setting Up Forms to be E-Signed

A form can be e-signed at the end of any step in any process. The key is that the forms must be in a Group assigned to the Process. For each form you can then define who needs to sign them to complete a step, for example, the manager or the employee.

13.4.9.1 How to Add Forms to a Forms Group

Context

> **Note**
>
> **Tool: SuccessFactors Onboarding Administration**

Procedure

1. Under *Reference Files*, select *Forms* from the dropdown menu.
2. Click *New*.
3. Enter a Group Name.
4. Select a process.
5. If you do not want the group to be editable, select *Lock*.
6. Click *Create*.
7. Select your group from the list of groups and click *Move*.
8. Choose your group from the *Select Group* dropdown list.
9. Select the forms to move. Use `Ctrl` or `Shift` to select multiple files.
10. Click *>* to move the forms.
11. Click *Close*.

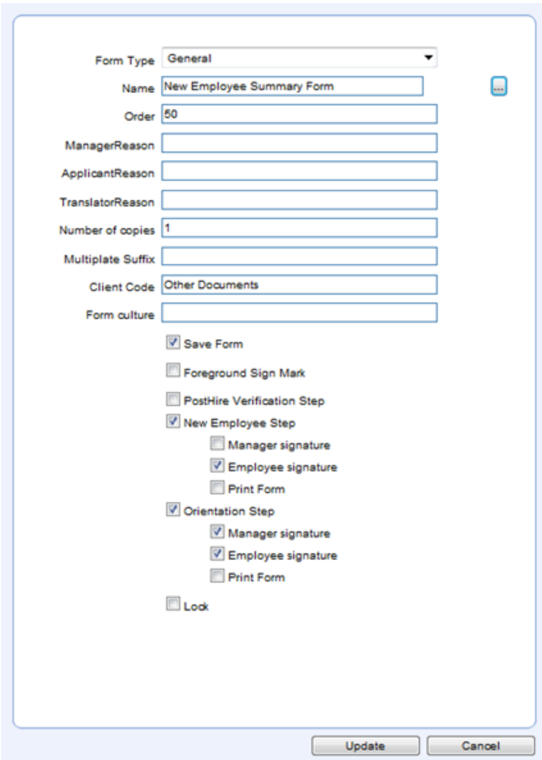
13.4.9.2 How to Set up Form Properties

Context

> **Note**
>
> **Tool: SuccessFactors Onboarding Administration**

Procedure

1. Click on a group name, select a form from the forms assigned to the group and click *Edit*.
2. Select which signatures will be required at a specific step.



3. Select if the form is to be printed after it is signed.
4. Click *Update*.

13.4.10 Named Users

Context

There are three default "named user" groups in the Onboarding system: Hiring Manager, Recruiting, and HR Manager. A named user is specified on the job requisition as associated with a specific hire. If the named user role is the only role a user belongs to, then the user only sees those activities in the Work Queue for which they are a named user.

Users are named on the Job Requisition and assigned to these named user groups after the import. You can also add a field to the Post Hire Verification step, and selecting a user to associate with the hire. To view these users, navigate to *Super Admin* > *Named User Types*. To assign a named user to a step in a process:

Procedure

1. Navigate to *Super Admin* > *Named User Types* to view the named user groups in the system. Click *Add Named User Type* to add new named users. You can also select the existing named user groups and change the *Title* of the named user group.
2. Under *Super Admin* > *Processes*, select the process you want to assign named users to, for example the Post Hire Verification step of Onboarding.
3. Select *Assign Options*
   a. To specify a named user group, select *Key* in the *Mode* column.
   b. Enter the corresponding key in the *Value* column. This value corresponds to the key for the named user group found in *Super Admin* > *Named User Types*. Surround the key with curly braces, for example {Recruitier}.
   c. Select *Auto* in the *Mode* column to follow the default step assignment logic.
   d. Select *None* in the *Mode* column if the step should not be reassigned at any time.
4. Navigate to *SuccessFactors HCM* > *Onboarding* > *Settings* > *Groups* and select the desired role.
5. Click *Assign*, then choose *Onboarding Activity Steps Permission.*
6. Grant permissions for the desired step.

13.5 Panel Designer

All processes in SuccessFactors Onboarding are completed using wizards that will guide the user through each step. Smart data entry panels in each wizard collect all unique data necessary to populate forms and create files needed for applications such as payroll, time, attendance, and HRIS.

When designing panels in Onboarding, it's important to consider the experience of the user, as well as performance considerations. Although it may seem natural to reduce the number of clicks, it is best pracice to create several smaller panels with fewer fields, rather than one large panel with many fields.

It's also best practice to only include six to eight fields on a single panel. When configuring picklists on panels, it's best to include no more than four per panel. Including more picklists can cause slow performance.

Panel Types

SuccessFactors Onboarding has three types of panels:

- **Compliance:** Compliance panels are used to collect data for US federal and state forms, such as Form I-9, W-4 and State Withholding. These panels cannot be edited by the Onboarding Administrator and are only updated by Engineering when the forms change.
- **Standard:** Standard panels are used collect data for standard corporate forms delivered with SuccessFactors Onboarding such as the Direct Deposit and Emergency Contact forms. The Onboarding Administrator can edit a number of these panels in the Panel Designer.

- **User Defined:** User defined panels are used to collect customer specific data, most often to populate customer specific forms. The Onboarding Administrator can create and edit these panels in the Panel Designer.

13.5.1 How to Edit Panels

The Onboarding Administrator can edit the properties, the order, and the Advanced Conditions for user-defined panels and for a select group of Standard panels in the Panel Designer.

Context

The Panel Design Workspace contains all of the tools and controls that are needed to ensure that the panel is designed to the agreed-upon specifications.

All User Defined and select Standard panels can be translated with the SuccessFactors Localization tool. This tool must be installed on the same server as the Onboarding instance, and is not part of SuccessFactors Onboarding.

> **Note**
>
> If an Advanced Condition is configured based on a picklist value, changing the picklist at a later date will break the Advanced Condition.

Procedure

1. Navigate to the panel to be edited, either under its corresponding process or in the *User Defined Panels* section.
2. To add a feature to the panel, click and drag it from the left side of the Panel Workspace onto the Panel. Available Panel Designer features:
    - Label
    - Section
    - Table
    - Text Box
    - Radio Button
    - Check Box
    - Date
    - Time
    - Drop Down List
    - Combo Box
    - File Upload (Maximum file upload size is 2 MB) Uploaded files can be included in the print package.
    - Policy Link
    - User List

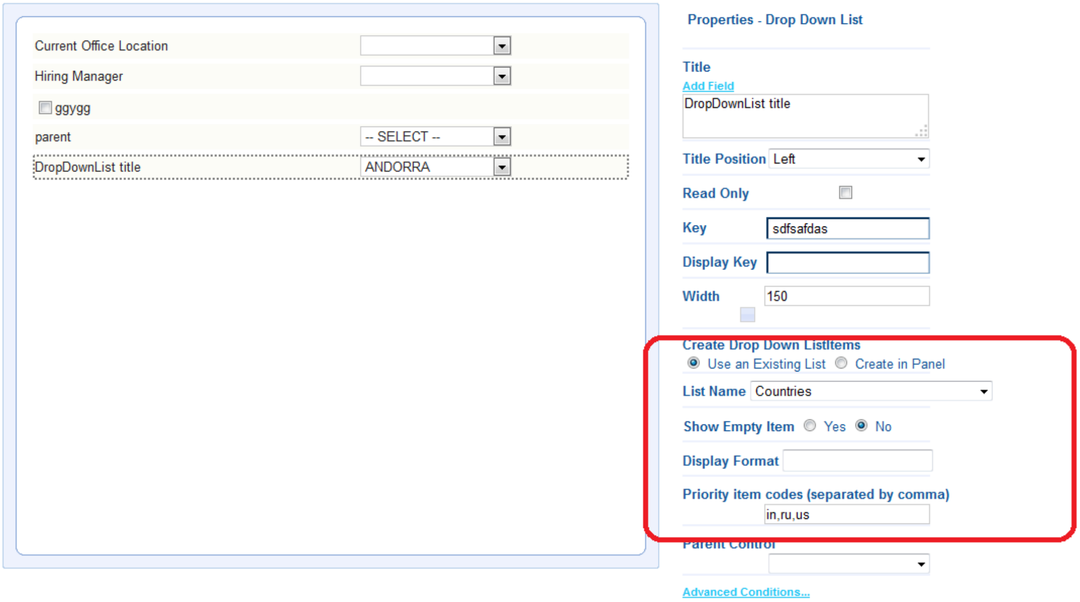
- Corporate Structure List
- SF HCM Picklist

> **Note**
>
> To specify a date format in Panel Designer, you must first select a type of date formatting (short, long, or otherwise) in *Date Format* dropdown. The available date formats for a locale are driven by the locale configuration performed in Super Admin. However, in order to see the configured locales for a specific panel, the user must click *Preview* in Panel Designer in order to see the panel in its configured locale. Doing so properly displays the chosen date format for the locale as configured in Super Admin.

a. Certain fields can be made read-only in the Panel Designer.
   - Text Box
   - Radio Button
   - Checkbox
   - Date
   - Time
   - Drop-down List
   - Combo Box
   - User List
   - Corporate Structure List
   - Section
   - Table

3. Once a feature has been added to the panel, the Onboarding Administrator can define its properties, add fields or Existing conditions.
   a. The Onboarding Administrator can also edit existing features by double-clicking on them in the Panel Workspace.
   b. For fields added in Panel Designer, a user can specify *Priority item codes*. Codes entered in this field are given priority over others. For example, for a country-related field, you could enter the two-letter country codes of countries you would like to appear first. These countries would override the existing priority of

alphabetical order.



c. Once a feature is defined in Panel Designer, the Onboarding Administrator can define parent-child relationships for fields using the *Parent Control* property drop-down list.When a user selects a parent value in panel designer, a selection of child options is displayed. For example, if a user selected the United States from a list of countires, a second dropdown with the states of the US would appear. The parent-child relationship is available for dropdown lists, combo boxes, and corporate structure dropdowns.

> **Note**
>
> When defining state-country relations, make sure to choose the Table Mapped Countries list in the *List Name* field, rather than the Global DB Countries list.

If only one dropdown is defined on the panel, the Parent Control property will not be available.

Only fields on the panel and with a corporate structure control are available for defining a Parent Control propery.

d. The following standard drop-downs can be added under *List Name*

- Schools
- Countries
- Relationships
- States/Provinces
- Race
- Gender
- Military Branch
- Military Era
- Suffix
- Users and subset of users (Hiring Managers, etc)
- Corporate Structure, ability to select a particular level
- Full/Part Time
- Regular/Temporary

- Employee Pay Type
- Pay Rate Per
- FLSA Status

> Note
>
> When working with addresses, be sure to add the `MailCountryAddress` and `MailCountryState` fields, which makes country and state data easier to work with on Panels.

4. Click the *Save* button in the Properties pane to view the changes in the workspace.
5. Click the *Save* button in the workspace to save the panel.

Related Information

[Recruiting, Onboarding, and Employee Central Integration Guide]
[Localization in Onboarding [page 67]]

13.5.1.1 How to Add a Custom Validator

Context

Custom validators are supported for SuccessFactors HCM picklists.

Procedure

1. Navigate to SAP SuccessFactors HCM and select *Onboarding* > *Settings* > *Panels*.
2. Select any editable panel and the field you would like to create a custom validator for.
3. Navigate to the *Validators* of the field, then enter your custom validator.
   For example, `^\d{5}$` All custom validators must start with "^\d." Then a number to determine a range can be added, and the validator is closed with "$." This example creates a validator that requires a five-digit number for a field, or else an error will occur.
   You can create validators with concatenated numbers, for example, `^\d{5}-^\d{4}$` would format numbers for zip codes. To format numbers for a phone number field, you chould use `^\d{3}-\d{4}$` or `^\d{3}-\d{3}-\d{4}$`.
   Date of birth cannot be greater than current date (Replace `testdate` with your field)

```
var fieldDate = context.testdate.value;
var v = fieldDate.split('/');
var fieldDateObj = new Date(v[2],v[0]-1,v[1]);
```

```
var currentDate = new Date(); if(currentDate>fieldDateObj)
{
var dateDiff =
currentDate.getTime()-fieldDateObj.getTime();
var days = dateDiff/(24 * 60 * 60 * 1000);
if((18*365)<=days)
{
return true;
}
else
{
return false;
}
}
else
{
return false;
}
```

Date of birth should not be less than 18 years (Replace `testdate` with your field)

```
var fieldDate = context.testdate.value;
var v = fieldDate.split('/');
var fieldDateObj = new Date(v[2],v[0]-1,v[1]);
var currentDate = new Date();
if(currentDate>fieldDateObj)
{
return true;
}
else
{
return false;
}
```

The total percentage share of accumulations cannot exceed 100%. If you have four fields in the panel, the sum of those fields cannot exceed 100%. Replace `text1` with the appropriate field value.

```
if (parseInt(context.text1.value) + parseInt(context.text2.value) <= 100)
{
return true;
}
else
{
return false;
}
```

Routing Number validator. For the Routing Number, you can also add a Regular Expression validator to check the length of the routing number `^((0\d)|(10)|(11)|(12)|(2[1-9])|(3[0-2])|(6[1-9])|(7[0-2])|(80))\d{7}$`. These examples only work for US-based routing numbers.

```
var numbers = [parseInt( context.control.value.charAt(0)),
                            parseInt( context.control.value.charAt(1)),
                           parseInt( context.control.value.charAt(2)),
                           parseInt( context.control.value.charAt(3)),
                           parseInt( context.control.value.charAt(4)),
                           parseInt( context.control.value.charAt(5)),
                           parseInt( context.control.value.charAt(6)),
                           parseInt( context.control.value.charAt(7)),
                           parseInt( context.control.value.charAt(8))];

            // There is a check digit, the ninth digit. It's calculated based on
the first eight digits.
            // The first, fourth and seventh of the eight are each multiplied by
3;
            numbers[0] *= 3;
```

```
            numbers[3] *= 3;
            numbers[6] *= 3;
            // the second, fifth and eighth each by 7;
            numbers[1] *= 7;
            numbers[4] *= 7;
            numbers[7] *= 7;
            // and the third and sixth by 1.

            // The eight products are added.
            var checkNumber = numbers[0] + numbers[1] + numbers[2] + numbers[3]
+ numbers[4] + numbers[5] + numbers[6] + numbers[7];
                  // To determine the check digit, subtract the sum of the
products from the next multiple of 10.
            if (Math.floor(checkNumber / 10) * 10 != checkNumber)
            {
                 return (numbers[8] == (Math.floor(checkNumber / 10) * 10 + 10 -
checkNumber));
            }
            else
            {
                 return (numbers[8] == 0);
            }
            return  true;
```

For examples of regular expressions, see http://www.regexr.com/

Note

Custom validators are available for localization.

13.5.1.2 How to Map Picklists and Lookups Using Panel Designer

It is best practice to configure all picklists for Onboarding using SuccessFactors HCM picklists.

Context

Users no longer need to manually map SuccessFactors HCM picklists to Onboarding lookups. They can now map picklists for fields on user-defined panels in Panel Designer using the*SF HCM Picklist* control.

Note

If an Advanced Condition is configured based on a picklist value, changing the picklist at a later date will break the Advanced Condition.

SuccessFactors HCM Picklists support these special characters: `~ ` ! @ # $ % ^ & * ( ) - _ + = { [}] \ | ' " : ; < > ? / , . ç`

To display picklist options alphabetically, navigate to *Provisioning* > *Company Settings* > *Sort Picklists Alphabetically*

Procedure

1. Configure the data fields you would like to map in the Data Dictionary. Navigate to SAP SuccessFactors HCM *Onboarding* > *Settings* > *Data Dictionary.* In the *Type* field, choose **`SF HCM Picklist.`**
2. Select an *Integration Mode.* This property specifies the value used for communication between SAP SuccessFactors HCM and Onboarding
   - Suite: Sends the Option Id from RCM to ONB and considers the value sent from ONB to EC as the Option ID. Recommended for RCM-ONB-EC integrations where RCM and EC use the same picklist names.
   - Code Based: Uses the external code of the picklist between SuccessFactors RCM and Onboarding. The external codes for the SF picklists should be unique and not empty.
   - Label Based: The label of the option in a specified locale will be used for communication. The SF HCM locale (en_US, fr_FR, etc.,) should be specified in the locale textbox. The labels for the picklist options in the specified locale should be unique and not empty. This mode is preferred when there are any external integrations (External ATS / External HRIS system). For Code Based and Label Based modes, a picklist name should be selected in the SF HCM Picklist Name dropdown.

   > **Recommendation**
   >
   > If RCM and EC use different picklists, then either Code Based or Label Based mode should be used. Specify the EC picklist name in the data dictionary field

   .
3. Navigate to *Settings* > *Panels.* Add the *SF HCM Picklist* control to the desired panel.
4. Select the name of the SF HCM picklist in the *Picklist Name* field .
   The values from the SF HCM picklist will be populated in the preview page of the user defined panel. This can be used to verify if the correct picklist name was chosen in the panel definition.

Related Information

Mapping Recruiting-Onboarding Enum Picklists [page 346]

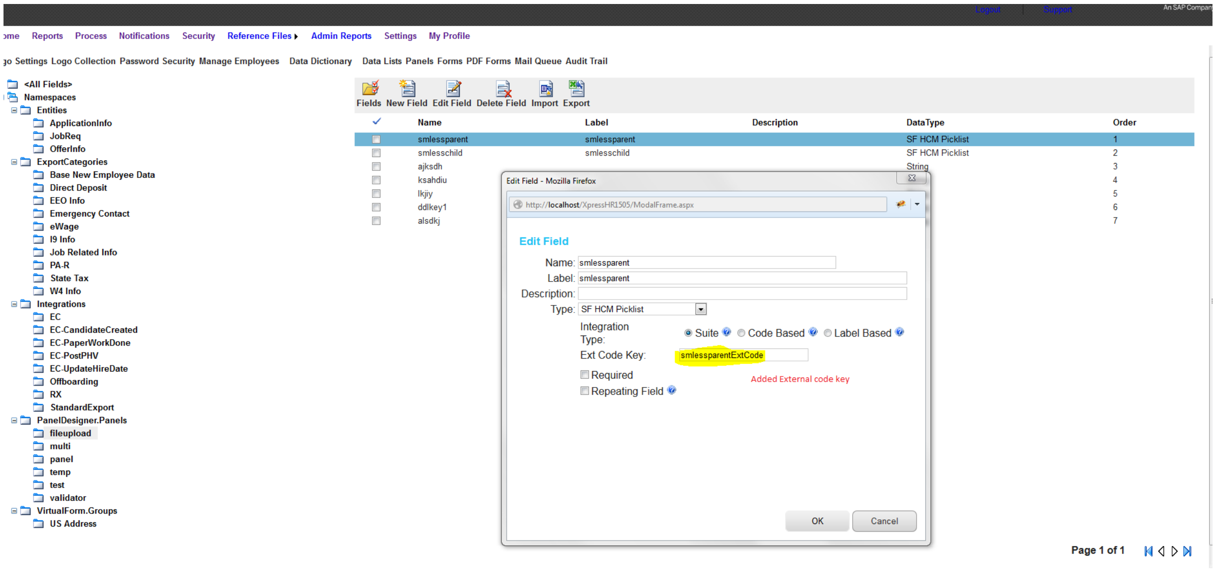
13.5.1.3 How to Configure Picklists for Advanced Conditions

You can map picklist names to external code key values to tell an HRIS or Employee Central how to translate SF HCM Picklist Option ID values into readable values. You can then create advanced conditions for panels based on these external codes.

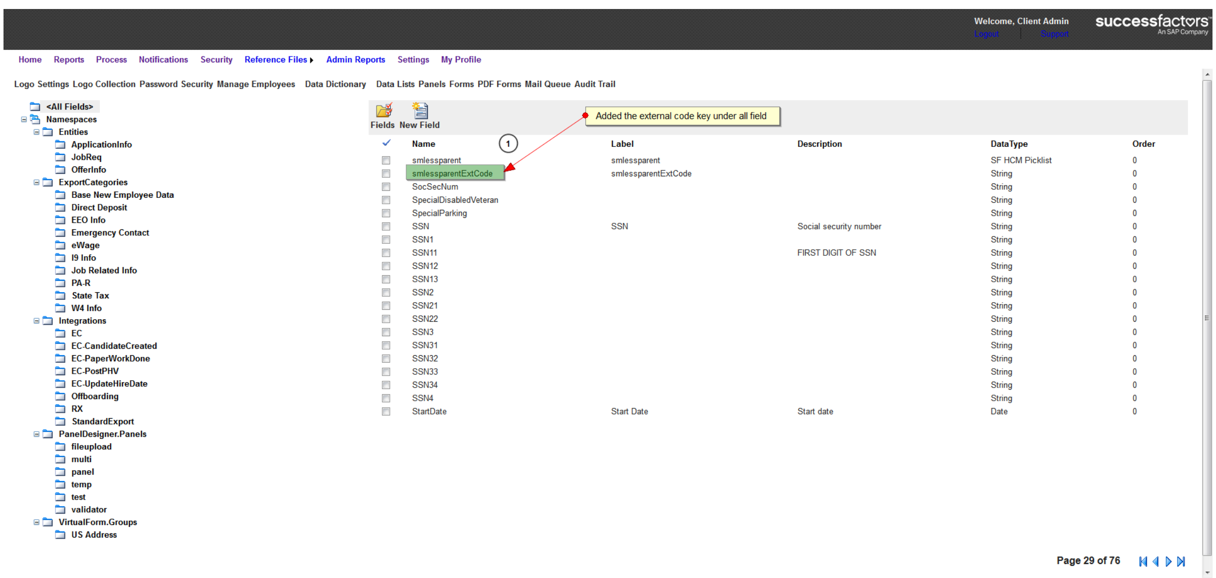
Procedure

1. In the Data Dictionary, find the Onboarding field you want to associate with the external code key. Click *Edit Field*.

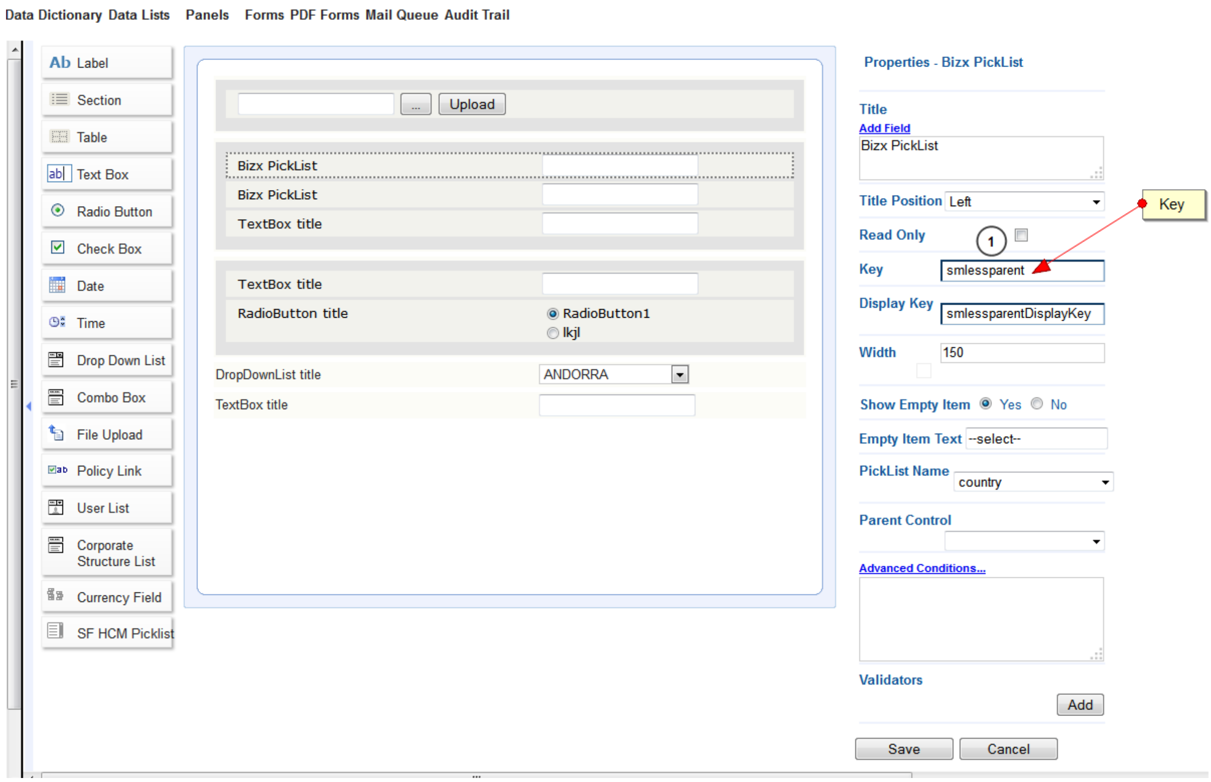
2. Select the *Suite* option under *Integration Mode* and enter the eternal key in the *Ext. Code Key* field. This value can be anything, but should allow you to quickly identify external code values.



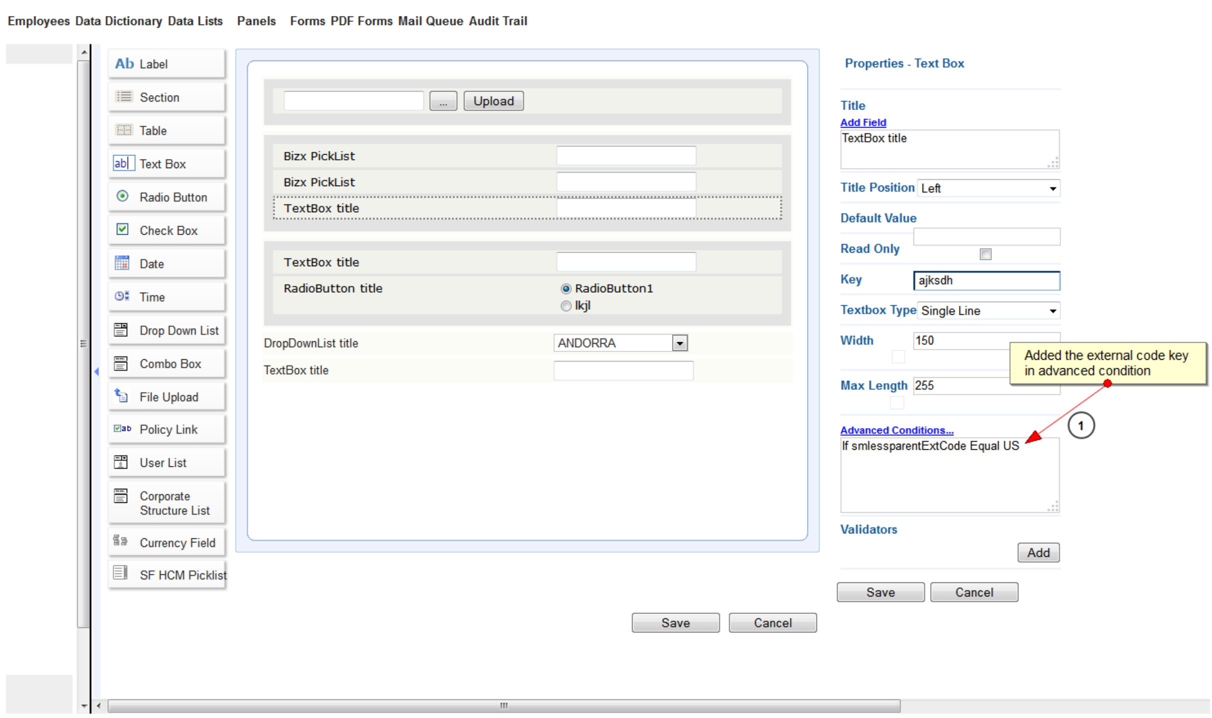
3. Navigate to *SuccessFactors HCM* > *Onboarding* > *Settings* > *Data Dictionary* > and click *Fields*.
4. Click *New Field* and create a field with a *Name* value matching the *Ext Code Key* value you entered in Step 2. Do not add this field to a specific namespace, but to the general field set.



5. Add an *SF HCM Picklist* field that corresponds to the Data Dictionary field to the desired panel. In the panel properties, enter the Onboarding field name from Step 1 in the *Key* field.



6. Add an advanced condition using the External Code Key to the desired text field on the panel. Advanced conditions control which options show on the panel. For example, if a user chooses "US" as a country, you can limit the states that display to US states.



13.5.2 How to Create Wizards

Procedure

1. Navigate to SAP SuccessFactors HCM and select *Onboarding* > *Settings* > *Panels* > *All Wizards*.
2. Select a Wizard to copy. Picking a smaller Wizard, like New Hire Activities, is recommended.
3. Click *Copy* to create a new wizard.
4. Enter a name for the new wizard and click *Copy* to create the wizard.
5. The copied wizard will appear under *All Wizards.* You can now add new panels to the wizard, remove the copied panels and attach the wizard to a Notification as desired.

13.5.3 How to Create Panels for Existing Wizards

The Onboarding Administrator needs to select the process and step for a new panel, then define its properties.

Procedure

1. Navigate to SAP SuccessFactors HCM and select *Onboarding* > *Settings* > *Panels*.
2. Select the process and step for the new panel from the left hand menu.
3. Click *Create* to open the *Create a Panel* dialogue box and define the panel's properties.
4. Click *Create* to create the panel.
5. Click *Order* to open the *Order Panels* dialogue box. Click the newly created panel and drag to the appropriate place in the wizard.
6. Click *Update* to finalize the re-ordering.
7. To add Advanced Conditions, click *Advanced* to open the Advanced Conditions dialog.
8. Define the Advanced Conditions and click *Submit.*

13.5.4 Standard Panels in Panel Designer

Standard Panels are available for editing, copying and maintenance in the Panel Designer. Compliance Panels are not available in Panel Designer.

> Note
>
> **Tool:** SAP SuccessFactors HCM Onboarding

Note

To edit a standard panel, copy and rename it, rather than making changes directly to the standard panel. That way custom edits will be preserved, even if the standard panel is edited.

Standard panels built in Panel Designer begin with "SAP_". These standard panels are available in Panel Designer.

- SAP_MA_Welcome
- SAP_EXT_Welcome
- SAP_Standard_NewHireSetup
- SAP_JobLocation
- SAP_EXT_Checklist
- SAP_Standard_Safari_Instructions
- SAP_JobDetail
- SAP_EXT_End
- SAP_Standard_OrientationManagerSetup
- SAP_EMP_Welcome
- SAP_E_Welcome
- SAP_EMP_ExitInterview
- SAP_Federal_EEO
- SAP_EMP_Cobra
- SAP_Federal_EEOVeteran
- SAP_BackgroundCheck
- SAP_EMP_End
- SAP_Federal_EEODisability
- SAP_BackgroundCheckStop
- SAP_MGR_SelectEmployee
- SAP_MGR_End
- SAP_DrugTest
- SAP_MGR_TerminationData
- SAP_EVInvalidData_NewHireSetup
- SAP_DrugTestStopo
- SAP_MGR_ExitInterview
- SAP_PayMethod
- SAP_PayMethodOption

  Note

  Any updates to the drop down on this panel have a direct impact on the non-editable Direct Deposit panel. Changing values on this panel could break the connection with the default Direct Deposit panel.

- SAP_PoliciesList

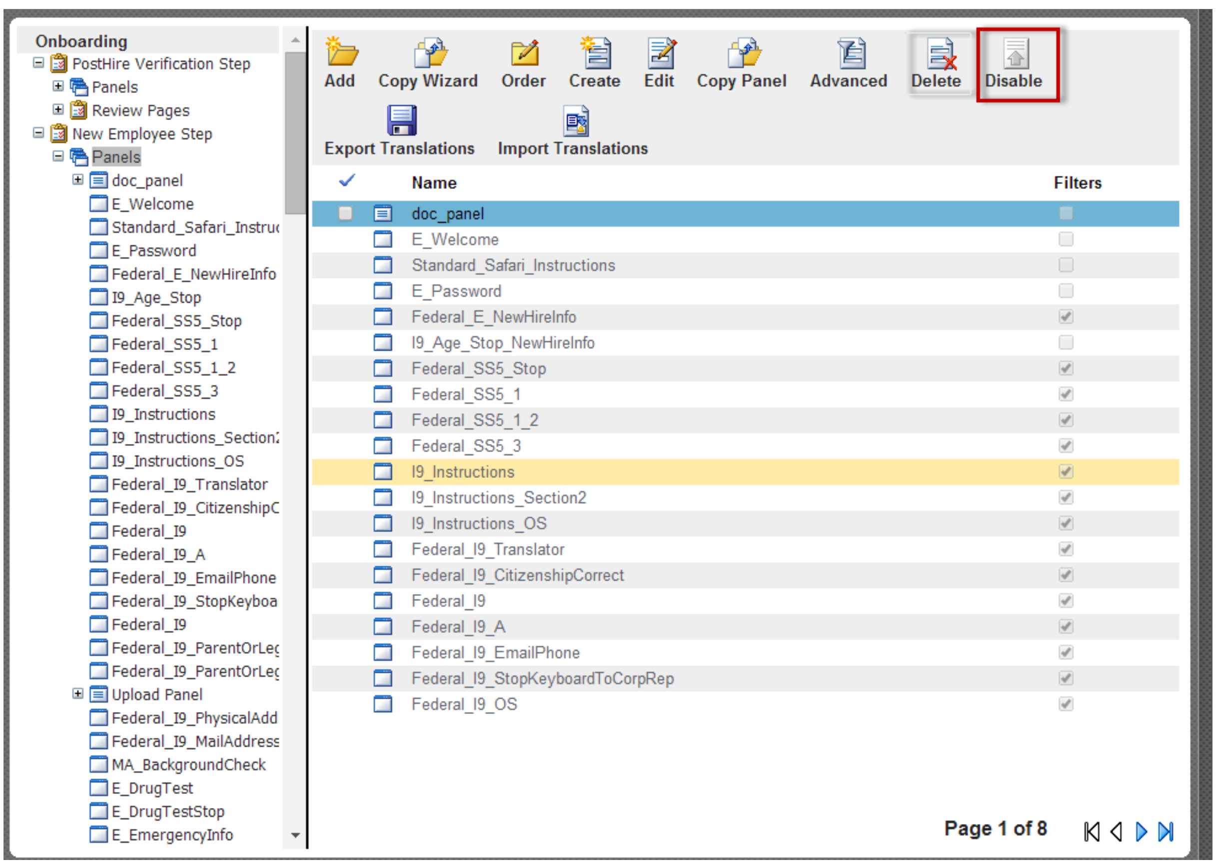
13.5.5 How to Enable/Disable Panels

Context

If a customer would like to configure a custom panel and disable an existing one, or remove a panel from a workflow, you can disable the panel using the SAP SuccessFactors HCM Onboarding tool. These panels are not permanently removed and can be reactivated.

Procedure

1. Navigate to SAP SuccessFactors HCM *Onboarding* > *Settings* > *Panels.*
2. Select the panel you would like to disable from the list on the left.
3. Click *Disable.*



4. The screen will refresh and the panel will be grayed out to show it's been disabled.
5. To re-enable the panel, select it, and click the *Enable* icon.

13.5.6 How to Localize and Customize Panels

You can customize Panel controls to display for different locales. Labels for Panel controls can also be customized using XML.

Prerequisites

Before localizing panels, you must enable the selected languages in *Super Admin*.

Context

Panel controls can only be customized or localized by editing XML files.

Procedure

1. Navigate to SAP SuccessFactors HCM *Onboarding* > *Settings* > *Panels* .
2. Select the panel you would like to customize, and then find the individual control and *Key* field. Fill in a value for the *Key* field, for example **`MyDate`** for a custom date field.
3. Select the panel and control, then choose *Export Translations.* Download the generated XML file and open it using an XML editor.
4. The XML file contains nodes for each local enabled for the instance. Enter the custom text for each node.
5. Reupload the XML file by navigating to *Panels* > *Import Translations.*
6. You can now preview the localized panels. Select a language from the available languages from the dropdown menu on the localized panel.
7. To create custom text for specific panels, navigate to *Super Admin* > *Import/Export Settings* > *LocalizationResources* > *Export File.*
8. Find the field you would like to customize and enter the client's desired text in the `[CDATA]` field.
   a. If you do not know the name of the field you would like to customize or localize, navigate to *Super Admin* > *Locales* > *Add Locale* and select the *Debug Locale* from the dropdown list. Click *Submit*.
   b. Once you have enabled the Debug locale, begin the process containing the panel you would like to customize, in the debug locale. In the debug locale, all field names display. Note the names of fields you want to customize on the desired panels or pages.
9. Each enabled locale will have a separate node in the XML file. You can enter custom text for each locale by editing the `Value` of the `data key` attribute.
10. Once you have finished making changes, navigate to *Import/Export Settings* > *LocalizationResources* > *Import File* and import the updated XML file.

> **Note**
>
> Once you have translated a panel, if you modify the name or rename the panel, the translations will be lost. Best practice is to copy the panel before renaming it, in order to preserve the translation source.

Related Information

Activate Features [page 28]

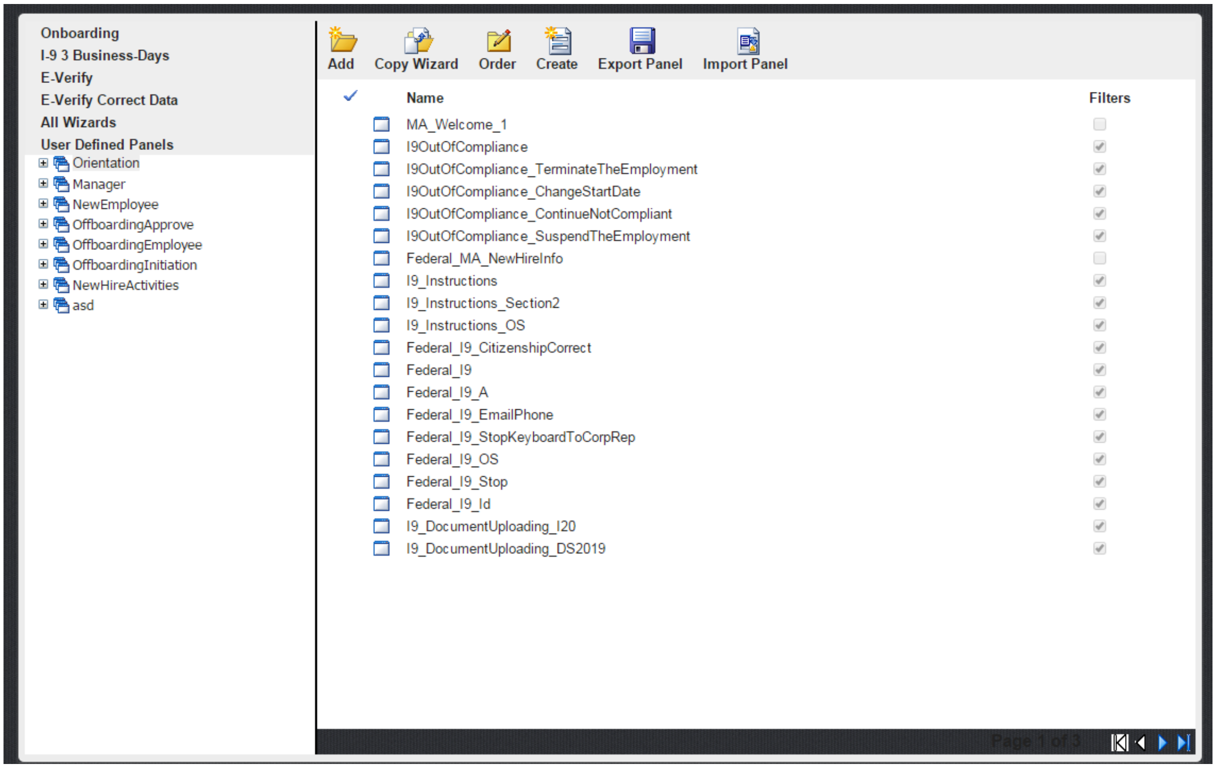
13.5.7 How to Import and Export Panels

Context

Import and Export of panels is only available for user-defined panels.

Procedure

1. Navigate to *SuccessFactors HCM* > *Onboarding* > *Settings* > *Panels*.
2. Select *User Defined Panels*.
3. Choose the panel group you want to import or export.
   - Click *Export* to create a zip file for the panel group. Download the file and edit the XML for the desired panels.
   - Click *Import* to import your edited XML files for new panels.



When you upload the XML for a panel, the Onboarding system will check for any conflicts. For each panel, the system checks for these parameters:

- Panel Name must be unique. A conflict is raised if the name of a panel in the import package matches the name of a panel in the target account.
- Data Keys must be unique. A conflict is raised if the name of a data key in the import package matches the name of a data key in the target account.
- List Items must be unique. A conflict is raised if the name of a data list in the import package matches the name of a data list in the target account.

If the upload generates conflicts, you must resolve those conflicts before the new panel XML is imported.

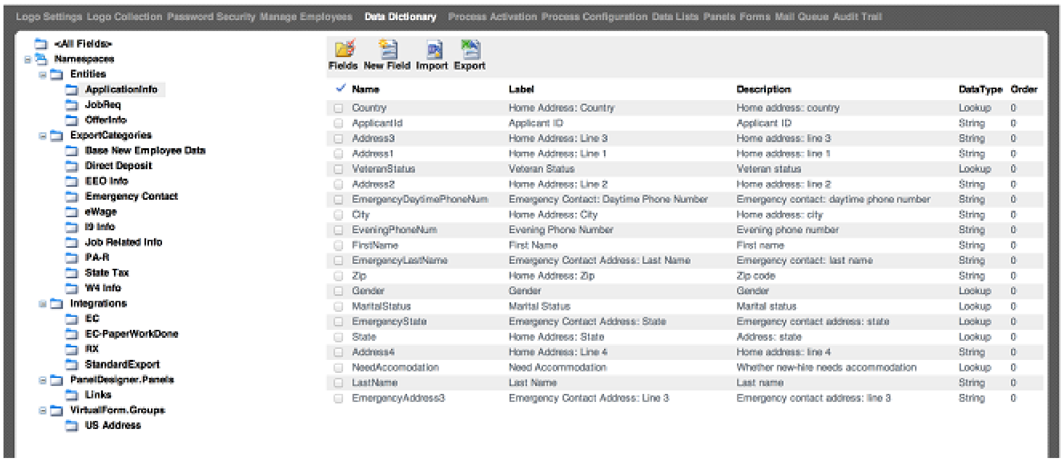
13.6 Data Dictionary

13.6.1 What is the Data Dictionary?

The Data Dictionary contains all of the fields that are used in SuccessFactors Onboarding and for the Recruiting and Employee Central integrations.

Onboarding Administrators have the ability to tag and add, edit and remove custom fields that can be used in the Panel Designer and Virtual Forms tools and for custom imports, exports and integrations.

To view the Data Dictionary, select *Settings* on the dashboard and select the *Data Dictionary* tab.



The Data Dictionary fields can be imported and exported in XML format.

13.6.2 What are the Components of the Data Dictionary?

There are three components in the Data Dictionary — namespaces, tags and fields.

Namespaces

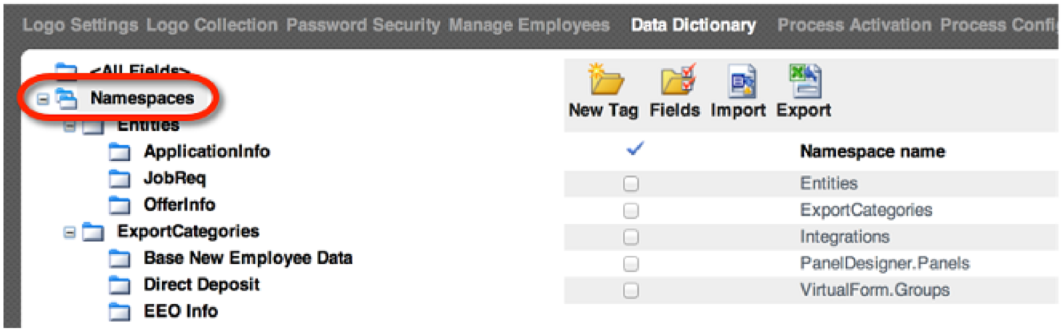
Namespaces organize and categorize the fields that are used in Onboarding, in the Recruiting and Employee Central integrations, for exports, and in the Panel Designer and Virtual Forms tools. The default Namespaces are:

- Entities: Tags and fields for ATS integrations
- ExportCategories: Tags and fields for exports
- Integrations: Tags and fields for integrations

Table 16:

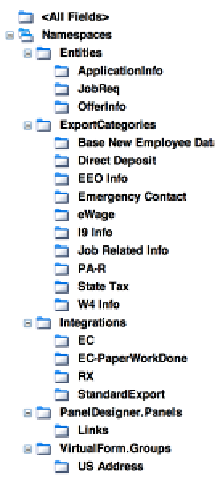
Tag	Description
EC	Fields that are exported from Onboarding to Employee Central.
EC-PaperWorkDone	Fields that are submitted from Onboarding to Employee Central as part of PaperWorkDone message.
RX	Fields that can be submitted from RCM to Onboarding. Fields assigned to this tag are available in the RCM field mapping tool.
StandardExport	Fields that are exported from Onboarding as CSV file or secure PDF as part of standard export. These fields are relevant for the integration of third-party HR systems.

- PanelDesigner.Panels: Tags and fields for use in the Panel Designer tool
- VirtualForms.Groups: Tags and Fields for use in the Virtual Forms tool



Tags

Tags function like folders to organize and categorize the fields. Fields can appear in multiple tags and can be copied to multiple tags by the Onboarding Administrator. In addition, the Onboarding Administrator can add tags if they are needed for a customer requirement.

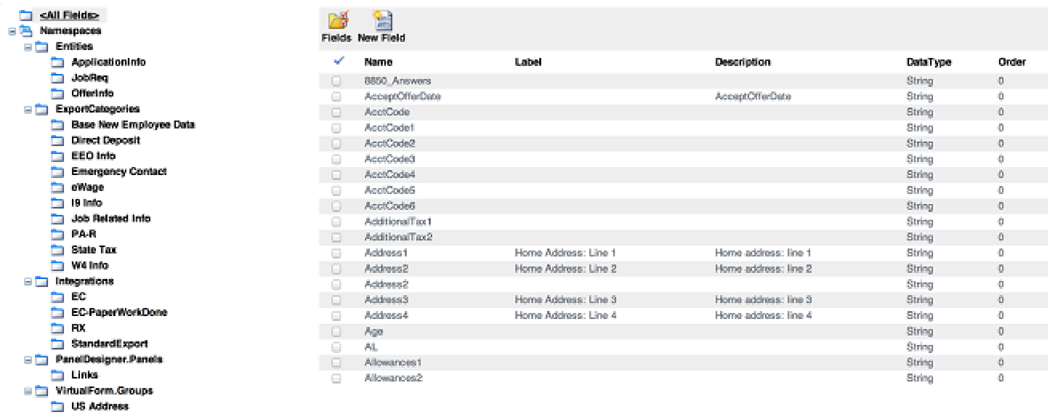


Note

Tags that were delivered with SuccessFactors Onboarding should not be removed or modified. Removal or modification of tags could have an adverse effect on integrations, exports, panels and forms.

Fields

A field is a data element. The fields are organized in various tags. When you choose *<All Fields>* all of the fields in the Onboarding instance are displayed.



Each field has properties. The Onboarding Administrator can modify basic field properties. Advanced properties can only be modified by the PS Technical Team or by Engineering. Those properties will not be displayed for fields that are delivered with Onboarding.

Onboarding Administrators can create new fields as needed for customer requirements. Fields that will be used for integrations and imports must exist in the target system and must be appropriately mapped in those systems.

> **Note**
>
> Fields that were delivered with SuccessFactors Onboarding should not be removed or modified. Removal or modification of fields could have an adverse effect on integrations, exports, panels and forms.

> **Note**
>
> The hiring manager field should always be mapped in the ONB > EC tool and the Hiring Manager field should always be made mandatory in Employee Central.

13.6.3 How to Create a New Tag

Context

Procedure

1. Navigate to SAP SuccessFactors HCM and select *Onboarding* > *Settings* > *Data Dictionary*.
2. Select the namespace where you want to place the tag.
3. Click *New Tag*.
4. Enter a name, leave the default namespace, and click *OK*.

The tag will appear in the list.

13.6.4 How to Edit a Tag

Procedure

1. Navigate to *SuccessFators HCM* > *Onboarding* > *Settings* > *Data Dictionary*.
2. Select the tag.
3. Click *Edit Tag*.
4. Edit the *Name* or select a new *Namespace*.
5. Click *OK*.

13.6.5 How to Delete a Tag

Procedure

1. Navigate to SAP SuccessFactors HCM and, select *Onboarding* > *Settings* > *Data Dictionary*.
2. Select the tag.
3. Click *Delete Tag*.
4. Confirm the popup.

13.6.6 How to Create a Field

Context

If you need additional Applicant Info, Job Requisition or Offer Letter fields, you must select the appropriate tag under the Entity namespace, then create the field. Once the field is in the correct tag you can use the SuccessFactors HCM mapping tool so that the data will properly display in the panel, form or notification where you will use that field

Procedure

1. Navigate to SAP SuccessFactors HCM and select *Onboarding* > *Settings* > *Data Dictionary*.
2. Select the tag for the new field.
3. Click *New Field*.
4. Enter the properties:
   - Name: Enter the name for the field
   - Label: Enter the label or caption for the field
   - Description: Enter the description, such as the business reason that this custom field is being created
   - Type: Select the data type from the drop down list.
     - String: Text
     - DateTime: Date and Time
     - Date: Date only
     - Time: Time only
     - Number: Numeric values, can specify Length and Precision
     - Lookup: Lookup values from a existing Data List, can specify the Lookup Code and Lookup Name
     - User: Security User
     - SF HCM Picklist: Used to map picklists between Recruiting Management and Onboarding
   - Required: Select the check box if data entry will be required for this field.
5. Click *OK*.

Related Information

Recruiting Management, Onboarding, and Employee Central Integration Guide

13.6.7 How to Edit a Field

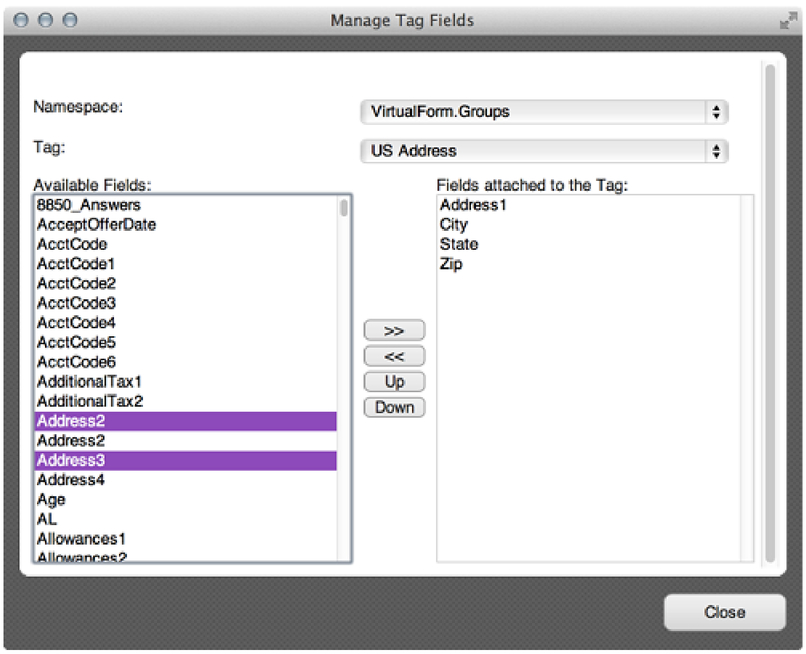
Procedure

1. Navigate to SAP SuccessFactors HCM and select *Onboarding* > *Settings* > *Data Dictionary*.
2. Select the tag to display the field you want to edit.
3. Select the field and click *Edit Field* icon in the menu.
4. Edit the field properties as desired.
5. Click the *OK*.

13.6.8 How to Copy a Field to a Tag

Procedure

1. Navigate to SAP SuccessFactors HCM and select *Onboarding* > *Settings* > *Data Dictionary*.
2. Select the tag.
3. Click *Fields*.
4. Select the field(s) you want to copy from the *Available Fields* list.
   Use the `Shift` or `Ctrl` keys to select multiple fields.



5. Click the arrow button to copy the fields.
6. To reorder the list of fields attached to the Tag, select a field and use the *Up* or *Down* buttons to move the field to its desired position.
7. To save the changes and close the window click *Close*.

13.6.9 How to Remove a Field from a Tag

Procedure

1. Navigate to SAP SuccessFactors HCM and select *Onboarding* > *Settings* > *Data Dictionary*.
2. Select the tag.
3. Click *Fields*.
4. Select the field(s) you want to move from the *Fields attached to the Tag* list.NOTE:
   Use the `Shift` or `Ctrl` keys to select multiple fields.
5. Click the arrow button to remove the fields.
6. To save the changes and close the window click *Close*.

13.6.10 How To Delete a Field

Context

> **Caution**
>
> This is a permanent operation. Do not delete a custom field unless:
>
> - You no longer need the data that is being stored in that field.
> - The field has been removed from any panels, forms or notifications.

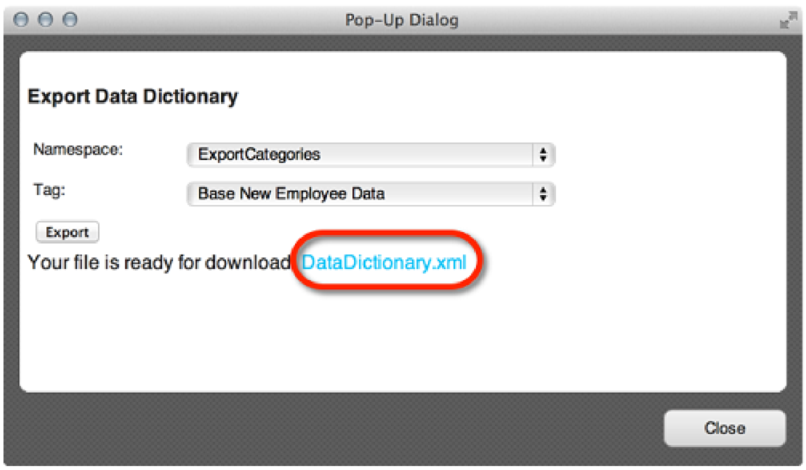
Procedure

1. Navigate to SAP SuccessFactors HCM and select *Onboarding* > *Settings* > *Data Dictionary*.
2. Select the tag to display the field you want to delete.
3. Click *Delete Field*.
4. Confirm the popup.

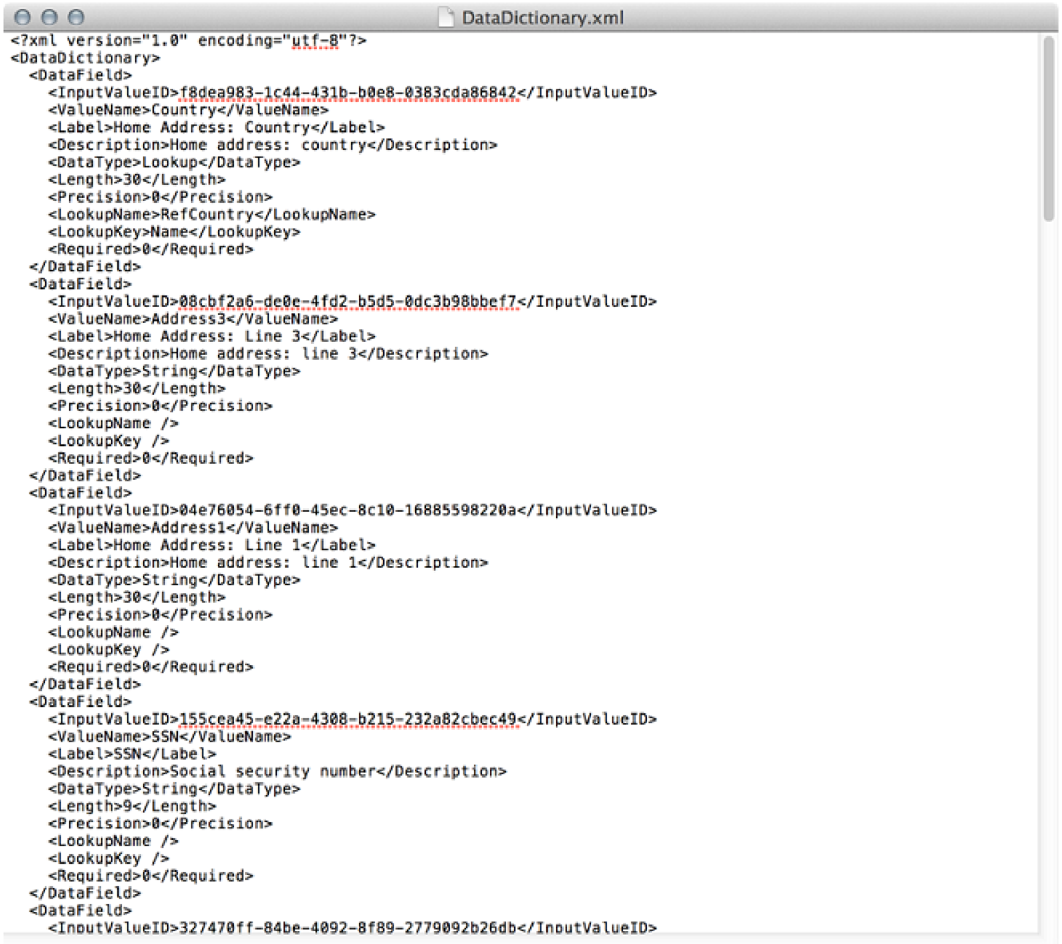
13.6.11 How to Export Data from the Data Dictionary

Procedure

1. Navigate to SAP SuccessFactors HCM and select *Onboarding* > *Settings* > *Data Dictionary*.
2. Select the tag you want to export.
3. Click *Export*.
4. Confirm the Namespace and Tag, then click *Export*.
5. Click the link to download the file.



6. Open the file with Notepad or an XML editor.



```xml
<?xml version="1.0" encoding="utf-8"?>
<DataDictionary>
  <DataField>
    <InputValueID>f8dea983-1c44-431b-b0e8-0383cda86842</InputValueID>
    <ValueName>Country</ValueName>
    <Label>Home Address: Country</Label>
    <Description>Home address: country</Description>
    <DataType>Lookup</DataType>
    <Length>30</Length>
    <Precision>0</Precision>
    <LookupName>RefCountry</LookupName>
    <LookupKey>Name</LookupKey>
    <Required>0</Required>
  </DataField>
  <DataField>
    <InputValueID>08cbf2a6-de0e-4fd2-b5d5-0dc3b98bbef7</InputValueID>
    <ValueName>Address3</ValueName>
    <Label>Home Address: Line 3</Label>
    <Description>Home address: line 3</Description>
    <DataType>String</DataType>
    <Length>30</Length>
    <Precision>0</Precision>
    <LookupName />
    <LookupKey />
    <Required>0</Required>
  </DataField>
  <DataField>
    <InputValueID>04e76054-6ff0-45ec-8c10-16885598220a</InputValueID>
    <ValueName>Address1</ValueName>
    <Label>Home Address: Line 1</Label>
    <Description>Home address: line 1</Description>
    <DataType>String</DataType>
    <Length>30</Length>
    <Precision>0</Precision>
    <LookupName />
    <LookupKey />
    <Required>0</Required>
  </DataField>
  <DataField>
    <InputValueID>155cea45-e22a-4308-b215-232a82cbec49</InputValueID>
    <ValueName>SSN</ValueName>
    <Label>SSN</Label>
    <Description>Social security number</Description>
    <DataType>String</DataType>
    <Length>9</Length>
    <Precision>0</Precision>
    <LookupName />
    <LookupKey />
    <Required>0</Required>
  </DataField>
  <DataField>
    <InputValueID>327470ff-84be-4092-8f89-2779092b26db</InputValueID>
```

13.6.12 How to Import into the Data Dictionary

Procedure

1. Prepare and save the XML file.

   The xml file must corresspornt to the following schema:

```
<DataDictionary>
<DataField>
<ValueName> </ValueName>
<Label> </Label>
<Description> </Description>
<DataType>String</DataType>
<Length>0</Length>
<Precision>0</Precision>
<LookupName />
<LookupKey />
<Required>1</Required>
```

```
</DataField>
<DataDictionary>
```

2. Navigate to SAP SuccessFactors HCM and select *Onboarding* > *Settings* > *Data Dictionary*.
3. Select the tag you want to import fields into.
4. Click *Import*.
5. Confirm the namespace and tag, then click *Import*.
6. Click *Click to select file*, choose your file and click *Upload*.
7. After the success message is displayed, close the window.

13.7 Data Lists and Provisioning Lists

13.7.1 What are Data Lists?

Data lists are all the lists that are used in drop down lists and combo boxes on panels in SuccessFactors Onboarding.

The data lists functionality allows the Onboarding administrator to create any flat, localized list and use it on a panel. There are five list types:

- Lists: All of the data lists in this list type are stored in the same table (similar to corporate structure). This list type supports multiple properties and localization. The user can create and maintain these lists. And this is the recommended list type for new data lists.
- Global DB: This list type will display countries and other global database lists.
- Provisioning: All provisioning lists are shown in this list type.
- Table Mapped: This list type will display table-mapped data lists such as countries and states. In addition, it will display custom tables as custom data lists. Users will now be able to maintain these lists.
- User Defined: Future functionality

Data lists consist of the data list itself and the data list items. The data list itself is the structure of the list—the name, properties and relations. It contains the data list items.

Data lists are located under *Settings* > *Data Lists*

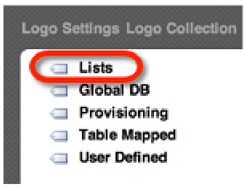
Data list items are the options in the data lists. The data list items are found in *Reference Files* > *Data Lists*.

> **Caution**
>
> Data lists and data list items that were delivered with SuccessFactors Onboarding should not be removed or modified. Removal or modification of fields could have an adverse effect on integrations, exports, panels and forms.

13.7.1.1 How to Create a Data List

Procedure

1. Navigate to SAP SuccessFactors HCM and select *Onboarding* > *Settings* > *Data Lists*.
2. Select the *Lists* list type.



3. Click *Create*.
4. Enter the name, which is similar to a code, and the title, which will display on a panel.
5. Select *Show in UI*.

> **Note**
>
> If you do not select *Show in UI?* you will still be able to use the data list in a drop down list or combo box on a panel. But you will not be able to create and manage the list items in the user interface.

6. Click *Submit*.

13.7.1.2 How to Add Data List Properties

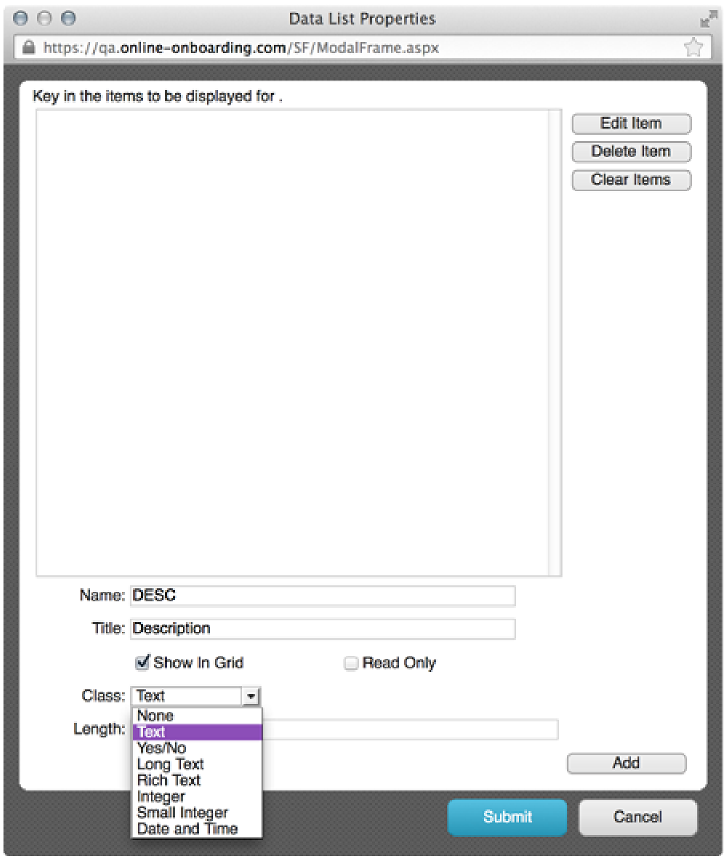
You can add properties to your data list if you want a data list item to have attributes other than the code and name. For instance, in Corporate Structure a location can have attributes such as address, city, contact phone and zip code.

Procedure

1. Navigate to SAP SuccessFactors HCM and select *Onboarding* > *Settings* > *Data Lists*.
2. Select the *Lists* list type.
3. Select the data list you want to edit.
4. Click *Properties*.
5. Enter the following:
    - *Name*: Enter a name or code for the property.

> **Note**
>
> Do not use the word “Name” in this field. It is reserved by the system

- *Title*: Enter a title for the property.
- *Show in Grid:* Select the check box if you want this property to appear as a column in the data list items grid.
- *Read Only*: Select the check box if you are going to enter a default value in this property in the data list item that will be read-only.
- *Class*: Select the data type from the drop down list.
- *Length*: Enter a maximum length for data entry in this property, if applicable.



6. Click *Add*.
7. To add additional properties, repeat steps 5 and 6.
8. Click *Submit*.

13.7.1.3 How to Edit, Delete, or Clear Data List Properties

Procedure

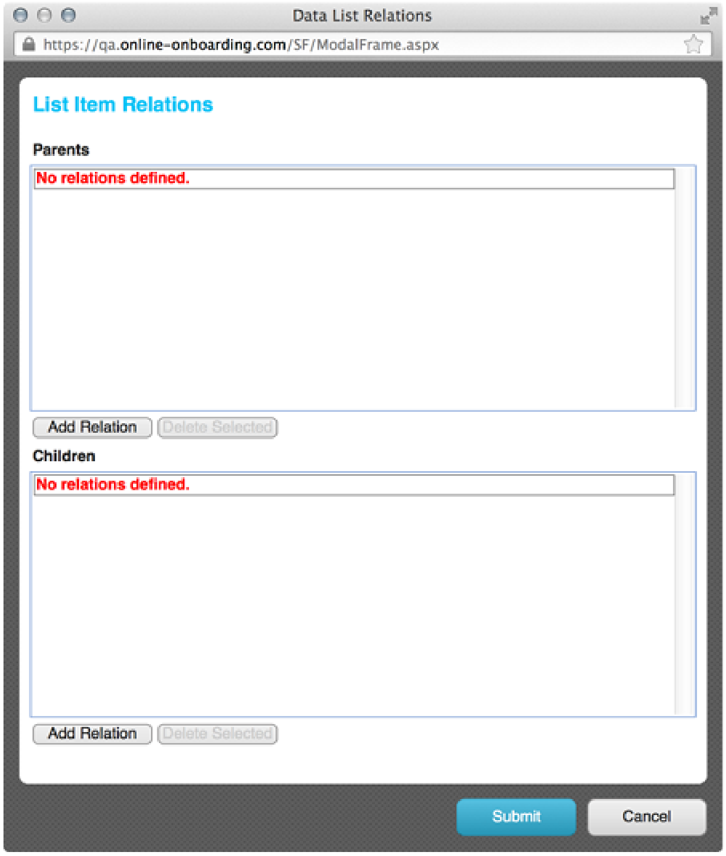
1. Navigate to SAP SuccessFactors HCM and select *Onboarding* > *Settings* > *Data Lists*.
2. Select the *Lists* list type.
3. Select the data list you want to edit.
4. Click *Properties*.
5. Make your changes:
   - To edit a property, select the property in the list and click *Edit Item*. Modify as needed, then click *Submit* to save the changes.
   - To delete a property, select the property in the list and click *Delete Item*. Click *OK* in the delete confirmation message, then click **Submit** to save the changes.
   - To remove all properties, click *Clear Items*. Click *OK* in the delete confirmation message, then click *Submit* to save the changes.

13.7.1.4 How to Add Data List Relations

A customer requirement might entail the use of filtered drop-down or combo boxes, meaning that the Data List Items in one drop down list should filter based on the selection in the previous list. The Data Lists that need this functionality have to be related.

Procedure

1. Navigate to SAP SuccessFactors HCM and select *Onboarding* > *Settings* > *Data Lists*.
2. Select the *Lists* list type.
3. Select the data list that will be the “parent” list in the relationship.
4. Click *Relations*.
5. Click *Add Relation* in the *Children* section of the window.



6. Select the data list and click *Select*.

   The data list will appear in the *Children* section of the *List Item Relations* window.
7. Click *Submit*.

13.7.1.5 How to Remove Data List Relations

Procedure

1. Navigate to SAP SuccessFactors HCM and select *Onboarding* > *Settings* > *Data Lists*.
2. Select the *Lists* list type.
3. Select the data list that is the "parent" list in the relationship.
4. Click *Relations*.
5. In the *Children* section of the window, click *Delete Selected*.
6. Click *Submit* to finalize the deletion.

13.7.1.6 How to Add Data List Item to a Data List

Context

> **Note**
>
> **Tool: SuccessFactors Onboarding Administration**

Procedure

1. On the dashboard, open *Reference Files* > *Data Lists*.
2. Select the data list from the list of data lists.
3. Click *Create*.
4. Create the data list item:
   - Enter the code and the name.
   - Select a language.
   - Enter properties, if applicable.
5. Click *Submit*.

13.7.1.7 How To Add Data List Items Relations

Context

> **Note**
>
> **Tool: SuccessFactors Onboarding Administration**

Procedure

1. On the dashboard, open *Reference Files* > *Data Lists*.
2. Select the data list that is the “parent” list in the relationship.

3. Click *Relations*.
4. In the *Children* section of the window, click *Add Relation*
5. Select the data list item and click *Select*.
   - The data list item will appear in the *Children* section of the *List Item Relations* window.
6. Repeat steps 4 and 5 as needed.
7. Click *Submit*.

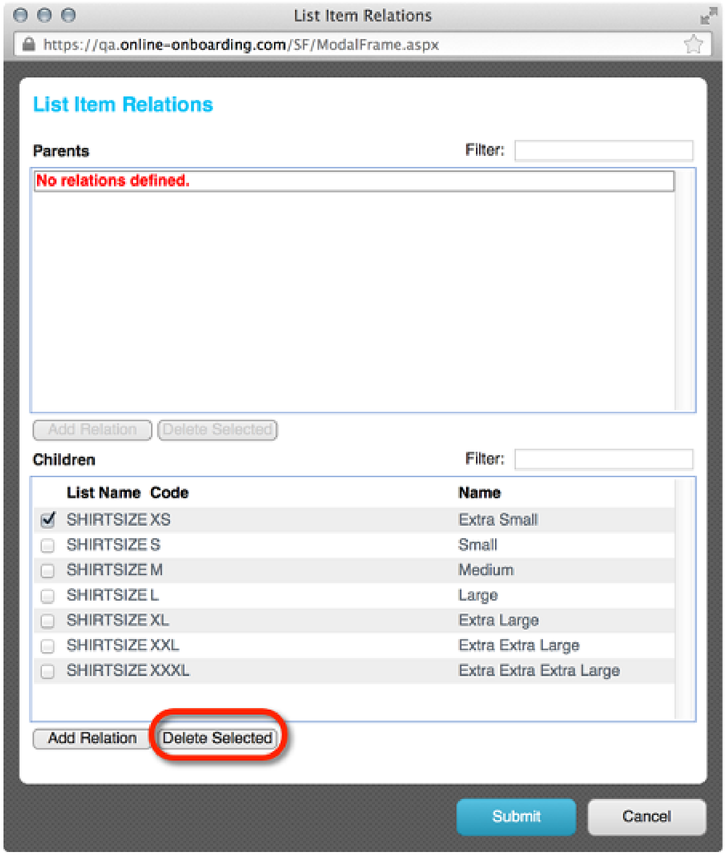
13.7.1.8 How to Delete Data List Item Relations

Context

> Note
>
> **Tool: SuccessFactors Onboarding Administration**

Procedure

1. On the dashboard, open *Reference Files* > *Data Lists*.
2. Select the data list that is the “parent” list in the relationship.
3. Click *Relations*.
4. Select the check box(es) next to the relation(s) to be deleted and click *Delete Selected*.



5. Click *Submit* to save the changes and close the window.

13.7.2 What are Provisioning Lists?

The *Provisioning* section of *Reference Files* allows administrators to create and manage the standard drop down lists in the system such as bank codes, credit cards, gender and marital status.

The Provisioning lists can be managed in *Data Lists* and *Provisioning* menus. The best practice, however, is to manage the provisioning lists and items in the *Provisioning* menu.

Recommendation

- Create a provisioning list for resources that will be assigned to an employee, or for compliance-related, financial or personal information.
- Create a data list for all other data collection purposes.

13.7.2.1 How to Create a Provisioning List

Context

> **Note**
>
> **Tool: SuccessFactors Onboarding Administration**

Procedure

1. On the dashboard, open *Reference Files* > *Provisioning*.
2. Click *Create*.
3. Enter the provision code and name.
4. Select the *Display As* option.

   In most cases you will select *Drop Down List*.
5. Select a *Repeat Direction* option.
6. To create an option list, click the *Create Option List* and proceed a described in How To Create an Option List [page 201]. Otherwise, click *Create*. The list will be displayed in the grid

13.7.2.2 How To Create an Option List

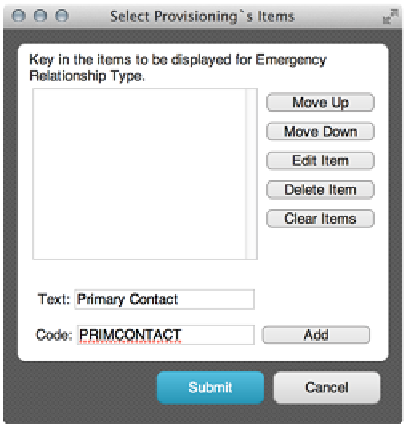
Every provisioning item should have two values: A text value that is displayed for the user in the options list and a code value that is returned to an integrated system for the selected option.

Context

> **Note**
>
> **Tool: SuccessFactors Onboarding Administration**

Procedure

1. On the dashboard, open *Reference Files* > *Provisioning* .
2. Select the list from the grid and click *Items*.
3. Create the item:
   a. In the *Text* field, enter the value that will be displayed to the user
   b. In the *Code* field, enter the value that will be retuned to an integrated system.
   c. Click *Add*.



4. Repeat step 3 until the option list is complete.
5. Click *Submit*.

13.7.2.3 How to Delete Items from an Options List

Context

> **Note**
>
> **Tool: SuccessFactors Onboarding Administration**

Procedure

1. On the dashboard, open *Reference Files* > *Provisioning* .
2. Select the list from the grid and click *Items*.
3. To delete an item, select it and click *Delete Item*.

   To delete all items, click *Clear Items*.

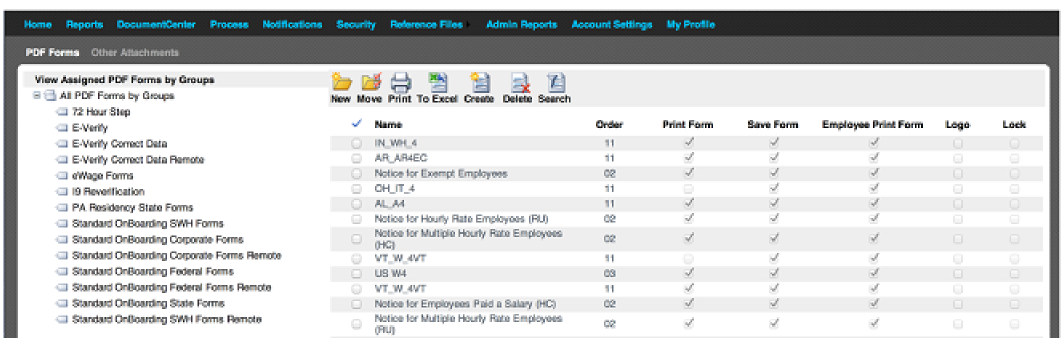
4. Confirm the popup and click Submit.

13.8 PDF Forms

13.8.1 What are PDF Forms?

PDF Forms are compliance and corporate forms that are populated with data collected during a SuccessFactors Onboarding process and are electronically signed.

PDF Forms may be assigned to any process and conditionally displayed based on any organizational unit or field in the database. All of the delivered PDF Forms can be accessed in *Reference Files* > *Forms*. The PDF Forms tab features a left and right frame where forms and form information are grouped for easy retrieval. The right frame of the forms screen displays the List of PDF Forms. The left frame of the forms screen displays the PDF Forms' tree, which can be displayed for viewing by Groups (e.g. federal, state, corporate forms) or Process (e.g. Onboarding, E-Verify, eWage).



Custom PDF Forms

Customers may also have corporate forms that need to be populated by a SuccessFactors Onboarding process and electronically signed. These forms must first be mapped and uploaded by a client, the SuccessFactors Project Team for implementations, or by a Solutions Consultant for scripted demos.

Uploading and Mapping

All of the fields that are going to be populated by SuccessFactors Onboarding need to be in the Data Dictionary. If a field needs to be added, see the *Data Dictionary* section for instructions.

The customer, Project Team Consultant, or the Solutions Consultant needs to have a PDF editor in order to map the fields on the customer's PDF to SuccessFactors Onboarding.

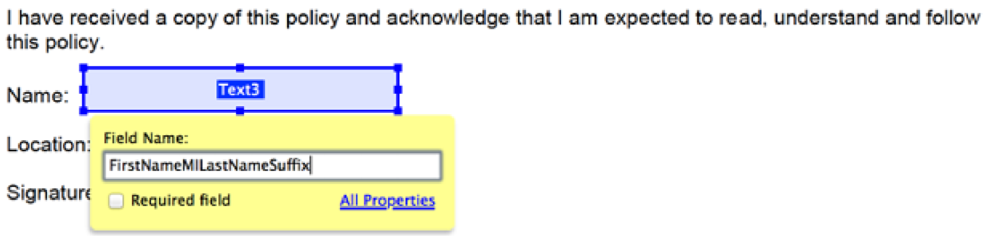


Figure 1: Fields Created on the Customer's Form with a PDF Editor

The form will be uploaded and mapped in the Onboarding Administrator application.

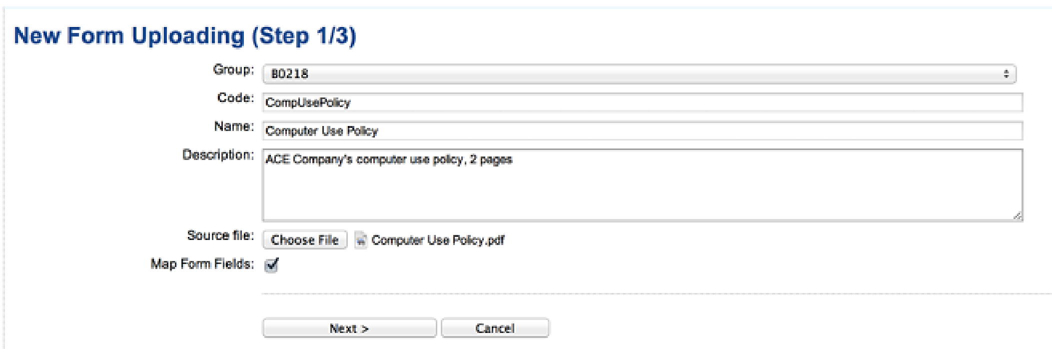


Figure 2: New Form Uploading Wizard in the Onboarding Administrator Application

> **Note**
>
> When some PDF forms are created, a user's Social Security Number may be added to the title of the form as an identifier. To use the Employee Login instead, configure the `PDFFiles.UseSsnAsPrefixForNewFiles` key using the Self-Service Account Options

Related Information

Data Dictionary [page 183]
Self-Service Account Options [page 33]

13.8.2 What are Form Groups?

All of the PDF Forms reside in Forms Groups. These groups are more than mere storage folders. Groups can have conditions that will cover all of the forms in that particular group.

The Onboarding Administrator can create new groups, edit, delete and assign forms to groups. The group lists can be printed or exported to Excel.

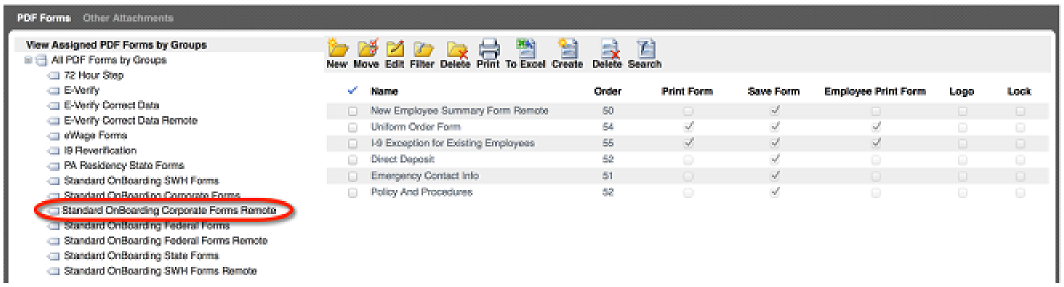


Figure 3: The Forms in the “Standard Onboarding Forms Remote” Group

Caution

The Groups that were delivered with SuccessFactors Onboarding should not be edited or deleted, as there is workflow and other configurations that are associated with a particular group or with the forms in that group.

When a custom form has been mapped and uploaded with the New Form Uploading wizard, it needs to be assigned to a group. A best practice is to create a Forms Group for all of the customer’s forms.

13.8.3 What are Form Attributes?

There are attributes associated with each PDF. Once the PDF has been uploaded into Onboarding, administrators can edit any of the attributes.

The list below represents the attributes associated with each PDF form:

- Name: The name of the form.
- Order: Determines the order the form will be presented on the Signature page.
- Reason Attributes: Optional fields used when there is no clear reason for signing the document on the form. There are three (3) types of reason attributes:
  - Manager Reason (or Corporate Representative): Pertains to data displayed in the signature box, such as “I authorize” or “I agree” for a Manager or Corporate Representative.
  - Applicant Reason (or Employee): Pertains to data displayed in the signature box, such as “I authorize” or “I agree” for an Employee.
  - Translator Reason: Pertains to data displayed in the signature box, such as “I authorize” or “I agree” for a Form I-9 Preparer/Translator.
- Print Count: Quantity of copies for printing
- Multiplate Suffix: If there many PDF forms, this setting determines which values should be mapped from a specific line of a data table. The Multiplate Suffix is the number of the table’s line.
- Client Code: This attribute value must be unique.
- Form Culture: Allows the setup of a cultural identifier for a PDF form to run culture-specific information, such as an associated language, sublanguage, country/region, calendar, or other cultural conventions.
- Save Form: Allows the PDF form to be saved in the document repository
- Foreground Sign Mark: Check this box when a PDF form has been converted from a TIF format.
- PostHire Verification Step: Check this box when a PDF form will be e-Signed in this step.
- New Employee Step: Check this box when a PDF form will be e-Signed in this step.
- Orientation Step: Check this box when a PDF form will be e-Signed in this step.

- Manager signature: Check this box when a PDF form will be e-Signed by the Manager.
- Employee signature: Check this box when a PDF form will be e-Signed by the Employee.
- Print Form: Allows the PDF form to be included in the manager's Print Package.
- Lock: Prevents editing of the PDF form.

Once a custom PDF form is assigned to a group, the Onboarding Administrator can view and edit the form's atributes. The Onboarding Administrator can view and modify the attributes for existing forms as well, but should not do so unless the workflow needs to be changed.

13.8.4 What are Conditions?

The Onboarding Administrator can create conditions for Forms Groups and Forms to control the workflow in a process. For example, a form might only be applicable to employees who are in a union, or employees in a particular country.

All conditions are created with the Advanced Conditions tool, which is used throughout SuccessFactors Onboarding. Conditions on Forms Groups apply to all of the forms in that group. Conditions on Forms apply only to that particular form. Onboarding Administrators must take care that the conditions do not conflict if a Forms Group and a Form in that group both have conditions.

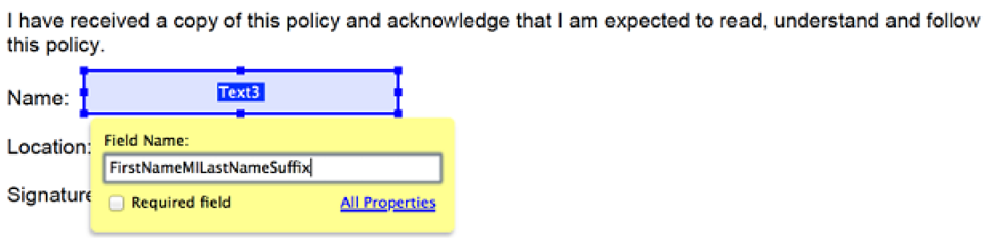
13.8.5 How to Add SuccessFactors Onboarding Fields to a Custom Form

Procedure

1. Make a list of all of the fields on the form that you need to map.
2. Navigate to SAP SuccessFactors HCM and select *Onboarding* > *Settings* > *Data Dictionary*.
3. Find all of the fields in the Data Dictionary and make note of the *Name* and *Data Type*.

   > **Note**
   >
   > The e-Signature fields are not in the Data Dictionary.

4. Open the form in your PDF editor.
5. Use your editor to search for fields. If the editor finds the fields you need to map, proceed to step 7. If you need to create fields, proceed to the next step.
6. Use your editor's functionality to create the first field. Choose the field type that matches the data type from the Data Dictionary.
7. Enter the name from the Data Dictionary as the field name in your editor.



For e-Signature fields, use the following:

- Employee: sgnEmployee
- Manager or Corporate Representative: sgnManager
- Form I-9 Preparer/Translator: sgnTranslator

8. If your editor has a *Save* function for the field creation, save the field.
9. Repeat steps 6-8 until all of the fields are created.
10. Save and close the PDF form.

> **Note**
>
> Forms should use the fonts embedded in Adobe Acrobat. Using non-standard fonts can results in blurry PDFs.

13.8.6 How to Upload and Map a Custom Form

You can upload and map custom PDF forms to tailor Onboarding to a customer's needs.

Procedure

1. Navigate to SAP SuccessFactors HCM *Onboarding* > *Settings* > *PDF Forms.* .
2. Select the company ID from the list of forms on the left.
3. Enter the *Code, Name,* and *Description.* Include business rules and any other relevant information in the Description.
4. Click *Choose File* and navigate to the desired PDF form
5. Click *Create.*
6. Re-select the company ID from the list of forms to view the newly created form.
7. Click on each field to map them. For the signature field (which is not in the Data Dictionary), indicate that the Employee needs to sign, and click *Update*.For the other fields, click the *...* button next to *Input Value*, then use the type-ahead to locate the field from the Data Dictionary, and select it. Click *Update*.Click the plus sign next to the form to view the mapped fields.
8. Navigate to *Reference Files* > *Forms.*
9. Click the *Create* icon.

10. Click the *...* icon next to the *Name* field.
11. Select the newly created form from the company ID form group that opens.
12. Click *Select.*
13. Enter the form attributes:
    - Name: The name of the form.
    - Order: Determines the order the form will be presented on the Signature page. Enter a high number (90+) if you want to ensure that it will be at or near the end of the Signature page.
    - Manager Reason (or Corporate Representative): Enter special verbiage, such as “I authorize...” or “I agree...” for a Manager or Corporate Representative, if applicable.
    - Applicant Reason (or Employee): Enter special verbiage, such as. “I authorize...” or “I agree...” for an Employee, if applicable.
    - Translator Reason: Enter special verbiage, such as “I authorize...” or “I agree...” for a Form I-9 Preparer/ Translator, if applicable.
    - Number of Copies: Select number of copies to print if applicable
    - Multiplate Suffix: If there many PDF forms, this setting determines which values should be mapped from a specific line of a data table. The Multiplate Suffix is the number of the table’s line. NOTE: For PS Technical Team Only.
    - Client Code: This attribute value must be unique.
    - Form Culture: Allows the setup of a cultural identifier for a PDF form to run culture-specific information, such as an associated language, sublanguage, country/region, calendar, or other cultural conventions.
    - Save Form: Select the check box. Allows the PDF form to be saved in the document repository.
    - Foreground Sign Mark: Check this box when a PDF form has been converted from a TIF format.
    - Print Form: Allows the PDF form to be included in the manager’s Print Package.
    - Employee Print Form: Allows the PDF form to be included in the employeer’s Print Package.
    - Lock: Prevents editing of the PDF form.
14. Click *Create.*
15. Select the Company ID form group from the list of forms group.
16. Click the *Move* icon, then find and select the newly created form from the list.
17. Click the *>* button to copy the form into the forms group.
18. Click *Close.* The screen will refresh. Re-select the company ID forms group. The form appears in the list of forms grid.

13.8.7 How to Edit a Registered Custom Form

Context

> **Note**
>
> **Tool: Super Admin**

Procedure

1. Log on to Super Admin.
2. Find your instance in the *SF Accounts* list and click the link.
3. Under *See Also*, click *Forms*.
4. Click the link for the form in the *Forms* list.
5. Edit the form.

   > **Note**
   >
   > If you upload a new file you will need to verify the mapping.

6. Click *Update*.
7. To edit the form's attributes or fields, under *See Also*, click *Form Properties* or *Form Fields*.

   To open the PDF form, click *Form File*.

13.8.8 How to Customize Form Field Formats

You can change the display format of form fields, for example, to accommodate different date or phone number formats.

Procedure

1. Navigate to *Super Admin* > *Forms*.
2. Select the name of the form to edit, then click *Form Fields* under *See Also*.
3. Click the name of the field you want to customize in the *Field Name* column.
4. Remove all text from the `HRDataKey` field.
5. In the *Value* field, specify the custom format.

   Supported date formats:
   - default: {DateOfBirth, formatdate}
   - time: {DateOfBirth, formatDate=time}
   - short: {DateOfBirth, formatDate=short}
   - short no year : {DateOfBirth, formatdate=shortNoYear}
   - medium : {DateOfBirth, formatdate=medium}
   - medium no year: {DateOfBirth, formatdate=mediumNoYear}
   - long: {DateOfBirth, formatdate=long}
   - date time: {DateOfBirth, formatdate=dateTime}
   - month year: date time: {DateOfBirth, formatdate=monthYear}

   Form fields also support locale-independent formats.
   - {DateOfBirth, DateFormat=dd/MM/yyyy} – to define date format exactly for the configured field.

- {DateOfBirth, daywithpostfix} – presents the day with postfix.
- {DateOfBirth, DateFormat=MMMM} – month in word format
- {DateOfBirth, DateFormat=dd} – day number
- {DateOfBirth, DateFormat=yy} – short year
- {DateOfBirth, DateFormat=MM} – month number

You can also create custom formats for form field. For example, to pull individual characters from a data key, use the format `{datakey, format specifier=x}`. If you wanted for format a phone number as **9 9 9 - 9 9 9 - 9 9 9 9**, with spaces between the digiets, you could use `{PhoneNumber, CharAt=1}` and so on to pull the individual characters of the phone number with spaces between them.

You can also enforce a particular date formation by using `{WOTCStartDate, dateformat=dd} / {WOTCStartDate, dateformat=MM} / {WOTCStartDate, dateformat=yyyy}`. This displays the date "3rd August 2015" as "03/08/2015."

13.8.9 How to Create a Forms Group

Context

> **Note**
>
> **Tool: SuccessFactors Onboarding Administration**

Procedure

1. In Onboarding, go to *Reference Files* > *Forms* .
2. Click *New*.
3. Enter the group name and select a process from the dropdown list. Select *Lock* to prevent editing of forms in the group, if desired.
4. Click *Create*.

13.8.10 How to Add Conditions to a Forms Group

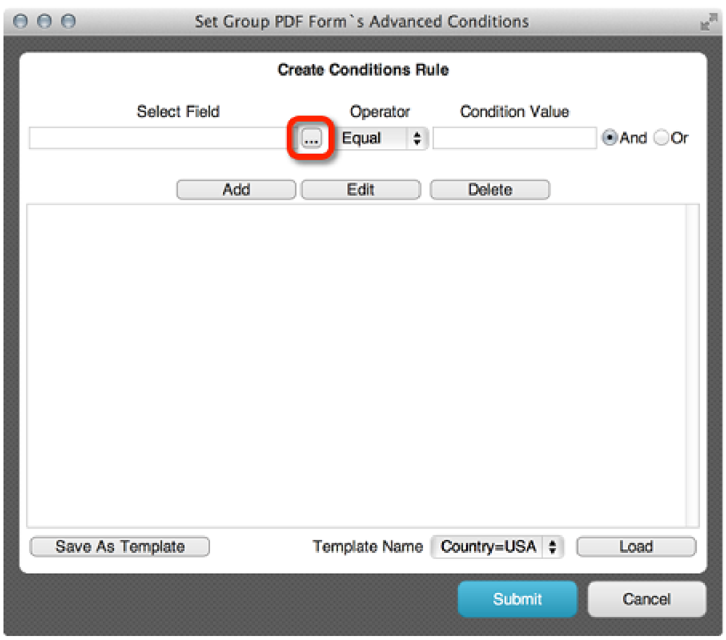
Context

i Note

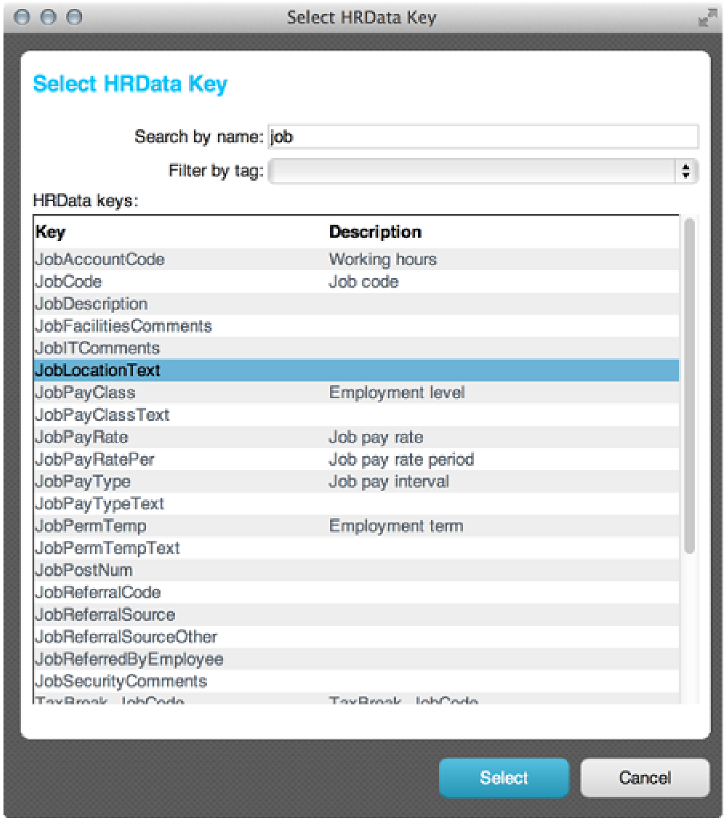
Tool: SuccessFactors Onboarding Administration

Procedure

1. In Onboarding, go to *Reference Files* > *Forms* .
2. Click *Filter*.
3. Click the *Select Field* button.



4. Enter the field name in the *Search by name* text box, or select a value from the *Filter by tag* dropdown list to filter by Data Dictionary tags.
5. Select the field from *HRData keys* and click *Select*.



6. Select the *Operator* from the dropdown list.
7. Select *And* or *Or*.
8. Click *Add*.
9. Click *Submit* to save the changes and return to the List of PDF Form Groups.

13.8.11 How to Move Forms into a Forms Group

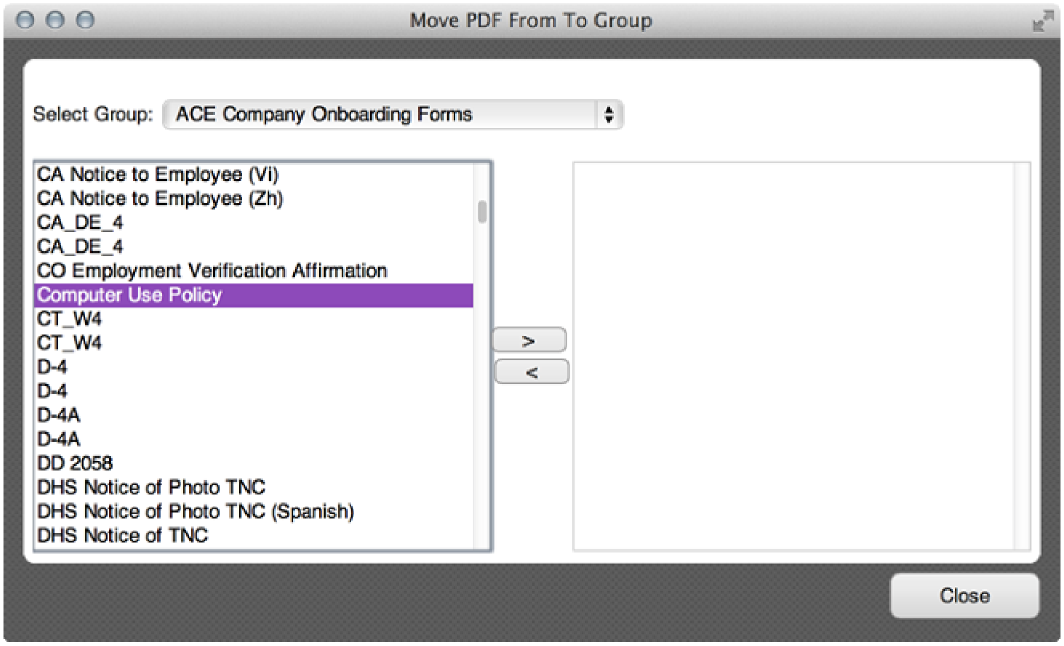
Context

> **Note**
>
> **Tool: SuccessFactors Onboarding Administration**

Procedure

1. In Onboarding, go to *Reference Files* > *Forms*.

2. Select the *Forms Group* to edit.
3. Click *Move*.
4. Select the form(s) you want to move into the group. You can use the `Shift` or `Ctrl` keys to select multiple forms.



5. Click the arrow button to move the form(s).
6. Click *Close*.

13.8.12 How to Edit Form Attributes

Context

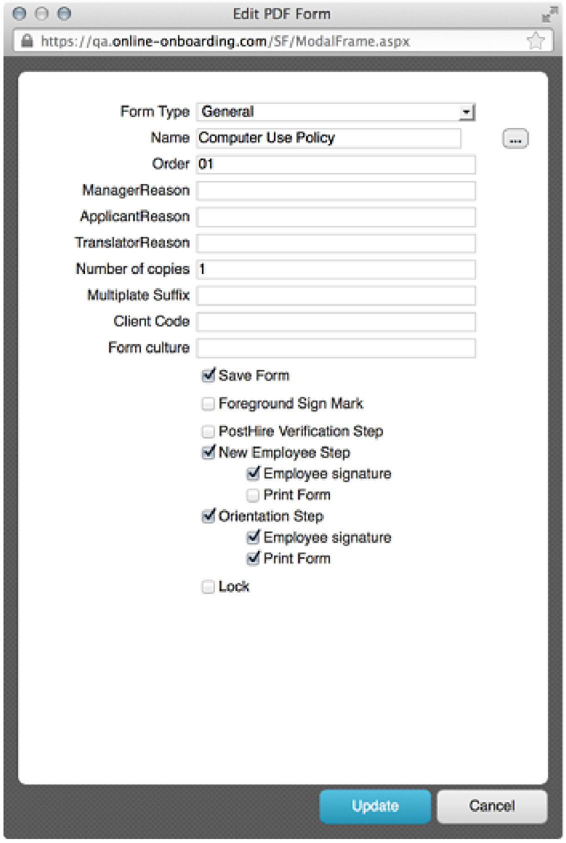
ℹ Note

Tool: SuccessFactors HCM Onboarding

Procedure

1. Navigate to ▶ *SuccessFactors HCM Onboarding* ▶ *Reference Files* ▶ *Forms* ▶.
2. Select the Forms Group that houses the form you want to edit.
3. Select the form and click *Edit* from the menu.

4. Edit the attributes as needed.



5. Click *Update*.

13.8.13 How to Add Form Conditions

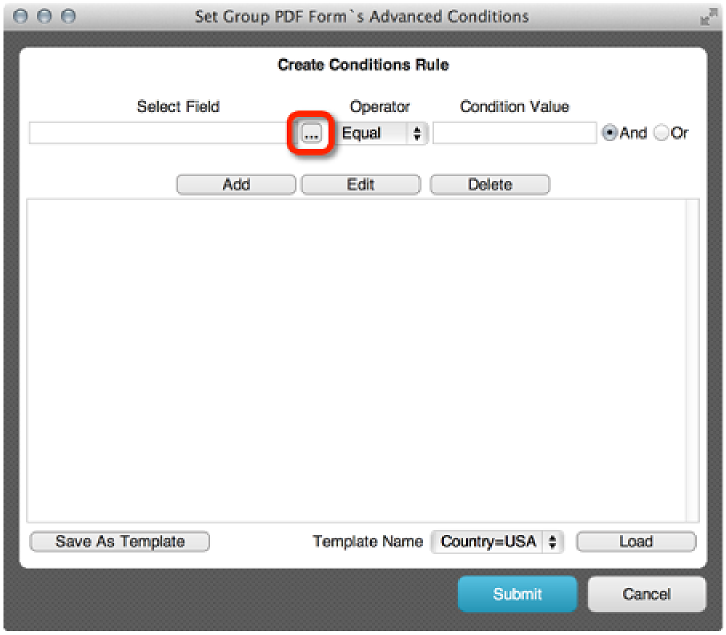
Context

> **Note**
>
> **Tool: SuccessFactors Onboarding Administration**

Procedure

1. In Onboarding, go to *Reference Files* > *Forms*.
2. Select the Forms Group that houses the form you want to edit.

3. Select the form and click *Conditions* from the menu.
4. Click the *Select Field* button.



5. Enter the field name in the *Search by name* text box, or select a value from the *Filter by tag* dropdown list to filter by Data Dictionary tags.
6. Select the field from *HRData keys* and click *Select*.
7. Select the *Operator* from the dropdown list.
8. Enter the *Condition Value*. It is a value containing alphanumeric or other symbols, by which the condition may be activated.
9. Select *And* or *Or*.
10. Click *Add*.
11. Click *Submit* to save the changes and return to the grid.

13.8.14 How to Edit Form Conditions

Procedure

1. Navigate to SAP SuccessFactors HCM *Reference Files* › *Forms.*
2. Select the forms group for the form you want to edit.
3. Select the form and click the *Conditions* icon.
4. Select the condition and click *Edit,* then edit the condition as needed.
5. Click *Submit* to save the changes and return to the grid.

13.8.15 How to Remove a Form

Removing the PDF form removes it from *Reference Files* > *Forms.* The form remains in its form group under *Settings* > *PDF Forms.*

Procedure

1. Navigate to *Reference Files* > *Forms.*
2. Select the forms group containing the form to delete.
3. Click the *Delete* icon.
4. Click *OK* on the delete confirmation message.
5. The form will no longer appear in the gird.

13.8.16 How to Edit Form Settings

Procedure

1. Navigate to *Settings* > *PDF Forms.*
2. Click the plus sign next to the desired company ID in the list of forms groups.
3. Select the desired form.
4. Edit the settings as needed. The *Code* field cannot be edited once the form has been created.
5. Click *Updates.*

13.8.17 How to Delete a Form

Procedure

1. Navigate to *Settings* > *PDF Forms.*
2. Click the plus sign next to the company ID in the list of forms groups.
3. Select the desired form.
4. Click the *Delete* button.

5. Click the *Yes* button. This will permanenetly delete the form from Onboarding.
6. The form will be removed from the list once the screen refreshes.

13.9 Other Attachments

Other Attachments are corporate forms that are not filled in with collected data nor electronically signed (i.e. a Holiday schedule).

The Onboarding Administrator can upload these forms to be used as attachments for email notifications.

The delivered PDF can be accessed in *Reference Files* > *Forms* > *Other Attachments*. The Onboarding Administrator can print or export the Other Attachments list, upload, edit or delete attachments in this tab.

13.9.1 How to Upload an Attachment

Context

> **Note**
>
> **Tool: SuccessFactors Onboarding Administration**

Procedure

1. Navigate to *Reference Files* > *Forms* > *Attachments*.
2. Click *Create*.
3. Enter a name.
4. Click *Choose File* to add the file.
5. Enter the code.
6. Click *Upload*.

13.10 Notifications

13.10.1 What are Notifications?

Throughout the onboarding process, notifications can be automatically sent to all internal and external resources to complete tasks such as drug testing, background checks, uniforms, access to facility services, badge creation, and more. Notifications can be assigned by group and by process.

There are four functional types of notifications:

- E-mail Notifications
- Work Queue Notifications
- Reminder Notifications
- Notifications Executed by Schedule

Each functional type of notification is further defined by its intended recipient. There are nine types of notification recipients:

Table 17:

Notification Recipients	Notifications sent
Employee	... to the new employee listed in the New Hire Record
External	... to outside resources such as background check, drug testing, and uniform vendors
Internal	... to internal users such as HR, IT, and facilities
Hiring Managers	... to the hiring manager listed in the New Hire record
Recruiters	... to the recruiter listed in the New Hire Record
Employee Download and Track	... when the employee needs to download a file or when tracking a document's status (received/opened)
Assignee	... to the person assigned to the activity
Supervisor	... to the employee's supervisor
Data Driven	... to the e-mail address contained in EEO data or other table

Notifications can be sent for different steps in any Onboarding process. As a default, the following *Notify at* steps are available:

Table 18:

Step	Explanation
New Employee Step	A notification to be sent upon the New Employee Step completion.
Orientation Step	A notification to be sent upon the Orientation Step completion.
On PostHire Verification Step	A notification will be sent each time you click the *Close* button on any panel of the Post Hire Verification Step. To prevent duplicates, check Prevent Duplicates to ensure the notification is only sent once regardless of the number of times Close is used during a step.
On New Employee Step	A notification will be sent each time you click the *Close* button on any panel of the New Employee Step . To prevent duplicates, check Prevent Duplicates to ensure the notification is only sent once regardless of the number of times Close is used during a step.

Step	Explanation
On Orientation Step	A notification will be sent each time you click the *Close* button on any panel of the Orientation Step . To prevent duplicates, check Prevent Duplicates to ensure the notification is only sent once regardless of the number of times Close is used during a step.
On Notification Step	A notification will be sent each time you click the *Close* button on any panel of the Notification activity . To prevent duplicates, check Prevent Duplicates to ensure the notification is only sent once regardless of the number of times Close is used during a step.
Signature	A notification will be sent upon completion of the Signature Step.
Failed Message	A notification will be sent when an email notification fails.
Undelivered Message	A notification will be sent when an emailed notification cannot be delivered.

If you E-Verify is enabled, the following notification steps are available in addition:

Table 19:

Step	Explanation
E-Verify Status Changed	A notification will be sent when the e-Verify Status has been changed.
E-Verify DHS Contest	A notification will be sent after employee contests the DHS Tentative Nonconfirmation .
E-Verify SSA Contest	A notification will be sent after employee contests the SSA Tentative Nonconfirmation .
E-Verify DHS Verification	A notification will be sent when the DHS Verification result is received.

13.10.2 How to Create a Notification

Configure notifications and notification options for Onboarding.

Context

Procedure

1. Under *Notifications*, click *Create*.
2. On the *Main Properties* tab, enter the following data or select required options:

Table 20:

Field or Option	Explanation
Process	
Type	
Name	The name should be relevant to the notification's topic.
Subject	
Wizard	You can assign a wizard's panel to the notification that requires the notification recipient to use the wizard to complete the activity,
Create Activity in WQ	Places the activity in the Work Queue
Notify At	Select the step of process which, upon completion, causes the notification to be sent. This dropdown list contains the standard set for each process according to the steps, and the set applicable for all processes and the set for the E-Verify process (if activated). The *Notify Employee Button on Panels* can only be used with E-Verify.
Due By	Determine when the notification is due by selecting an option from the *Due By* dropdown list.
Post Controller	After the completion of a notification activity, a customized operation can be executed automatically. To enable this, enter the class name defining the program code into the *Post Controller* field.
Remove Parent Activity	After sending the notification, the employee's activity is deleted from the HR database and Work Queue.
Hide Parent Activity	Hides the employee's activity in the Work Queue until the notification is completed.
Secured Wizard	Forces the user to enter their user ID and password to access the notification's wizard panel.
Attach Logo , Send Email, or Print	Allows to attach a logo, send an email and/or print the notification.
Don't attach forms to email	If the notification has a form attached to it and you want to send an email notification but do not want to attach the form for security reasons.
Prevent Duplicates	Prevents the duplicate sending of the notification.
Use Business Days	Ties the notification's due date and reminder to business days.
Attach Form Group	Allows to attach multiple forms to the notification. As a prerequisite, the form group must be setup and forms assigned to the group.
Send with iCalendar Event	Sends the notification .ics file which will allow the user to save the task in the Outlook calendar format in the recipients e-mail client calendar.
Enable Notification	Activates the notification
Locale	This dropdown displays the customer's configured locales. The selection here also drives the format of dates on the notification. Date formats are customized user Super Admin.

3. On the Recipients tab, specify the notification recipients:
    a. Under *Specify Notification Recipients*, select the *Notification Type*.
    b. Select Group(s) to receive the Notification using the > button to add the group and the < button to exclude the group from the list of recipients .

   c. Under *Specify CC Notification Recipients*, specify which groups should receive a copy of the notification.
4. On the Monitoring tab, select one or several groups responsible for monitoring the notification. Highlight the group or several groups (using the `CTRL` key) in the List of All Groups. Click the > button to select the group/groups to move to the list. To remove group/groups, highlight the group(s) in the right part of the window, and click on the < button .
5. On the *Reminder Configuration* tab, configure a notification reminder:
   a. Determine when the Notification is due by selecting one of the options from *Due Date*.
   b. Determine when a reminder should be sent by selecting the *Remind When* number of days *Before Due Date* or *After Due Date*.
   c. Use *Remind Every x Days* if you want the system to send additional reminders if the task is not complete by the Due Date.
   d. Determine when the reminder notifications should be stopped by selecting a *Stop Status*.
   e. By default when a reminder notification is executed the advanced conditions set up for the notification are not checked. Select *Use advanced conditions* to enable the conditions before the reminder notification is executed.
   f. When the onboarding process ends and reminder notifications are still active they will be executed even after process completion. Select *Cancel reminder when process ends* to cancel the reminder upon process completion.
   g. If you would like the notification to be resent if the new hire's start date changes, enable *Resend on updated condition of due date*.
6. Click *Create*.

Related Information

Localization in Onboarding [page 67]

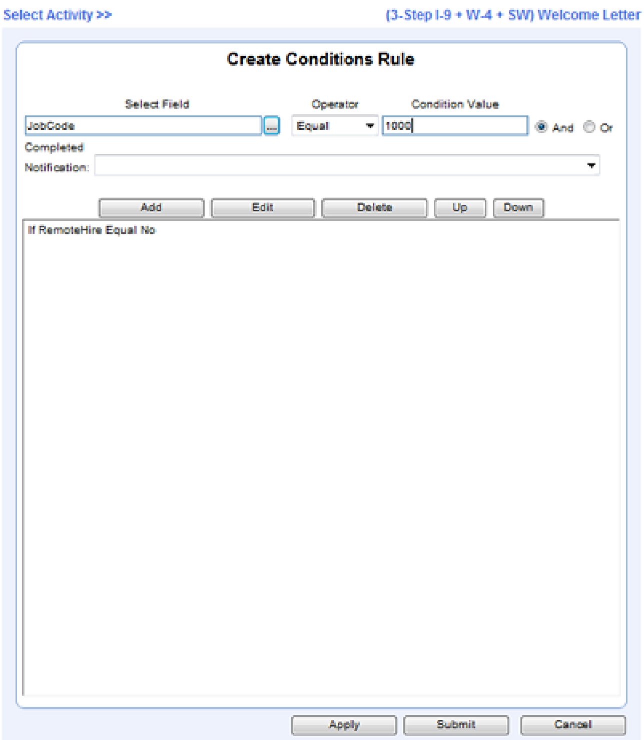
13.10.3 How to Add Advanced Conditions to a Notification

Context

> **Note**
>
> **Tool: SuccessFactors Onboarding Administration**

Procedure

1. Select a notification from the list of notifications and then click *Advanced*.
2. Click the *Select Field* button.
3. Enter the field name in the *Search by name* field or select a *Filter by tag* value. The field is any data point in the Onboarding system.
4. Select the field from the HRData keys and click *Select*.
5. Select the *Operator* from the dropdown list.
6. Enter the *Condition Value*. It is a value containing alphanumeric or other symbols, by which the condition may be activated.
7. If required, select a *Completed Notification*, if needed .
8. Click *Add*.



9. To save your changes and return to the list of notifications, click *Submit*.

   To save your changes and add additional conditions, click *Apply*. When you define further condition rules, choose the *And* or *Or* radiobutton to link them with the previous condition.

13.10.4 How to Attach Forms and Files to a Notification

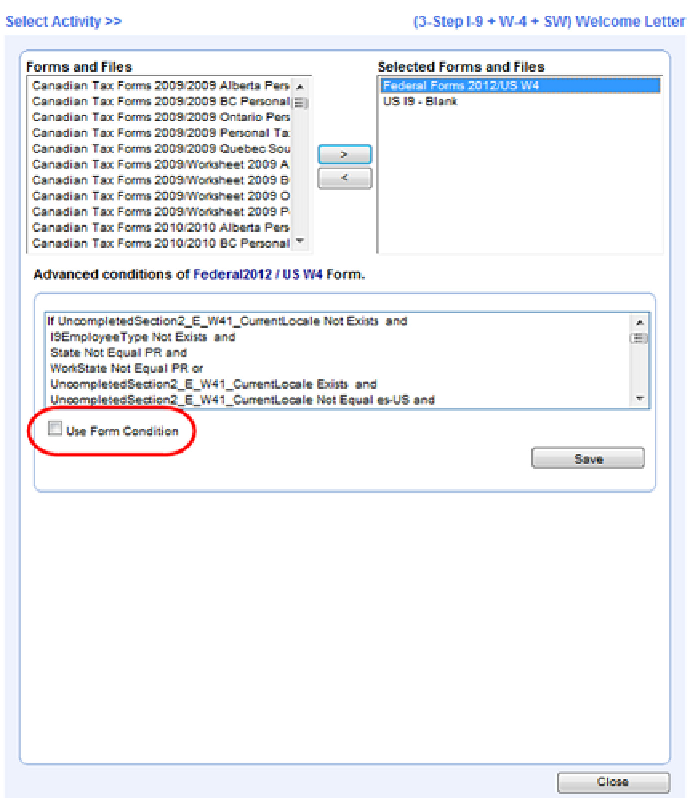
Context

> **Note**
>
> **Tool: SuccessFactors Onboarding Administration**

Procedure

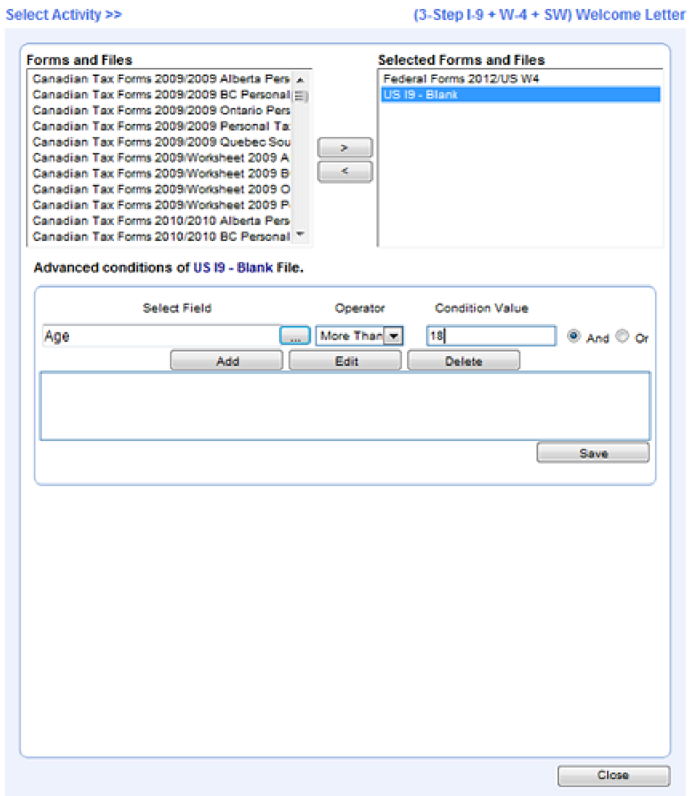
1. Select a notification from the list of notifications and then click *Attach*.

   The list of all forms and attachments is displayed on the left side of the dialog box.
2. To attach a file/files to the notification, select a file (use `Ctrl` to select several files) in the list of all forms and files. Click > to attach the form/file(s) to the notification.
3. To add advanced conditions to forms or files, click on a form or file in the *Selected Forms and Files* pane.
   - If the form has advanced conditions, you can activate them by selecting *Use Form Condition*. Then, click *Save*.



   - If the form has no advance conditions, you can add a condition as follows:

a. Under *Select Field*, click the *...* button.
b. Enter the field name in the *Search by name* text box or select a value from the *Filter by tag* dropdown list.
c. Select the field from the HRData keys and click *Select*.
d. Select the *Operator*.
e. Enter the *Condition Value*.



f. Click *Add* and then click *Save*.
g. Repeat the steps to add further conditions. Select either the *And* or *Or* radiobutton to link them with the previous condition.
h. Click *Close* after you have added the final condition.

13.10.5 How to Add E-Signed Forms to a Notification

Forms can be attached to a notification for e-signature. The forms need to be in a Forms Group which matches the Notifications Group of your notification. For instance, if your notification is a Welcome Letter in the OnBoarding Notifications group, your form needs to be in one of the Standard OnBoarding groups.

Prerequisites

The form is in the appropriate group. You can check this under *Reference Files* > *Forms*. To move a form to that group or create a new group which corresponds to the notification's group, see How to Add Forms to a Forms Group [page 166].

Context

> **Note**
>
> **Tool: SuccessFactors Onboarding Administration**

Procedure

1. Select the notification from the list of notifications.
2. Click *Edit*.
3. Choose *Select Activity* > *Notification's Form to Sign*.
4. Select the forms which need to be signed and click *>* to add them to the *Selected Forms* list.
5. Click *Close*.

13.10.6 How to Add or Edit the E-Mail Notification Text

Context

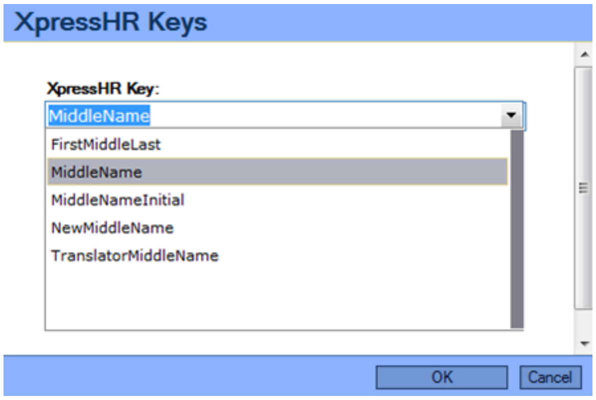
> **Note**
>
> **Tool: SuccessFactors Onboarding Administration**

Procedure

1. Select the notification in the list of notifications and click *Email*.
2. Select the tab with the text you need to add or edit.
3. Add or edit notification text using.

   All text that will be populated by the system, such as an employee's first name or last name, must be HRData keys surrounded by brackets. To ad a HRData key:

   a. Choose *{K}* from the menu.
   b. Enter a search term and select the key.



Example

Dear {FirstName}{MiddleName}{LastName}

Welcome to our Team!

Example

To add the Hiring Manager name, use {user:HiringManager, objattr=firstname}

4. To apply and save the changes without closing the window, click *Apply*. Click *Submit* to close the window and save the e-mail notification in the database .

13.10.7 How to Create a Custom Notification for Undelivered or Failed E-Mails

There are two standard notifications that will be sent when an email cannot be sent and cannot be delivered: E-Mail Failed and E-Mail Undelivered. You can create a custom undelivered email notification.

Context

Note

Tool: SuccessFactors Onboarding Administration

Procedure

1. Create the notification by following the instructions in the How to Create a Notification [page 219] section. Under *Main Properties*, from the *Notify At* dropdown list, select *E-mail Failed* or *E-mail Undelivered*.

2. Select the notification from the list of notifications, then click *Email*.
3. Use the following HRData keys to tailor the message:

HRData keys	Meaning
`mail:ID`	The mail queue message number.
`mail:Subject`	The subject line of the email message.
`mail:FromName`	The sender's name.
`mail:To`	To whom the email the email was sent.
`mail:CC`	To whom the email was copied.
`mail:Body`	The text in the body of the email.

Related Information

How to Add or Edit the E-Mail Notification Text [page 225]

13.10.8 How to Create a Custom Trigger

Procedure

1. Navigate toSAP SuccessFactors HCM *Onboarding* > *Notifications.*
2. Select the *Actions* tab, and click *Add Action.*
3. Define the action properties.
   a. In the *Name* field, select **`SetCustomStatus`**.
   b. Choose an *Execution Type.* The execution type defines when the action is executed. There are two options:
      - **On Start:** The action is executed before sending or executing the notification
      - **On Finish:** The action is executed when the notification is executed.
   c. In the *Filter* field, define critera used to decide if the action should be executed.
   d. In the *Parameters* field, only one parameter should be defined. A status with the name specified in the *Key* field and the value specified in the *Value* field is created when the action is executed.
4. The created action will be displayed in the Actions list. To edit an action, click on its name in the list.

13.10.9 Notification Groups

Once you configured the notifications, you can group them.

13.10.9.1 How to Create a Notification Group

Context

> **Note**
>
> **Tool: SuccessFactors Onboarding Administration**

Procedure

1. Click *Add*.
2. Enter a name in the *Group Name* field. It should be relevant to the type of notification.
3. Click *Submit* to save the new group.

13.10.9.2 How to Add Notifications to a Notification Group

Context

> **Note**
>
> **Tool: SuccessFactors Onboarding Administration**

Procedure

1. Select a notification group in the list of notification groups.
2. Click *Move*. The list of notifications displays in the left frame of the pop-up window.
3. Select the notifications to add from the pane on the left. Use the `Ctrl` and/or `Shift` keys to select multiple notifications.
4. Click *>* to add notifications to the group
5. Click *Close* to save your changes.

13.10.9.3 How to Add Advanced Conditions to a Notification Group

Context

> **Note**
>
> **Tool: SuccessFactors Onboarding Administration**

Procedure

1. Select the group from the list of notification groups and click *Filter*.
2. Under *Select Field*, click the *...* button.
3. Enter the field name in the *Search by name* text box or select a value from the *Filter by tag dropdown* list. The field is any data point in the Onboarding system.
4. Select the field from the HRData keys and click *Select*.
5. Select the *Operator* from the dropdown list.
6. Enter the *Condition Value*. It is a value containing alphanumeric or other symbols, by which the condition may be activated.
7. Click the *Add* button.
8. To save your changes and return to the list of notification group, click *Submit*. To save your changes and add additional conditions, click *Apply*. When you define further condition rules, choose the *And* or *Or* radiobutton to link them with the previous condition.

    > **Note**
    >
    > If you want to save the conditions to apply them to other notification groups, click *Save as Template* and enter a name for the template.

9. Click *Submit* after you have added the final condition.

13.10.9.4 How to Add Advanced Conditions to a Notification Group Using a Template

Prerequisites

You have saved conditions as a template. For more information, see How to Add Advanced Conditions to a Notification Group [page 229]

Context

> Note
>
> **Tool: SuccessFactors Onboarding Administration**

Procedure

1. Select the group from the list of notification groups and click *Filter*.
2. At the bottom of the window, select a template name and click *Load*.
3. Click Submit to save the *Advanced Conditions*.

13.11 Admin Reports

You can produce Onboarding metrics and security reports.

Admin Reports include :

- Metric Reports
  PostHire Verification Step Average, New Employee Step Average, Orientation Step Average
- Activities
  A list of activities and their status
- Groups by Users
  A list of security groups, to which a user is assigned
- Users by Groups
  A list of users by security groups, to which users are assigned

13.11.1 How to Create an Admin Report

Context

> **Note**
>
> **Tool: SuccessFactors Onboarding Administration**

Procedure

1. Click *Admin Reports* and then select the tab containing the report you need to create.
2. Enter and/or select report parameters such as processes or dates.
3. Click *Show Report*.

13.12 Onboarding Mobile

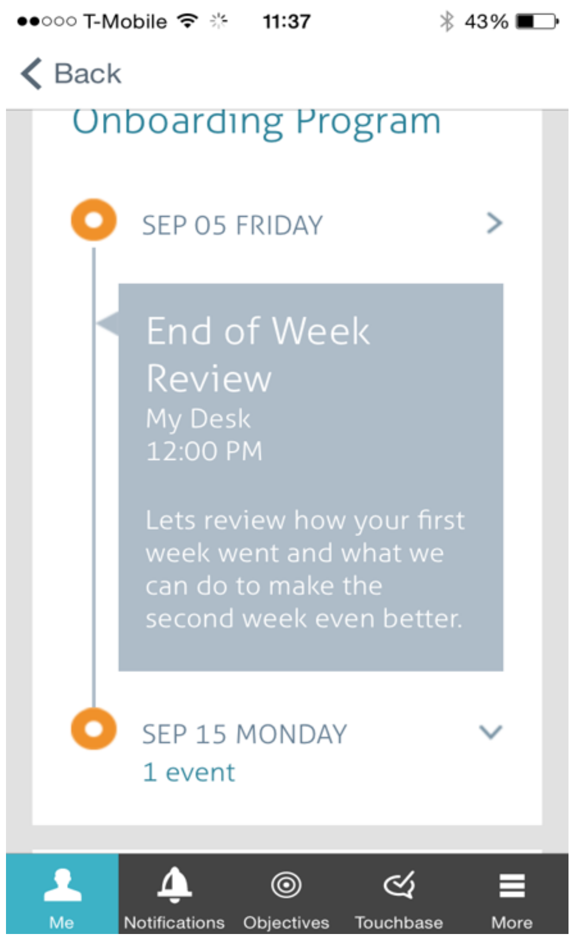
13.12.1 About Onboarding Mobile

This feature allows Hiring Managers to provide information to new hires before their first day at the company. Information includes where to go, what to bring, who they'll meet, what will happen and other details.

The Onboarding Mobile applications is shown to a new employee who downloads and accesses the SuccessFactors HCM Mobile app before their start date. The Onboarding mobile experience does not require a seperate app, just the SuccessFactors HCM application. The Onboarding Mobile application provides new hires with a variety of information to alleviate first day anxiety. .

Parts of the Onboarding Mobile App

- **First Day Countdown:** Based on the New Hire start date, configured during the Onboarding Process
- **Office Locations:**Either based on HR data or configured by the Hiring Manager as part of the Onboarding Program.On the new hire's first day, this will be the location of their first meeting. If the customer is using Employee Central, in the case that the new hire's first meeting is an orientation and the location is somewhere other than their home office, this displays the location of the orientation.

- **Onboarding Program:** The Onboarding Program displays meetings configured for the new hire by their manager and by the HR administrator. 

- **What to Bring (EC integration only):** Configured by the HR administrator using Admin Tools
- **People to Meet:** The hire's Manager, New Hire Buddy and recommended people. In the People to Meet section, a new hire can call, email or message their new contacts. They can also create a Touchbase item or view their mobile profile by tapping on the photo.
- **My Peers:**Based on the organization chart
- **My Profile:**Based on the new hir's mobile profile

Onboarding Mobile Workflow

Before Day 1

Before a new hire's official start date, a countdown to their first day at the company will show in the Onboarding Mobile application. They can also see their office location, what items to bring, key meetings and who to meet. In the *People to Meet* feature, the hire can email, call or message key contacts. The Onboarding Program shows the expanded details of the first day's meetings.

Selecting *My Peers* displays the company's organization chart.

Day 1

On the new hire's first day, a welcome message from their manager will display, along with the other information that appeared before their start date. The countdown will no longer appear.

After Day 1

The Onboarding Application appears as an option in the mobile app for the hire's first 30 days. After 30 days, the Onboarding option disappears.

If the Onboarding Guide is not showing up in the mobile app for the new hire, check the new hire's start date. The Onboarding guide expires 30 days after the start date and no longer shows up as a notification tile in the mobile app. If the Mobile Onboarding Guide does not show some content (Links, What to Bring, etc), the content comes from different sources. Orientation Meeting and What to bring are only available for customers with Employee Central and can be configured under Onboarding in Admin UI. Links are available on the mobile app only if using the new hiring manager experience.

Troubleshooting

- If the Onboarding Guide is not showing in the mobile app, check the start date of the new hire – the Onboarding guide expires 30 days after the start date and no longer shows as a notification tile in the mobile app.

- If the mobile onboarding guide does not show some content (for example, Links, What to Bring, and so on), this may be because the customer's instance does not have the required elements for the content. For example, Orientation Meeting and What to Bring are only availalbe for customers with Employee Central. Links are only availalbe on the mobile app if the customer is using the new hiring manager experience.

13.12.1.1 How to Set Up Onboarding Mobile

Procedure

1. Navigate to *SuccessFactors HCM* > *Admin Center* > *Enable Mobile Features* > *Modules* and check *Onboarding* .
2. Set Mobile permissions by logging in to SAP SuccessFactors HCM as an Admin user, and navigating to *Admin Tools* > *Manage Permission Roles.*
   a. Select the role created for New Hires. Under *Permission Settings* > *General User Permission* grant all Mobile permissions:
      - Mobile To-Do List Access
      - Mobile Organization Chart Access
      - Mobile Touchbase Access
   b. Select the role created for Onboarding Admins. Under *Permission Settings* > *Administrator Permissions* > *Manage Onboarding* make sure *Manage onboarding additional first day content* is enabled.

13.12.1.2 How to Configure the Onboarding Program

The “Onboarding Program” block of the Onboarding Mobile app displays details of the meetings the admin user has configured for New Hires. These meetings are seperate from meetings configured in the New Hire Activities by the hiring manager. The Central Orientation Meeting feature is only available with the Employee Central Integration.

Context

> **Note**
>
> Tool: SuccessFactorsOnboarding Administration

Procedure

1. Navigate to to ▶ *Admin Tools* ▶ *Manage Onboarding* ▶ *Maintain Central Orientation Meetings* ▶
2. To create a new Central Orientation Meeting click *Create New.*
3. Click *Edit* in the newly created meeting record
4. In the pop-up window, specify the effective date for the new meetings, then click *Proceed*
5. Enter the relevant information about the meeting. The following fields are required: Meeting Date, Meeting Start Time and Time Zone
   a. To define the users who will see this meeting, first define a time frame for hires by choosing a date for *Valid for users with a start date on or after* and *Valid for users with a start date on or before.* The start date on or after is the beginning of the defined time frame, and the start date on or before is the end. The meeting will appear for new hires with start dates between the two dates.
   b. Once the time frame is defined, select the office locations where new hires will attend this meeting. you can make multiple selections for this element, but the meeting deails (location, description, etc) will remain the same for all selected locations.

13.12.1.3 How to Configure Items to Bring

Context

> **Note**
>
> Toole: SuccessFactors Onboarding Administration

Procedure

1. Navigate to ▶ *Admin Tools* ▶ *Manage Onboarding* ▶ *Maintain Lists of Items to Bring* ▶
2. To create a new list, click *Create New*
3. Click *Edit* on the newly created onboarding First Day Item List record. Enter an effective date for the list.
4. Enter a description for the list and up to ten items for the new hire to bring on their first day.
5. Enter a time frame for the list by defining a *Valid for users with start date on or after* and *Valid for users with start date on or before.* For example, if you wanted the list to be valid only for employees starting in January 2014, you would select 01/01/2014 for the first date and 01/31/2014 for the second.
6. Select the office locations where new hires will need this list of items. You can make multiple selections for this element, but the list details will remain the same for all selected locations.
7. Click *Save.*

8. To edit an existing list, select the list from the available configured lists.
9. Click *Edit* and select an effective date for the changes to list. Click *Proceed.*
10. Make the desired changes to the list and click *Save.*

13.13 Hiring Manager Activities

Hiring managers can complete their new hire activities, either via an iPad or the Web, including assign buddy, welcome message, equipment provisioning, meetings, recommended links, and goal setting.

The hiring manager activities are only available for hiring mangers. All other employees should use panel-based workflows.

Customers using SAP SuccessFactors Goal Management can configure an activity that allows hiring managers to set new hire goals directly in the activity.

Scenarios for configuring hiring manager activities fall into one of several groups:

- New vs. existing instances. For instances where Onboarding was enabled after December 2014, open a JIRA ticket to migrate the hiring manager activities settings.
- Using content from the Success Store. You can either use the out-of-the-box content provided in the Success Store, or configure the activities from scratch.

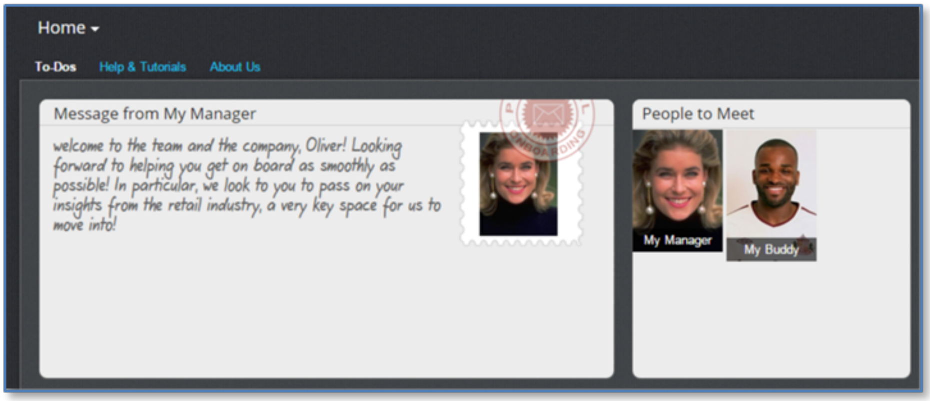
  > Recommendation
  >
  > Using content from the Success Store is recommended to implement the hiring manager activities. You can customize the provided content, but downloading the template files from the Success Store creates duplicate activities. Delete the blank activities before customizing the ones provided via the Success Store.

> Recommendation
>
> The Hiring Manager activities do not affect the trigger for New Hire activity. Creation of the OnboardingCandidateInfo object triggers the New Hire activity.

Hiring Manager activities can be reassigned or delegated to other users, in case the original Hiring Manager is not available. Reassignment is a one-off transfer of activities to a new person, while delegation assigns all processes and activities to another user for a period of time (for example, during a Leave of Absence). Multiple Delegation scenarios are not supported for the Hiring Manager activities, or any other Onboarding activities.

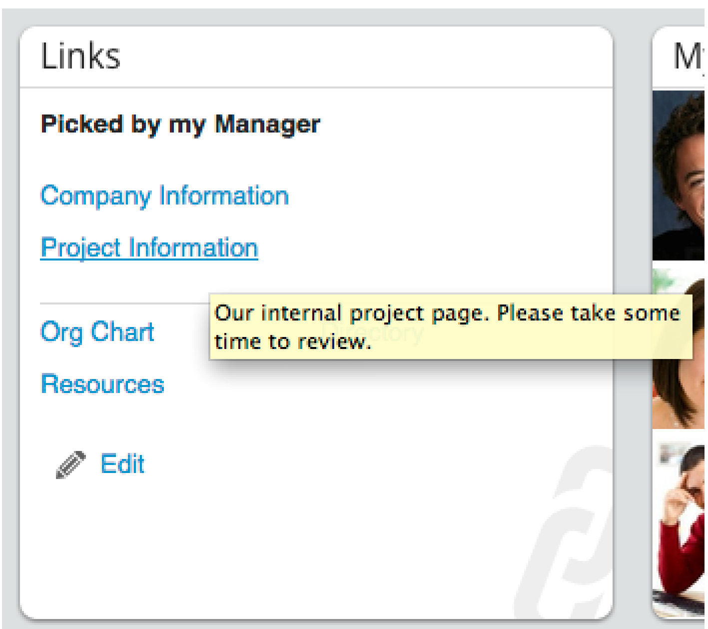
Send Welcome Message

Content entered appears on the new hire's homepage, either as part of the Onboarding Tour or as a tile. You can configure default text for the Welcome message, which the hiring manager can customize for each new hire, or as needed.



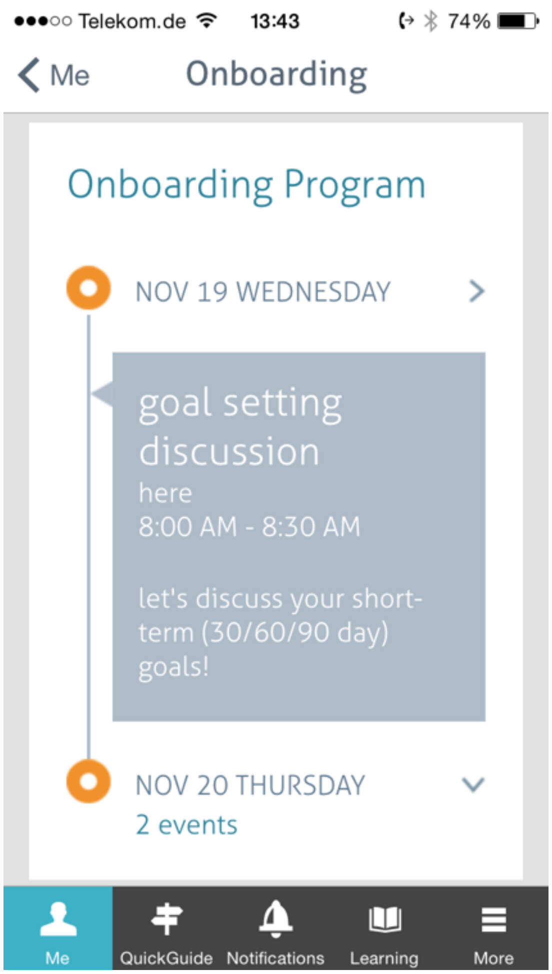
Recommend Links

Links recommended by the manager will show for the new hire in two locationsm both in the mobile app and in a tile on the homepage. No additional configuration is required beyond making the activity relevant and mandatory,



Schedule Meetings

This activity shows a number of Recommended Meetings, with a default subject (What) and Agenda for each type of meeting. You can configure the types of meetings to recommend. For example, you may want to recommend the manager set up an end of the first week recap meeting, meeting between the new hire and buddy, or a short-term goal setting discussion.If an orientation has been scheduled by HR, it shows up in the Schedule Meetings window so the manager does not create any conflicting appointments

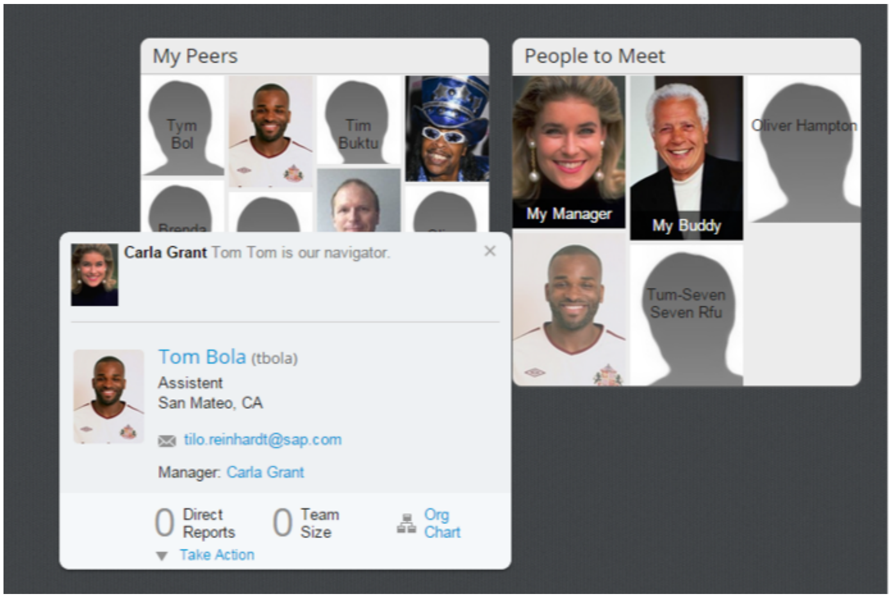


Assign a Buddy

The manager can select a buddy from the carousel of the new hire's teammates, or search from the employee directory. The manager enters a reason for assigning the buddy, and can also use the Notify button to send an email to the buddy about their assignment, or configure e-mail notifications to be sent automatically. This e-mail is filled by template but can be modified before being sent. You can only choose one Buddy. For additional people, use the Recommended People activity.

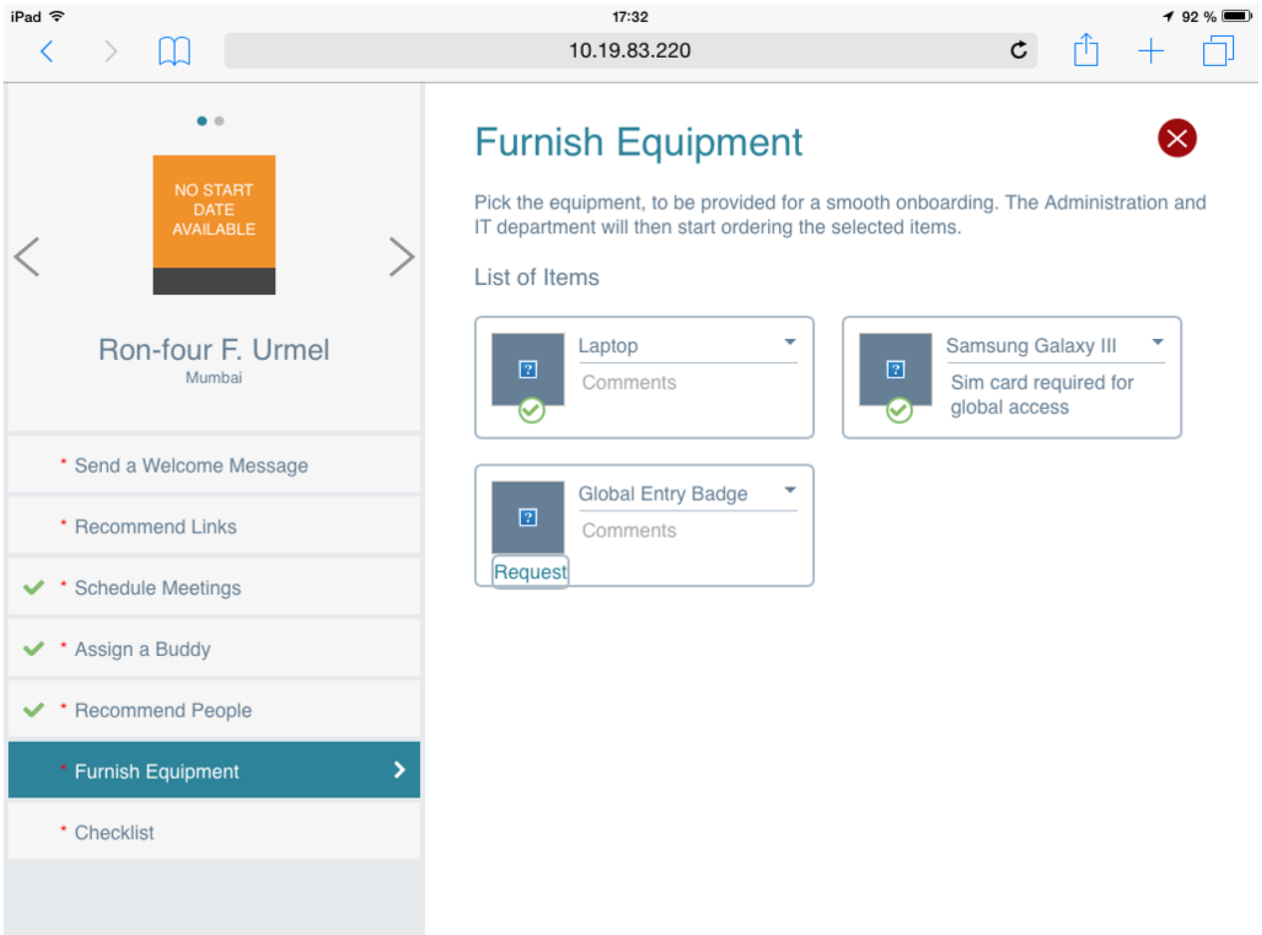
Recommend People

Select people to recommend from the carousel of the new hire's teammates, or search from the employee directory. You can select multiple people as recommended. The manager enters a reason for recommending each person, and can also use the Notify button to send an e-mail to each person, or send notifications to the selected employees automatically. This e-mail is filled by template but can be modified before being sent



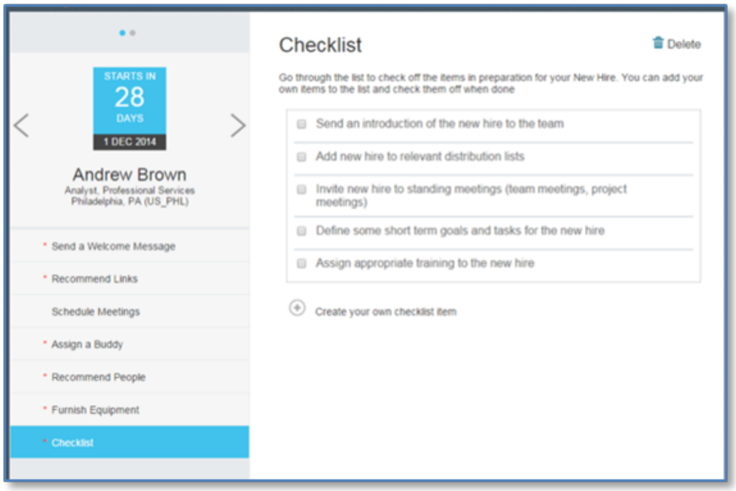
Furnish Equipment

Helps the manager kick off workflows to obtain equipment for their new hire. In addition to saying whether the Furnish Equipment activity itself is relevant/not relevant and mandatory/optional, you can configure the types of equipment that the manager needs to consider as part of the onboarding process. Furnish equipment requires configuration of a workflow and business rules to trigger the workflow. Furnish Equipment is both for equipment approval and equipment provisioning. For example, if a computer or phone requires departmental approval, or if an access badge or desk simply needs to be provided for the new hire.



Checklist

The checklist activity is a set of reminders for the hiring manager. In addition to saying whether the *Checklist* activity itself is relevant/not relevant and mandatory/optional, you can configure standard checklist items for the hiring manager to consider as part of the onboarding process. You can add hyperlinks to these standard checklist items. The items defined in this central checklist display for the hiring manager in the UI. The hiring manager can delete them from the list for a new hire, mark them as complete, and add custom reminders to the checklist, for example, taking the new hire and team out for lunch.



Related Information

Success Store Content for Hiring Manager Activities [page 248]

13.13.1 How to Configure Hiring Manager Activities

Context

By default, all new hire activities are defined as relevant and mandatory. “Relevant” means that the activity is part of the new hire activity planning process (for example. a company may decide only to assign a buddy, but not to recommend other people for the new hire to interact with; in which case the “Assign Buddy” activity would be “relevant”, and the “Recommend People” activity would not) “Mandatory” means that the activity has to be completed by the hiring manager before the overall new hire activity planning process is set to complete. Mandatory activities are marked in the hiring manager’s UI by a red asterisk. In addition, the “due date” for all of these activities is set by default to seven days before the start date of the new hire (there is only one due date per set of activities, NOT per individual activity).

Activities cannot be configured by department or division; activities configured are global for all new hires.

Procedure

1. Navigate to *Provisioning* > *Company Settings* > *Enable MDF-based new hire activity planning (refer to Onboarding Config Guide for details)*. Ensure that this option is enabled. For instances created after

December 2014, this option is enabled when Onboarding is enabled. If not, you cannot manually enable it, but need to open a JIRA ticket for a migration script.

a. Open a COSR JIRA ticket and request a run of the MigrateKMSNHActivitiesToMDFClient migration script. Include the company ID and the range, in days, of new hires to be migrated. For example, a range of 40 would migrate information for all new hires who started in the last 40 day, or in the future. The default range is 30 days. Once this script runs successfully, the *Provisioning* switch is enabled.
b. Once you have enabled the MDF-based new hire activity planning, disable the N6 and N7 notifications for Onboarding.

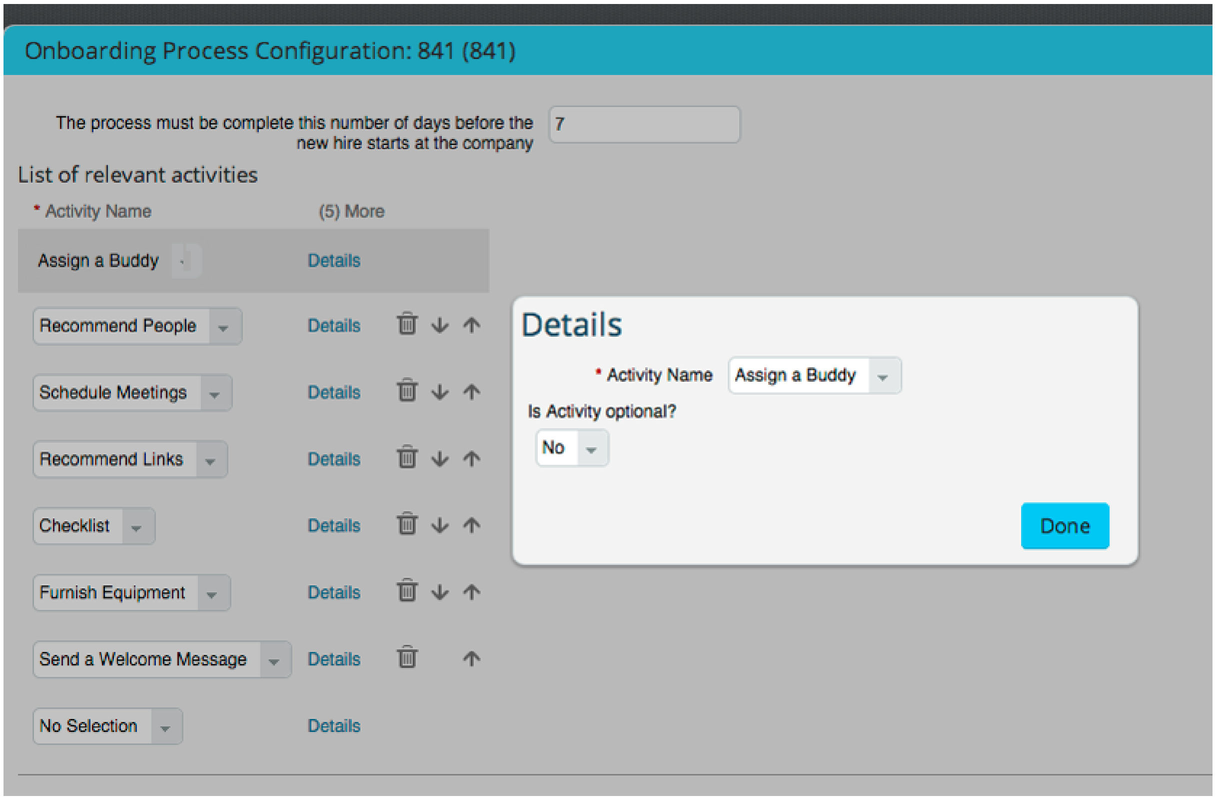
```
ant runclient -
Dscript_class=com.successfactors.onboarding.service.runclient.MigrateKMSNHActivit
iesToMDFClient -Dscript_args="-c [companyid] -r [range] -d"
```

> **Note**
>
> The script above is for a migration dry run. After the script runs initially, it must run again with the `-d` designation removed.

2. Navigate to *Super Admin* > *Account Options*
3. Enter **`BX.Urls.EmployeePage.ActivityPlanning`** in the *Key* field. If no **`BX.Urls.EmployeePage.ActivityPlanning`** option is set, click *Add Option* and enter the required information.
    - `Key`: BX.Urls.EmployeePage.ActivityPlanning
    - `Name`: BX.Urls.EmployeePage.ActivityPlanning
    - `Group`: System
    - `Type`: String
    - `Value`: /xi/ui/onboarding/pages/iframeAction.xhtml?action=redirectManagerActivities
4. Grant the user permission for the MDF objects by navigating to *SuccessFactors HCM* > *Admin Center* > *Manage Permission Roles* > *Role* > *User Permissions* > *Metadata Framework* > *Manage Data*
5. Navigate to *SuccessFactors HCM* > *Onboarding* > *Notifications*. Under *All Notifications by Group*, select *OnBoarding Notifications*.
6. Select the *N1 Manager - New Hire Activities Wizard*, then click *Edit.*
7. Select *Actions* > *Add Action*. Select **`Redirect`** in the *Name* field and **`Run instead`** for *Execution Type*. Click *Submit.*
8. By default all new hire activities are both relevant and mandatory. Relevant means that the activity is part of the new hire activity planning process, and mandatory means that the activity must be completed by the hiring manager before the completion of the new hire activity planning process. In the hiring manager's UI, mandatory activities are indicated with a red asterisk. The due date for all the new hire activities is set to seven days before the start date of the new hire by default.

    Changes to the *Relevant* or *Mandatory* aspects of an activity only apply to new hires created after the changes are made, not to new hires already being processed. It is possible to have new hires with different sets of activities in the system if the process has been changed.
9. Enter a number of days in the *The system notifies the hiring manager when a workflow is incomplete this many days before the new hire's start date*. This notifies the hiring manager if a workflow for furnishing equipment is overdue, and creates a To-Do list item on the Hiring Manager's home page.

10. To edit the default settings for the new hire activities, navigate to SAP SuccessFactors HCM ▶ *Admin Tools* ▶ *Manage Onboarding* ▶ *Configure new hire activity planning process* ▶



a. To change the default due date, click *Edit* then enter the desired number of days in the *The process must be complete this number of days before the new hire starts at the company* field. The number entered is the number of days before the new hire's start date that the activities must be completed. Changes to the due date apply to all new hires immediately. Sets of new hire activities are shown in due date order in the hiring manager UI.
b. Click *Edit* and the trash can icon to make an activity not relevant. This removes it from the new hire activity set. For example, if a customer wants to use the *Assign a Buddy* activity, they may not want to use the *Recommend People* activity.
c. To set an activity as optional, click ▶ *Edit* ▶ *Details* ▶ next to the activity you wish to change, and switch the *Is Activity optional?* dropdown to *Yes*.

➡ Recommendation

Using the up and down arrows in the Edit dialog does not impact the way activities display in the hiring manager UI. Relevant activities are always visible to the hiring manager, and the activities do not need to be completed in a specific order.

11. To add items to the *Checklist* activity, click *Edit* then *Details* next to the Checklist activity. In the *Item* field, add any tasks the hiring manager should consider as part of the onboarding process. For example, **`Add new hire to team email distribution list.`** You can remove items from the checklist by clicking on the trash can icon.
12. In the *Schedule Meetings* activity, you can configure the type of meetings recommended for the hiring manager as part of the onboarding process. Enter the title of the meeting in the *Subject* field, and a suggested agenda in the *Agenda* field. For each configured meeting, the hiring manager sees a button in the UI. Clicking

the button brings up the subject and default agenda for the meeting. The hiring manager can override the default suggestions in the *Meeting Details* field.

13. To add items to the *Furnish Equipment* activity, navigate to *Admin Tools* > *Metadata Framework* > *Manage Data*.
    a. To add a new equipment type, select *Onboarding Equipment Type* from the *Create New* dropdown.
    b. Enter a code and description for the new equipment type, for example **`computer.`** Click *Save.*
    c. Once you have created all the appropriate equipment types, select *Value for Onboarding Equipment Type* from the *Create New* dropdown.
    d. Enter a code and description for the value, then select the appropriate type from the dropdown. For example, you could associate the value **`PC`** or **`Macbook`** with the computer equipment type.
    e. The "Suppress workflow?" flag (yes/no) enables you to determine whether a workflow is to be triggered for the item in question. For example: you may also want to configure additional values for the hiring manager to select, for example, "not required" or "employee uses own device", giving the manager the opportunity to review the need and to record the decision.
    f. After adding the types and values, add the appropriate types to the *Furnish Equipment* activity by navigating to *Edit* > *Details.* Select the desired equipment types and click *Save.* For each equipment type, the hiring manager sees a button in the UI.
14. If the customer is using the standard New Hire Goal Management template in Goal management, you can add 30, 60, and 90 day goals for the new hire using the *Set Goals* activity. All new hires processed after the Goals activity is configured will have this activity assigned to their Hiring Manager.

13.13.1.1 How to Configure the Furnish Equipment Activity Workflow

New hire activities require action only by the manager, except for the Furnish Equipment activity. For example, a request for a new PC may require approval by someone else and action by other departments.

Context

You can configure a workflow for every equipment type and value. When the manager clicks *Request*, the system generates a workflow item, which is sent to the appropriate people based on the workflow configuration.

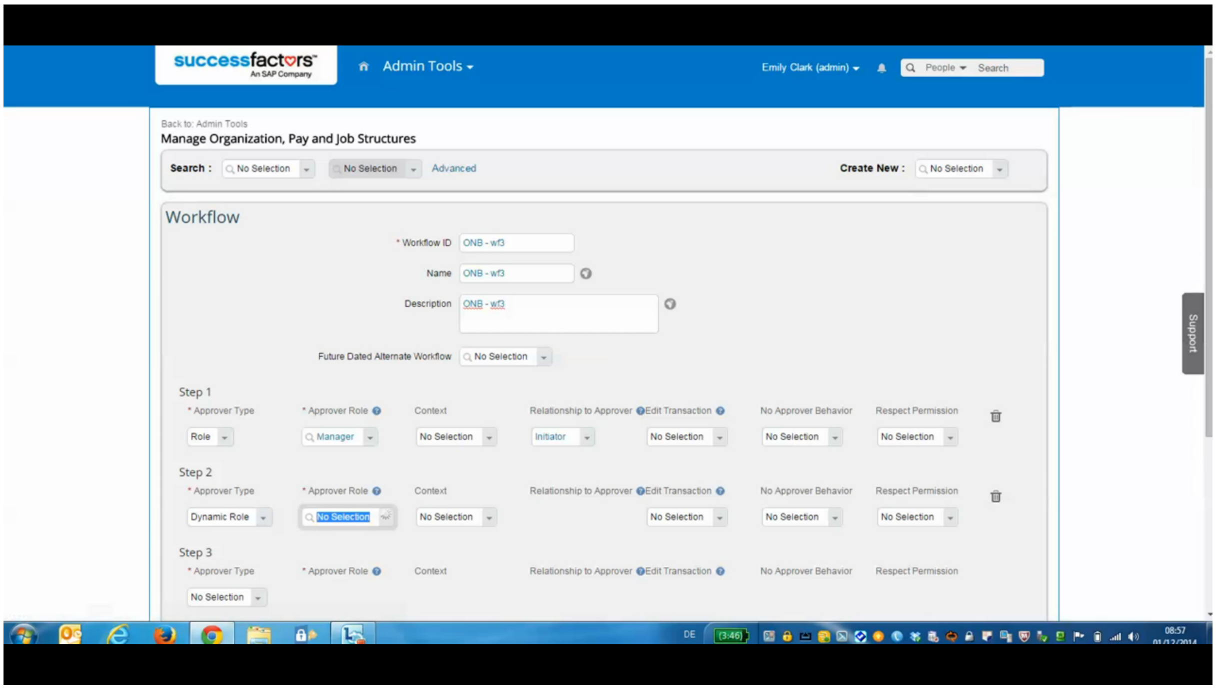
After configuring the workflow, when a user requests an equipment type for a new hire, the manager of the initiator receives a request for retrieval. You can use the same workflow for more than one type or equipment, or configure separate workflows per equipment type, by defining a business rule to evaluate the value rather than the equipment type code.

Employee Central is not required to configure the Furnish Equipment activity. Enabling the Hiring Manager Activities provides sufficient access to the workflow objects.

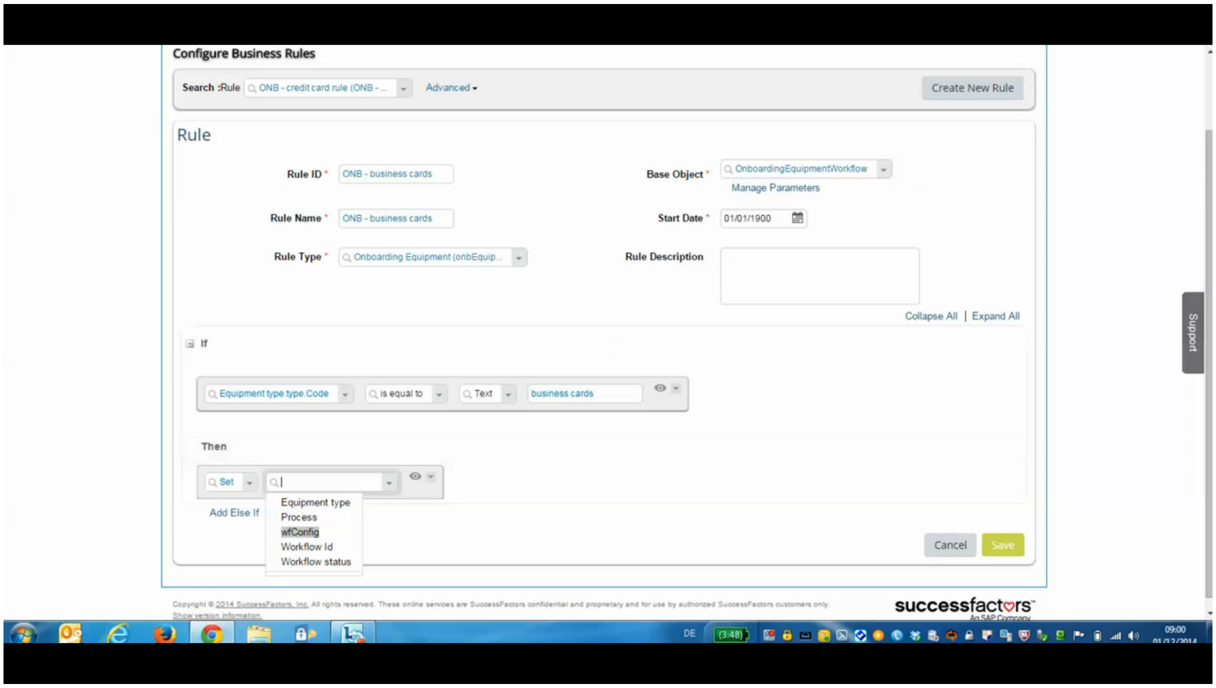
Procedure

1. Define the workflow object. Navigate to *Admin Tools* › *Manage Employee Central Foundation Objects* › *Manage Organization, Pay and Job Structures.*
2. In the *Create New* dropdown, choose *Workflow Configuration.* Enter data to define the workflow.

   You can configure multiple steps of the workflow if items require more than one level of approval or multiple people to complete. Enter an *Approver Type* and *Approver Role* for each step of the workflow.



3. Click *Save*.
4. Create a business rule. Business rules define when the workflow is triggered. Navigate to *Admin Tools* › *Configure Business Rules.* Relate the rule to the *OnboardingEquipmentWorkflow* base object.
5. To define the business rule, set the *If* condition equal to the type of equipment being requested, for example, business cards. Then, set the *Then* condition to the appropriate workflow that you configured in steps 1-3.



6. Assign the business rules to an Onboarding-specific rule type, called for example Onboarding Equipment. To create this new rule type, use *Admin Tools* > *Configure Object Definitions* > *Picklist (in search bar)* > *Rule Type* > *Insert New Record.*
7. Under *Configure Object Definitions*, select *Object Definition* and *OnboardingEquipmentWorkflow* in the *Search* bar.
8. Click *Take Action* > *Make Correction*, then navigate to the *Rules* section. Click *Details* to see the business rules associated with the object definition.
9. Under the *saveRules* section, add the newly created business rule and click *Save*.

Related Information

Employee Central Master Implementation Guide
Metadata Framework (MDF) Implementation Guide
Configuring Business Rules

13.13.1.2 E-mail Notifications for Hiring Manager Activities

You can send manual or automatic e-mail notifications to a new hire's buddy or recommended people.

The *Assign Buddy* and *Recommend People* activities show a *Notify* button. Clicking this button sends an e-mail message to the buddy or recommended person. The hiring manager can change the default text before sending the notification. You can maintain default text for the notification e-mail, and translations of the text in *Admin Center* > *E-Mail Notification Template Settings* > *Onboarding Buddy Notification* or *Onboarding Recommended Person Notification*.

The notification emails support these tokens:

- [[ONB_NEW_HIRE_FIRSTNAME]]
- [[ONB_NEW_HIRE_LASTNAME]]
- [[ONB_NEW_HIRE_STARTDATE]]
- [[ONB_NEW_HIRE_JOB]]
- [[ONB_NEW_HIRE_LOCATION]]
- [[ONB_MANAGER_FIRSTNAME]]
- [[ONB_MANAGER_LASTNAME]]
- [[ONB_PERSON_FIRSTNAME]] (Buddy or Recommended Person)
- [[ONB_PERSON_LASTNAME]] (Buddy or Recommended Person)
- [[ONB_REASON_FOR_RECOMMENDATION]] This token is only supported for manually sent notifications, and not for automatically triggered notifications.

Automatic e-mail notifications are configured in *Admin Tools* > *Configure new hire activity planning process*. Under the *Details* option for the *Assign a Buddy* or *Recommend People* activities, and set *Send notification mail automatically* to **`Yes`**. When this setting is enabled, the *Notify* button will not display and the notification e-mail sends automatically when a buddy or recommended person is assigned.

When configuring meeting details, if the *Send meeting as a calendar entry (.ics file)* option is enabled, an e-mail notification is sent automatically to all participants.

To change the default text for the meeting e-mail notification, navigate to *Admin Center* > *E-Mail Notification Template Settings* > *Onboarding Manager Meeting Notifications*.

The e-mail notification supports these tokens:

- [[ONB_SUBJECT]]
- [[ONB_NEW_HIRE_FIRSTNAME]]
- [[ONB_NEW_HIRE_LASTNAME]]
- [[ONB_NEW_HIRE_STARTDATE]]
- [[ONB_NEW_HIRE_JOB]]
- [[ONB_NEW_HIRE_EMAIL]]
- [[ONB_NEW_HIRE_LOCATION]]
- [[ONB_MANAGER_FIRSTNAME]]
- [[ONB_MANAGER_LASTNAME]]

Data to populate the tokens is pulled from the CandidateInfoObject if the user has not been created, or the user record for existing users. If data is not populating to the e-mail notifications, make sure that information is properly mapped from Recruiting to Onboarding, as a mapping failure causes the tokens to show as empty.

13.13.1.3 Default Welcome Message

Administrators can configure default text for the new hire's Welcome Message, which the hiring manager sees in the *Write a Welcome Message* activity.

To configure the Default Welcome Message text, navigate to *SuccessFactors HCM* > *Admin Tools* > *Onboarding* > *Configure new hire activity planning process* then click *Edit* in the upper right corner. Find the *Welcome Message* activity and click *Details*. Enter your default text in the *Default Text* field.

To enter translated default text, or see which locales have translated default text already existing, click the globe icon next to the *Default Text* field. You can only enter translated text for locales already enabled for Onboarding.

When configuring default Welcome Messages, the administrator can also maintain translations of the default text. When the hiring manager uses the *Write a Welcome Message* activity, the translation used for the default text depends on the default locale of the manager and new hire. If the locale for both is the same, then the appropriate language version is used where available, otherwise the default locale displays.

The default welcome message also supports tokens that will be populated with the relevant data for individual users. The default welcome message supports these tokens:

- [[ONB_NEW_HIRE_FIRSTNAME]]
- [[ONB_NEW_HIRE_LASTNAME]]
- [[ONB_NEW_HIRE_JOB]]
- [[ONB_NEW_HIRE_LOCATION]]
- [[ONB_NEW_HIRE_STARTDATE]]
- [[ONB_NEW_HIRE_EMAIL]]
- [[ONB_MANAGER_FIRSTNAME]]
- [[ONB_MANAGER_LASTNAME]]

13.13.2 Success Store Content for Hiring Manager Activities

As a starting place, you can download content for the checklist, meetings and equipment activities from the Success Store. You can add or change this content as needed.

The file name in the Success Store is *NH Activity Planning - default configuration.zip*. You can also access the Success Store file under *Admin Tools* > *Import and Export Data* > *Onboarding Process Configuration*.

If you have not configured the Hiring Manager Activities in your instance, use the SuccessStore content as a starting point for setting up the activities.

If you have already implemented the Hiring Manager Activities, or if you have changed the configuration since first setting up the activities, use the following process:

- Navigate to *Admin Tools* > *Import and Export Data* > *Export Data* > *Onboarding Process Configuration*. Select `Yes` for the *Include dependencies* and *Select all records* fields. This backs up your existing configuration
- Import the latest configuration from the SuccessStore by navigating to *Admin Tools* > *Import and Export Data* > *Import Data* > *Onboarding Process New Hire Activities Step*
- Review the newly imported configuration under *Admin Tools* > *Configure new hire activity planning process*.
- If the new configure meets your needs, you can keep it and update as needed. If it does not, you can reimport the backup of your current configuration.

> **Note**
>
> Before reimporting an existing configuration, remove the imported configuration from your instance. Navigate to *Admin Tools* > *Manage Data* and select *Onboarding Process* in the *Search*dropdown. Select an available object, then click *Take Action* > *Permanently Delete Entry*. Repeat this for each available Onboarding Process object.

Only one configuration object should be present in an instance. If you have two, use *Admin Tools* > *Manage Data* to permanently delete the configurations you no longer need.

13.13.3 AdHoc Reporting

Customers using Hiring Manager activities want to understand which actions hiring managers perform, and measure and follow up on the content created.

Users can configure Ad Hoc reports for different parts of the Hiring Manager activities. For example, you can configure a scheduled job to export equipment selections, which are then imported into a ticketing system to trigger import tickets. Users could also extract all assigned buddies using a report, to allow for follow-up processes like six month surveys, instructional e-mails, or other related tasks.

13.13.3.1 How to Configure Ad Hoc Reporting

Prerequisites

Ad Hoc Reporting for Onboarding requires initial engagement with SAP SuccessFactors Professional Services.

- Navigate to *Provisioning* > *Company Settings* and make sure *Enable Onboarding Application* and *Enable MDF-based new hire activity planning* are checked.
- Navigate to *Provisioning* > *Company Settings* and enable *Ad Hoc Report Builder*

Enabling the MDF-based new hire activities does not require the customer to have Employee Central.

Procedure

1. Grant permissions for the Ad Hoc Report Builder. Navigate to SuccessFactors HCM *Admin Center* > *Manage Permission Roles* and select the role you want to grant Report Builder permissions.
2. Select *Permissions* > *Reports Permission*. Enable *Create Ad-Hoc Report* and *Run Ad-Hoc Report*.
3. Click *Done*.
4. To create the report, navigate to *SuccessFactors HCM* > *Reports* > *Ad Hoc Reports* > *Create New Report*.
5. In the *Report Definition Type* field, select `Onboarding` to create reports based on the Hiring Manager activities data.

13.13.4 Business Rule-Driven New Hire Activities

Customers can configure Business Rules to control Hiring Manager Activities.

The Business Rules allow customers to configure different sets of activities or different default content for different parts of their organization. For example, a manufacturing company might make heavy use of the Hiring Manager Activities in their corporate offices, but they do not apply for factory workers. The Hiring Manager Activity configuration supports different process configurations based on business rules around criteria available in Onboarding.

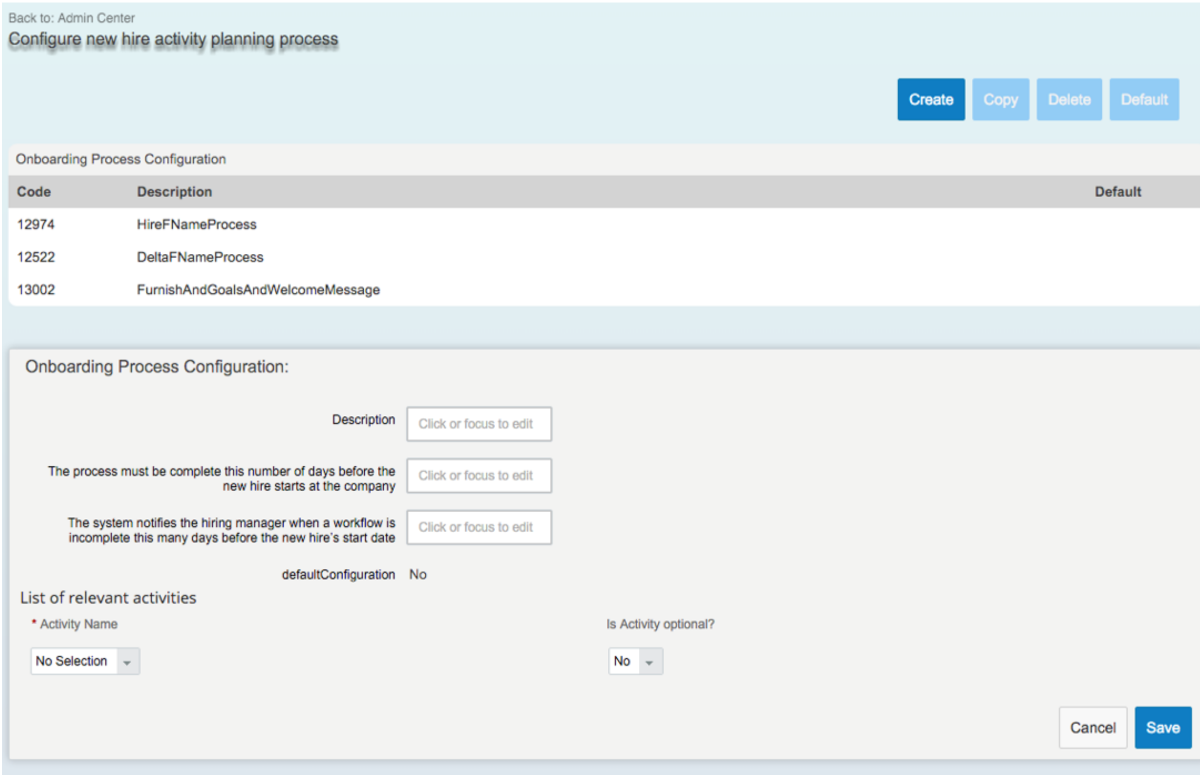
13.13.4.1 How to Configure Business Rules for New Hire Activities

Prerequisites

MDF-based hiring activities must be enabled in *Provisioning* > *Company Settings*. Contact SAP Support to have this setting enabled.

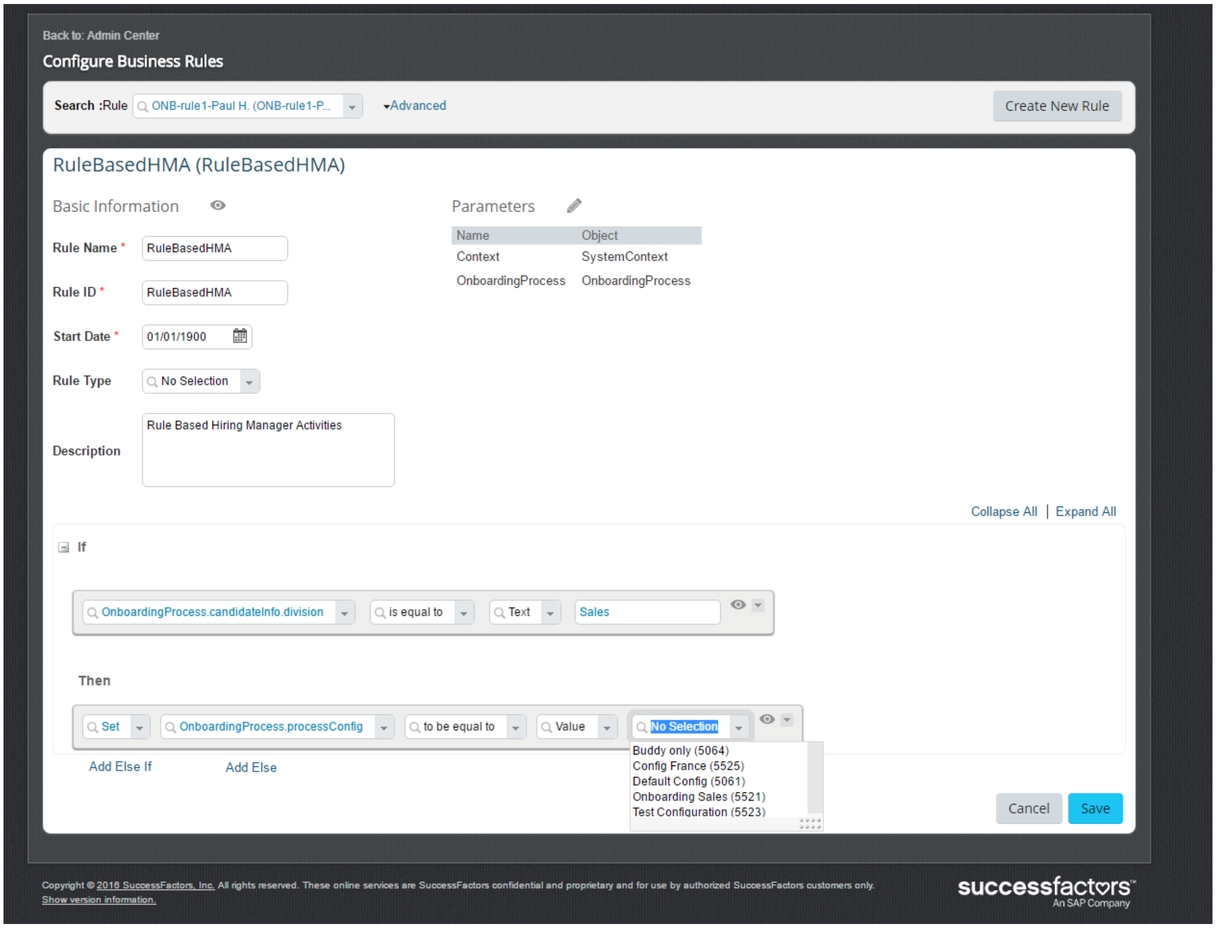
Procedure

1. Navigate to *SuccessFactors HCM* > *Admin Center* > *Manage Onboarding* > *Configure new hire activity planning process.*
2. Click *Create* to create a new process configuration.



3. Enter a *Description* for the configuration, a number of days before the start date that the activities must be complete before the new hire's start date, and a number of days before the new hire's start date that the hiring manager receives a notification if the activities are incomplete.
4. Under *List of relevant activities* select the Hiring Manager activities you want to add to this configuration.
5. Click *Save*.
6. Select a process configuration and choose *Default* to make it the default for the instance. There must always be one default process configuration.

   If no rule applies, the configuration marked as default will be used for the Hiring Manager Activities creation. If no rule applies and there is no default available, the system uses the first configuration available in the system. You cannot delete the configuration marked as default, or designate more than one configuration as the default.
7. Navigate to *SuccessFactors HCM* > *Admin Center* > *Configure Business Rules* > *New Rule* to create a new business rule for hiring activities.



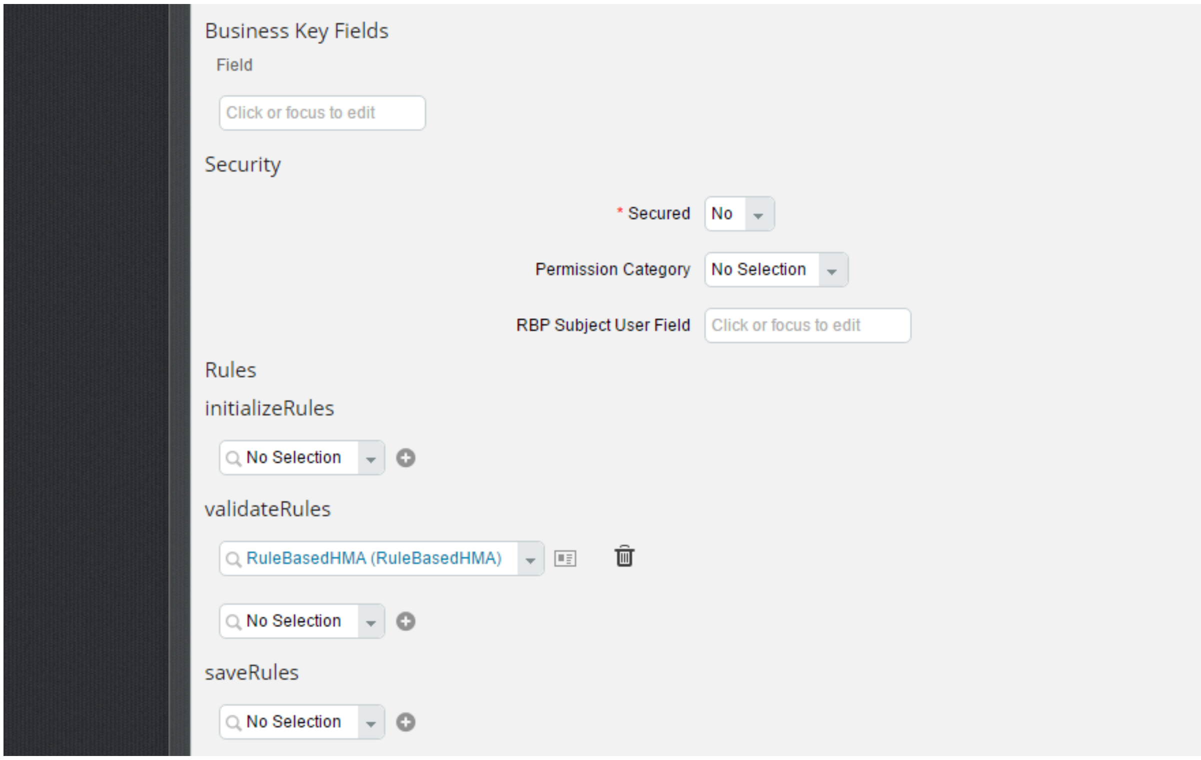
a. Define an if-condition, for example **`OnboardingProcess.candidateInfo.Division is equal to Sales`** where `Sales` is the value in the `Division` field of the `OnboardingCandidateInfo` object.

b. Define a then-condition, for example `Set OnboardingProcess.processConfig to be equal to Onboarding Sales` where `Onboarding Sales` is the name of the configuration. All configurations created in the Admin Center are available here.

Recommendation

For customers using an external ATS, it's best to configure business rules using the division, department, or location of the Hiring Manager, rather than the candidate's information, because some fields may not be available.

8. Link the new business rule to the `OnboardingProcess` object. Navigate to *SuccessFactors HCM* > *Admin Center* > *Configure Object Definitions*.



a. Choose *Object Definition* and select the `OnboardingProcess` object.
b. Go to E*dit* mode and select the created busines rule in the *validate Rules* dropdown.
c. Save the object definition.

The business rule is evaluated when the Hiring Manager activities are created and the corresponding configuration is used. If more than one rule condition is true, the value from the last condition will be used.

13.14 Processes

13.14.1 What is a Process?

13.14.2 How to Create a Custom Process

Use a custom process to direct new hires to any set of steps outside the standard Onboarding process. For example, for crossboarding, international hires, or other custom configurations.

Prerequisites

To create a new process, users must have account Admin User permissions.

Context

Custom processes support crossboarding (internal hires), offboarding, and integration with Intelligent Services.

Procedure

1. Navigate to SAP SuccessFactors HCM *Panels* > *All Wizards.* Choose any existing wizard and click *Add.* Repeat to create a total of three empty wizards.
2. Navigate to Super Admin, then select *Accounts* and choose the desired account. Click *Processes* > *Add Process.*
3. Enter a name and description for the new process. The *StartControl* and *Process Controller* fields must match the existing Onboarding Process.
4. Click *Create.*
5. After you have created the process, click *Index Fields* and add the desired index fields. These can match the Onboarding Process Index Fields.

   In the *Index Fields* menu, you can add new Index Fields, or edit the data keys for existing Index Fields. To display a data key in the Onboarding Work Queue, check the *Display in Work Queue* option. Customers may want to use this feature to display custom data keys in the Work Queue. For example, if the client is not using the standard location field, they can add a data key for a field like Recruiter Name instead.

   > **Note**
   >
   > After making changes to the Work Queue columns, navigate to *Super Admin* > *Manage Index Fields Cache*. Select *Yes* and then click *Rebuild Cache* and *Save Changes*.

6. Navigate to *Account* > *Account Options* and select the *XpressHR.Signature.NESSignatureForStandardProcessesOnly* .
7. Set the *Value* for the account option to `False.`
8. Navigate to *Super Admin* > *Processes* and select the custom process configured to handle internal hires.

9. In the *Process Type* field, select *Onboarding* and click *Update*.
10. Navigate to SAP SuccessFactors HCM *Security* select *Groups*, then *Enter Info and view Results* and click *Assign.*
11. Hover over the *Select Process* control in the upper left, and choose the process you just created. Add the *Activity Step Permission* and *Monitoring Step Permission*.
12. Click *Apply Changes,* then *Submit.*

> **Note**
>
> When you add a custom process, sometimes it will not appear in the reporting index under *SuccessFactors HCM* > *Onboarding* > *Reports* > *Process*. If you do not see the custom process, navigate to *Super Admin* > *Account Options* and locate the *XpressHR.ReportableProcesses* option. Add the value *CustomProcess1* to this field.

13.14.2.1 How to Import a New Hire to a Custom Process

You can create custom processes for new hires, and must perform additional configuration to direct hires to those processes. This allows you to use custom processes for crossboarding, or international hires, for example.

Prerequisites

Before performing these steps, you must create a custom process in SAP SuccessFactors Onboarding. You should also identify your use case for the custom process, and what field you will use to trigger the process. The steps in this section demonstrate the scenario where a customer needs a custom process for international new hires.

In this

Procedure

1. Create a new data key by navigating to *SuccessFactors HCM* > *Onboarding* > *Settings* > *Data Dictionary* and select the *RX* namespace. Click *New Field*.
   a. Enter a *Name*, *Label*, and *Description* for the new field. This is the field you'll use to trigger the custom process, so enter a description that reflects that.

   For an international onboarding process, you might enter **`JobReqCountry`** in the *Name* and *Label*fields, and **`Country listed on the Job Requistion`** in the *Description* field.
2. Navigate to *Super Admin* > *Import/Export Settings* > *HRXML.ImportNewHire* > *Export File* > *Submit*.
3. Enter the conditions in the XSLT file that will direct new hires to the custom process.

```
<xsl:template match="/RCM2KMSDataExchange/Field">
    <xsl:choose>
      <!-- process -->
```

```
      <xsl:when test="./ID='JobReqCountry'">
        <xsl:call-template name="item">
          <xsl:with-param name="key">Process</xsl:with-param>
          <xsl:with-param name="value">
            <xsl:choose>
              <xsl:when  test="translate(normalize-space(./Value),$smallcase,
$uppercase)='US' or translate(normalize-space(./Value),$smallcase,
$uppercase)='USA'">
                <xsl:text>Onboarding</xsl:text>
              </xsl:when>
              <xsl:otherwise>
                <xsl:text>Onboarding - Canada</xsl:text>
              </xsl:otherwise>
            </xsl:choose>
          </xsl:with-param>
        </xsl:call-template>
      </xsl:when>
```

a. Enter the name of the newly created field in this line `<xsl:when test="./ID='JobReqCountry'">` . Replace **JobReqCountry** with the name of the field you created.
b. Enter the conditions that must be met to direct a new hire to the standard

   The example below, a new hire will be directed to the standard Onboarding process when the `JobReqCountry` field is **US** or **USA**. Otherwise, the new hire is directed to a custom process called **Onboarding - Canada**. The name of the process is entered in the `<xsl:text>Onboarding - Canada</xsl:text>` line of XSLT. The name of the process here must exactly match the name of the process as it was created in Super Admin.

```
<xsl:when  test="translate(normalize-space(./Value),$smallcase,
$uppercase)='US' or translate(normalize-space(./Value),$smallcase,
$uppercase)='USA'">
                <xsl:text>Onboarding</xsl:text>
</xsl:when>
              <xsl:otherwise>
                <xsl:text>Onboarding - Canada</xsl:text>
              </xsl:otherwise>
            </xsl:choose>
          </xsl:with-param>
        </xsl:call-template>
      </xsl:when>
```

c. Another way to do this would be for internal hires or crossboarding. In this example, if the field `InternalHire` is false, the new hire is directed to the standard Onboarding process. If the field `InternalHire` is true, the new hire is directed to a custom process called **Internal Hire Onboarding**.

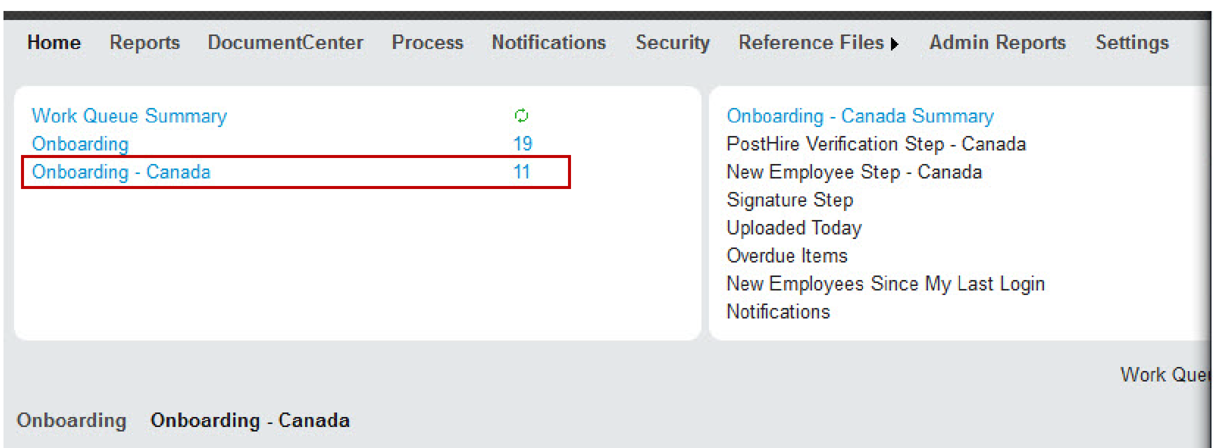
```
<xsl:variable name="InternalHire" select="normalize-space(/
RCM2KMSDataExchange/Field[ID = 'InternalHire']/Value)"/>
              <xsl:if test="(./Value = 'US') and ($InternalHire = 'false')">
<xsl:call-template name="item">

<xsl:with-param name="key">Process</xsl:with-param>
                 <xsl:with-param name="value">Onboarding</xsl:with-param>
</xsl:call-template>
</xsl:if>
<xsl:if test="(./Value = 'US') and ($InternalHire = ‘true’)">
<xsl:call-template name="item">
<xsl:with-param name="key">Process</xsl:with-param>
<xsl:with-param name="value">Internal Hire Onboarding</xsl:with-param>
</xsl:call-template>
</xsl:if>
```

4. If a customer is using a custom process with crossboarding or Intelligent Services, designate a process type for both standard and custom processes in the XSLT.

Sample Code

```
<xsl:when test="./ID='InternalHire'">
               <xsl:if test="./Value = 'false'">
                              <xsl:call-template name="item">
                                             <xsl:with-param
name="key">Process</xsl:with-param>
                                             <xsl:with-param
name="value">Onboarding</xsl:with-param>
                              </xsl:call-template>
               </xsl:if>
               <xsl:if test="./Value = 'true'">
                              <xsl:call-template name="item">
                                             <xsl:with-param
name="key">Process</xsl:with-param>
                                             <xsl:with-param
name="value">CustomProcess</xsl:with-param>
                              </xsl:call-template>
               </xsl:if>
</xsl:when>
```

5. Once you have finished editing the XSLT, click *Save*.
6. Navigate to *Super Admin* > *Import/Export Settings* > *HRXML.ImportNewHire* > *Import file* and select the newly created custom process file, then click *Submit*.
7. Map the newly added trigger field in Onboarding to the corresponding field in Recruiting. Navigate to *SuccessFactors HCM* > *Admin Center* > *Setup Onboarding Integration*
8. Navigate to *SuccessFactors HCM* > *Onboarding* > *Home*. You should see the newly created process in the Onboarding Dashboard.



9. You can test your configuration by initiating Onboarding for a test hire, either from Recruiting Management or through another ATS. Once Onboarding is initiated, confirm that the PHV step is created in the appropriate new, custom process.
10. If multiple customer processes are configured, the *Getting Started* link in the Employee Portal to begin the New Employee Step will not work correctly without additional configuration. Navigate to *Super Admin* > *Account Options* and activate the *EmployeePortal.Service.ProcessPriority* option. In the *Value* field, enter the names of all active custom processes.

13.15 Process Steps

13.15.1 What are Process Steps?

Onboarding manages new employee activities using a function called process steps.

There are three process steps available in Onboarding.

- **PostHire Verification Step** - At this step the Corporate Representative either confirms or enters information regarding the New Employee's job, such as where the new hire will work, salary, and provisioning. If the new hire activity is started from applicant tracking, such as with Recruiting Execution, then the data is pre-populated from the new hire XML and the Corporate Representative confirms and/or changes the data as needed. If the new hire activity is started manually, the Corporate Representative enters this initial information.
- **New Employee Step** - At this step the New Employee enters personal information not collected in the applicant process, such as government tax forms, direct deposit, emergency contact information, and policies and procedures..
- **Orientation Step** - Both the Corporate Representative and New Employee enter information into this wizard. In the US this would be used for Section 2 of the Form I-9. It can also be used where certification information is required, such as proof of receiving a teaching, legal or medical degree.

> Recommendation
>
> Customers using remote hires must configure a separate I-9 Instructions e-mail notification with the address and fax number where the authorized representative completing the I-9 will send the document. You must also update the I-9 instructions panel for the new employee step. The address and fax number on this panel are populated by the Super Admin options *XPressHR.Wizard.RemoteEmployeeAddress* and *XpressHR.Wizard.RemoteEmployeeFax*.

13.15.2 How to Disable and Enable Process Steps

Context

> Note
>
> **Tools:** Super Admin

Procedure

1. Navigate to *Super Admin* > *Select Account* > *Processes.*
2. Select a process (for example, Onboarding) and then the step to edit. You can also select the step to edit directly from the *Processes* screen.
3. Define a display filter for the step. For example, if there are steps only U.S.-based employeeds need to complete, define a filter for `Country EQUALS "United State of America` to restrict the step.

13.15.3 Update Default Due Dates

Context

If the due dates are not configured, the system uses these default due dates:

- PHV: DueDate = HireDate + 5 days
- NES: If the Date Of Orientation was entered, then DueDate = Date Of Orientation. If no Date of Orientation is entered, DueDate = Date PHV was finished + 14 days
- Orientation Step: If the Date Of Orientation was entered then DueDate = Date Of Orientation + 3 days. If no Date of Orientation is entered, DueDate = Date NES was finished + 14 days
- For notifications the DueDate is taken from Due By field.

Procedure

1. Navigate to *Super Admin* > *select Account* > *Processes.*
2. Select a process and the step to edit, or select the step directly from the *Processes* screen.
3. Select *Assign Due Dates* then *Add Due Date*to define a due date for the step.
4. Define the due date properties. Due dates can be defined based on any field defined as a date in the data dictionary. You can also define filter criteria to determine if the due date should be used for this step.
5. Click *Create.* The new due date is displayed in the list. Click the due date to edit it.

13.15.4 Create a Custom Export

Use the custom export to trigger a user data export at any point in the Onboarding process other than the completion of the Orientation step.

Context

You can configure multiple customer exports, each with a trigger at a different point in the Onboarding process. For example, you can configure an export for both the start and completion of the Post-Hire Verification step.

Procedure

1. To create a custom set of fields for a custom export, navigate to *SuccessFactors HCM* > *Onboarding* > *Settings* > *Data Dictionary*.
2. Click the *Integration* folder, then click *New Tag*.
3. Enter a name for the custom tag, and make sure it's creating in the *Integrations* namespace.

   > **Note**
   >
   > You can configure multiple customer-specific tags per instance.

4. Click on the newly created tag, then click *Fields*. Move the desired field from the *Available Fields* column to the *Fields Attached to Tag* column.
5. Navigate to *Super Admin* > *select Account* > *Processes.*
6. Select a process and the step to edit, or select the step directly from the *Processes* screen.
7. Select *Assign Actions* > *Add Action* and define the action properties.
   a. In the *Name* field, select `SelectCustomStatus`
   b. Chose an *Execution Type.* Execution type defines when the action is executed. There are three options.
      - **OnStart:** The action is executed when Onboarding activity is advanced to the step.
      - **OnFinish:** The action is executed when the step is completed.
      - **OnWizardStart:** The action is executed when the wizard is opened by a user.
   c. In the *Filter* field, you can define criteria used to decide if the action should be executed.
   d. In the *Parameters* field, only one parameter should be defined. A status with the name specified in the *Key* field and the value specified in the *Value* field will be created when the action is executed.
8. The newly created action is displayed in the list. To edit the action, click its name in the list.

   > **Recommendation**
   >
   > Once you have configured a trigger status for the custom exports, you must activate a feature to process the custom status at regular intervals. One job processes and exports all activities with configured custom status triggers, based on the status of the activity.

9. Navigate to *Features* > *CustomNewHireExportFeature*. Select the times when you would like to process the custom status triggers.
10. Click *Add Export.* Enter the *Custom Status Name, Custom Status Value, Field Set,* the folder name on the SFTP site, and the file format. Custom status trigger only supports .xml and .csv files.

    The *Field Set* option is populated by the Data Dictionary Integrations namespace.

    > **Note**
    >
    > If you add a field to the Custom Export and associate it with a particular step, make sure that field is captured in the appropriate step, or the related column appears as blank in the export. This can affect the display of other, populated columns in the export, or cause data to shift into the wrong column.

11. To create custom header, select the *Use custom headers* checkbox, then enter your custom header separated by commans in the *Headers* text box.
12. Enter a custom file name format, if desired in the *File name format* field. The default file name format is `NH-{accountname}-{timestamp}.{file-format }`.
13. Click *Activate.*

13.16 eWage

The Onboarding eWage process allows customers to electronically capture the required wage information for a new or existing employee and provide written notice of this information to the employee as mandated by the Wage Theft Prevention Act (WTPA).

Onboarding supports the New York and California version of the WTPA.

New York Wage Theft Prevention Act

The New York Wage Theft Prevention Act requires employers to notify new employees about their wage rates at the time of hire.

The notice must include:

- Rate or rates of pay, including overtime rate, where applicable
- How the employee is paid: by the hour, shift, day, week, commission, and so on
- Regular payday
- Official name of the employer and any other names used for business
- Address and phone number of the employer's main office or principal location
- Allowances taken as part of the minimum wage (tip, meal, and lodging deductions)

Each employee must sign and date the completed notice. If any information in the notice changes, the employer must tell existing employees at least a week before it happens unless they issue a new paystub with the notice. The employer must notify an existing employee in writing before they reduce the existing employee's wage rate. Employers in the hospitality industry must notify employees every time a wage rate changes.

The NY WTPA requires employers to report overtime. Most non-exempt employees must receive overtime pay at two times their regular rate, time over 40 hours in a workweek. Unless otherwise noted, the overtime rate is calculated at two times the regular rate of pay for all hours worked over forty in a work week. The Onboarding eWage module for New York supports the following types of employees:

- Employees paid an hourly rate
- Employees paid multiple hourly rates
- Employees paid a weekly rate or a salary for a fixed number of hours (40 or fewer in a week)
- Employees paid a salary for varying hours, day rate, piece rate, flat rate, or other non-hourly basis
- Employees paid the prevailing rate and other jobs
- Exempt employees

California Wage Theft Prevention Act

The CA WTPA requires employers to provide written notice of specific wage information, and requires an employer to post the minimum wage labor law poster, specifying wage and hour information in a location where existing employees can view it. Employers must also provide new employees with written notice of the wage ratee and basis of compensation at the time of hire. Employers must also notify existing employees in writing of any changes to their wage information within seven calendar days of the changes. The California law requires all employees hired on or after January 1, 2012 receive this notice, except:

- Employees directly employed by the state, including any city, county, or special district.
- Employees exempt from the payment of overtime wages by statue, or the Wage Order of the Industrial Welfare Commission. This exception covers employees properly classified under the wage laws as professional, executive, or administrative, outside salespersons, and some members of an employee's family. It can cover employees in particular occupations who receive more than half their compensation in commissions, including truck and other drivers (including taxi cab drivers), broadcasting industry employees, irrigators, and motion picture projectionists.
- Employees covered by a valid collective bargaining agreement (CBA) if the CBA expressly proves for
  - Wages
  - Hours of work
  - Working conditions of the employee
  - Premium wage rates for all overtime hours worked
  - A regular hourly rate of pay for those employees, of not less than 30 percent more than the state's minimum wage

13.16.1 How to Configure eWage

Context

- The eWage panel is triggered by the corporate structure. To choose the corporate structure level that triggers eWage, navigate to *Super Admin* > *Form I-9 Company Level*. For the *E-Wage* entry, choose the Corporate Structure you want to configure eWage. When this level contains New York or California, eWage is triggered, based on what is configured for the customer. New York eWage only triggers where configured, for example.

- When configuring eWage, do not copy or deleted any of the Onboarding standard panels without ensuring the required eWage data keys are included in the customer's process. To find which fields are required for eWage, reference the *NY Wage* and *CA Wage* tabs of the Onboarding Configuration Workbook. If the required eWage fields are not configured, data from the eWage panels will not map properly to the eWage forms.

Procedure

1. Navigate to *Super Admin* > *Features* > *WTPA*
2. Select the appropriate settings for the customer's eWage needs.
   a. *State:* You can configure eWage for New York, California, or both.
   b. *Overtime Options:* Enter the double and overtime rates, and select if the overtime rate should calculate automatically.
   c. Select the default payday and pay frequency.
   d. If using New York eWage, select the appropriate form.
   e. Enable *Show PHV panels*: It is best practice to configure a PHV step when using eWage. Select this option, otherwise the eWage panels will not display during the PHV step.
   f. *Show special info:* New York eWage has the option to configure additional special rules. This option displays the additional panel for those rules.
   g. *Additional Panel Text:* Text to display on the special rules panel.
3. Click *Activate*.

13.16.2 eWage for New Hires

You can incorporate eWage into the new hire onboarding process for new employees.

EWage information can be entered in one of three ways:

- In the Post Hire Verification Step using the data entry wizard
- In the Orientation Step, where there is no PHV step using the data entry wizard
- Automatically by import file - fields available in the new hire XML record prepopulate the data entry wizard panels

In the New Employee Step, the same panels used for data entry in the Post Hire Verification Step by the Corporate Representative appear for the New Employee to:

- Review and acknowledge that the New Employee received the WTPA information
- Choose his/her primary language for the WTPA form(s) (NY e-Wage). In California, the employer chooses the primary language to communicate the notice to the New Employee
- Sign the WTPA form(s) The applicable WTPA form will be based on pay type and language A Special Pay Rate Information form will be displayed, if applicable

The information that will be communicated to the New Employee is as follows:

- The employee’s rate or rates of pay
- The overtime rate of pay, if the employee is subject to overtime regulations
- The basis of wage payment (per hour, per shift, per week, piece rate, commission, etc.)

- Any allowances the employer intends to claim as part of the minimum wage including tip, meal and lodging allowances
- The regular payday
- The employer's name and any names under which the employer does business (DBA)
- The physical address of the employer's main office or principal place of business and, if different, the employer's mailing address
- The employer's telephone number
- Any special pay instructions – varies by company and pay type.

You can add the wage data fields to the end of the company's current new hire record import.

13.16.3 eWage for Existing Employees

The eWage module notifies existing employees based on a variety of parameters.

New York Employees are notified when any data in the notice changes. The employer must tell the employee at least a week before it happens unless they issue a new paystub that carries the notice. The employer must notify an employee in writing if they reduce the employee's wage rate. Employers in the hospitality industry must give notice every time a wage rate changes.

California employees are notified when the employee has had a change in pay.

With both these events, a new wage form must be presented to the employee and must be signed by the employee. The notification has to be within seven days of the change unless one of the following applies:

- All changes are reflected on a timely wage statement furnished in accordance with Labor Code section 226.
- Notice of all changes is provided in another writing require by law within seven days of the changes.

The employee notice of wage change must be received by the employee at least seven calendar days after any changes to the employee's pay or other terms contained in the notice.

You can create WTPA Activities in three ways.

- Entered using the eWage process tab. A corporate representative can initiate the process and enter the salary information. The system sends a notification to the employee with a link to login to the eWage process. The employee goes through the same set of panels presented in the New Employee Step of the New Hire Onboarding process.
- Scheduled upload - automatically created by a delimited import file or an XML file. The HRIS sends a file to Onboarding on a scheduled basis, the records are imported into the eWage process, and a new activity is created. The employee receives an e-mail notification with a link to view the same set of panels presented in the New Employee Step of the New Hire Onboarding process. After viewing the panels, the employee must sign the form.
- Real time upload - automatically created by web services and an XML file. Using web services, employee activities are sent to the eWage process and a new activity is created. The employee receives an e-mail notification with a link to view the same panels presented in the New Employee Step of the New Hire Onboarding process. After viewing the panels, the employee must sign the form.

13.17 How to Create an Audit Trail Report

The Audit Trail stores all Onboarding activity. You can create reports on system activities.

Procedure

1. Navigate to SAP SuccessFactors HCM and select *Onboarding* > *Settings* > *Audit Trail*.
2. Select the audit parameters as desired.
3. Click *Apply Filter*. To export the data to an Excel spread sheet, click *Export to Excel*. To clear the search criteria, click *Reset Filter*.

13.18 How to Make Activities Editable

Hiring managers and corporate users may wish to be able to edit an activity after it has been completed. This can be configured on an activity by activity basis by the system administrator. Activities with down stream impact (for example, an activity that spawns an integration to a third party system) should be left not-editable as a best practice.

Context

The following rules apply to editable panels:

- Panels are only editable after they have been completed.
- Panels within the same workflow step that are not editable will be grayed out to the user.

Procedure

1. Log on to Onboarding as a user with Onboarding admin permissions.
2. Select *Settings* > *User Designed Panels*.

   > **Note**
   >
   > Hiring manager activity panels are located in NewHireActivities.

3. Select the panel you want to make editable and click *Edit*.
4. Select *Yes* for the option *Is this panel an editable panel after completion?* and click *Update*.

13.19 How to Search for Generated E-Mails

The *Mail Queue* allows you to search for emails generated by the Onboarding application.

Procedure

1. Navigate to SAP SuccessFactors HCM and select *Onboarding* > *Settings* > *Mail Queue*.
2. Select the search parameters as desired.
3. Click *Apply Filter*.
4. Click the *Reset Filter* button to clear the search criteria.

13.20 How to Configure the Display Time for Tiles and the About Us Tab

You can determine how long Onboarding tiles are displayed to a new hire. After the period you specified is over, the tile will be suggested for removal in the *Tile Removal* dialog. The new hire can then choose to select the tile for removal or leave them on the home page. The same applies to the *About Us* tab.

Context

> Note
>
> **Tool: SuccessFactors Onboarding Admin Tools**

You can define a display period for the following tiles:

- People to Meet
- Message from My manager
- Paperwork

Procedure

1. Go to *Admin Tools*, and choose *Company Settings* > *Manage V12 Home Page*.
2. Under *Active Dates*, enter the days until the tiles will be suggested for removal.

   At the end of the list of tiles, you can set then period for the *About Us* tab.

   You can enter any positive integer up to 999. „Start Date + 0“ would mean a tile is never shown.

13.21 How to Configure the Pronounce My Name Feature

Prerequisites

You've selected the appropriate checkbox in Provisioning as mentioned above.

Context

> **Note**
>
> **Tool: SuccessFactors Onboarding Admin Tools**

Procedure

1. Go to *Administration Tools*. In the *Company Processes & Cycles* portlet, select *Employee Files* > *Configure Employee Files*.
2. Click *Public Profile*.
3. Select the *My Name* checkbox to enable the My Name feature and save your settings.

   > **Note**
   >
   > If the Pronounce My Name feature is not working, this can be due to the missing media service profile. Sometimes the media service profile is not cloned when an instance is cloned to prevent issues with the New Hire wizard. In this case, disable and re-enable the My Name and About me feature in Admin Tools under *Employee Configuration* > *Public Profile* to create the media service profile.

13.22 How to Set up Theming

Theming is only available for the work queues of the corporate users and hiring manager. Data entry panels and admin functions are currently not supported. For demo instances, solution consultants can use a grey theme.

Context

> **Note**
>
> **Tool: SuccessFactors Onboarding Admin Tools**

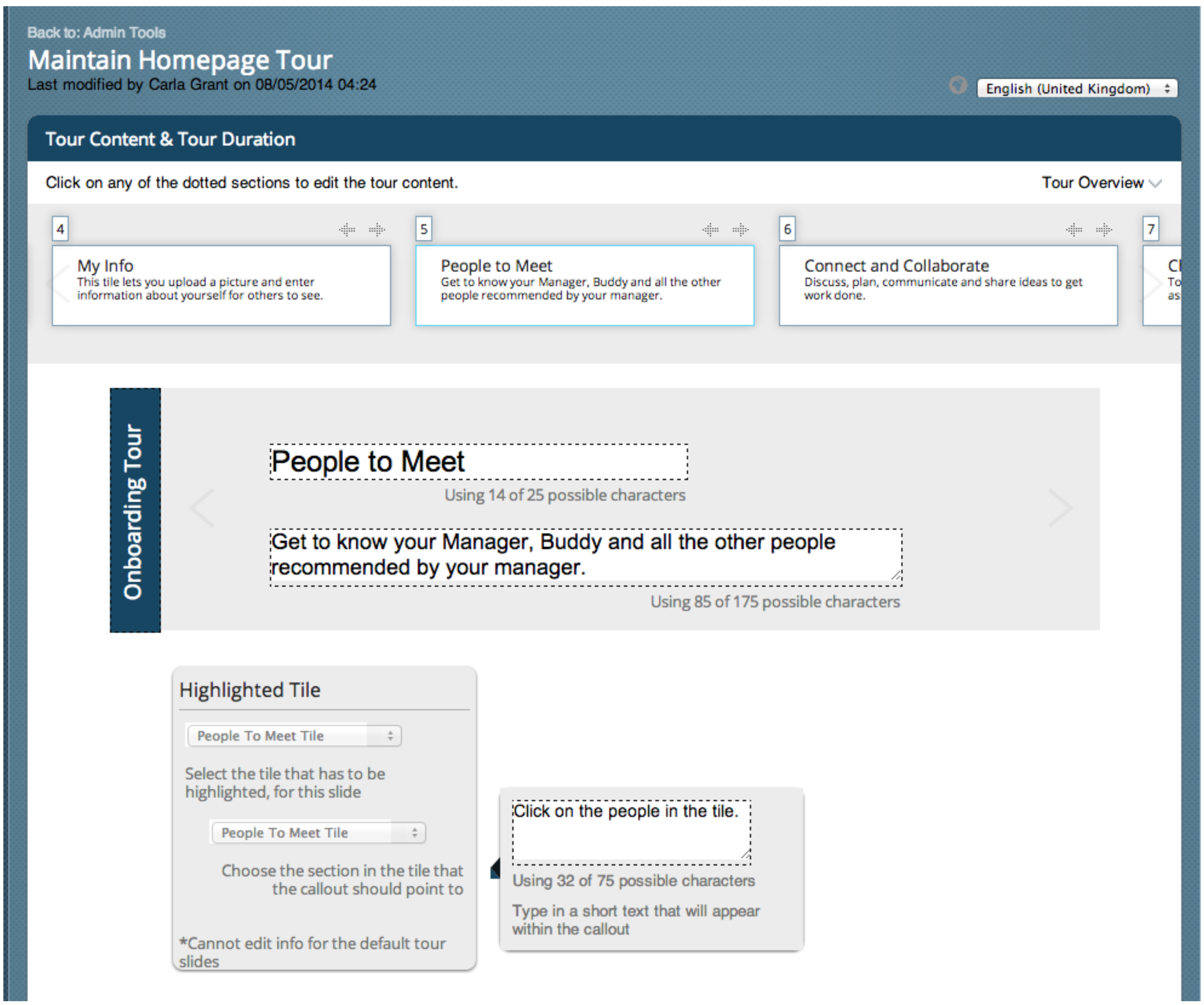
Procedure

1. To import the grey theme, go to *Admin Tools*. In the *Company Processes & Cycles* portlet, select *Company Settings* > *Theme Manager*.
2. Click *Create a new theme*.
3. From the *Theme Sharing* dropdown menu, click *Import theme*.
4. Paste the content of the onboarding theme.txt file into the text box.
5. Click *Import*.

13.23 How to Configure the Onboarding Home Page Tour

The Onboarding Home page tour walks new hires through the sometimes overwhelming content presented to them.

Context



Procedure

1. Navigate to *Manage Security* *Manage Permission Roles*
   a. Select an existing role or createa new role to grant Onboarding Tour permissions.

b. In the selected role, navigate to *Miscellaneous Permissions* > *TourPath.* Select *View* and *Edit.*

2. Navigate toSAP SuccessFactors HCM Admin Tools > *Manage Security* > *Manage Permission Groups*. Create a new group for the New Hires who should see the home page tour (for example, tourNewHires.
3. Under *Manage Security* > *Manage Permission Roles* create a new role (for example, onbTour).
   a. Click *Add Permissions* then navigate to *Miscellaneous Permissions* > *Tour Path* and selet *View.*
   b. In the *Grant this role to...* section, click *Add.*
   c. In section 1: *Define whom you want to grant this role permission to*select the role created in step three (the role with both *View* and *Edit* permissions.
   d. In section 2: *Specify the target population for the other objects* select `All.`
4. To edit the default Onboarding Tour, navigate to *Admin Tools* > *Manage Onboarding* > *Edit Tour.*
   a. Select the desired slide to edit from the carousel.
   b. Sections surrounded by a dotted line indicate content available for editing.
   c. Set a length of time for the tour to be active under *Define Tour Duration*. This is required for all slides and will always be in the format of Start Date + a specified number of days.
5. Configure custom text in multiple languages by selecting a language from the dropdown menu in the upper right.
6. To createa new custom slide from a blank template, click *Add Slide.*

> **Recommendation**
>
> If the Homepage Tour is not displaying, check that you have assigned the correct permissions to the employee or new hire group. You can also check the validity range for the tour. If the new hire's start date is too far in the past, the Tour may have expired.

> **Recommendation**
>
> If you do not see the Homepage Tour configuration link in the Admin UI, check that the Tour Edit permission is assigned to the appropriate administrator(s) group.

13.24 Onboarding Dashboard

13.24.1 How to Hide the Process Tab

Onboarding users can manually start processes from the Onboarding Dashboard using the *Process* tab.

Context

If you want to hide the *Process* tab from certain users, do not grant those users permissions for the PHV step.

To hide the *Process* tab from all users:

Procedure

1. Navigate to *Super Admin* > *Processes* > *Onboarding*
2. In the *Start Control* field, select the blank option from the dropdown list.
3. Click *Update*.

13.25 Standard Compliance Forms

The expansion of standard forms outside the US makes it possible for employers who hire in other countries to quickly add support for commonly used forms.

Forms and panels for all countries are available only in English, with the exception of Canada's TD1 Personal Tax Credits Return and the Quebec Source Deductions Return.

Canada Forms

Table 21:

Form Code	Form Name
TD 1	Personal Tax Credits Return
TD1AB	Alberta Personal Tax Credits Return
TD1BC	British Columbia Personal Tax Credits Return
TD1MB	Manitoba Personal Tax Credits Return
TD1NB	New Brunswick Personal Tax Credits Return
TD1NL	Newfoundland and Labrador Personal Tax Credits Return

Form Code	Form Name
TD1NT	Northwest Territories Personal Tax Credits Return
TD1NS	Nova Scotia Personal Tax Credits Return
TD1NU	Nunavut Personal Tax Credits Return
TD1ON	Ontario Personal Tax Credits Return
TD1PE	Prince Edward Island Personal Tax Credits Return
TD1SK	Saskatchewan Personal Tax Credits Return
TD1YT	Yukon Personal Tax Credits Return
TP-1015.3-V	Quebec Source Deductions Return

Australia Forms

- Tax file number declaration
- Superannuation standard choice form

UK Forms

- Starter Checklist
- P45 – Details of employee leaving work (standard panel prompts the employee to upload a scanned copy)

India Forms

- Provident Funds Declaration and Nomination Form
- Transfer Claim Form

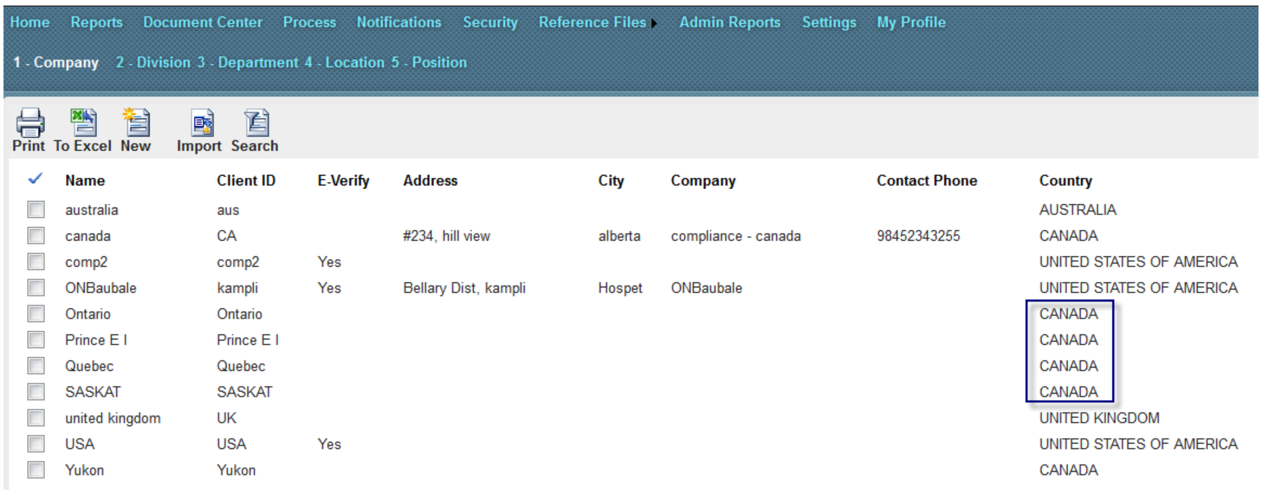
13.25.1 How to Configure Standard Compliance Forms

Prerequisites

To use the standard Compliance panels for non-US locations, you must configure a custom process to support the panels.

The panels a user sees will be based on the country information in Level 1 of the Corporate Structure. Standard panels and forms are preconfigured with advanced conditions for the Country field (`DivCountry`) and the province/state where applicable (`WorkState`) associated with Level 1 of the candidate's work location. For example, users located in Canada will see the Canadian panels, if they are configured correctly.

> **Note**
>
> To ensure the user sees the correct panels, make sure that Level 1 of the Corporate Structure captures `DivCountry` and `WorkState` information. `WorkState` is only applicable for Canadian compliance forms.

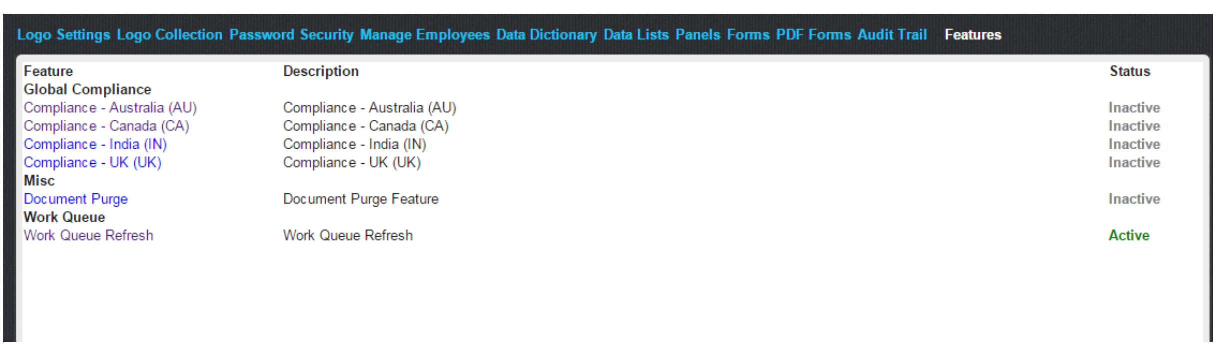


Procedure

1. If necessary, grant permissions for the Features menu to the HR Admin security group. Navigate to SAP SuccessFactors HCM *Onboarding* > *Security* > *HR Admin* and click on the desired group name.

   > **Note**
   >
   > Users in the System Admin or Partner Admin role have access to the features menu by default.

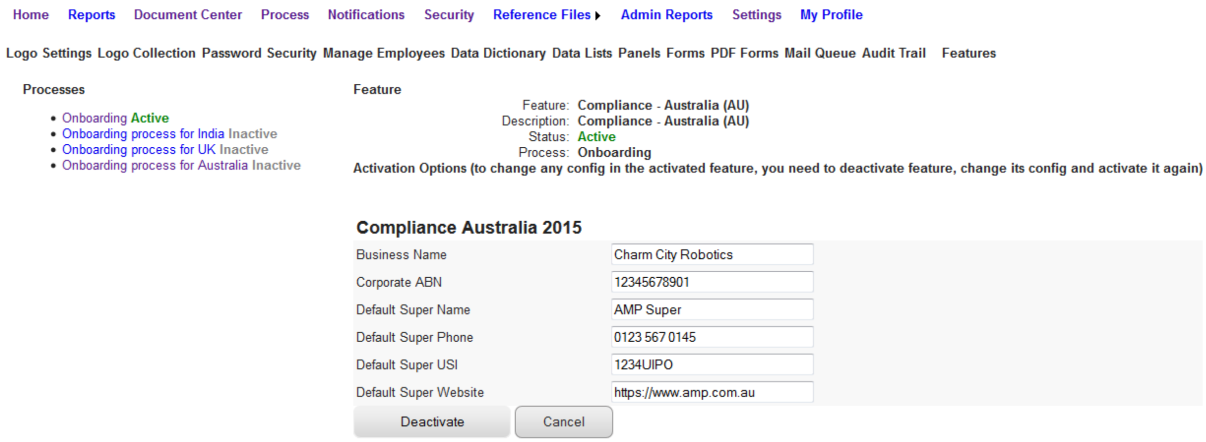
2. Click *Edit*, then select *Other Properties* and enable the *Features* checkbox.
3. Navigate to *Onboarding* > *Settings* > *Features*.

4. Select the option for the country you want to activate under *Global Compliance*.
5. Compliance forms are activated by process. Select the process you want to associate the forms with from the list on the left.

6. Select *Activate.*

   The activation process for Australia prompts you to enter details for default fields.



13.26 Manage Onboarding User Data

Context

For candidates who are already in the Onboarding process, you can change data already entered, or delete a process or candidate info object if necessary.

Procedure

1. Navigate to *Admin Center* > *Manage Data*
2. Select one of the Onboarding-related items in the dropdown menu next to *Search*.

   For example, choose *Onboarding Process* to delete or modify a process.
3. Select the object you want to update in the next dropdown menu. These objects are associated with a particular candidate, so make sure you have the name of the candidate available.
4. Select *Take Action* and then choose either *Make Correction* to change data or *Permanently Delete Entry* to remove it.

13.27 DocuSign for Onboarding

DocuSign allows new hires and managers to electronically sign Onboarding forms.

You cannot make changes to documents signed with DocuSign, because the electronic signature protects the file.

Forms with only one signature are signed at the end of the signature step. Forms with multiple signatures (for example, from the new hire and the manager), are signed at the last step where the form can be signed. For example, if the new hire is supposed to sign a form after the New Employe Step, and the manager signs the form after the Orientation Step, the DocuSign form displays after the Orientation Step for both signers.

DocuSign has two possible signature methods, remote signing and embedded signing. Remote signing allows users to sign documents directly in DocuSign, using a web browser or a mobile device.

Remote signing allows signers the ability to sign on any device. Using embedded signing, signers can only sign in a web browser. There is no mobile signing support for embedded signing. When using remote signing, rather than directing the signer to sign the paperwork immediately, they receive an e-mail instructing them how to sign their forms. You cannot use remote and embedded signing in parallel. When remote signing is enabled, the print package is no longer available. All signed documents and documents configured for the print package are viewable directly in DocuSign. If the customer is using DocuSign, but does not have remote signing, the print package is still available.The Print Package goes away only when the Remote Signing option is enabled, in which case all signed documents and documents configured for the print package are viewable directly in DocuSign. If the customer is using DocuSign but they do not enable Remote Signing, they will still have the Print Package.

Table 22: Onboarding forms not supported by DocuSign

Form Name	Form Group
CA Notice to Employee (Ko)	State Forms 2012
CA Notice to Employee	State Forms 2014
CA Notice to Employee (T1)	State Forms 2012
CA Notice to Employee (Es)	State Forms 2014
CA Notice to Employee (Vi)	State Forms 2014
CA Notice to Employee (Zh)	State Forms 2012

13.27.1 How to Enable DocuSign for Onboarding

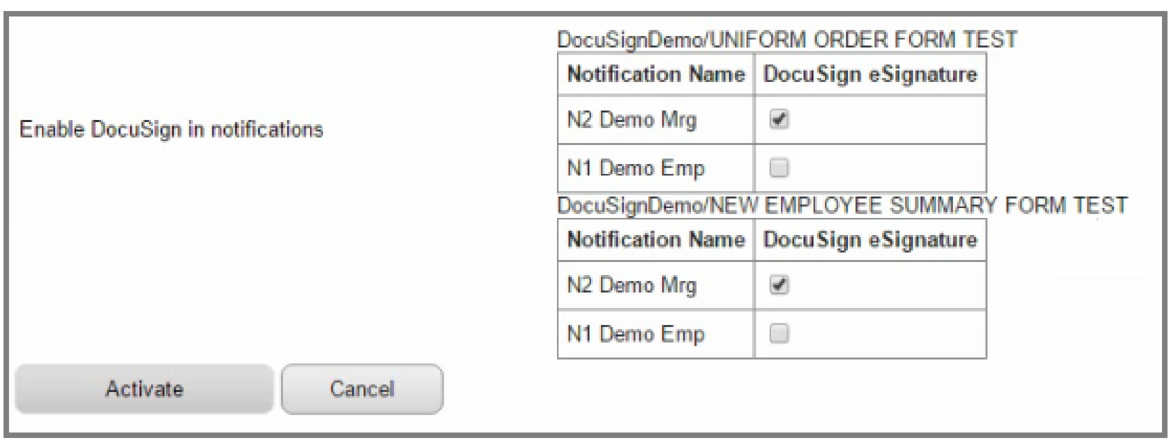
Prerequisites

- 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 do not have an existing DocuSign Account, contact your 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.
- In order to use remote signing, customers must enable DocuSign Connect before enabling the feature in Onboarding. This feature is enabled in DocuSign admin. Once you have signed in to DocuSign Admin, click *Connect* and on the configuration page, select *Enable Connect*.

Procedure

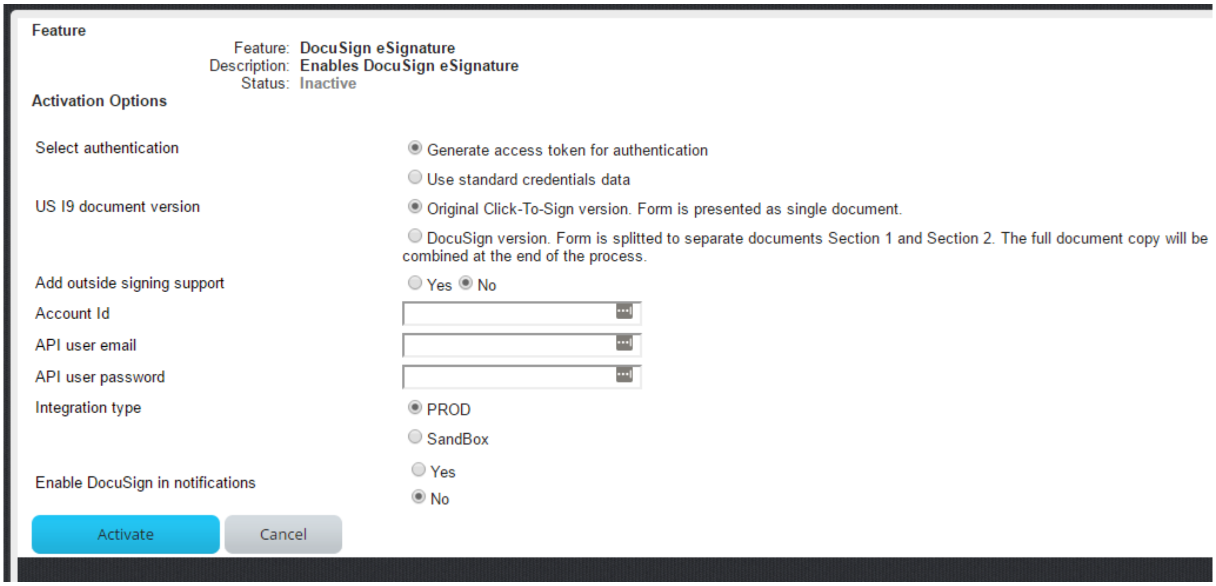
1. Navigate to *SuccessFactors HCM* > *Onboarding* > *Settings* > *Features* and click *DocuSign eSignature*.
2. Enter the account details
   - Select authentication – Select *Generate access token for authentication* for token-based authentication, or *Use standard credentials data* for username/password authentication.
   - US I9 document version – To use DocuSign with I-9 forms, choose *DocuSign version*. This splits the form into two sections, signed separately by the new hire and the manager. Choosing *Original Click-to-Sign version* uses the standard Click-to-Sign behavior, without DocuSign.
   - Add outside signing support - This enables remote signing, which allows users to sign documents directly in DocuSign using a web browser or mobile device.
   - Account ID – DocuSign will provide the account ID.
   - API user email – The DocuSign system administrator email address.
   - API user password – The password that was established when the DocuSign account was created.
   - Integration Type – Choose PROD for production integrations or Sandbox for non-production integrations.
   - Enable DocuSign in notifications - When set to `Yes` the system displays all forms configured to be signed in a notification. For each form, specify a notification step to trigger the DocuSign signature process. When multiple signatures are required, select the last sequential notification step to ensure that all data fields mapped to the form have been captured.



> **Note**
>
> To configure a DocuSign account for demo instances, enter these credentials

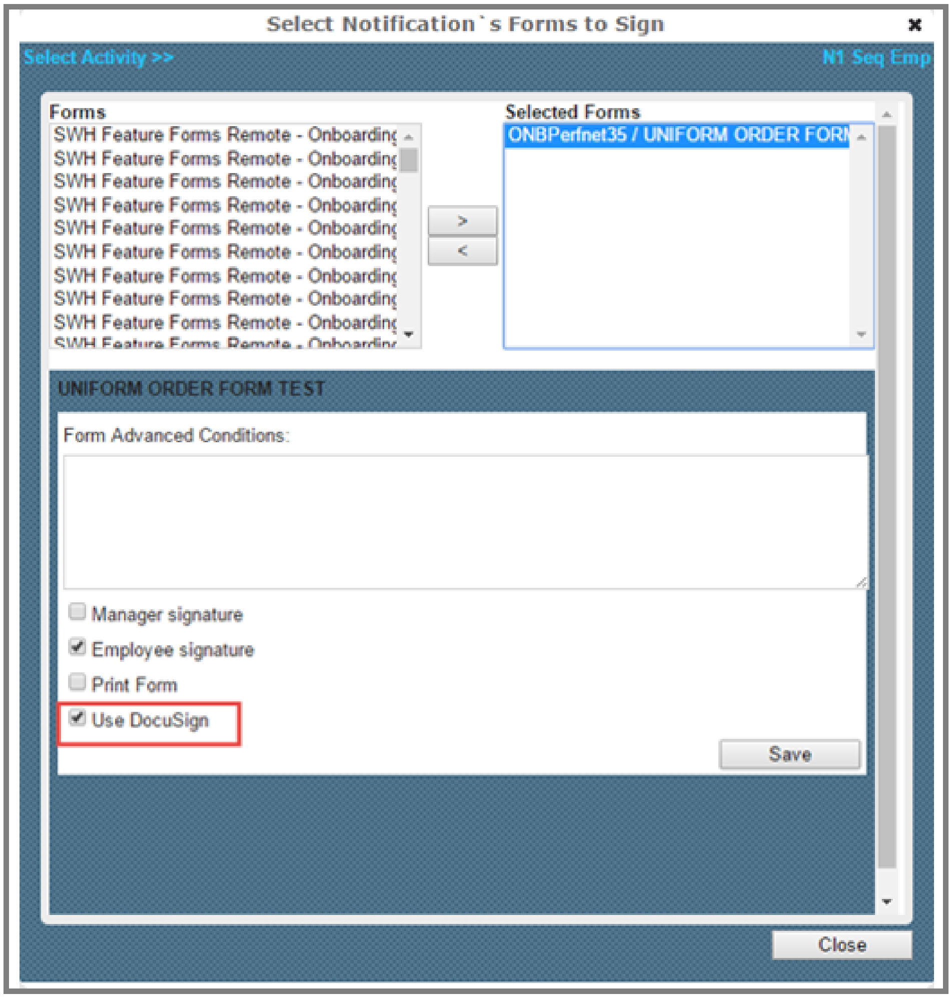
- Account ID – 728735.
- API user email – SuccessFactorsDocuSignBranding@outlook.com.
- API user password – DocuSign1.

When configuring a demo instance, you must select *Use standard credentials data* in the *Select authentication* field.



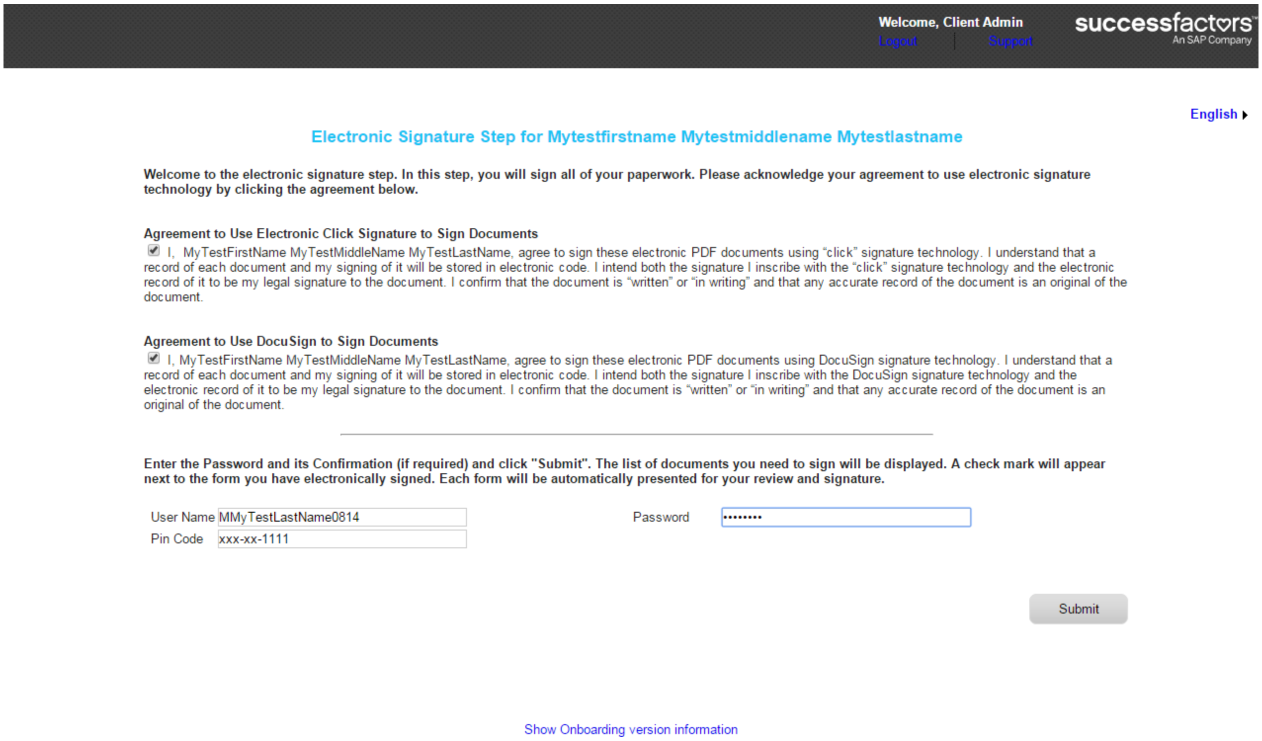
3. Click *Activate*.
   - DocuSign will be used for new signing events.
   - Previously initiated signing events must continue to use the existing click signature e-signature feature. Clicking the name of the form to open it for signature via Click Signature constitutes initiating the signing event.
   - If DocuSign is deactivated, ALL unsigned forms will be signed using Click Signature. Any form already signed in DocuSign, where the process has not completely finished, will be overwritten with a new instance of the form that will be signed using Click Signature.
4. After you have enabled the DocuSign feature, designate the forms to be signed using DocuSign. Navigate to *SuccessFactors HCM* > *Onboarding* > *Reference Files* > *Forms*.
5. Select the form group and select the specific form you want to enable DocuSign for. Click *Edit*.
6. Activate the *Use DocuSign* checkbox and click *Update*.

   Once you have activated DocuSign, this box is checked on all existing forms by default. It's important that customers double-check their existing forms to make sure they are compatible with DocuSign.
7. If you are using DocuSign with notifications, when you create or edit a notification, you can select the *Use DocuSign* option in the *Select Notification's Forms to Sign* screen. Forms chosen with this option enable will be available to sign using DocuSign.

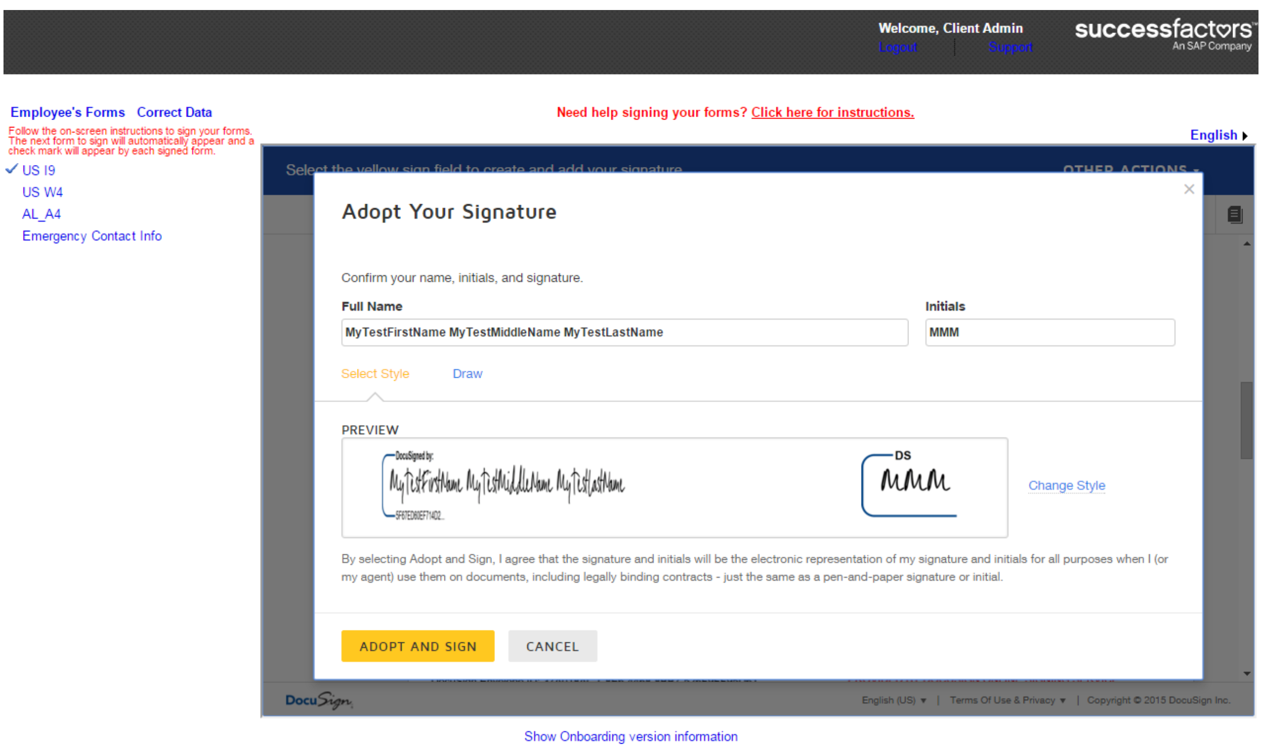


13.27.2 Signing Forms with DocuSign

When the user attempts to sign a form with DocuSign, the application checks if the signer has already crated a DocuSign signature. If there is no signature created, a warning dialog box displays. Once the user creates their signature, they cannot change it. The signer must acknowledge the DocuSign signature disclosure before proceeding, even if they have already created a signature.

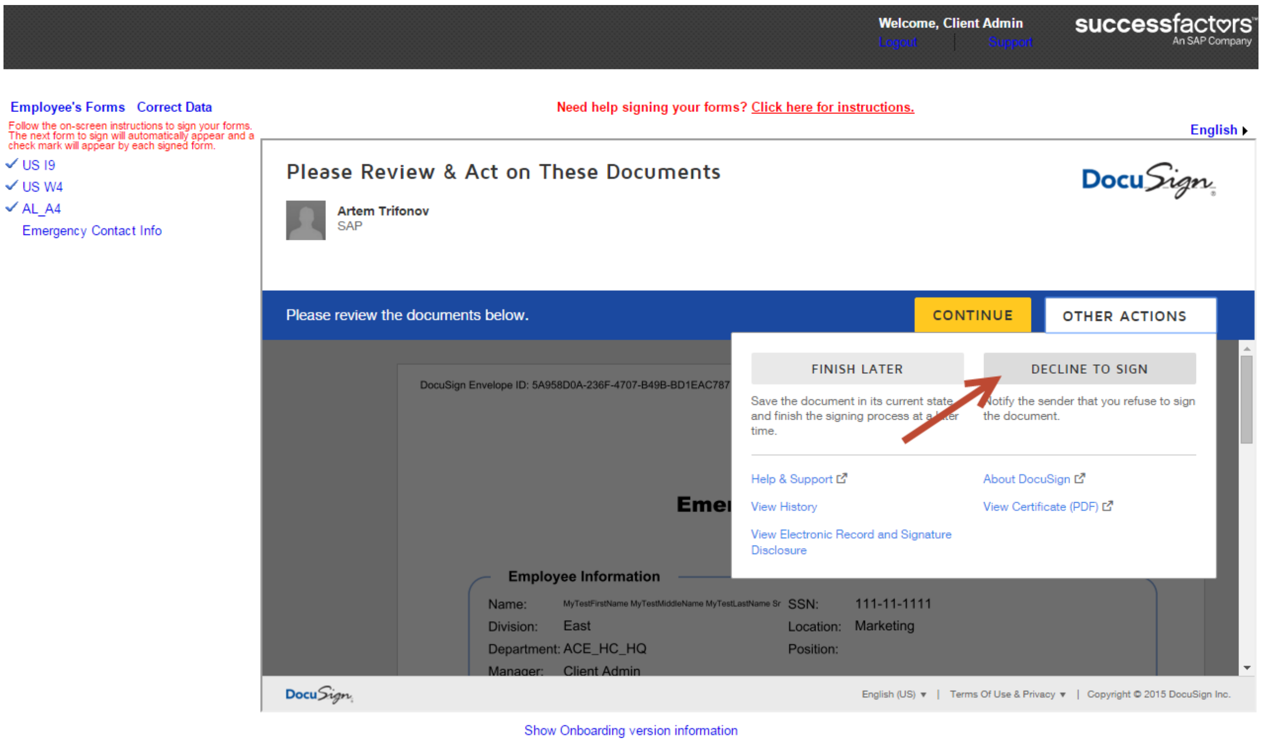


Once the signer has acknowledged the DocuSign disclosure, they will see the form and a flag for the required signature. The signer clicks on the *Sign* flag, which opens the signature dialog box. Here the signer can set up and correct their signature. After configuring the signature, the signer must click the *Adopt and Sign* button to save the signature and add it to the form. The signer clicks *Finish* to proceed to the next form.



If the signer has already created a DocuSign signature, the flag for the signature displays on the form. The signer clicks the *Sign* flag and the signature is placed in the signature location on the form. The signer must then click *Finish*.

The signer can choose to decline the form by navigating to *Other Actions* > *Decline to Sign*. The application asks the signer to supply a reason for declining. After declining to sign, the user is directed to a review page where he can change the data collected in the step. After processing the review page the signature step is restarted.



Documents are exported from DocuSign and imported to Onboarding after they are signed. Documents are imported to the Onboarding Document Center according to form configuration settings.

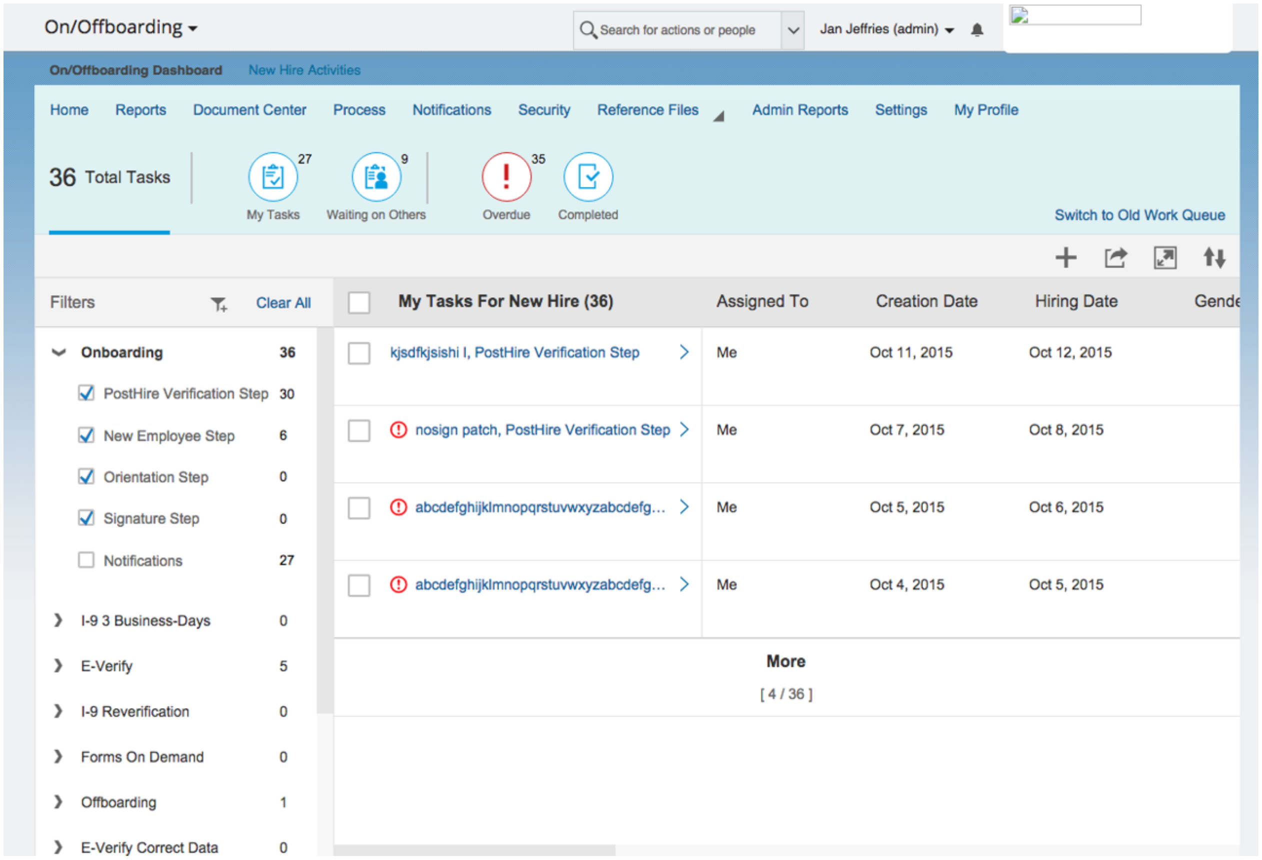
13.28 Work Queue Refresh

The Onboarding Work Queue has a new user interface available.

Benefits of this update include:

- Localization Support
- SuccessFactors HCM Theming Support (limited)
- Consistent User experience across modules
- Improved user experience
- Default Filters
- Page reload performance enhancements

Once enabled, end users will have the option to use the new UI via a link. The new UI displays for administrative users by default, but they can opt-out of the experience using the *Switch to Old Work Queue* link.



13.28.1 How to Enable Work Queue Refresh

Procedure

1. Navigate to *SuccessFactors HCM* > *Onboarding* > *Settings* > *Features*.
2. Select *Work Queue Refresh*.
3. Click *Activate*.

   Once the new Work Queue has been activated, users will see a link to opt-in to the new UI. Users can click *Try new version* to see the updated UI. At any time they can switch back to the old UI by clicking *Switch to Old Work Queue*.

14 Managing the Employee Portal

14.1 Employee Portal Tips

To ensure the Employee Portal works properly, try these tips and fixes.

- Change the *Get Started* link in the body of the page. Click *Insert/Edit Link* and enter **`@LinktoNES@`** in the *URL* field. Click *OK*.
- If multiple customer processes are configured, the *Getting Started* link in the Employee Portal to begin the New Employee Step will not work correctly without additional configuration.

  Navigate to *Super Admin* > *Account Options* and activate the *EmployeePortal.Service.ProcessPriority* option. In the *Value* field, enter the names of all active custom processes.
- To edit the Employee Profile using Internet Explorer, you must an a URL to IE's compatibility settings. Navigate to *Internet Explorer* > *Tools* > *Compatibility Settings* and add **`www.successfactors.com`**. However, if a user has the Compatibility Settings enabled, PDFs will not display in the New Employee Step.

14.2 What is the Employee Portal?

The Success Factors Onboarding Employee Portalt bridges the client's Internet site and Intranet sites to provide required information to the new employee. It personalizes the employment experience for new employees to ensure they are engaged and informed on day one.

The Employee Portal helps guide the new employee through all of the resources available to them as they prepare for the transition to a new company.

New employees can access streaming videos providing valuable training content, information about the company's core values, mission statement, and corporate objectives. New hires can start online conversations with HR, payroll or their designated mentor.

When a new hire clicks on the Employee Portal link in the Welcome Letter e-mail, they are prompted to create a password, which is also used for signatures. The new hire can chose to click *Start Employee Wizard* to proceed directly to their paperwork, or *Go to the Employee Portal*.

Related Information

Activate Features [page 28]

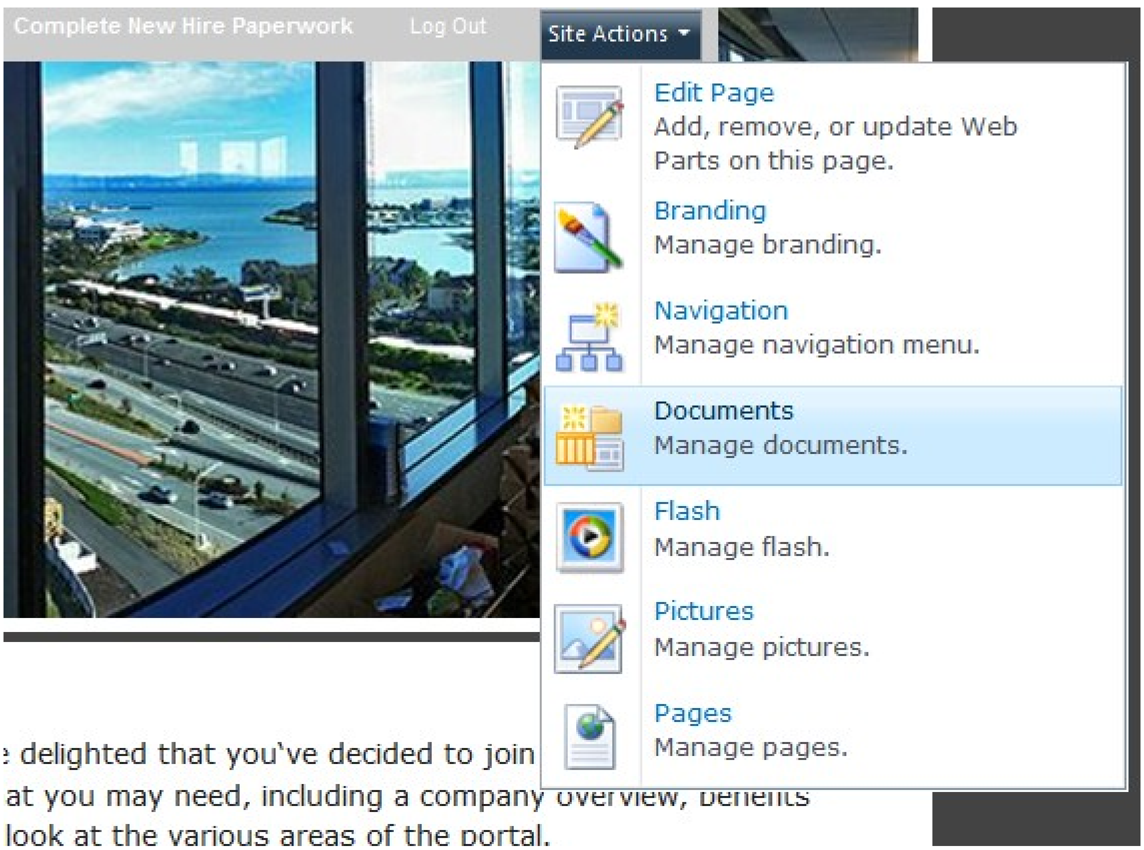
14.3 Managing Documents

Documents are an important component of the Employee Portal. Benefit forms and Employee Handbooks are two of many types of documents employees can access from our Employee Portal. All documents – including videos and graphics – must be uploaded to the Employee Portal server before they can be used in web pages.

14.3.1 How to Upload Single Documents

Procedure

1. Click *Site Actions* > *Documents* .



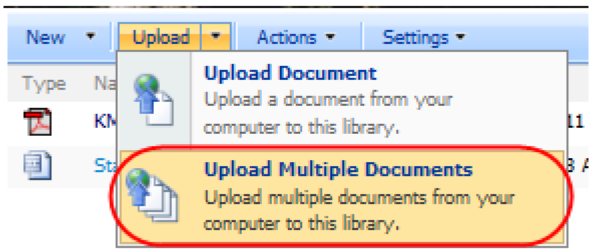
2. Select a folder from the Document Library List where you want to upload a new document.
3. Click *Upload*.
4. In the Upload Document window, click *Browse* and select the document.
5. Select *Overwrite the existing files* if the document with the same name already exists in the folder and should be updated.

The new uploaded document will appear in the List of Documents with a *New!* status flag.

14.3.2 How to Upload Multiple Documents

Procedure

1. Click *Site Actions* > *Documents*.
2. Select a folder from the Document Library List where you want to upload a new document.
3. Click the down arrow next to *Upload* and select *Upload Multiple Documents*.

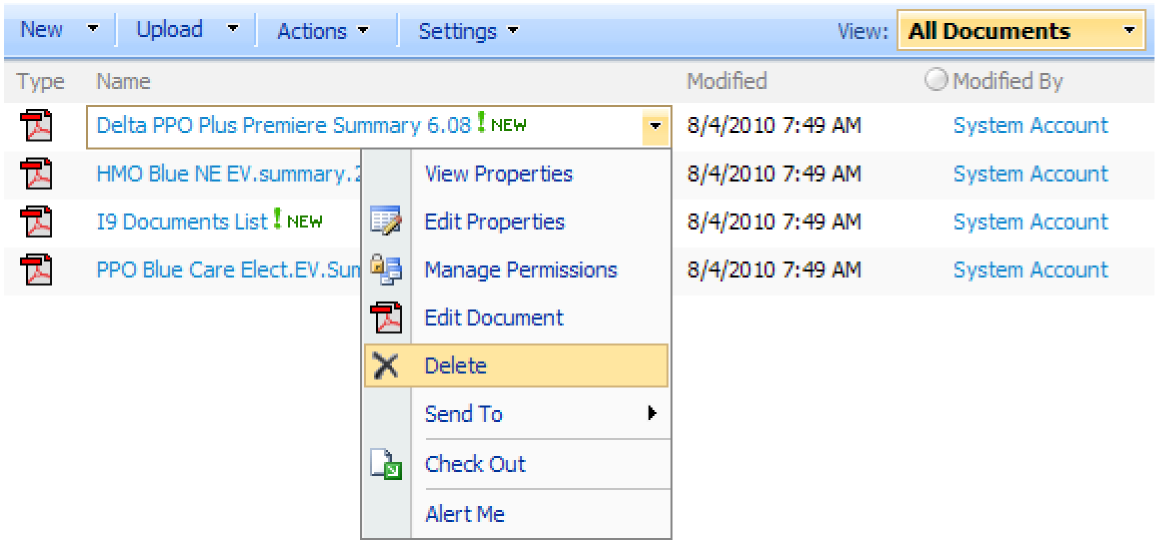


The *Upload Documents* window opens.
4. Open Windows Explorer, locate your files and and drag them to the *Upload Documents* window.
You can also click *Browse for files instead* to select the files.
5. Select *Overwrite the existing files* if documents with the same name already exist in the folder and should be updated.

14.3.3 How to Delete Documents

Procedure

1. Click *Site Actions* > *Documents*.
2. Select the folder from the Document Library List where you want delete a document.
3. Point to a file to display a down arrow.
4. Click the down arrow and from the context menu, select *Delete*.



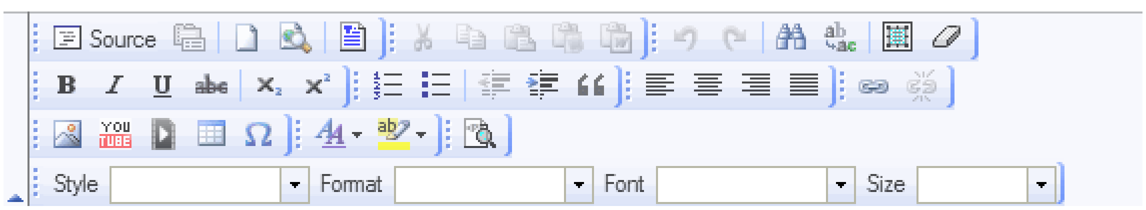
5. Confirm the deletion.

   The document will be removed and sent to the Recycle Bin.

14.4 Managing Pages

The web pages contain all of the content on the Employee Portal. Once the portal shell has been delivered, you will be able to add and/or modify the content via an easy user interface.

The key component in this interface is the Rich Text Toolbar. Most of the tools will be familiar to you, as the Employee Portal is based on a Microsoft product called SharePoint. If you are unfamiliar with a particular tool, simply place your mouse over it to reveal the ToolTip.

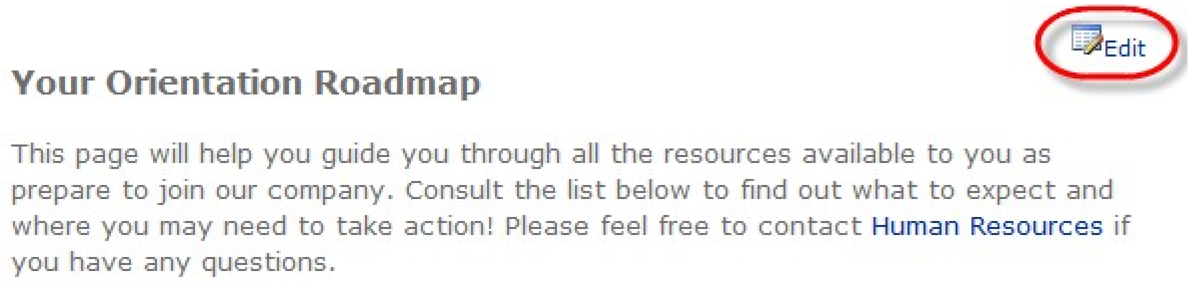


14.4.1 How to Edit Text in a Web Page

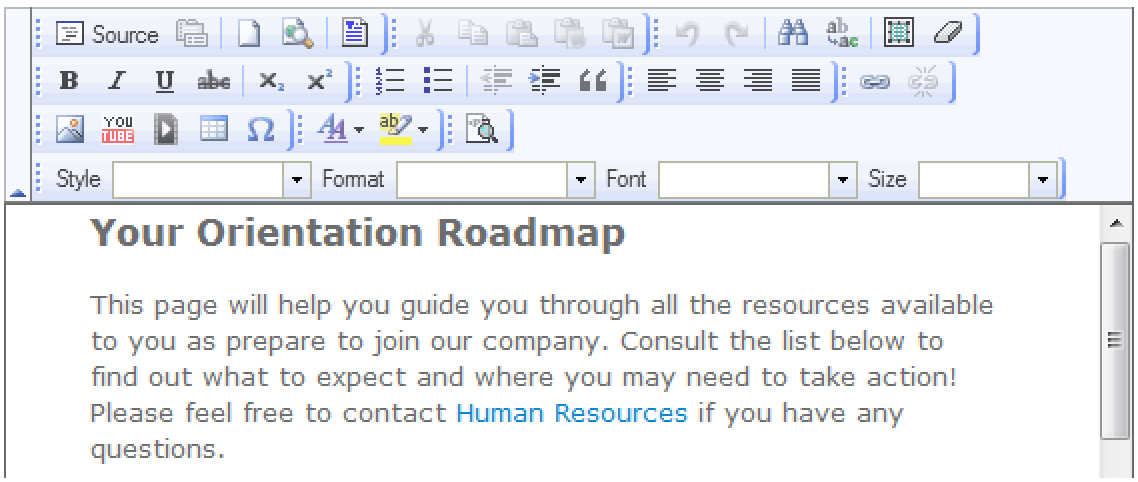
Procedure

1. Select the page from the navigation menu.

2. Click *Edit* at the top right corner of the page content to go into edit mode.



3. Type or edit the text. Use the buttons on the formatting toolbars at the top of the window to enter and format the content.



4. Save your changes.

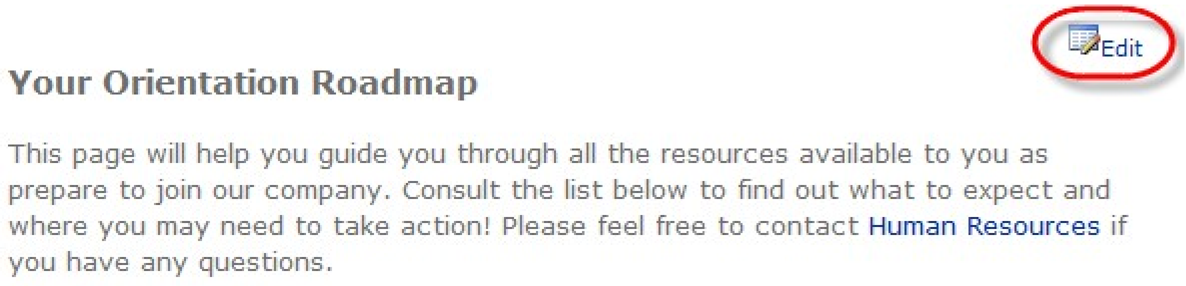
14.4.2 How to Add Data Keys to a Web Page

Context

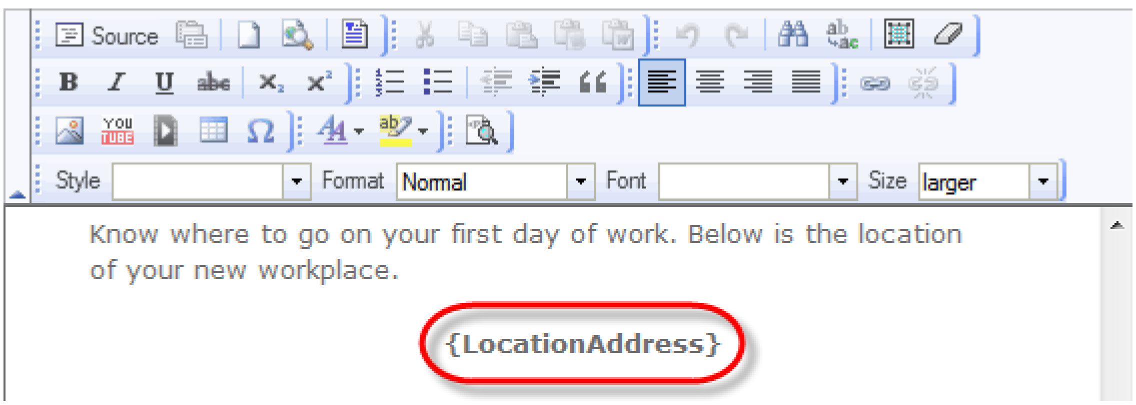
Procedure

1. Select the page from the navigation menu.

2. Click *Edit* at the top right corner of the page content to go into edit mode.



3. You can add any Data Key from the Data Dictionary. The field must be typed exactly as it appears in the Data Dictionary (not case-sensitive) and must be enclosed with braces { }. Once the field is entered in the text, format as desired.



4. Save your changes.

14.4.3 How to Create a Link to a Document

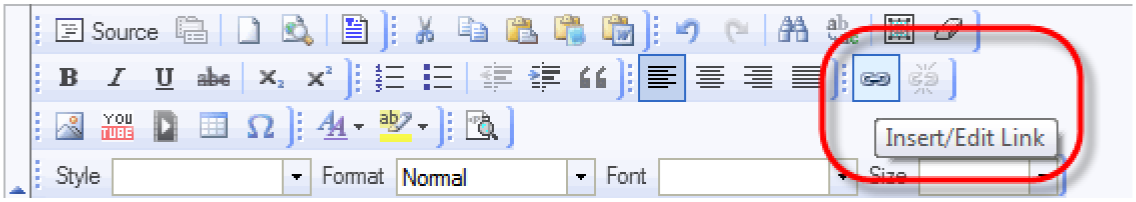
Prerequisites

You have uploaded the document to the Employee Portal server.

Procedure

1. Select the page from the navigation menu.
2. Click *Edit* at the top right corner of the page content to go into edit mode.
3. Highlight the text that you want to link to the document.

4. On the toolbar, click *Insert/Edit Link*.



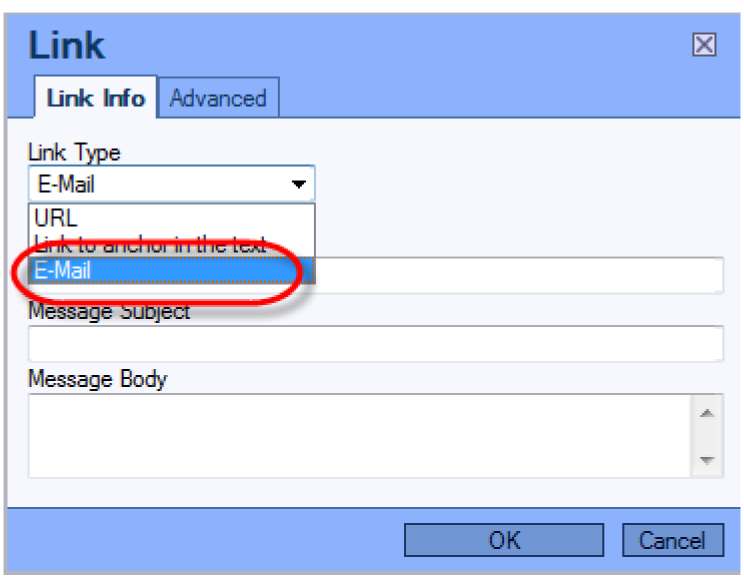
5. Click *Browse Server* and select the document.
6. On the *Target* tab, select the method for opening the document from the *Target* dropdown list.
7. Click *OK*.

   Your selected text should be formatted as a hyperlink.
8. Save your changes and test the link.

14.4.4 How to Create a Link to an E-Mail Address

Procedure

1. Select the page from the navigation menu.
2. Click *Edit* at the top right corner of the page content to go into edit mode.
3. Highlight the text that you want to link to the document.
4. On the toolbar, click *Insert/Edit Link*.
5. As *Link Type*, select *E-Mail*.



6. Enter the e-mail address and click *OK*.

   Your selected text should be formatted as a hyperlink.

7. Save your changes and test the link.

14.4.5 How to Create a Link to Onboarding

Procedure

1. Select the page from the navigation menu.
2. Click *Edit* at the top right corner of the page content to go into edit mode.
3. Highlight the text that you want to link to Onboarding Compliance.
4. On the toolbar, click *Insert/Edit Link*.
5. As *Protocol*, select *<Other>*.
6. In the URL field, enter **`@LinkToApplicantPage@`**.
7. Click *OK*.

   Your selected text should be formatted as a hyperlink.
8. Save your changes and test the link.

   If you are logged in as an admin, the link will simply open Onboarding. For an employee, it will open the New Employee Step.

14.4.6 How to Create a Link to an External Web Site

Procedure

1. Select the page from the navigation menu.
2. Click *Edit* at the top right corner of the page content to go into edit mode.
3. Highlight the text that you want to link to external Web site.
4. On the toolbar, click *Insert/Edit Link*.
5. As *Link Type*, keep *URL*.
6. Change the *Protocol*, if applicable.
7. Enter the URL in the *URL* field.
8. On the *Target* tab, select the document opening method.
9. Click *OK*.

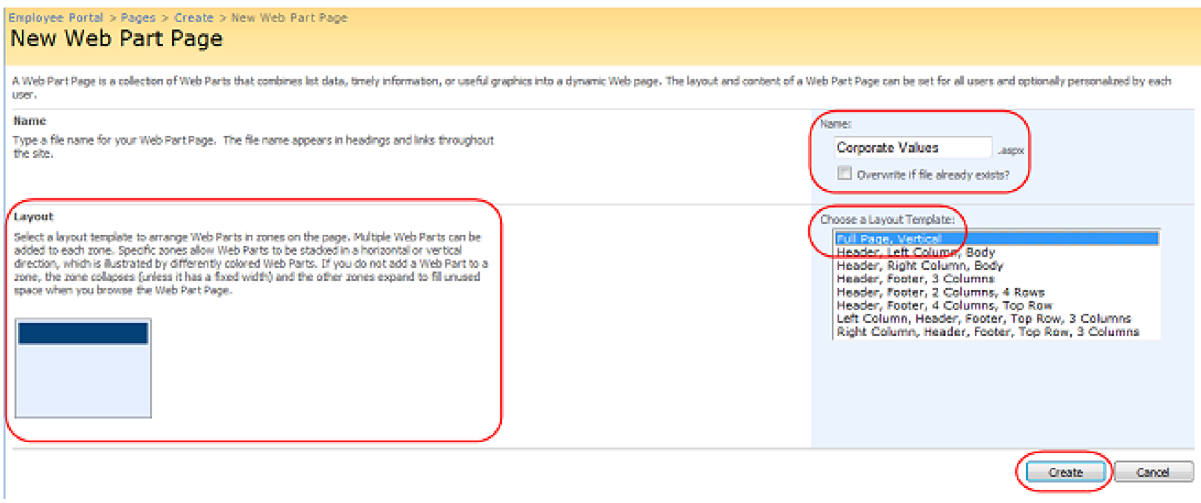
   Your selected text should be formatted as a hyperlink.
10. Save your changes and test the link.

14.4.7 How to Create a Web Page

Procedure

1. Select *Site Actions* > *Pages* .
2. Click *New*.
3. In the *New Web Part Page* window, enter your page name in the *Name* field. If you are overwriting an existing file, select *Overwrite if file already exists?*.
4. Select a layout from the *Choose a Layout Template* list.

   A preview of the layout displays on the left.
5. Click *Create*.



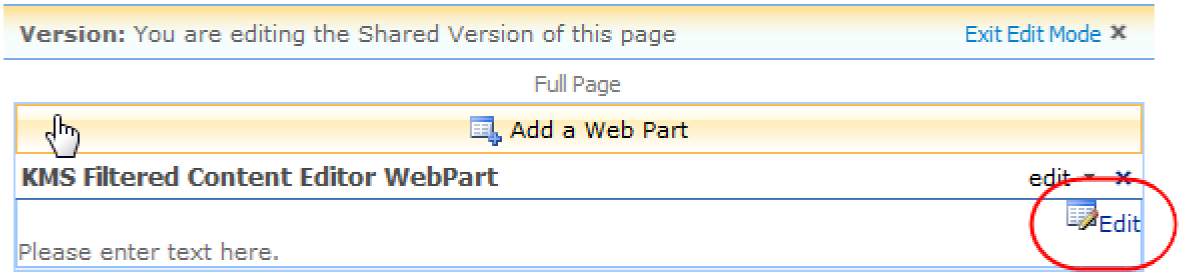
The Web Page you have created is just a shell. The content resides in the Web Parts.

14.4.8 How to Create a Web Part

Procedure

1. Click *Add a Web Part*.
2. Select an option:
   - *KMS Filtered Content Editor WebPart*: Use this option if you plan to include data keys (variables) into text without any conditions. This is the option you will use the majority of the time.
   - *KMS Template Content Editor WebPart*: Use this option if you plan to include data keys into text with conditions.

3. Click *Add* and then click *Edit*.



4. Enter your content.
5. Click *Save*.

14.5 Managing the Navigation

14.5.1 How to Create a New Menu or Sub-Menu Item

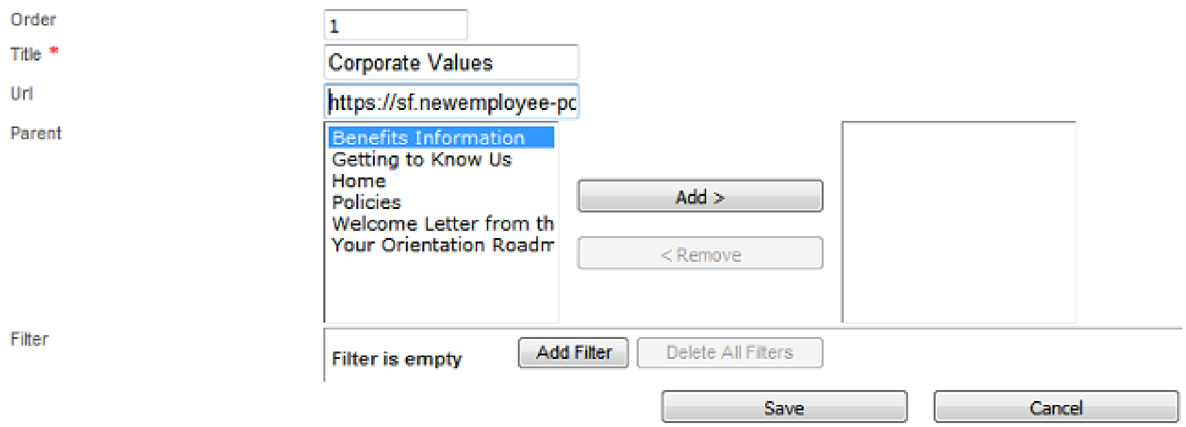
Prerequisites

You have copied the URL of the page you want to link to to your clipboard.

Procedure

1. Select *Site Actions* > *Navigation*.
2. Click *New*.

3. Enter the page title and page URL.



4. If you want that the menu item appears as a subitem of an existing menu item, then select a parent item and click *Add*.
5. Click *OK*.
6. Select the menu item from the navigation to test the link.

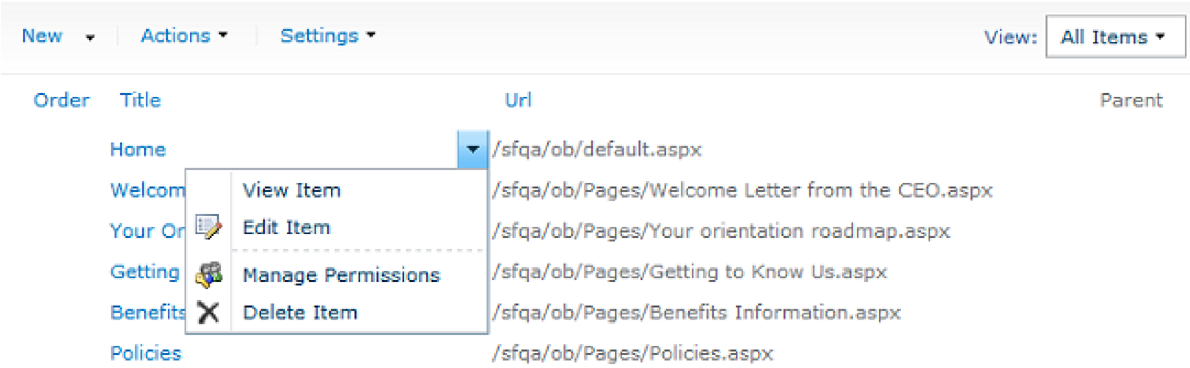
14.5.2 How to Edit a Menu Item

Procedure

1. Select ▸ *Site Actions* ▸ *Navigation* ▸.

   The list of menu items displays.
2. Click the down arrow on the menu item you wish to edit to open the menu.

3. Select *Edit Item* to modify the menu. Select *Delete Item* to remove the menu.



14.6 Managing Videos

Videos are an exciting way to communicate with the employees. A message from the CEO or President can make a new employee feel welcome. The Employee Portal allows you to insert Flash (.flv files) and YouTube videos

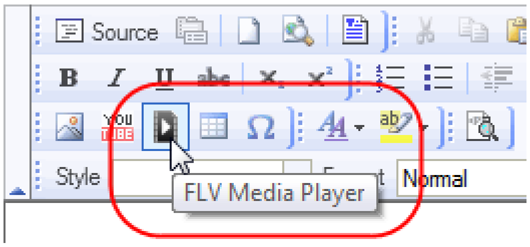
14.6.1 How to Insert a Flash Video in a Page

Procedure

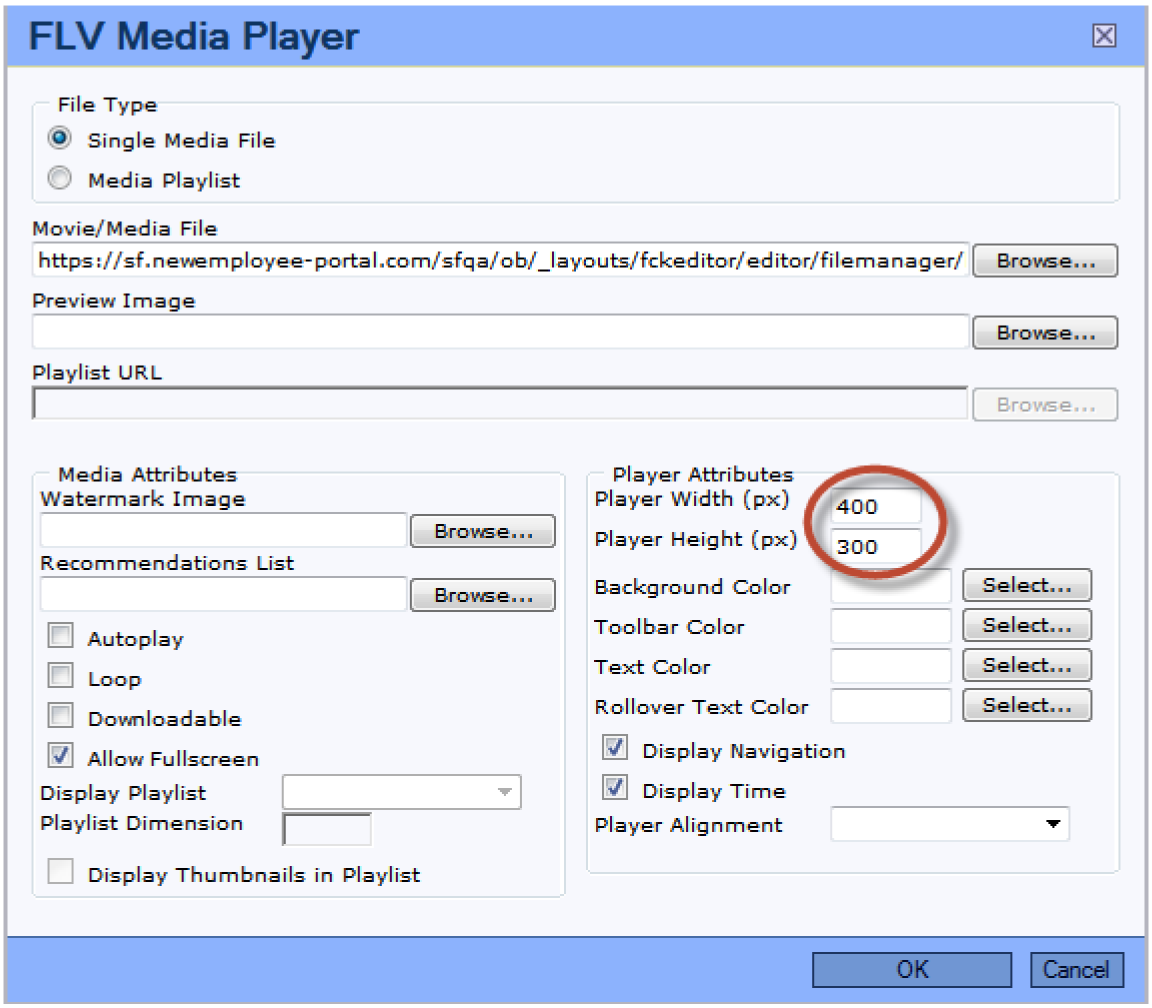
1. Select *Site Actions* > *Flash*.
2. Click *Upload*.
3. Click *Browse* and select the video file.
4. Select *Overwrite the existing files* if a file with the same name already exists in the folder and needs to be updated.
5. Click OK.

   The new uploaded video file will appear in the list with a *New!* status flag.
6. From the navigation menu, select the page.
7. Click *Edit* at the top right corner of the page content to go into edit mode.
8. Navigate your cursor to the place where the video should be added.

   > **Recommendation**
   >
   > Use the Center tool to center the video on the page.
9. Click the *FLV Media Player* icon.



10. Click *Browse* to select the Movie/Media File.
11. Enter player width and height and then click *OK*.



12. Save your changes and test if the video plays.

> **Note**
>
> You need the Flash player to play the video.

14.6.2 How to Insert a YouTube Video in a Page

Prerequisites

You have copied the URL of the YouTube video to your clipboard.

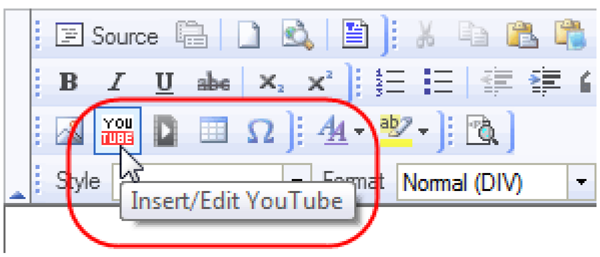
Procedure

1. From the navigation menu, select the page.
2. Click *Edit* at the top right corner of the page content to go into edit mode.
3. Navigate your cursor to the place where the video should be added.

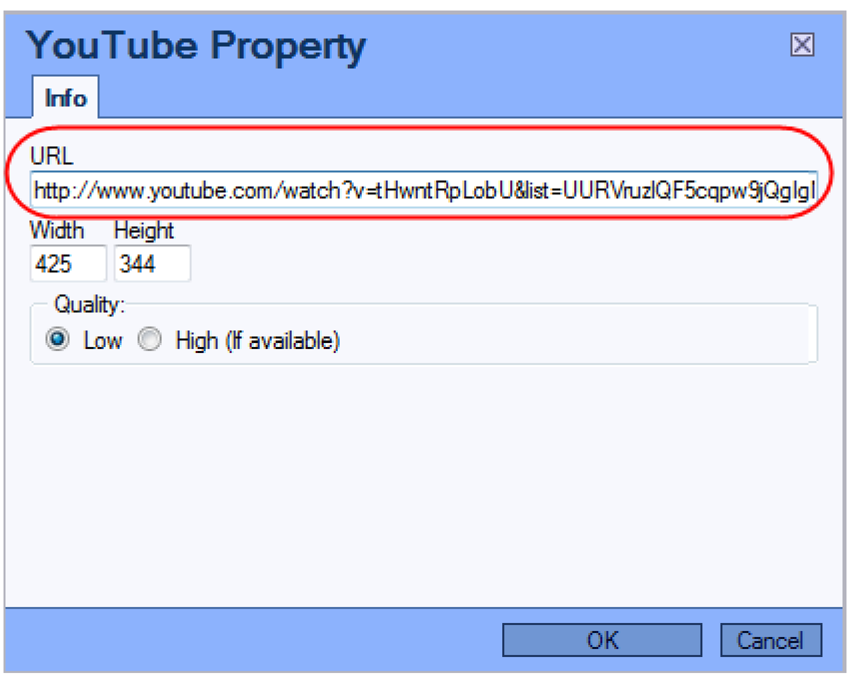
    Recommendation

    Use the Center tool to center the video on the page.

4. Click the YouTube icon.



5. Paste the URL in the *URL* field and click *OK*.



6. Save your entries and test if the video plays.

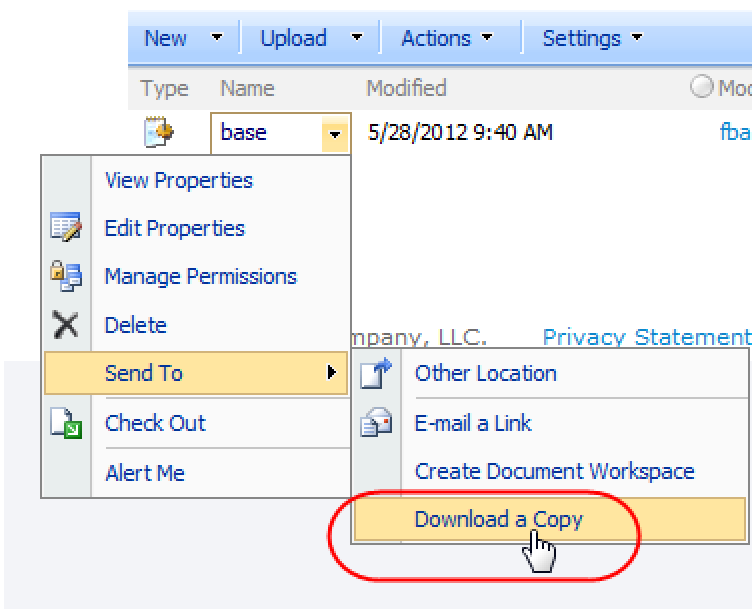
14.7 Managing the Branding

Branding of the Employee Portal includes the company logo, color scheme and graphics. This branding can be changed at any time.

14.7.1 How to Update the Cascading Style Sheet

Procedure

1. Select *Site Actions* > *Branding*
2. Open the `css` folder.
3. Click the file's down arrow to open the menu and select *Send To* > *Download a Copy* .



4. Open or save the css file.
5. Change the css file according to your needs.
6. Select *Site Actions* > *Branding* , then click *Upload*.
7. Click *Browse*and select the Cascading Style Sheet.
8. Select *Overwrite the existing files*.
9. Click *OK*.

The new uploaded document will appear in the list with a *New!* status flag.

14.7.2 How to Update Graphics

Procedure

1. Select ▸ *Site Actions* ▸ *Branding* ▸
2. Open the `images` folder.
3. To replace an existing graphic, make sure the new graphic has the same name. For example, to update the logo (logo.png), the new graphic should be named logo.png.
4. Click *Upload*.
5. Click *Browse* and select the graphic.

   The *Overwrite the existing files* checkbox is selected by default.
6. Click *OK*.

   The new uploaded graphic will appear in the list with a *New!* status flag.

   The new graphic should appear on the site in place of the previous graphic.

14.7.3 How to Manage Logos

Admin users can update the Employee Portal logo based ona condition or data field in the new hire, internal hire, or employee actvity. Clienst can have more than one logo per Employee Portal.

Context

The Logo Library in the Employee Portal stores logo images for the company. Each image has two important columns: order and filter. The order field is a numeric field that controls logo visibility checking order. Logo images are sorted ascending by the Order field, then filters are checked one-by-one.

By default, the Logo Library contains a logo image with an empty Filter field, and an Order number of 9999.

Procedure

1. To upload a new logo to the Logo Libray, select the file and enter the relevant image information. Populate the *Order* and *Filter* fields appropriately.

2. Add as many logos with appropriate filters as required.
   When a user visits the site, the first logo with matching filter criteria displays. If no appropriate logo is found, the default logo displays.

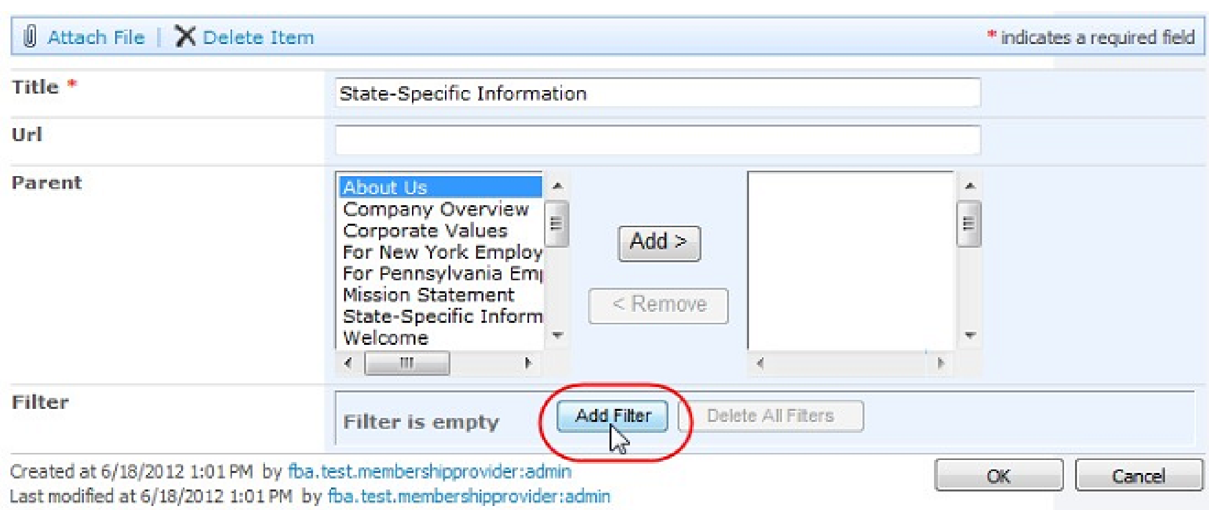
14.8 Managing Filters

Filters allow you to create customized content for different groups of users based on data keys such as JobCode, WorkState or JobPayClass. You can filter menus and web parts using an interface that is similar to that in other Onboarding tools. In addition, you can use HTML to filter text in a web part.

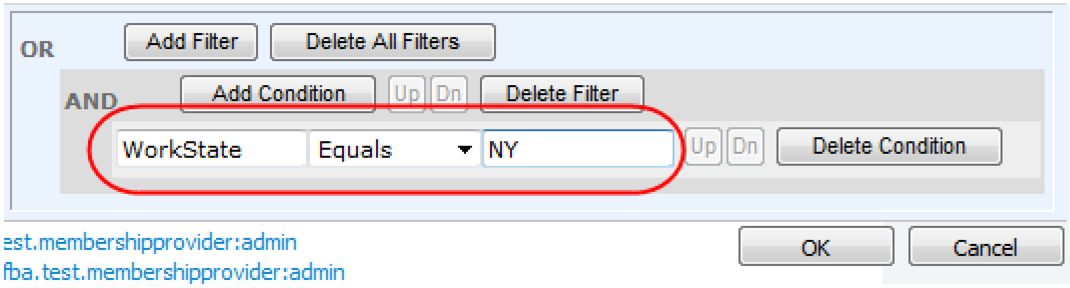
14.8.1 How to Filter Menus

Procedure

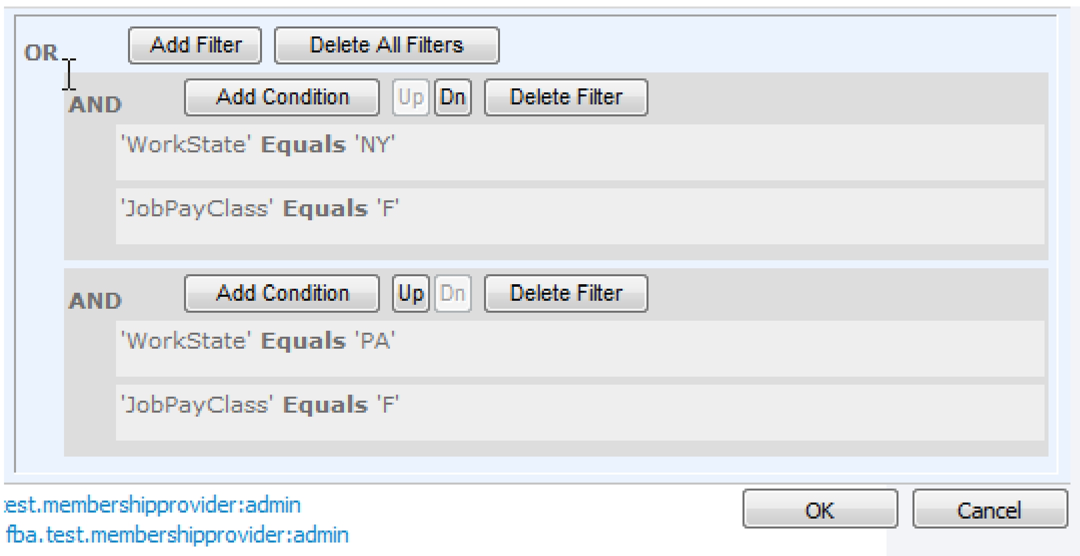
1. Select *Site Actions* > *Navigation* .
2. Click the down arrow on the menu item you wish to filter to open the menu, then select *Edit Item*.
3. Click *Add Filter*.



4. Click *Add Condition*.
5. Enter the data key, select the operator and enter the value for the condition. The data key must match the key in the Data Dictionary.



6. Repeat steps 4 and 5 to add additional conditions to this filter. If the view should be displayed when a group of conditions are satisfied, all of them should be in the same filter.
7. To add additional filters and conditions, repeat steps 3 to 6. If the view should be displayed when either one of the conditions are satisfied, they should be in different filters.



In the example screenshot above, the *State-Specific Information* menu needed to be filtered for full-time employees who work in NY and Pennsylvania. The steps were:

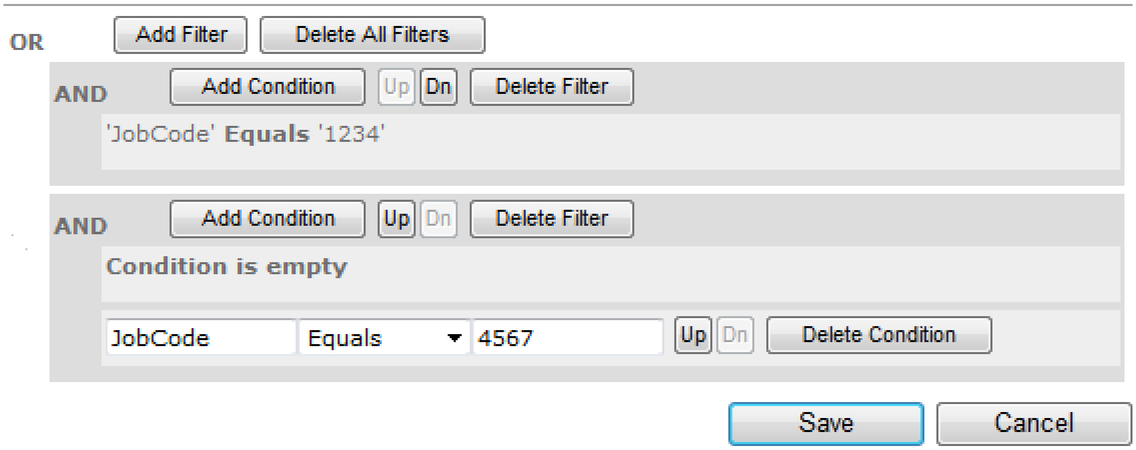
1. Add filter.
2. Add Condition “WorkState equals NY” (For New Hires working in New York).
3. Add Condition “JobPayClass equals F” (For Full-Time workers).
4. Add filter.
5. Add Condition “WorkState equals PA” (For New Hires working in Pennsylvania).
6. Add Condition “JobPayClass equals F ” (For Full-Time workers).

8. Click OK.
9. To test, logout as the administrator and login as a user whose profile meets the conditions. Navigate the menu.

14.8.2 How to Filter Web Parts

Procedure

1. Open the page you want to filter.
2. Click *Edit* on the part you want to filter.
3. Click *Add Filter*, then click *Add Condition*.
4. Enter the data key, select the operator and enter the value for the condition.



5. To add additional conditions to this filter, repeat steps 4 to 5.
6. To add an additional filter, repeat steps 3 to 5.
7. Click *OK*.
8. To test, logout as the administrator and login as a user whose profile meets the conditions.

14.8.3 How to Filter Text in a Web Part

Filters inside a page content allow you to show or hide part of the page content according to conditions. To add a filter in a Onboarding Template Content Web Part, you can specify conditions directly in the source of the text.

Procedure

1. Open the page you want to edit and click *Edit*.
2. In the editor, click *Source*.

   Filters and conditions must be edited in the source view because they do not allow a rich text to be used inside of them.
3. Find the text you want to apply the filter to.

In this example, we will apply the filter to “Sarbanes-Oxley FAQ” so that only Experienced Hires, International, and Managing director can see it.

```
<a target="_blank" href="/sites/site1/Documents/PLC
Instructions.pdf"><font style="font-size: larger">PLC
Form</font></a><br />
<a target="_blank" href="/sites/kpmg/Documents/FAQ.pdf"><font
style="font-size: larger">FAQ</font></a><br />
<a target="_blank" href="/sites/site1/Documents/FAQ-
SARBANESOXLEY.pdf"><font style="font-size: larger">SARBANES-OXLEY
FAQ</font></a><br />
<a target="_blank" href="/sites/site1/Documents/User Guide for PLC
form.pdf"><font style="font-size: larger">User Guide for PLC
form</font></a><br />
</blockquote></div>
```

4. Add a condition around the filtered text.

```
<a target="_blank" href="/sites/ site1 /Documents/FAQ.pdf"><font
style="font-size: larger">FAQ</font></a><br />
#if ($CandidateTypeOfHire == &quot;EH&quot; ||
$CandidateTypeOfHire == &quot;MD&quot; || $CandidateTypeOfHire ==
&quot;I&quot;)
<a target="_blank" href="/sites/ site1 /Documents/FAQ-
SARBANESOXLEY.pdf"><font style="font-size: larger">SARBANES-OXLEY
FAQ</font></a><br />
#end
<a target="_blank" href="/sites/site1 /Documents/User Guide for PLC
form.pdf"><font style="font-size: larger">User Guide for PLC
form</font></a><br />
```

To open a conditional block, write “#if”. To close a conditional block, write “#end”. The condition after “#if” must be in brackets.The text inside the conditional block will only be shown if the condition inside the brackets is true. Brackets can also be used to group conditions.

Table 23: Operators

Operator	Means...
==	equal - true when the right part is equal to the left part
!=	not equal - true when the right part is not equal to the left part
||	or - true if either one condition is true
&&	and - true if both conditions are true

To use data dictionary keys in conditions, you must use a dollar sign before them. All string constants must be surrounded by quotes (").

Example

```
$CandidateTypeOfHire == &quot;EH&quot; ||
 $CandidateTypeOfHire == &quot;MD&quot; ||
 $CandidateTypeOfHire == &quot;I&quot;
```

EH = Experienced Hires, MD = Managing Directors, I = International Hires

You can also write an alternative text to be shown if condition in the filter is not true:

```
#if (condition)
Text if condition is true
#else
Text if condition is false
#end
```

In addition, you can group conditions. For example, text must be shown if condition1 or condition2 is true, and condition3 must always be true:

```
#if ((condition1 || condition2) && condition3)
Text if condition is true
#end
```

5. Click *Save*. If the filter you entered is incorrect, an error message is displayed.

14.9 How to Customize the Employee Portal Password Panel

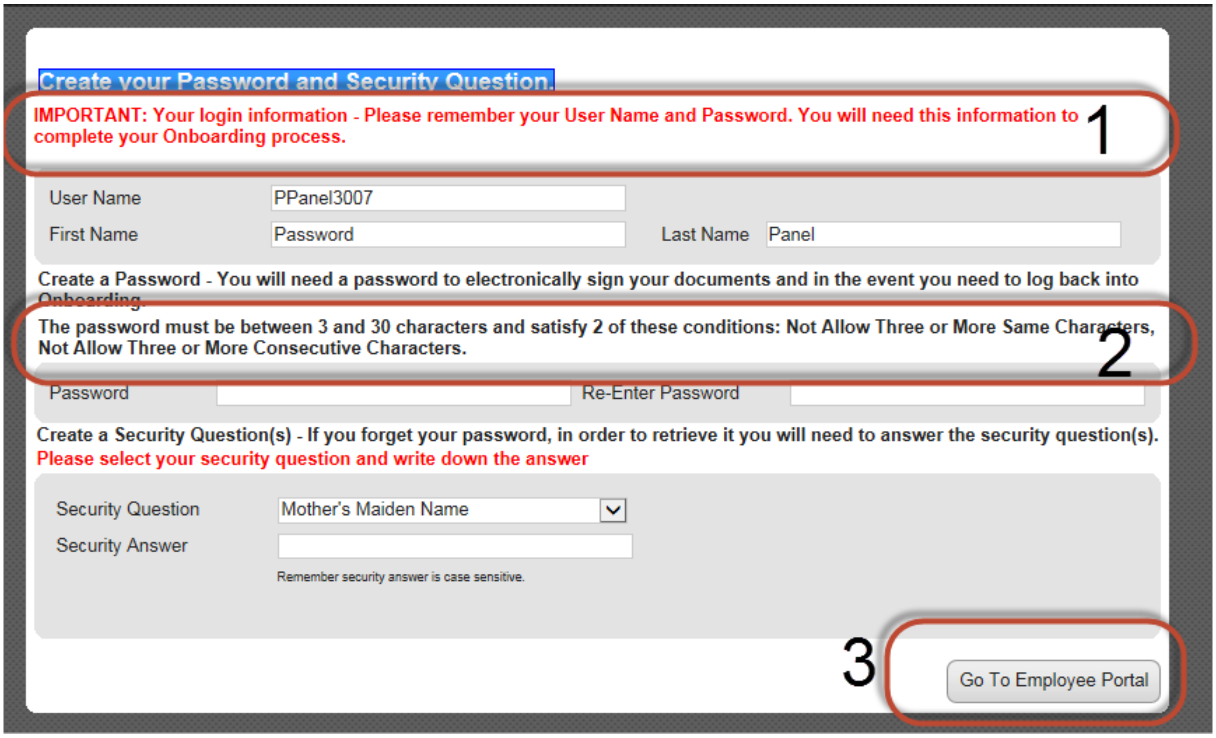
To change the default labels and text on the Employee Portal password panel, you must have experience working with XML. Export and update the customer's localization file to make these changes.

Prerequisites

- Ensure portal link button has `@LinkToNES@` inside The link renders with `&src=ep' postfix ('src' param`). Following this link will open the New Employee Step wizard seamlessly.

Procedure

1. Navigate to *Super Admin* > *Account Options* > *XpressHR.ApplicantPageBtnGoPortalShow* enter **`True`** in the *Value* field. Click *Update.* You must configure this option for each process with a customized Employee Portal password panel.
2. You can customize three areas of the password panel. This is the screen that prompts a user to set up a password once they have clicked the link to the Employee Portal in the Welcome Letter.



3. Navigate to *Super Admin* > *Import/Export Settings* > *Localization Resources*. Export the file.
4. Open the exported file. Add the following to the `GlobalResources` section. The `Onboarding:ApplicantStartWizard.lblMsgHeader.Text.NoticeWithProcessName` key corresponds to the text at the top of the panel. The `Onboarding:ApplicantStartWizard.btnPortal.Text` corresponds to the *Go to Employee Portal* button.

```
<Data
key="Onboarding:ApplicantStartWizard.lblMsgHeader.Text.NoticeWithProcessName">
         <Value><![CDATA[<center><font size="3"color="black">Welcome to the DSW
new hire onboarding process!<br>We are excited that you have made the decision
to join DSW.</font></center><br><font color="black"> Please setup your password
and security questions so that we can grant you direct access to the employee
portal to learn about DSW and to complete your new hire paperwork.  Password is
<u>required</u> for the electronic signature of onboarding documents.<br><br></
font><u>Password Rules:</u><ul style="padding-left: 20px"><li style="padding-
left: 20px">Password must be between 3 to 30 characters in length</li><li
style="padding-left: 20px">Cannot contain 3 or more consecutive characters</li></
ul>]]></Value>
      </Data>
      <Data key="Onboarding:ApplicantStartWizard.btnPortal.Text">
        <Value><![CDATA[Go to DSW New Associate Portal]]></Value>
      </Data>
```

5. To update the instructions for creating a password, navigate to SAP SuccessFactors HCM > *Onboarding* > *Settings* > *Password Security* and add the desired text in the *Enter text for password security instructions*. Click *Apply*.

15 Integrating Recruiting Management and Employee Central

To create a seamless flow of user data, clients can choose to integrate the Recruiting Management, Onboarding, and Employee Central modules. This passes data gathered from candidates during recruiting through the onboarding process and into their new employment.

> **Note**
>
> Some aspects of the Recruiting - Onboarding- Employee Central integration **must** be configured by SAP SuccessFactors Professional Services and cannot be configured by the customer.

To map fields from Onboarding to Recruiting or Employee Central, the fields must be mapped to fields of corresponding types. For example, an Onboarding text field must be mapped to a Recruiting text field. The field value must also match exactly, including case. For example, if Recruiting uses the value `FullTime`, Onboarding must use the same value, including matching the value's case and spacing.

15.1 Recruiting to Onboarding Integration

The SuccessFactors Onboarding integration replaces all previous third-party onboarding integrations. New clients should only be implemented with SuccessFactors Onboarding.

You cannot send date from Recruiting to Employee Central, then send additional data to Employee Central once the candidate has been onboarded. It is best practice to pass candidate data from Recruiting to Onboarding, then from Onboarding to Employee Central when customers have all three modules integrated.

If a customer wants two separate workflows - for example, to send data for certain candidates from Recruiting to Employee Central, and data from other candidates from Recruiting to Onboarding, each workflow requires a separate requisition.

Prerequisites:

- Enable V12 framework
- Enable Role-Based Permissions

- Grant feature permissions for Onboarding on the Job Requisition XML template

```
<feature-permission type="onboarding">
        <role-name><! [CDATA [R]]></role-name>
        <role-name><! [CDATA [S]]></role-name>
        <role-name><! [CDATA [O]]></role-name>
        <role-name><! [CDATA [T]]></role-name>
        <role-name><! [CDATA [G]]></role-name>
        <role-name><! [CDATA [GM]]></role-name?
        <status><! CDATA[Hire]]></status>
    </feature-permission>
```

- When configuring fields on the Onboarding side, you must assign the field to its "entity" so the mapping tool knows which tab fields should appear on. Navigate to *Onboarding* > *Settings* > *Data Dictionary*. Select the Entities folder in the navigation area on the left, then click the *Fields* icon. Make sure you have **Entities** selected in the *Namespace* field, and choose the part of the Recruiting application you want to assign fields to in the *Tag* field. Highlight fields in the *Available Fields* list, then click the *>>>* icon to move them to the selected Recruiting element. You can remove fields using the *<<<* icon, or reorder the fields using the *Up* and *Down* buttons.

Related Information

Onboarding Implementation Guide

15.1.1 Configure the Recruiting to Onboarding Integration

Configuring the Onboarding and Recruiting Integration requires initial configuration and field mapping for information to move from one system to the other.

Procedure

1. Navigate to Provisioning. Select the desired company ID, then *Company Settings* > *Recruiting* > *Enable Onboarding Integration* > *BizX Onboarding Integration*.
2. Still in Provisioning, select *Company Settings* > *Enable Onboarding Application*. Select the appropriate datacenter and environment from the *Environment* dropdown menu. Enter **SF** or **SFQA** in the *Path* field.
3. Grant feature permissions for Onboarding in the Requisition XML. Feature permissions define operator access to certain special functionalities. This permission must be granted separately for each status users will initiate onboarding from. For example:

```
 <feature-permission type="onboarding">
<description><![CDATA[Users can launch interview assessment]]>
</description>
<role-name><![CDATA[R]]></role-name>
<role-name><![CDATA[G]]></role-name>
<status><![CDATA[Interview]]></status>
</feature-permission>
```

4. Permission admin users to access the*Setup Onboarding Integration* Admin Page.
   a. *Admin Tools* > *Manage Permission Roles* > *Role* > *Permissions* > *Setup Onboarding Integration*
5. Permission the appropriate users to initiate Onboarding. Navigate to *Admin Tools* > *Manage Permission Roles* > *Role* > *User Permissions* > *Recruiting Permissions* > *Onboarding Initiate Permission*
6. Navigate to *Admin Tools* > *Setup Onboarding Integration.* > *Settings.* The Settings tab allows the recruiting user to enable Onboarding for either all Job Requisitions, or only certain Requisitions. Use the provided dropdown menu to set criteria for the requisitions, which will have Onboarding applied. You can only limit Onboarding to Requisitions based on one field or criteria. For example, a client may only want to onboard hires in the US, and so could make the Onboarding options available only on US requisitions.
   a. Under *Restrict the onboarding of applicants who have been onboarded in the past (days):* Enter a number of days, after which a candidate can be reonboarded. If a recruiting user attempts to reonboard a candidate before this period expires, a dialog box will display, notifying the user that the candidate has already been onboarded.

15.1.1.1 Mapping Fields from Recruiting to Onboarding

You can map field from the Job Application, Job Requisition, and Job Offer in Recruiting to Onboarding.

Context

You cannot map fields from the Candidate Profile, or any other Recruiting entities.

Some fields are automatically passed from Recruiting to Onboarding. These fields do not require mapping or any other additional configuration.

- JobReqId
- ApplicationId
- CandidateId
- InternalHire (true/false)
- EmployeeLogin (for internal hires)

Procedure

1. Ensure that all the correct fields are available for mapping. Navigate to SAP SuccessFactors HCM *Onboarding* > *Account Settings* > *Data Dictionary* > *Namespace* > *Integrations* > *RX.* Fields included in the RX folder are included in the integration mapping.
2. To add or remove a field, click *Fields.* Fields on the right are available for mapping. To add a field, move it to the right. To remove a field, move it to the left. Only remove fields you know are not part of Recruiting.
3. Ensure that the fields are associated with the correct template under *Data Dictionary* > *Namespace* > *Entities.* Here you can see which fields are associated with the Job Requisition, Job application, or Job Offer mapping. Add or remove fields by moving them between the menus for each template.

4. Map Job Requisition, Job Application, or Job Offer fields. Navigate to *Admin Tools* > *Setup Onboarding Integration* and select each template to map. Fields marked with a red asterisk require a job mapping. Fields marked with a blue asterisk show up on more than one form, but can only be mapped to one location. Do not map these fields to multiple templates.

   Recommendation

   Initially, map only the required fields for each Recruiting template. Once the mapping is executed successfully, map any additional fields.

   Note

   Do not map the Social Security Number (SSN). This field is not encrypted.

Table 24: Default Onboarding Field mapping - Job Requisition

Onboarding Field ID	RCM Template Field	Notes
RecruiterID	recruiter operator	recruiterName
RecruiterFullName	N/A	Onboarding will fetch these fields automatically
RecruitingTitle	N/A	
RecruiterEmail	N/A	
ManagerID	N/A	
ManagerFullName	N/A	
ManagerTitle	N/A	
ManagerEmail	N/A	

Table 25: Default Onboarding Field mapping - Job Application

Onboarding Field ID	RCM Template Field
Basic Employee Data	
LastName	lastName
FirstName	firstname
MiddleName	middleName
Suffix	No Mapping
EMail	contactEmail/primaryEmail
Address1	address
Address2	address
City	city
Country Township	No Mapping
State	state
Zip	zip
Zip4	zip

Onboarding Field ID	RCM Template Field
Country	country
PostCode	zip
PhoneAC	cellPhone/homePhone
EveningPhoneCountryCode	No Mapping
DaytimePhoneCountryCode	No Mapping
PhoneNum	cellPhone/homePhone
MailAddress	address
MailAddress2	address
MailCity	city
MailZip	zip
IsMailingAddressSamePhysical	No Mapping
MailAddressState	state
MailAddressState_Text	state
MailCountry	country
MailCountry_Text	country
MailZip4	zip
EEO Information	
DateofBirth	dateofBirth
HispOrLat	race
EthnicGroupCode2	No Mapping
Ethnicity_text	ethnicity
Gender	gender
GenderDesc	gender
VeteranVietnam	No Mapping
VeteranRecentlySeparated	
VeteranDisabled	
VeteranAnother	
Campaign	
MilitaryEra	
SeparationDate	
ArmyBranch	
VeteranStatus	veteranStatus
Emergency Contact Details	
EmergencyCountry	No Mapping
EmergencyState	

Onboarding Field ID	RCM Template Field
EmergencyFirstName	
EmergencyLastName	
EmergencyAddress	
EmergencyCity	
EmergencyZip	
EmergencyZip4	
EmergencyDaytimePhoneCountry	
EmergencyDaytimePhoneNum	
EmergencyDaytimePhoneAC	
EmergencyEveningPhoneCountry	
EmergencyEveningPhoneAC	
EmergencyEveningPhoneNum	
EmergencyWorkPhoneCountry	
EmergencyWorkPhoneAC	
EmergencyWorkPhoneNum	
EmergencyEmail	
EmergencyRelationship_Code	
Standard Disability	
DisabledPerson	disabilityStatus
NeedAccomodation	No Mapping
DisabilityStatusText	disabilityStatus
Job Information	
JobReferralSource	referralSource
JobReferralSourceOther	No Mapping
JobReferredByEmployee	
HireDate	
OrientationDate	
OrientationTime	

There are 54 hard-coded fields, which come from the Onboarding Module. These fields show on the Requisition and Application and are not updated based on the customer.

> **Note**
>
> The Onboarding field `WOTCStartDate` must be populated, because Onboarding uses it has the Hire Date for new employees by default. This field is captured in the *Start Date* field on the standard panel *SAP_Standard_NewHire_Setup*, which is part of the PHV step. If the customer is not using this panel, it must

be captured on a custom panel, using the `WOTCStartDate` data key. This field can also be captured in Recruiting and mapping to Onboarding, but the Recruiting field must be mapped to `WOTCStartDate`.

15.1.1.2 How to Map Picklists and Lookups Using Panel Designer

It is best practice to configure all picklists for Onboarding using SuccessFactors HCM picklists.

Context

Users no longer need to manually map SuccessFactors HCM picklists to Onboarding lookups. They can now map picklists for fields on user-defined panels in Panel Designer using the*SF HCM Picklist* control.

> **Note**
>
> If an Advanced Condition is configured based on a picklist value, changing the picklist at a later date will break the Advanced Condition.

SuccessFactors HCM Picklists support these special characters: ~ ` ! @ # $ % ^ & * ( ) - _ + = { [}] \ | ' " : ; < > ? / , . ç

To display picklist options alphabetically, navigate to *Provisioning* > *Company Settings* > *Sort Picklists Alphabetically*

Procedure

1. Configure the data fields you would like to map in the Data Dictionary. Navigate to SAP SuccessFactors HCM *Onboarding* > *Settings* > *Data Dictionary.* In the *Type* field, choose **`SF HCM Picklist.`**
2. Select an *Integration Mode.* This property specifies the value used for communication between SAP SuccessFactors HCM and Onboarding
   - Suite: Sends the Option Id from RCM to ONB and considers the value sent from ONB to EC as the Option ID. Recommended for RCM-ONB-EC integrations where RCM and EC use the same picklist names.
   - Code Based: Uses the external code of the picklist between SuccessFactors RCM and Onboarding. The external codes for the SF picklists should be unique and not empty.
   - Label Based: The label of the option in a specified locale will be used for communication. The SF HCM locale (en_US, fr_FR, etc.,) should be specified in the locale textbox. The labels for the picklist options in the specified locale should be unique and not empty. This mode is preferred when there are any external integrations (External ATS / External HRIS system). For Code Based and Label Based modes, a picklist name should be selected in the SF HCM Picklist Name dropdown.

> **Recommendation**
>
> If RCM and EC use different picklists, then either Code Based or Label Based mode should be used. Specify the EC picklist name in the data dictionary field

.

3. Navigate to *Settings* > *Panels.* > Add the *SF HCM Picklist* control to the desired panel.
4. Select the name of the SF HCM picklist in the *Picklist Name* field .
   The values from the SF HCM picklist will be populated in the preview page of the user defined panel. This can be used to verify if the correct picklist name was chosen in the panel definition.

Related Information

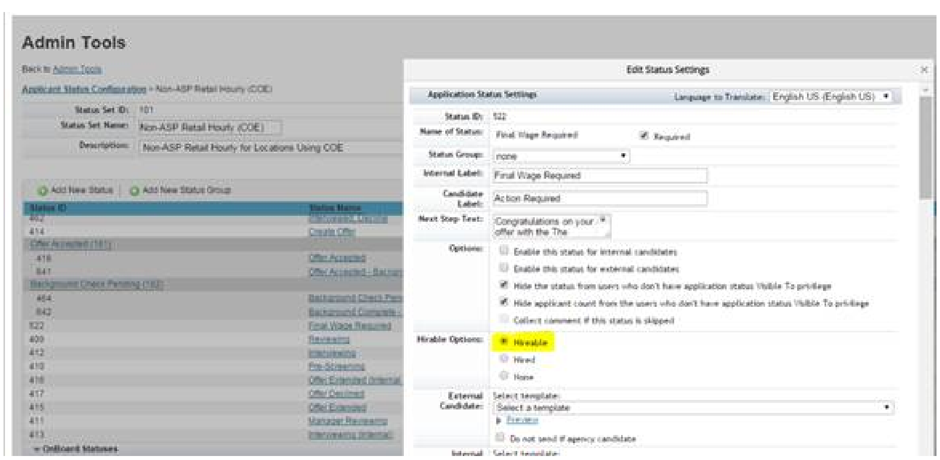
Mapping Recruiting-Onboarding Enum Picklists [page 346]

15.1.2 Initiate Onboarding

Once Onboarding is configured, a recruiting user can click *Initiate Onboarding*on the application. Only users in roles tha have been granted the appropriate Initiate Onboarding button permissions in the XML will see this Initiate Onboarding option.

For applications where the applicant is in a status configured to support the initiate onboarding feature, a recruiting user can click "Initiate Onboarding" on the application once Onboarding is configured.

Check the Application Status Set. Configure one *Hireable* and one *Hired* status in the In Progress status set. For all other statuses, set the *Hireable Options* setting to `None`. The candidate should be onboarded in the *Hireable* status, and then in the *Hired* status once onboarding is complete. Set the *Hireable Options* for any inactive statuses to `None`.



If you configure the Application Stats Set in any other way the new hire tiles will fail. This can also affect other parts of Onboarding. You cannot have more than one Hired and one Hirable status.

Once onboarding is initiated, data is sent once, based on the mapping configured between Recruiting and Onboarding in Admin Tools. The Onboarding portlet then appears in Recruiting, showing the user who initiated the request, when the request was submitted, the status of the submission (success or failure) and a link for more details.

A candidate can only be sent to Onboarding once within the period defined in *Admin Tools* > *Setup Onboarding Integration* > *Settings*. If a user attempts to onboard a candidate more than once before this period has expired, they will see a pop-up saying the candidate has already been onboarded for a job.

> **Note**
>
> Do not set the `readytoHire` parameter on the OnboardingCandidateInfo object to **`required`**. This causes errors in initiating Onboarding.

15.1.3 Import/Export RCM to ONB Mapping Templates

The user can import working Recruiting Management to Onboarding mapping of Job Application, Job Requisition, and Job Offer templates from stage to production sites, or from other sites in order to streamline implementation.

Procedure

1. Navigate to *Provisioning* > *On/Offboarding Settings* > *Import Export for RCM templates Mapping.*
2. Select the desired template from *Job Application, Job Requisition,* or *Job Offer.* Choose *Import* or *Export.*
3. To view the imported mapping, navigate to SAP SuccessFactors HCM Suite *Admin Tools* > *Managing Recruiting* > *Setup Onboarding Integration.*
4. Select the templates imported in Provisioning to see the mapping.

15.1.4 How to Map the Corporate Structure

Context

Mapping the Corporate Structure from Recruiting Manage to Onboarding populates information about the job's department, division and location from the requisition to the new hire in Onboarding. This allows customers to provide certain hires with required paperwork, or allows managers for different locations to onboard any new hire, for example.

Do not sync the Corporate Structure information, because the sync only brings the label and code information, which can result in information loss. When you add a new Division, Department or Location in SuccessFactors

HCM, you have to manually add them in ONB too. If you do not map the Corporate Structure, when a new hire is onboarded, the Level 1 information populates using the first value listed in Onboarding. For example, if the first value listed is Global Services, then every new hire will be placed in that Division, though this can be changed in the Post-Hire Verification step.

If you map the Corporate Structure, the information from the requisition will be carried with the new hire's information to Onboarding, but only if parent/child relationships are not enabled in Onboarding. In SF HCM, Division, Department, and Location are enum fields, and the values are derived from the employee file. In SuccessFactors HCM, the label for picklists must match the code in Onboarding. This is true for enum fields too.

Procedure

1. Navigate to *Super Admin* > *Corporate Structure* and click the levels of the Corporate Strucutre. Note the value in the *Data Key for Level Code* field. For division, department, and location these are typically `DivCode`, `LocDistrict`, and `LocNumber`.
2. To configure Level 1, first ensure that `DivCode` is in the Integrations Namespace under the RX tag in the Data Dictionary in .SAP SuccessFactors HCM Onboarding
3. Also ensure that `DivCode` is mapped under *Onboarding* > *Settings* > *Namespaces* > *Entities* > *JobReq*, so that it can be mapped in Admin Tools under Job Requisition.
4. Check that all three Data Keys for Level Code are mapped under RX and JobReq inSAP SuccessFactors HCM Onboarding .
5. Map the Data Key for Level Code to the Recruiting level name under *Admin Tools* > *Setup Onboarding Integration.*

15.2 Onboarding to Employee Central Integration

Onboarding to Employee Central integration allows customers to convert candidates into employees, with or without an integration with Recruiting.

There are two ways to convert a candidate to an employee: a Recruiting to Employee Central integration and a Recruiting to Onboarding to Employee Central integration.

You can configure both of these scenarios in the same customer instance. The candidate data is wholly extracted from either Recruiting or Onboarding. It is not possible to have some data elements from Onboarding and some data elements from Recruiting for the same candidate.

To bypass Onboarding for some candidates, for example, internal hires, the customer must create a separate Job Requisiton template in Recruiting Management or their ATS to handle these employees.

If propagation rules are configured from Employee Central, these rules will overwirite data that comes to EC from Onboarding. Propagation rules are configured in the Employee Central XML.Do not configure propagation rules for Onboarding - Employee Central integrations.

You define propagation rules to have the system automatically fill in fields in employment data. For example, if the user selects a certain location in Job Information, the time zone for that location can be filled automatically. Or if the user selects a job code, the job title to it will automatically be displayed in the job title field. This way, you reduce the amount of data the user has to enter manually, and it improves the consistency of data, which is vital for accurate reporting. Propagation is only possible from certain foundation objects to certain employment objects.

Related Information

Employee Central Implementation Guide

15.2.1 Enable Onboarding to EC Integration

To enable the Onboarding to EC integration, you must set up SuccessFactors HCM message notifications.

Procedure

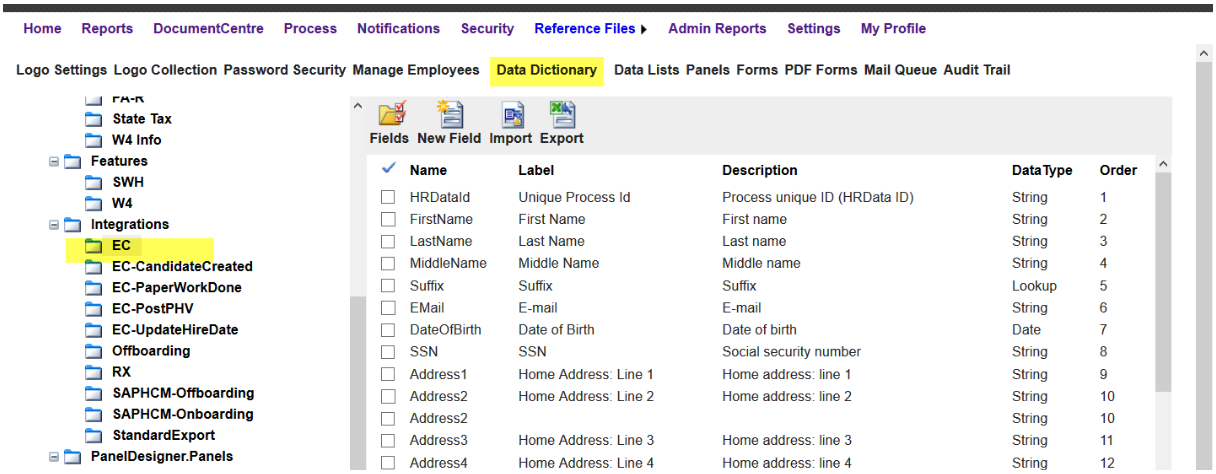
1. Navigate to *Super Admin* > *BizX Integration* and enable *SF_Notifications.*
2. To enable a specific message, select the checkbox of the message on the feature activation screen. There are three notification messages available: CanddateCreate message to BizX once new-hire is created, PostPHV message to SuccessFactors HCM after PHV is completed, and PaperWorkDone message to SuccessFactors HCM after NES is completed by new-hire.

15.2.2 Make Onboarding Fields Available for Mapping

Before configuring the Onboarding to Employee Central integration, make Onboarding fields available for mapping.

Procedure

1. Navigate to SAP SuccessFactors HCM *Onboarding* > *Settings* > *Data Dictionary.*
2. Under *Namespaces,* click the *Integrations* folder from the list on the left, then click the *EC* folder.



3. Click the *Fields* folder at the top of the window.
4. Select the namesapce *Integrations*, then select the *EC* tag. Move the fields you want to map from the left list (*Available Fields)* to the right list (*Fields attached to the Tag*).

   Some fields do not map from Onboarding to Employee Central. Do not include them in the *Fields attached to the Tag* list.
   - I9 fields (any fields beginning with `I9`)
   - W-4 fields (any fields beginning with or containing `W4`) Employee Central cannot accept W-4 fields. To pass W-4 fields from Onboarding, you must run a Standard Export and transfer it to Employee Central Payroll. Employee Central Payroll is not integrated with Onboarding.

> **Note**
>
> For customers using Recruiting Management and Employee Central, the field type must be the same in Onboarding as in Recruiting (RCM) or Employee Central (EC). For example, if the field you select is a string in Recruiting, it must also be a string in Onboarding.

15.2.2.1 How to Configure Repeating Fields

Configuring repeating fields allows you to send multiple values for a single field from Onboarding to Employee Central. For example, when listing dependents, a user can send multiple names.

Prerequisites

- Navigate to *Provisioning* > *Company Settings* > *Employee Central* > *Enable Dependents Management*.

Context

You can configure four types of repeating fields: Emergency Contacts, Dependents Information, Work Permit, and National ID. Configuration is the same for all types. You can send multiple National IDs from Onboarding to Employee Central.

> **Note**
>
> You must configure Emergency Contact, Dependents Information, or Work Permit as a repeating fields, even if you are only collecting one value.

Procedure

1. Create a multipanel. Navigate to SAP SuccessFactors HCM Onboarding *Settings* > *Panels*.
   - If you are creating an Emergency Contacts panel, copy the existing panel by clicking on *All Wizards* > *New Employee*. Click on the name of the panel group, not the plus sign next to the name. Then find the *SAP_EmergencyInfo* panel, click the checkbox to the left, then click *Copy Wizard*.
   - If you are creating a Dependents Information or Work Permit panel, navigate to *All Wizards* > *New Employee* then click *Create*. Make sure to click on the name of the panel group (*New Employee*) and not the plus sign next to the name.

   a. Check **`Yes`** next to *Is this a multi-panel?*
   b. Enter the number of panels in the multipanel.
   c. Enter the start index. This is the panel the workflow begins on. The recommended value is **`0`**
2. Navigate to *Data Dictionary* and select the panel you created or modified from the list on the left. Choose the field you want to designate as repeating from the list and click *Edit Field.*
   a. Enable the *Repeating Field* checkbox.
   b. Map the new repeating fields to the corresponding Employee Central fields, using *Admin Tools*.
   c. Navigate to *Admin Tools* > *Manage Onboarding* > *Filed Mapping tool for Onboarding EC Integration*. Fields with brackets around the type icon to the left are array fields. For dependent information, enable the checkbox in the *Dependent* column. Select a *Category, Field Mapping,* and *Variant* for the field and proceed with the mapping.
3. You can also manually map repeating fields in the XML, but best practice is to map them using the Admin Tools UI. The **`#`** in the `<target variant>` field is required as a placeholder. For repeating fields set, `multi-valued` to **`true`**.

```
<mapping-attribute>
<source multi-valued="true" refid="EmergencyFirstName"/>
<target variant="" refid="emergencyContactPrimary.[#].name"/>
</mapping-attribute>
```

15.2.3 Set up Onboarding to EC Integration (New Hire Processing)

How to set up an Onboarding to Employee Central Integration, also known as new hire processing.

Procedure

Set up the transformation of data between Onboarding and Employee Central. You can do this in one of two ways.

- Using Provisioning, upload the transformation template XML file. Navigate to *Provisioning* > *On/Offboarding Settings* > *Import Export for EC Integration Template.*

  Note

  When using the XML notation, you have to specify the *source entity-type* **if** the data was sent from Recruiting to Onboarding, and then on to Employee Central. For data entered into Onboarding directly, leave this attribute blank.

- Using the BizX Mapping tool. Navigate to *Admin Tools* > *Field Mapping tool for Onboarding to EC Integration* and use this tool to make changes to the mapping. Changes made in this tool are updated in the XML file.

15.2.3.1 Sample Employee Central to Onboarding Integration Template

You can copy this sample Employee Central to Onboarding template.

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?><objectMappingsType
mappingXML-createdBy="UI"><entity-details-mapping>
<!--  Personal Info -->
<mapping-attribute><source multi-valued="false" entity-type="ApplicationInfo"
refid="FirstName"/>
<target variant="" refid="personalInfo.first-name"/>
<processes><process>onboarding</process></processes>
</mapping-attribute>
<mapping-attribute><source multi-valued="false" entity-type="ApplicationInfo"
refid="LastName"/>
<target variant="" refid="personalInfo.last-name"/>
<processes><process>onboarding</process></processes>
</mapping-attribute>
<mapping-attribute><source multi-valued="false" entity-type="ApplicationInfo"
refid="MiddleName"/>
<target variant="" refid="personalInfo.middle-name"/>
<processes><process>onboarding</process></processes>
</mapping-attribute>
<mapping-attribute><source multi-valued="false" entity-type="ApplicationInfo"
refid="Suffix"/>
<target variant="" refid="personalInfo.suffix"/>
<processes><process>onboarding</process></processes>
</mapping-attribute>
```

```
<mapping-attribute><source multi-valued="false" entity-type="ApplicationInfo"
refid="EMail"/>
<target variant="P" refid="emailInfo.email-address"/>
<processes><process>onboarding</process></processes>
</mapping-attribute>
<mapping-attribute><source multi-valued="false" entity-type="ApplicationInfo"
refid="DateOfBirth"/>
<target variant="" refid="personInfo.date-of-birth"/>
<processes><process>onboarding</process></processes>
</mapping-attribute>
<!-- Phone Info -->
<mapping-attribute><source multi-valued="false" refid="DaytimePhoneCountryCode"/>
<target variant="H" refid="phoneInfo.country-code"/>
<processes><process>onboarding</process></processes>
</mapping-attribute>
<mapping-attribute><source multi-valued="false" entity-type="ApplicationInfo"
refid="DaytimePhoneAC"/>
<target variant="H" refid="phoneInfo.area-code"/>
<processes><process>onboarding</process></processes>
</mapping-attribute>
<mapping-attribute><source multi-valued="false" entity-type="ApplicationInfo"
refid="DaytimePhoneNum"/>
<target variant="H" refid="phoneInfo.phone-number"/>
<processes><process>onboarding</process></processes>
</mapping-attribute>
<mapping-attribute><source multi-valued="false" refid="WOTCStartDate"/>
<target variant="" refid="employmentInfo.start-date"/>
<processes><process>onboarding</process></processes>
</mapping-attribute>
<!-- Address Info -->
<mapping-attribute><source multi-valued="false" entity-type="ApplicationInfo"
refid="Country"/>
<target variant="home" refid="homeAddress.country"/>
<processes><process>onboarding</process></processes>
</mapping-attribute>
<mapping-attribute><source multi-valued="false" entity-type="ApplicationInfo"
refid="City"/>
<target variant="home" refid="homeAddress.city"/>
<processes><process>onboarding</process></processes>
</mapping-attribute>
<mapping-attribute><source multi-valued="false" entity-type="ApplicationInfo"
refid="Zip"/>
<target variant="home" refid="homeAddress.zip-code"/>
<processes><process>onboarding</process></processes>
</mapping-attribute>
<mapping-attribute><source multi-valued="false" entity-type="ApplicationInfo"
refid="Address1"/>
<target variant="home" refid="homeAddress.address1"/>
<processes><process>onboarding</process></processes>
</mapping-attribute>
<mapping-attribute><source multi-valued="false" entity-type="ApplicationInfo"
refid="State"/>
<target variant="home" refid="homeAddress.state"/>
<processes><process>onboarding</process></processes>
</mapping-attribute>
<!-- Job Info -->
<mapping-attribute><source multi-valued="false" entity-type="JobReq"
refid="DivCode"/>
<target variant="" refid="jobInfo.company"/>
<processes><process>onboarding</process></processes>
</mapping-attribute>
<mapping-attribute><source multi-valued="false" entity-type="JobReq"
refid="LocDistrict"/>
<target variant="" refid="jobInfo.division"/>
<processes><process>onboarding</process></processes>
</mapping-attribute>
<mapping-attribute><source multi-valued="false" entity-type="JobReq"
refid="LocNumber"/>
```

```
<target variant="" refid="jobInfo.department"/>
<processes><process>onboarding</process></processes>
</mapping-attribute>
<mapping-attribute><source multi-valued="false" entity-type="JobReq"
refid="DeptCode"/>
<target variant="" refid="jobInfo.location"/>
<processes><process>onboarding</process></processes>
</mapping-attribute>
<!-- Emergency Contacts -->
<mapping-attribute><source multi-valued="true" entity-type="ApplicationInfo"
refid="EmergencyFirstName"/>
<target variant="" refid="emergencyContactPrimary.[#].name"/>
<processes><process>onboarding</process></processes>
</mapping-attribute>
<mapping-attribute><source multi-valued="true" entity-type="ApplicationInfo"
refid="EmergencyLastName"/>
<target variant="" refid=""/>
<processes><process>onboarding</process></processes>
</mapping-attribute>
<mapping-attribute><source multi-valued="true" refid="EmergencyRelationship"/>
<target variant="" refid="emergencyContactPrimary.[#].relationship"/>
<processes><process>onboarding</process></processes>
</mapping-attribute>
<mapping-attribute><source multi-valued="true" refid="EmergencyEmail"/>
<target variant="" refid="emergencyContactPrimary.[#].email"/>
<processes><process>onboarding</process></processes>
</mapping-attribute>
<mapping-attribute><source multi-valued="true" refid="EmergencyDaytimePhone"/>
<target variant="" refid="emergencyContactPrimary.[#].phone"/>
<processes><process>onboarding</process></processes>
</mapping-attribute>
<!-- Job Relationships -->
<mapping-attribute><source multi-valued="false" entity-type="JobReq"
refid="HRManager"/>
<target variant="" refid="jobRelationsInfo.[hr manager].rel-user-id"/>
<processes><process>onboarding</process></processes>
</mapping-attribute>
<mapping-attribute><source multi-valued="false" entity-type="JobReq"
refid="HiringManager"/>
<target variant="" refid="jobRelationsInfo.[hiring manager].rel-user-id"/>
<processes><process>onboarding</process></processes>
</mapping-attribute>
<mapping-attribute><source multi-valued="false" entity-type="JobReq"
refid="Recruiter"/>
<target variant="" refid="jobRelationsInfo.[recruiter].rel-user-id"/>
<processes><process>onboarding</process></processes>
</mapping-attribute>
</entity-details-mapping>
</objectMappingsType>
```

15.2.3.2 Onboarding to Employee Central Supported Entities

Only certain HRIS elements are supported in the EC-ONB integration.

Recommendation

For any field defined in the Employee Central data model, the `required` parameter of the field must match in Recruiting, Onboarding, and Employee Central. Disagreement about the required status of a field causes disagreement with the hire data as it moves through the system.

Only these HRIS elements are available for the Employee Central-Onboarding integration. No additional elements are available.

- personalInfo
- globalInfo
- nationalIdCard
- homeAddress
- employmentInfo
- jobInfo
- payComponentRecurring
- payComponentNonRecurring
- phoneInfo
- employmentInfo
- jobRelationsInfo
- emergencyContactPrimary
- workPermitInfo

Variants

Some entities require more than the field information to configure mapping. You can map this additional information using *Admin Tools* > *Manage Onboarding* > *Field Mapping Tool for Onboarding to EC Integration.*

The variant is the external code of the picklist (for example, *job-rel-type*for *jobRelationsInfo*) or the foundation object (for example, *Pay Component* for *payComponentRecurring*).

These entities support the variant:

- phoneInfo
- globalInfo

> **Note**
>
> Currently, you cannot use the variant notation for globalInfo. As a workaround, use the **`[example]`** notation through the XML file for country-specific mapping on globalInfo.

- homeAddress
- emailInfo
- jobRelationsInfo
- payComponentRecurring
- payComponentNonRecurring
- emailInfo
- imInfo

You can also add additional information to these objects using the **`[example]`** notation in the XML. Example of the **`[example]`** notation.

```
<mapping-attribute>
<source refid="HRManager"/>
<target variant=""refid="jobRelationsInfo.[hr manager].rel-user-id"/>
</mapping-attribute>
```

Example of the variant notation:

```
<mapping-attribute>
<source refid="HRManager"/>
<target variant="hr manager" refid="jobRelationsInfo.rel-user-id"/>
</mapping-attribute>
```

Related Information

Employee Central Master Guide

15.2.3.3 How to Map Onboarding to EC Fields

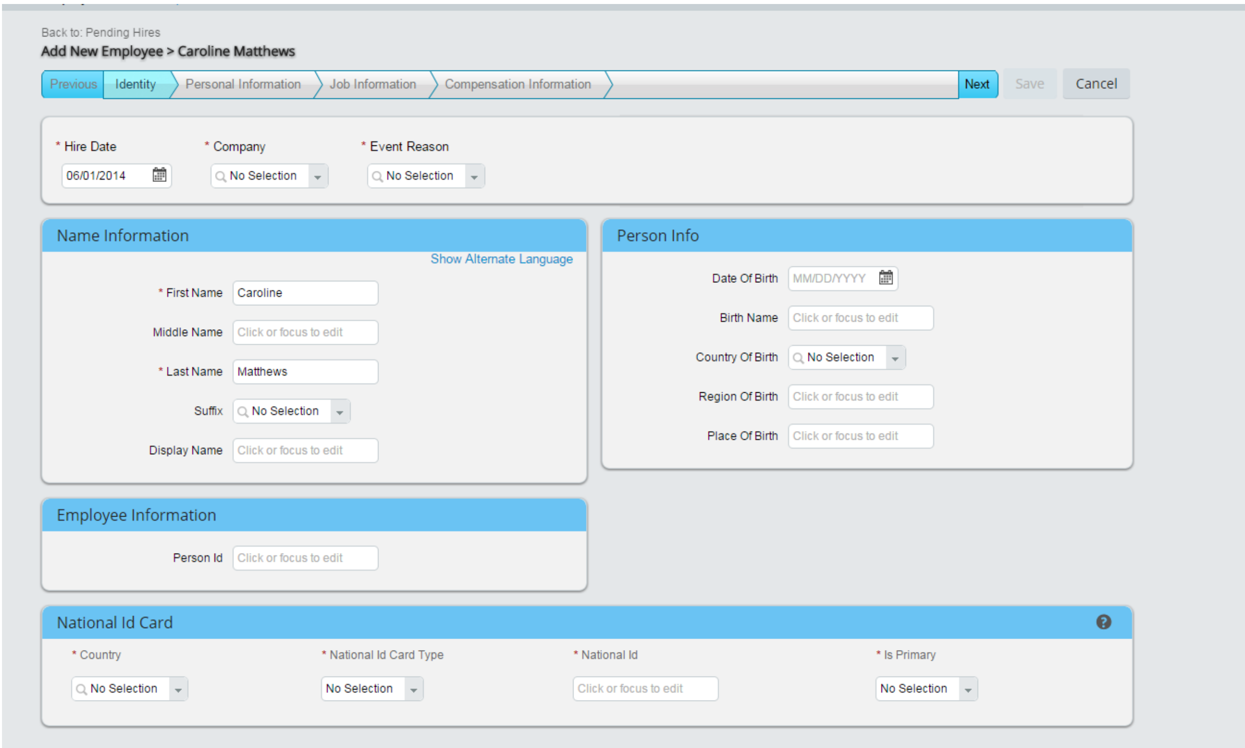
You can use SAP SuccessFactors HCM Admin Center to map Onboarding to EC fields.

Prerequisites

Users who need to map fields from Onboarding to Employee Central must have permissions to create Business Rules. Navigate to *Admin Center* > *Manage Permission Roles* > *Permission* > *Metadata Framework* > *Create Business Rules* > .

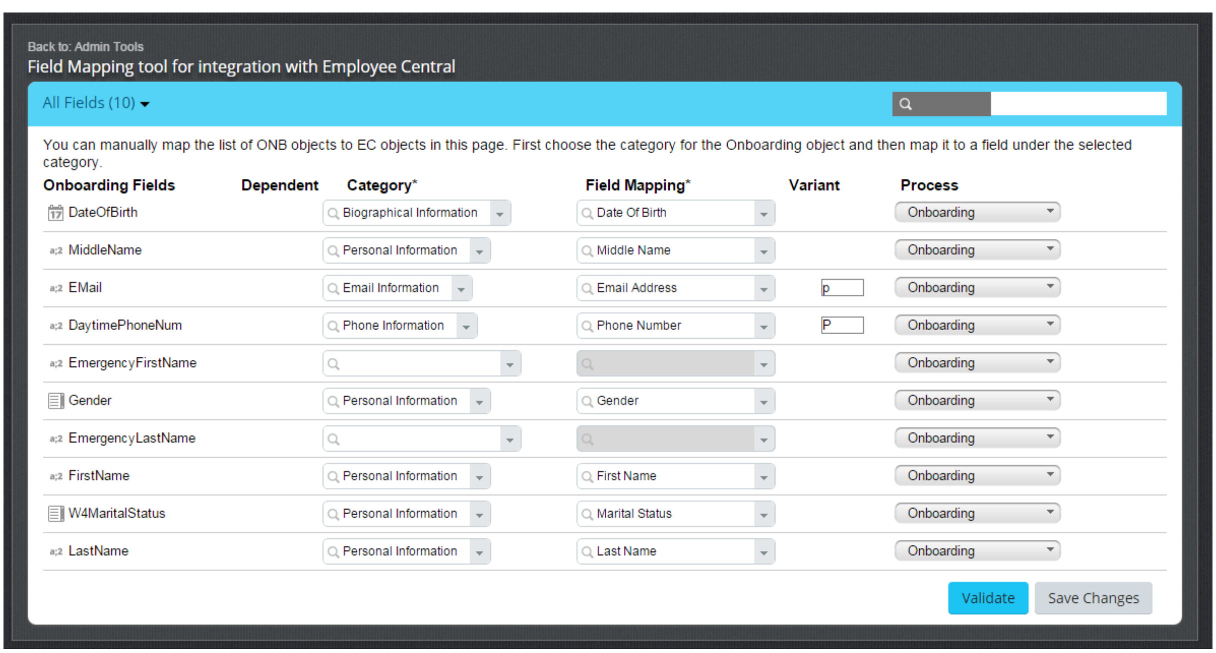
Context

When mapping fields from Onboarding to Employee Central, it is best practice to start with a few simple fields (for example, name and e-mail address), then test the workflow and checking new employee record under *Admin Center* > *Manage Pending Hires*. This allows you to confirm that the data is flowing between Onboarding and Employee Central. Clicking on the new employee's name allows you to view the portlets which correspond with the Employee Central categories in the mapping. The portlets are the individual information sections, for example, *Name Information* or *Person Info*.



Procedure

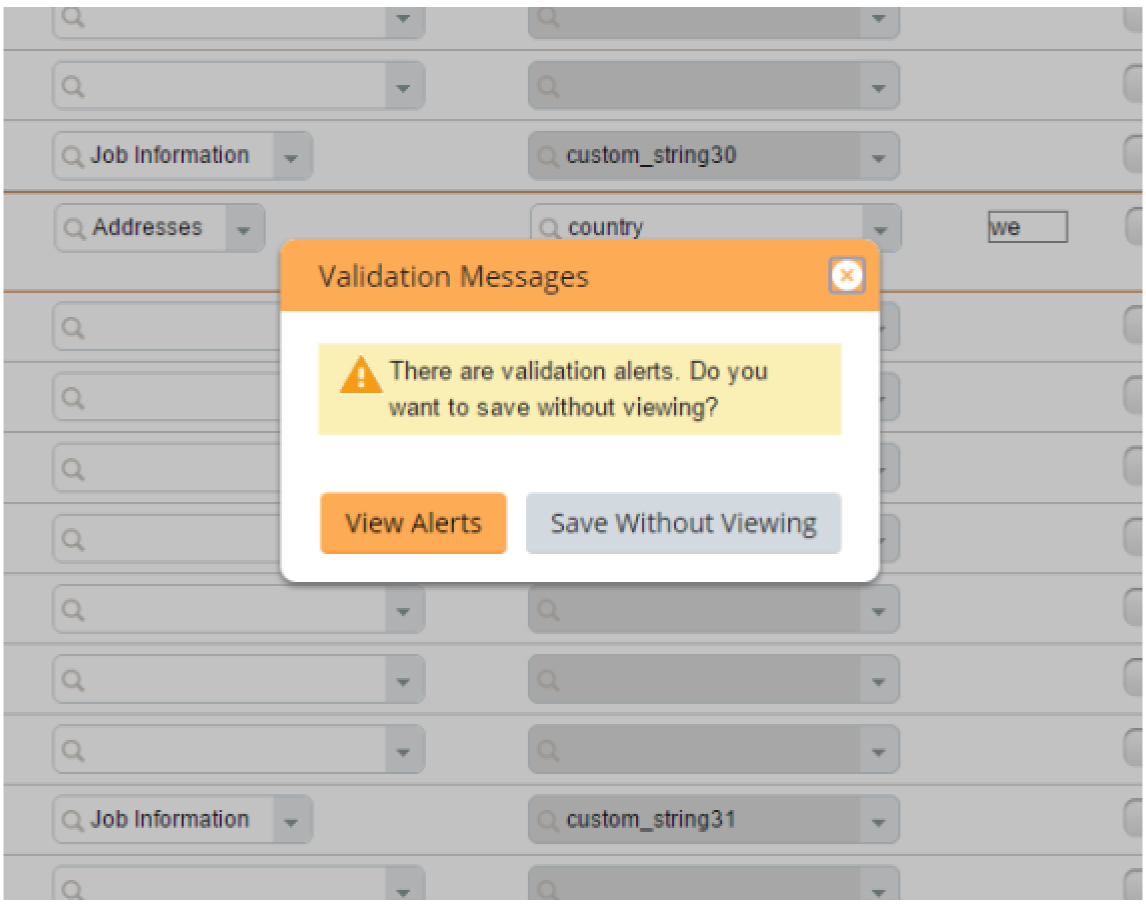
1. Navigate to SAP SuccessFactors HCM *Admin Center* > *Manage Onboarding* > *Field Mapping tool for Onboarding to EC Integration.* .



2. All Onboarding fields display in the left column. Select a category for the field and choose a matching Employee Central object in the variant column. Categories correspond to the information groupings, or portlets, on the *Manage Pending Hires* page. You can map multiple Employee Central fields to a single Onboarding field.

   > **Note**
   >
   > You can map hard-coded Employee Central values like `gender` in the same way as any other field. For the desired Onboarding field, select a Category, then select the hard-coded Employee Central field.

3. Click the *Fields* menu in the upper left corner to sort the Onboarding fields by their assigned category. Only categories with at least one field mapped to them will display. Fields without a category appear as *Unmapped Info*.
4. When mapping is finished, click *Save*. This validates the field mappings. If the field mapping is not accurate, click *View Alerts* to display error messages describing why the field validation failed. .



5. When changes are made to the mapping via the Admin Center UI, they are automatically written to the XML file. To view the XML file, navigate to *Provisioning* > *On/Offboarding Settings* > *Import Export for EC Integration Template*.
6. You can also map Onboarding-Employee Central fields directly in the XML. Navigate to *Provisioning* > *On/Offboarding Settings* > *Import Export for EC Integration Template*. Click *Export* to download the existing XML file, or import to upload a new XML template.

When using the XML notation, you have to specify the *source entity-type* **if** the data was sent from Recruiting to Onboarding, and then on to Employee Central. For data entered into Onboarding directly, leave this attribute blank.

> **Note**
>
> You cannot map comp fields to the compInfo category.

15.2.3.3.1 Onboarding to Employee Central Field Mapping Recommendations

When integrating Onboarding and Employee Central, certain fields are commonly mapped between the two systems.

Do not map multiple Employee Central fields to a single Onboarding field. The `Country` must be mapped to populate other address fields, including `Address1`, `City`, `State`, and `Zip`.

These HRIS elements must have a value in the `variant` field.

- `homeAddress`
- `phoneInfo`
- `emailInfo`
- `jobRelationsInfo`
- `globalInfo`

Table 26: Commonly Mapped Fields

Onboarding Field	Employee Central Field	Comments	Similar Fields
FirstName	personalInfo.first-name		
LastName	personalInfo.last-name		
MiddleName	personalInfo.middle-name		
EMail	emailInfo.email-address.<variant>	<variant> should come from picklist values of email-type	
DateOfBirth	personalInfo.date-of-birth personInfo.date-of-birth		
SSN	nationalIdCard.national-id		
Address1	homeAddress.address1.<variant>	Address fields would generally be present in CSF data model <variant> should come from 'addressType' picklist values	Address2, Address3, Address4
City	homeAddress.city.<variant>		country
State	homeAddress.state.<variant>		

Onboarding Field	Employee Central Field	Comments	Similar Fields
Zip	homeAddress.zip-code.<var-iant>		
Country	homeAddress.country.<var-iant>		
DaytimePhoneCountryCode	phoneInfo.country-code.<var-iant>	<variant> should come from picklist values of phone-type	EveningPhone
DaytimePhoneAC	phoneInfo.area-code.<var-iant>		
DaytimePhoneNum	phoneInfo.phone-num-ber.<variant>		
WOTCStartDate	employmentInfo.start-date		
HireDate	employmentInfo.start-date		
DivCode (Company)	jobInfo.company		
LocDistrict (Division)	jobInfo.division		
LocNumber (Department)	jobInfo.department		
DeptCode (Location)	jobInfo.location		
JobCode	jobInfo.job-code		
Suffix	personalInfo.salutation		
HiringManager	jobRelationsInfo.rel-user-id.<variant>	<variant> should be the pick-list value corresponding to HiringManager from the pick-list id mentioned under rela-tionship-type	
Recruiter	jobRelationsInfo.rel-user-id.<variant>	<variant> should be the pick-list value corresponding to Re-cruiter from the picklist id mentioned under relationship-type	
HRManager	jobRelationsInfo.rel-user-id.<variant>	<variant> should be the pick-list value corresponding to HRManager from the picklist id mentioned under relation-ship-type	

15.2.3.3.2 Onboarding to Employee Central UI Field Mapping Guide

Table 27: Add a New Employee Page One

UI Field Name	Expected Employee Central Field Format
Hire Date	employmentInfo.start-date
Company	jobInfo.company
Event Reason	jobInfo.change-reason
Name Information	
First Name	personalInfo.first-name
Last Name	personalInfo.last-name
Middle Name	personalInfo.middle-name
Suffix	personalInfo.suffix
Person Information	
Date of Birth	personInfo.date-of-birth
Country of Birth	personInfo.country-of-birth
City of Birth	personInfo.place-of-birth
Employee Info	
Person ID	personalInfo.person-id-external
National ID	
Country	nationalIdCard.country
National Id	nationalIdCard.national-id
Primary	nationalIdCard.is-primary

The *Contact Information* object on the second page contains the new employee's e-mail and phone information. These fields expect a variant as the field type. This is determined in the Onboarding-Employee Central mapping tool. You can configure these as either static variants (for example, Home or Business) or as dynamic variants. Dynamic variants substitute another Onboarding field enclosed in `$` symbols, for example `$phone$`.

Table 28: Add a New Employee Page Two

UI Field Name	Expected Employee Central Field Format
Personal Information	
Gender	personalInfo.gender
Marital Status	personalInfo.marital-status
Native Preferred Language	personalInfo.native-preferred-lang
Preferred Name	personalInfo.preferred-name
Contact Information	
Email Information - Eail	emailInfo.email-address.$emailType$
Email Information - Primary	emailInfo.isPrimary.$emailType$
Phone Information - Country Code	phoneInfo.country-code.$phoneType$
Phone Information - Number	phoneInfo.phone-number.$phoneType$
Global Information The fields related to a country have the country code as a prefix in the second dropdown in the mapping tool. These examples use the country code for India, IND.	
Religion	globalInfo.[IND].genericNumber1
Number of Children	globalInfo.[IND].genericNumber2
Occupational Code	globalInfo.[IND].genericNumber3
Marital Status Since	globalInfo.[IND].genericNumber4
Other Allowances.	globalInfo.[IND].genericNumber5
Child Educational Allowances	globalInfo.[IND].genericNumber6
Child Hostel Allowances	globalInfo.[IND].genericNumber7
Addresses You do not need to map the address type. The value of the variant for fields in the Address object is used to populate the address type by Employee Central.	
Country	homeAddress.country.$addresstype$
Address 1	homeAddress.address1.$addresstype$
Address 2	homeAddress.address2.$addresstype$
Address 3	homeAddress.address3.$addresstype$
City	homeAddress.city.$addresstype$
State	homeAddress.state.$addresstype$

UI Field Name	Expected Employee Central Field Format
Zip	homeAddress.zip.$addresstype$
Emergency Contact Emergency contact fields should be designated as repeating fields in the Onboarding data dictionary.	
Name	Emergencycontact.[#].first-name
Phone Number	Emergencycontact.[#].phone
Relationship	Emergencycontact.[#].relationship
Email	Emergencycontact.[#].email
Dependent	Emergencycontact.[#].dependent
Emergency Contact	Emergencycontact.[#].isEmergencyContact
Primary	Emergencycontact.[#].isPrimary
Dependent Info In order for values to populate the Dependent Info fields in Employee Central, the values must be mapped to emergency contact, and the *isDependant* checkbox should be enabled.	

Table 29: Add a New Employee Page Three

UI Field Name	Expected Employee Central Field Format
Employment Details	
Hire Date	employmentInfo.start-date
Original Start Date	employmentInfo.originalStartDate
Seniority Start Date	employmentInfo.seniorityDate
Eligible for Stock	employmentInfo.eligibleForStock
Service Date	employmentInfo.service-date
Professional Service Date	employmentInfo.professionalServiceDate
First Date Worked	employmentInfo.firstDateWorked
Job Information	
Company	jobInfo.company
Business Unit	jobInfo.business-unit
Local Division	jobInfo.division
Department	jobInfo.department

UI Field Name	Expected Employee Central Field Format
Cost Center	jobInfo.location
Work Location	jobInfo.cost-center
Reporting Location	jobInfo.timezone
Direct Upline	jobInfo.manager-id
Job Code	jobInfo.job-code
Job Title	jobInfo.job-title
Local Job Title	jobInfo.local-job-title
Pay Grade	jobInfo.pay-grade

Table 30: Add a New Employee Page Four

UI Field Name	Expected Employee Central Field Format
Compensation Information	
Pay Type	compInfo.pay-type
Pay Group	compInfo.pay-group
Is Eligible for Benefit	compInfo.eligible-for-benefit
Is Eligible for Car	compInfo.is-eligible-for-car
Benefits Rate	compInfo.benefits-rate
Payroll System Id	compInfo.payroll-system-id
Payroll Id	compInfo.payroll-id
Pay Component - Compensation	
Amount	payComponentRecurring.paycompvalue.$paycomponent$
Currency	payComponentRecurring.currency-code.$paycomponent$
Frequency	payComponentRecurring.frequency.$paycomponent$
Pay Component - Pay Targets	
Amount	payComponentRecurring.paycompvalue.$paycomponent$
Currency	payComponentRecurring.currency-code.$paycomponent$
Frequency	payComponentRecurring.frequency.$paycomponent$

UI Field Name	Expected Employee Central Field Format
Pay Component - Spot Bonus	
Issue Date	payComponentNonRecurring.pay-date
Type	payComponentNonRecurring.pay-component-code
Currency Code	payComponentNonRecurring.currency-code
Amount/Percentage	payComponentNonRecurring.amount

15.2.4 Admin Alerts

The Admin Alerts tile is available to users in BizX.

The number of onboarded employees who are ready to be converted to employees is displayed on the Admin Alerts tile. The list is filtered by role-based permission based on the manager of the onboarding candidate.

If Recruiting and Onboarding are both enabled, there are two separate links on the Admin Alerts tile.

15.2.5 Manage Pending Hires

The Manage Pending Hires process allows uses to consolidate candidates coming from Recruiting and Onboarding.

Navigate to *Admin Tools* > *Manage Pending Hires* to view the information for new employees who have completed the Onboarding process. When you click on a new employee's name on this page, you can see the information that has populated the employee record from Onboarding. The portlets on this page correspond to the categories mapped in the Admin Tools UI mapping tool.

In order for candidates to appear under *Pending Hires*, they must be set to both hired=No and readyToHire=Yes.

Note

Do not set the `readytoHire` parameter on the OnboardingCandidateInfo object to **`required`**. This causes errors in initiating Onboarding.

Access to *Pending Hires* is controlled with role-based permissions. The role-based permissions in this case are enforced through the manager, meaning the user managing hires should have access to the manager of the candidates being hired.

Under *Manage Pending Hires*, you can toggle between candidates from Onboarding and candidates from Recruiting.

After clicking *Hire*, you are taken to the *Add New Employee* screen, where the candidate's data from Onboarding is populated.

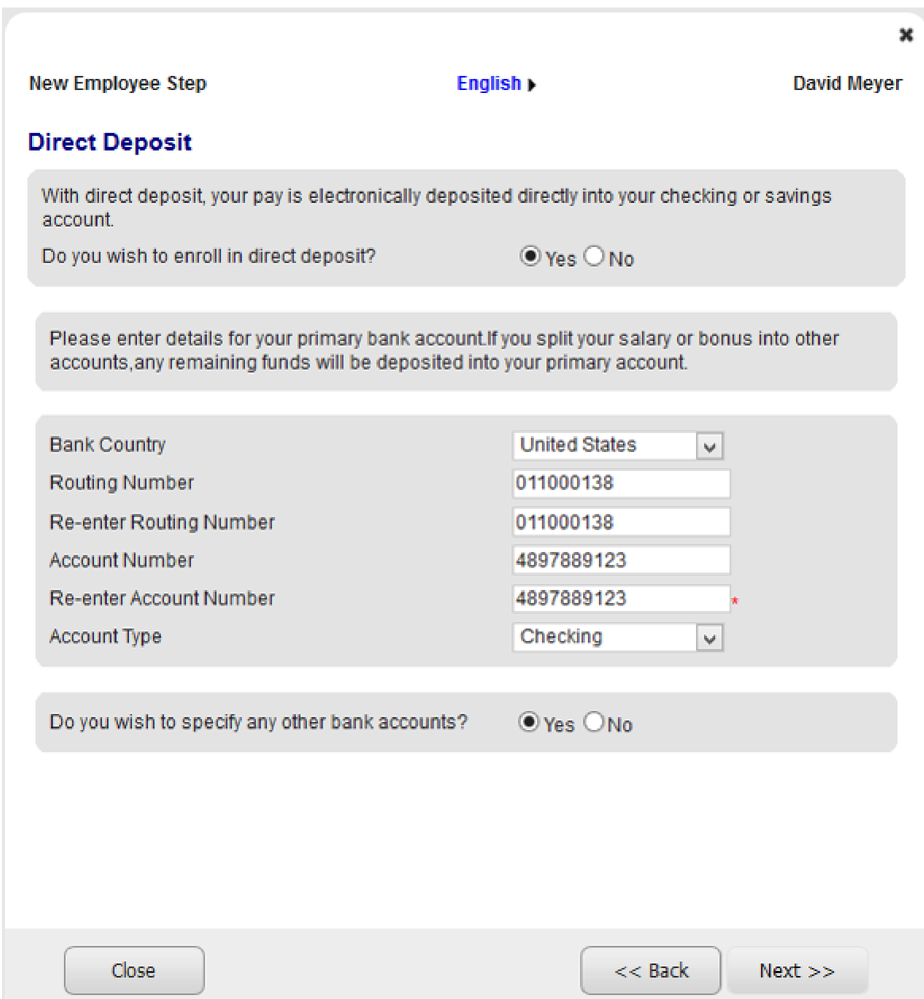
Related Information

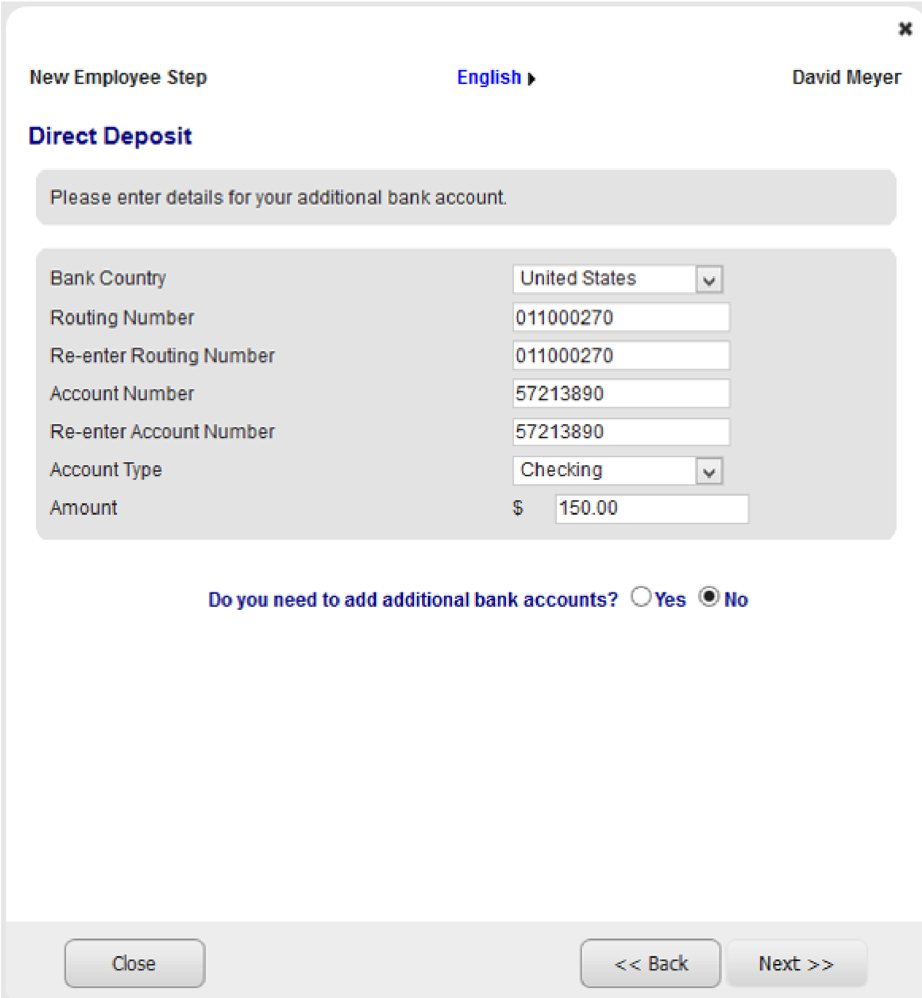
[How to Map Onboarding to EC Fields [page 321]]

15.2.6 Direct Deposit with Employee Central

The Direct Deposit integration with Employee Central capturs a candidate's bank account information during Onboarding to allow the employer to make electronic deposits into the new hire's account.

When the Direct Deposit feature is enabled, two non-editable standard panels are added to the New Employee Step for a customer's instance, *SAP_DirectDeposit_Main* and *SAP_DirectDeposit_Additional*. The first panel is a regular panel, and the second is a multi-panel. You can configure the by process, so the panels are added to the process selected during configuration. When direct deposit is enabled for a custom process, the panels are added to the second step.





15.2.6.1 How to Configure Direct Deposit with Employee Central

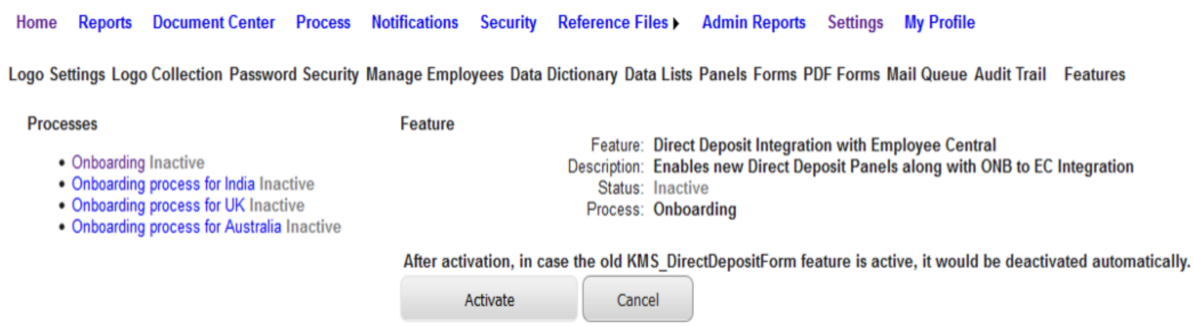
Prerequisites

Configuring Onboarding Direct Deposit with Employee Central requires People Profile 3.

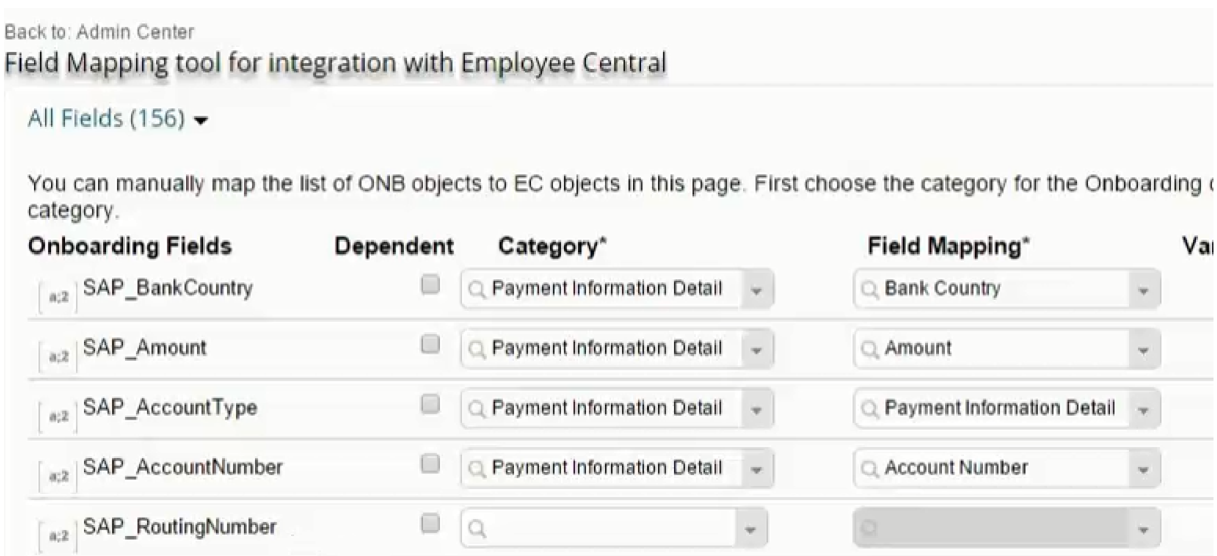
Procedure

1. Navigate to *SuccessFactors HCM* > *Onboarding* > *Settings* > *Features* and click *Direct Deposit Integration with Employee Central*.

2. Select a process to activate direct deposit for.



3. Click *Activate*. Once direct deposit is activated for a process, the existing *KMS_DirectDepositForm* feature is deactivated immediately.
4. Navigate to *Admin Center* > *Manage Onboarding* > *Field Mapping tool for Onboarding to EC Integration.* Map the new direct deposit dictionary keys to the corresponding `PaymentInformation` fields in the *Field Mapping* column.



For country-specific keys, provide the country in the *Variant* column.
5. To support direct deposit for countries outside of the US you can update the configuration one of two ways.
   - Modify the existing Direct Deposit panels to support multiple countries. Navigate to *Onboarding* > *Reference Files* > *Data Lists* and add the required countries to the *DirectDepositCountries* list. Make sure to include the same three letter code used in Employee Central in the *Code* field. You must also set advanced conditions on the panel to support additional countries.
   - Copy the existing panel to create a custom panel for non-US bank countries, and modify the new panels as required.

16 Intelligent Services for Onboarding and Offboarding

When configured, the Intelligent Services automatically updates data in Onboarding or Offboarding based on changes to data in Recruiting or Employee Central.

Any time a change is made to relevant data, even after initialization of Onboarding (for example, start date changes, hiring manager is updated), the data is automatically updated in Onboarding or Offboarding.

Related Information

Introduction to Intelligent Services
Using the Event Center Administration Tool

16.1 How to Enable Intelligent Services

Prerequisites

- The customer must have Recruiting and Onboarding enabled for Recruiting - Onboarding Intelligent Services.
- The customer must have Employee Central and Offboarding enabled for Employee Central - Offboarding Intelligent Services.
- Check the *Enable Intelligent Services* setting in Provisioning. This requires engagement with SAP SuccessFactors Professional Services.
- If using the Employee Central-Offboarding Intelligent Services, Offboarding must be enabled in Provisioning.

  You must also navigate to *Provisioning* > *Company Settings* and enable the *Enable Offboarding EC Writeback-requires "Employee Central V2"* setting. This setting is only available if you have Offboarding enabled.

Procedure

1. Navigate to *SAP SuccessFactors HCM* > *Admin Center* > *Recruiting* > *Setup Onboarding Integration* > *Manage Updates to Onboarding*.
2. Enable *Allow data updates from Recruiting to Onboarding (i.e. Start Date)*.

3. Enable *Reassign activities in Onboarding if Hiring Manager is changed in Recruiting*

> **Note**
>
> These options should be enabled be default for instances created after August 2015. Customers can opt-out of the Event Center by disabling these options.

16.2 How to Add Fields to the Restart Tag

Only fields configured on the Restart tag will trigger a process step restart.

Context

The process step only restarts after employee documents are signed on the New Employee Step if the information in one of the critical fields changes in Recruiting. If any information changes in the fields added to this tag, the employee must resign any document they have already signed on the New Employee Step. Adding fields to the Restart tag is optional. The same applies for Offboarding, but the behavior applies to the Employee Step instead of New Employee Step.

Procedure

1. Navigate to SAP SuccessFactors HCM *Onboarding* > *Settings* > *Data Dictionary*.
2. Add the fields that will trigger a step restart to the restart tag.
   - For Recruiting-Onboarding events, add fields to the *Restart-Fields-Onboarding* tag. Only assign fields to this tag that have been mapped from Recruiting to Onboarding.
   - For Employee Central-Offboarding events, add fields to the *Restart-Fields-Offboarding* tag. Only the *HiringManager* and *JobClassificationCode* fields are supported for Offboarding.

16.3 Restart and Reassign Notifications

Onboarding supports notifications for restart and reassign actions triggered by Intelligent Services.

You can configure the restart and reassign notifications under *SuccessFactors HCM* > *Onboarding* > *Notifications* > *Restart Notifications* or *Re-Assign Notifications*.

Re-Assign Notifications include notifications for *Hiring Manager Change*, *New Direct Report*, and *Direct Report Change*. When configuring these, use the *HiringManagerChange* option for the *NotifyAt* field.

Re-Assign Notifications include *Activity Restarted* and *Data from another source has been updated* notifications. When configuring these notifications, use *Notify on Restart* in the *NotifyAt* field.

These notifications are available by default for the standard Onboarding and Offboarding processes. For custom processes, copy the notifications and modify them accordingly. Make sure the *NotifyAt* field value matches that of the original notification.

16.4 Onboarding Step Restart and Reassign with Intelligent Services

Onboarding steps can be automatically restarted or reassigned based on changes to user information.

Changes to configured new hire field in Recruiting will trigger a restart of the New Employee Step. Three new notifications are available for the step restart.

- Data from another source has been updated (Sent to the new hire.)
- Activity Restarted (Sent to the activity assignee who must revalidate the data once the activity has restarted. This is sent to the old assignee in case the current assignee is different.)
- Activity Reverted back (Sent to the current assignees of the activity before it is restarted.)

The activity restart has some special behavior.

- If an activity is in the Orientation step and a restart is triggered, the activity always reverts to the New Employee Step, whether or not the Orientation Step has started.
- If an activity is in any step except *SIGNED* and the work location changes to California, New York, or Pennsylvania, the activity restarts back to the Post-Hire Verification step.
- If the Post-Hire Verification step is disabled and the New Employee Step hasn't started, when a critical field changes the activity remains on the New Employee Step.
- If an activity restarts mid-New Employee Step, and an additional update come from Recruiting Management, the activity is not pushed back to the Post-Hire Verification step.

When the Post-Hire Verification step is finished and the New Employee Step is not started, the new hire receives a welcome letter with a link for the Onboarding application. If the step restarts before the new hire clicks the link, the step reverts to the Post-Hire Verification step. This invalidates the e-mailed link, and if the new hire clicks it, an error message displays. You can customize this behavior using two parameters under *Super Admin* > *Account Options*.

- **Applicant.LoginPage.DisableIfStepChanged**: When set to `True`, if a new hire tries to login to an activity that has reverted to the Post-Hire Verification step, a warning message displays instead of the login page.
- **Applicant.LoginPage.DisableLoginMessageTemplate**: This field contains the message a new hire sees when attempted to access an activity that has reverted to the Post-Hire Verification step. If you include `{0}` in the string, the activity assignee's name and e-mail address will populate in its place. If this option is not configured, the default message displays. *Your activity is in the process of being updated. Please try again later or contact {0} for assistance.*

If a new hire's Hiring Manager, HR Manager, or New Hire buddy changes in Recruiting, then this change populates to Onboarding and the step is reassigned. Notifications to support the reassignment:

- Hiring Manager Change (Employee Notification)
- Buddy Change (Employee Notification)

- HR Manager Change (Employee Notification)
- Direct Report Change (Hiring Manager Notification)
- New Direct Report (Hiring Manager Notification)
- Your activity's HR Manager has changed (HR User Notification)
- Your activity's Buddy has changed (HR User Notification)

16.5 Offboarding Step Restart and Reassign with Intelligent Services

Offboarding steps can be automatically restarted based on changes to data in Employee Central.

> **Note**
>
> Customers using the Employee Central to Offboarding Intelligent Services need to configure the Termination Event in Employee Central. Please contact Employee Central product team for further configuration details.

If a Hiring Manager is reassigned during an Offboarding activity, or if job classification data changes in Employee Central during the Offboarding process, Offboarding is updated with the new Employee Central data. Personal data in Offboarding can be changed directly on a record via the UI, by upload, or API. When these changes are made, no event is published in the Event Center, but notifications are sent in the same way as if the event was triggered in Employee Central.

When data changes are published from Employee Central to Offboarding, the change is reviewed for relevance by the Offboarding system. If the Offboarding activity is in the *All Documents Submitted* status, Offboarding does not react to the event.

If the Offboarding activity does not have an *All Documents Submitted* status, and if the activity is active, the data update is accepted. If the event is not accepted, the user is notified with a message that says the data was not updated in Offboarding.

When job classification or Hiring Manager data changes in EC and is sent to Offboarding, the intended workflow for the employee can change. An existing Offboarding activity can also be updated with a new Hiring Manager who may be responsible for completing the activity.

If the employee was in the Initiate Step when the data changes:

- The employee reverts to the beginning of the Initiate step if the Initiate step is incomplete. The step owner is notified and should revalidate the data.
- If the Initiate step is complete, but the Employee Step is not yet started, the step owner is notified and should revalidate the data. If an integration point has already been passed in the Initiate step, an update file or flag for downstream integrations is set via API or webservices.
- If the Initiate step doesn't exist, the Employee Step rules apply.

If the employee is in the Employee Step when the data changes:

- The employee reverts to the beginning of the Employee Step if the Employee Step is started , but not completed. The employee receives a message that they must restart the step.
- If the Employee step is complete, but the Exit Step is not started, and a field attached to the Restart tag changes, the employee receives a message that they must restart the step. If an integration point has already been passed in the Employee step, an update file or flag for downstream integrations is set via API or

webservices. Any documents the employee has already signed in the Employee Step are kept and stored. Documents requiring the employee to resign are signed and stored. Both copies are stored in the Document Center or the client-designated document storage facility.
- If the Employee step is complete, the Exit Step is started but not completed, and a field attached to the Restart tag changes, the employee receives a message that they must restart the step. If an integration point has already been passed in the Employee step, an update file or flag for downstream integrations is set via API or webservices. Any documents the employee has already signed in the Employee Step are kept and stored. Documents requiring the employee to resign are signed and stored. Both copies are stored in the Document Center or the client-designated document storage facility. Any notification initially triggered when a step has to be started is resent.
- If no Exit Interview step exists, Employee step rules apply.
- If no Employee step exists, Initiate step and Exit step rules apply.

Employees in the Offboarding process receive an alert with the Hiring Manager changes. Original and new Hiring Managers are also alerted of the change. The new Hiring Manager has access to the updated data. The corporate user responsible for the current Offboarding step is also alerted of the Hiring Manager change. Any steps or activities are automatically reassigned and any current notifications assigned to the Hiring Manager are sent to the new Hiring Manager. The new Hiring Manager can also edit the content provided by the former Hiring Manager if a step the Hiring Manager is assigned to is restarted.

16.6 Crossboarding with Employee Central

If a customer is using Intelligent Services and an integration with Employee Central, they can create a trigger for an automatic transfer process for internal hires.

When information for an existing employee is updated in Employee Central, a crossboarding event is triggered in Onboarding for the job transfer. The creation of the crossboarding event is based on rules configured in the SuccessFactors Rules Engine. For example, you can write rules based on location change, department change, business unit change, and so on. The transfer event triggered in Employee Central passes employee data, including the Employee ID, to Onboarding.

Supported objects for Business Rules:

- COMP_INFO
- JOB_INFO
- PERSONAL_INFO
- EMPLOYMENT_INFO
- JOB_RELATIONS_INFO
- PER_PERSON_INFO
- EMAIL_INFO
- PHONE_INFO
- HOME_ADDRESS

16.6.1 How to Configure Crossboarding with Employee Central

Prerequisites

Initial configuration for Intelligent Services requires engagement with SAP Support. Configuration required for this feature:

- Enable Intelligent Services
- Configure a custom Onboarding process for internal hires
- Configure the transfer event in Employee Central
- Configure the relevant Business Rule for the transfer event

Procedure

1. Navigate to *Super Admin* > *Processes* and select the custom process configured to handle internal hires.
2. In the *Process Type* field, select *Onboarding* and click *Update*.
3. Navigate to *Super Admin* > *Import/Export Settings* and choose *HRXML.ImportNew Hire* and export the file.
4. Add the required code to the file.

Sample Code

```
<!-- RCM2KMSDataExchange message handling -->
  <xsl:template match="/RCM2KMSDataExchange/Field">
    <xsl:choose>

                <xsl:when test="./ID='InternalHire'">
                                   <xsl:if test="./Value = 'false'">
                                                  <xsl:call-template
name="item">
                                                                <xsl:with-
param name="key">Process</xsl:with-param>
                                                                <xsl:with-
param name="value">Onboarding</xsl:with-param>
                                                  </xsl:call-template>
                                   </xsl:if>
                                   <xsl:if test="./Value = 'true' and
translate(/RCM2KMSDataExchange/Field[ID='DeptCode']/Value, $uppercase,
$smallcase) = 'hyderabad (hyd)'">
                                                  <xsl:call-template
name="item">
                                                                <xsl:with-
param name="value">New Hire Activities Crossboarding</xsl:with-param>
                                                                <xsl:with-
param name="key">Process</xsl:with-param>
                                                  </xsl:call-template>
                                   </xsl:if>
                                </xsl:when>
```

This code directs internal hires to the custom process configured for internal hires. Custom processes can be configured for a number of different workflows, for example for customers who need to direct users from different countries to different workflows.

5. Navigate to *Super Admin* > *Import/Export Settings* > *HRXML.ImportNewHire*. Select *Import File* and upload the newly edited file.

Related Information

How to Create a Custom Process [page 254]
How to Import a New Hire to a Custom Process [page 255]

16.6.1.1 How to Configure Crossboarding with Hiring Manager Activities

You can configure a Crossboarding process which skips the standard Onboarding paperwork, but instead uses the Onboarding New Hire Activities.

Prerequisites

- Intelligent Services must be enabled in *Provisioning* > *Company Settings* > *Enable Intelligent Services*
- MDF-based New Hire Activities must be enabled in *Provisioning* > *Company Settings* > *Enable MDF-based new hire activity planning*
- Configure the transfer event in Employee Central and configure the relevant Business Rule for the transfer event.
- The Crossboarding with Hiring Manager Activities works with the Employee Central integration configuration, and by configuring a custom Crossboarding process. If necessary, the customer can use both configurations, in the instance where they have HRIS data coming from multiple sources.

Context

Configuring Crossboarding with the Hiring Manager Activities only is useful in cases where an employee is transitioning to a new job, but does not require any additional paperwork. For example, if an employee take a new position in the same location, you may want to recommend a buddy or request equipment, but no other forms are required.

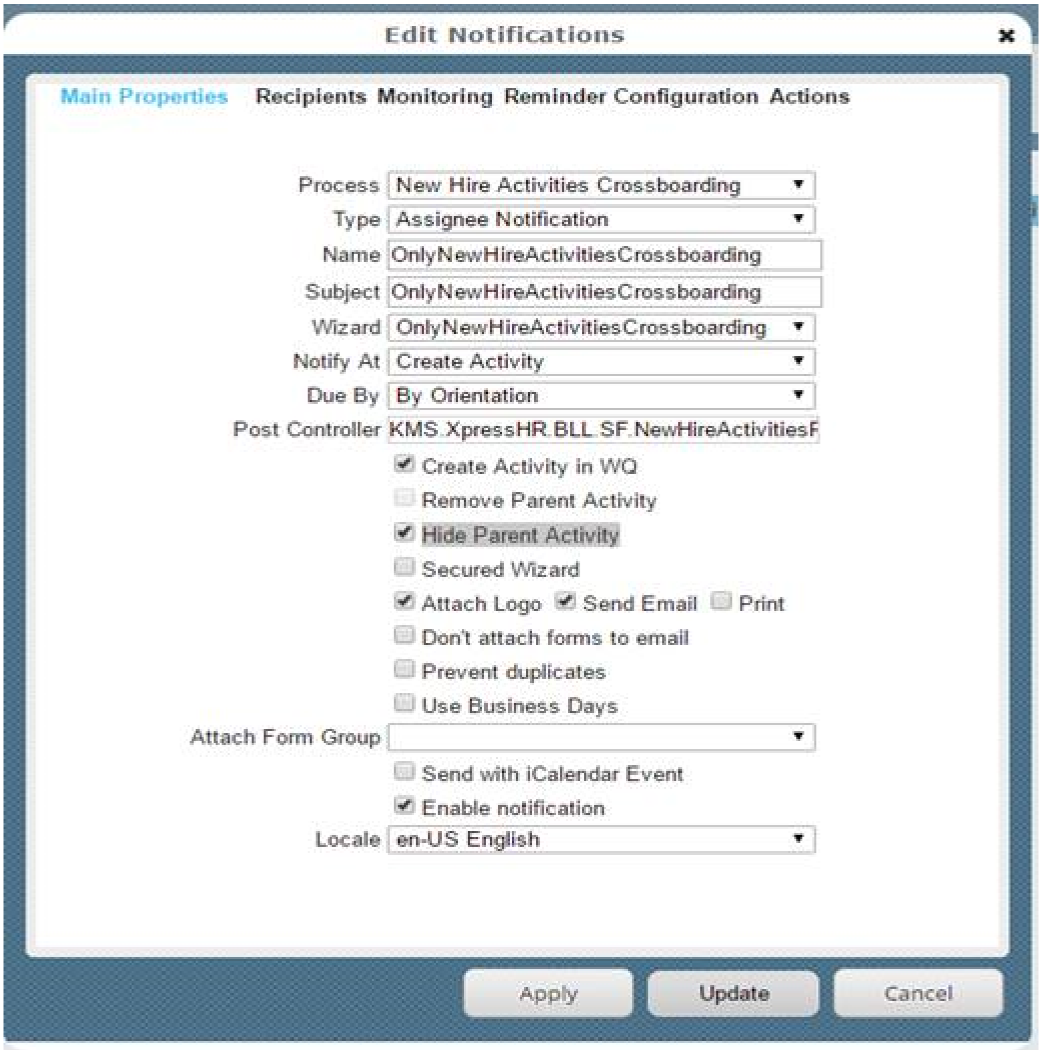
Procedure

1. Navigate to *Super Admin* > *Processes* > *Add Process*.
2. Enter a name and description for the new process. The *StartControl* and *Process Controller* fields must match the existing Onboarding Process.
3. In the *Process Type* field, select **Onboarding**.
4. Click *Create.*
5. Select each step of the process and set the *Wizard* field to **Empty**. Each step in the process must be empty.
6. Navigate to *Super Admin* > *Import/Export Settings* and choose *HRXML.ImportNew Hire* and export the file.
7. Add the required code to the file.

   Sample Code

   ```
   <!-- RCM2KMSDataExchange message handling -->
     <xsl:template match="/RCM2KMSDataExchange/Field">
       <xsl:choose>

   <xsl:when test="./ID='InternalHire'">
       <xsl:if test="./Value = 'false'">
           <xsl:call-template name="item">
               <xsl:with-param name="key">Process</xsl:with-param>
               <xsl:with-param name="value">Onboarding</xsl:with-param>
           </xsl:call-template>
       </xsl:if>
       <xsl:if test="./Value = 'true' and translate(/RCM2KMSDataExchange/
   Field[ID='DeptCode']/Value, $uppercase, $smallcase) = 'hyderabad (hyd)'">
           <xsl:call-template name="item">
               <xsl:with-param name="value">New Hire Activities Crossboarding</
   xsl:with-param>
               <xsl:with-param name="key">Process</xsl:with-param>
           </xsl:call-template>
       </xsl:if>
   </xsl:when>
   ```

   This code directs internal hires to the custom process configured for internal hires. Custom processes can be configured for a number of different workflows, for example for customers who need to direct users from different countries to different workflows.
8. Navigate to *Super Admin* > *Import/Export Settings* > *HRXML.ImportNewHire*. Select *Import File* and upload the newly edited file.
9. Configure the Crossboarding with New Hire Activities notification. Navigate to *SuccessFactors HCM* > *Onboarding* > *Notifications* and select the Onboarding notification group.
10. Click *Create*. Enter the following information for the notification.

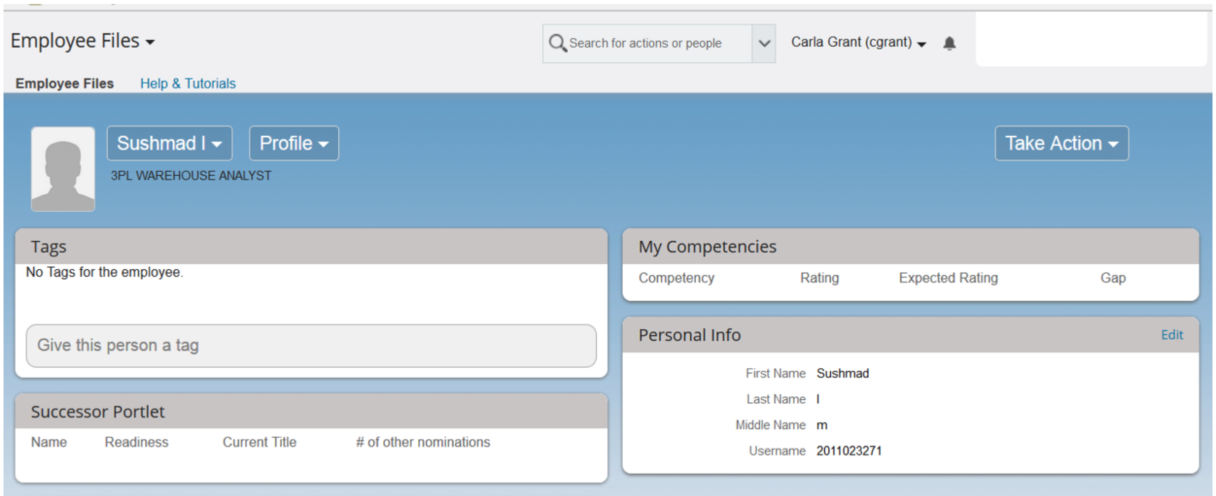


> **Note**
>
> Make sure the *Hide Parent Activity* box is checked when configuring this notification.

16.6.2 Crossboarding with Employee Central Workflow

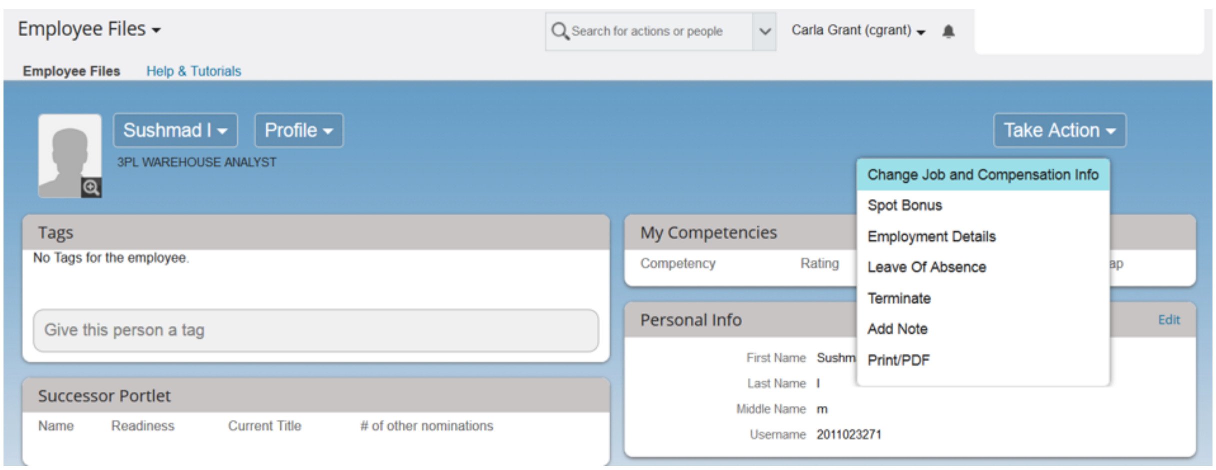
Procedure

1. Search for the employee you would like to update in *Employee Files*.

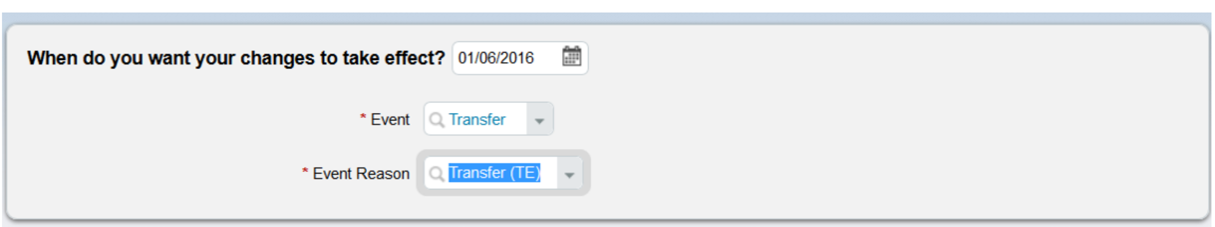


> **Note**
>
> You can initiate crossboarding for current employees who have already completed SuccessFactors Onboarding, or those who have never gone through the SuccessFactors Onboarding process.

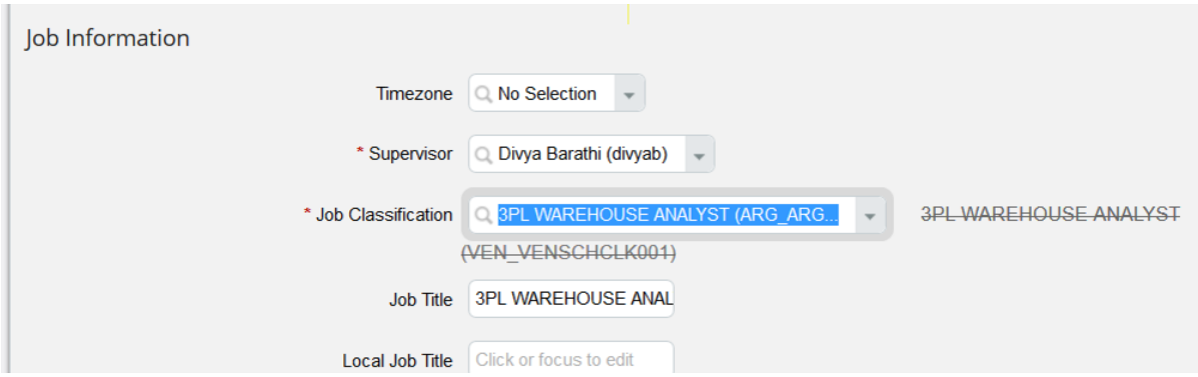
2. Select *Take Action* > *Change Job and Compensation Info* .



3. Select `Transfer` in the *Event* and *Event Type* fields.



4. Edit the employee's job information and click *Submit*.



After the employee information is updated, the activity is created in Onboarding to process the internal hire. The activity begins on the first step of the process identified in the custom process xml for internal hires. The rest is completed as outlined in the process. Internal hire activities that are completed in Onboarding do not go through the Manage Pending Hire page. You can monitor crossboarding event triggered from Employee Central in the Event Center.

16.7 Published Events for Step Completion

On/Offboarding supports two events triggered by step completion.

On/Offboarding now publishes events to signify the completion of Onboarding and Offboarding steps. Customers using Intelligent Services can subscribe to these events to notify users or other entities when steps are completed.

There is no specific event published for Crossboarding, but because Crossboarding uses the same steps as Onboarding, when an employee completes a Crossboarding activity step in Onboarding, it triggers the same Onboarding events.

Customers can subscribe to these events to trigger external processes like asset assignment and e-mail creation. Customers may also use data from the first step of the Onboarding process to create a shell HRIS record to create the EmployeeID for a new hire. Customers can also collect all available data at tne end of each data collection step, in order to run reports or audit the Onboarding process.

The Onboarding step completion event (`ONB_Step_Completed`) publishes this data at the end of any step in the Onboarding process.

- `HRDataID` Unique ID for each Onboarding activity
- `Process Type` Onboarding
- `Step Name` Step 1/Step2/Step 3/Signature Step
- `Process Name` Customer-specific name of the process created
- `Default Step Name` Initiation Step/Employee Step/Exit Step/Signature Step
- `Custom Step Name` Customer-specific name of the step, where applicable.

Offboarding customers can subscribe to the step completion event to trigger external processes based on the step completion.

The Offboarding step completion event (`OFB_Step_Completed`) publishes this data at the end of any step in the Onboarding process.

- `HRDataID` Unique ID for each Offboarding activity
- `Process Type` Offboarding
- `Step Name` Step 1/Step2/Step 3/Signature Step
- `Process Name` Customer-specific name of the process created
- `Default Step Name` Initiation Step/Employee Step/Exit Step/Signature Step
- `Custom Step Name` Customer-specific name of the step, where applicable.

16.7.1 How to Enable Events for Step Completion

Enabling Intelligent Services events published by Onboarding.

Prerequisites

Intelligent Services must be enabled in *Provisioning* > *Company Settings* > *Enable Intelligent Services*

Procedure

1. Navigate to *SuccessFactors HCM* > *Onboarding* > *Settings* > *Features*.
2. Select the *Step Complete Events* option.
3. Click *Activate*.

   After you have enabled the events, you must configure the event subscription. For information on configuring the subscription, refer to the Intelligent Services Implementation guide.

Related Information

Intelligent Services Implementation Guide

17 Mapping Recruiting-Onboarding Enum Picklists

Do not use this method for mapping picklists other than those for enum fields. Always map other picklists using Panel Designer.

Context

Mapping enum fields may be required for all Recruiting to Onboarding integrations. Customers with Employee Central do not need to perform any additional mapping. The same mapping is used when data is moved from Onboarding to Employee Central, so if picklist names are not identical in Recruiting and Employee Central, values may not be matched and therefore will not appear in a drop-down, but rather just below the drop-down

Before executing the mapping, you will need to downlod the RCM XML files from Provisioning for the JobRequisition, Job Offer and Application objects. Then, search the XML files for the "picklist-id" tag to identify picklists used by RCM that need to be mapped to the lookup drown-downs in Onboarding.

You can also use the data dictionary XML files from Onboarding for Recruiting Execution and Employee Central to determine the list of fields with the tag `<lookupName>` or `<lookupKey>`. Lookup name and picklist name may be identical across the two applications.

The HRIS system (such as EC) is the system of record. Values in Recruiting must match those in Employee Central in order for mapping to work.

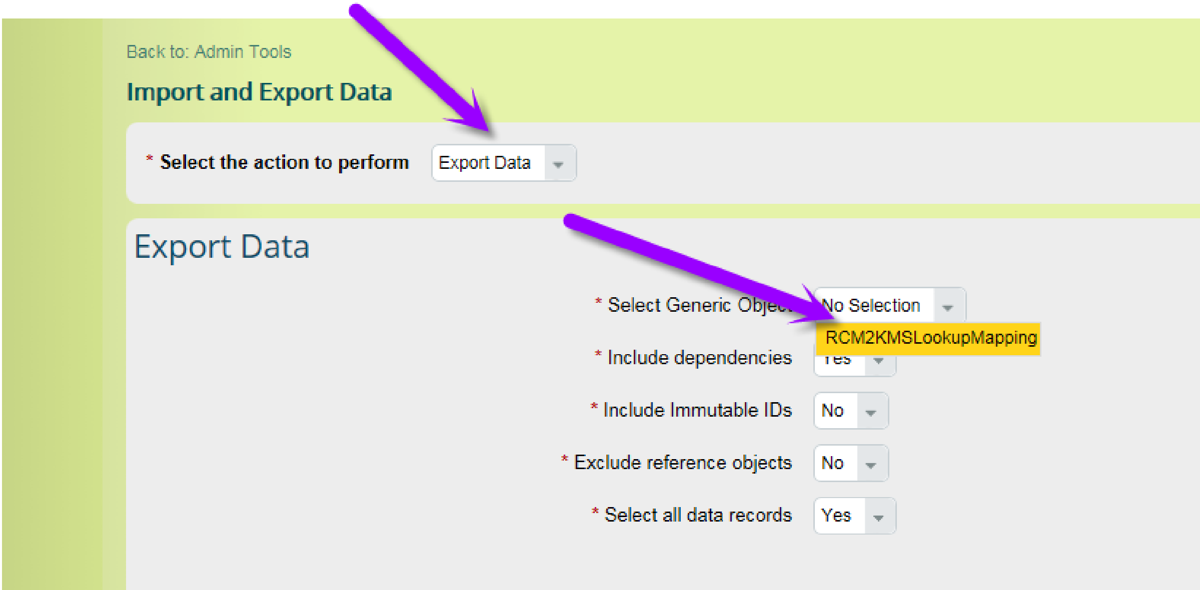
Procedure

1. For picklists, the description (label) in SAP SuccessFactors HCM must match the *Code* value in Onboarding. Before beginning the mapping, the picklists you want to map must be adde to the Data Dictionary and the job requisition. Then check the Provisioning lists for the pickilist text and code. You must also add the corresponding dropdown to a panel.

A	B	C	D	E	F	G	H	I
^picklistId	OptionId	minValue	maxValue	value	status	external_code	parentOption	en_US
yesNo	380	0	0	0	ACTIVE		-1	No
yesNo	381	1	1	1	ACTIVE		-1	Yes

2. Navigate to *SuccessFactors Onboarding* > *Admin Tools* > *Metadata Framework* > *Import and Export Data.* Select **`Download Template`** and choose the **`RCM2KMSLookupMapping`** object. Download the template and unzip the resulting .csv file.

> **Note**
>
> If you are unable to find the *Import and Export Data* option, try using legacy Admin Tools, or searching for the menu in the advanced Admin Tools.



3. Navigate to *Admin Tools* > *Employee Files* > *Monitor Job*. Find the RCM2KMSLookupMapping file and click *Download Status* to download the file.
4. Remove the first column (*externalCode*) and the last column (*MDFSystemStatus*).

	A	B	C	D	E
1	externalCode	optionId	lookupCode	lookupName	mdfSystemStatus
2	externalCode	optionId	lookupCode	lookupName	status

5. Generate the input data for both field types (enum and picklist) from the Job Requisition.
   - For enums, navigate to *Provisioning* > *Managing Recruiting* > *Import/Update/Export Job Requisition Template.* Click the arrow icon next to the template you wish to map.
   - For picklists, navigate to *Admin Tools* > *Company Settings* > *Picklist Management* and select *Export all picklist(s)* and *Include System Generated Job Codes.*
6. Values for the optionID column can come from both enum fields on the JobRequisition template(s) or SAP SuccessFactors HCM picklists.
   - To populate the optionID for enum fields, search the Job Requisition XML template for fields of the type "enum." The enum-value attribute gives you the value for optionID. For example:

```
<field-definition id="classificationTime" type="enum" required="false"
custom="false">
    <field-label>< ! [CDATA[Full Time/Part Time]]></field-label>
    <enum-value value="null">
        <enum-label>< ! [CDATA[No selection ]]></enum-label>
    </enum-value>
    <enum-value value="FULLTIME">
        <enum-lavel>< ! [CDATA [Full-time]]></enum-label>
    </enum-value>
</field-definition.
```

     Enter the optionID (in the example, "FULLTIME") into the lookup mapping template.
   - To populate the optionID column for picklists, Filter column A (optionID) of the picklist file in order to filter on the picklist you want to map, for example Ethnicity. Note the optionIDs for the relevant picklists. For mapping picklist information, the *picklistId* column corresponds to the *LookupName* column of the

RCM2KMSLookup file.The Option ID columns between the two files should also match.

Picklist file

^picklistId	Option	minVal	maxVal	value	status
Ethnicity	5111	-1	-1	1	ACTIVE
Ethnicity	5112	-1	-1	1	ACTIVE
ethnicity	5107	-1	-1	-1	ACTIVE
ethnicity	5108	-1	-1	-1	ACTIVE

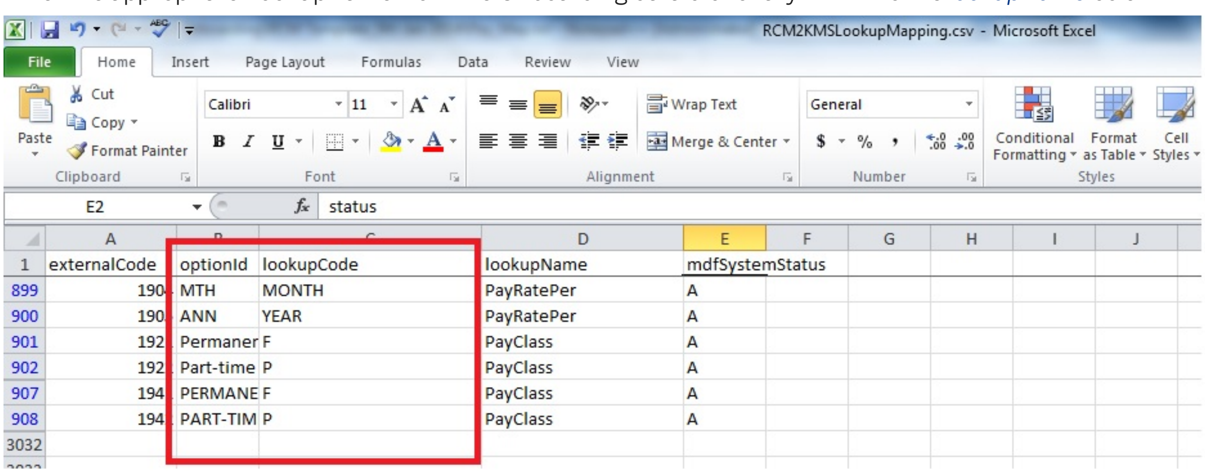
RCM2KMS Lookup file

optionId	lookupCode	lookupName		
optionId	lookupCode	lookupName		
	M	MaritalStatus		
	S	MaritalStatus		
	A	Ethnicity		
	I	Ethnicity		

You may also need to filter out inactive picklists, for example, filter column F (status) to **ACTIVE**. Inactive picklists come from previous uploads of picklists data, but you will only need active picklists for this mapping.

You may also want to temporarily include more detailed information corresponding to the optionIDs in one of the empty columns in the picklist download. This will help you quickly identify the corresponding Onboarding entries.

7. Identify the corresponding information from Onboarding. Navigate to *Onboarding* > *Reference Files* > *Data Lists.* For the results, click on the entry corresponding to the picklist you want to map to.
8. Add the appropriate code from Onboarding to the *lookupCode* column in the RCM2KMSLookupMapping template.
9. Enter the appropriate LookupName from the Onboarding data dictionary XML into the *lookupName* column.



	A	B	C	D	E
1	externalCode	optionId	lookupCode	lookupName	mdfSystemStatus
899	190	MTH	MONTH	PayRatePer	A
900	190	ANN	YEAR	PayRatePer	A
901	192	Permaner	F	PayClass	A
902	192	Part-time	P	PayClass	A
907	194	PERMANE	F	PayClass	A
908	194	PART-TIM	P	PayClass	A
3032					

10. Remove any temporary information you have entered to identify the lists being mapped.
11. Save the template as a .csv file
12. Upload the mapping data to SuccessFactors HCM. Navigate to *Admin Tools* > *Employee Files* > *Import and Export Data.*
13. Select *Import Data*, choose *CSV File* and then navigate to the modified RCM2KMSLookup file. Click *Import.*

14. When the import job has finished, you can find your lookup mappings in *Manage Data* by viewing the RCM2KMSLookupMapping object (or by simply exporting the data in *Import and Export Data*, using the generic object RCM2KMSLookupMapping. If you export the data from this menu, you can view the file by navigating to *Process Job Monitor* > *Monitor Job* Here you can view the progress of the data export and download the file.

18 How to Configure Position Management with Onboarding

Integrating Onboarding with Employee Central's Position Management allows users to capture to sync position information during the Onboarding process.

Procedure

1. Navigate to *SuccessFactors HCM* > *Onboarding* > *Settings* > *Data Dictionary*. Click *New Field* and enter **`Position`** in the *Name*, *Label*, and *Description* fields. Select *String* as the *Type*.
2. Navigate to *SuccessFactors HCM* > *Onboarding* > *Settings* > *Panels* and add the new `Position` field to the desired panel. It's logical to add this field as a text box to the JobLocation panel, but you can add it anywhere you would like to capture the position information.
3. Navigate to *SuccessFactors HCM* > *Onboarding* > *Settings* > *Data Dictionary*. Select the namespace under *Integrations* > *Rx*.
4. Click *Fields* and add the new `Position` field to the tag.
5. Under the *Entities* > *JobReq* namespace, click *Fields* and add the `Position` field to the tag.
6. Navigate to *Admin Center* > *Recruiting* > *Setup Onboarding Integration*.
7. Select *Job Requisition* and choose the relevant job requisition template. Map the `Position` field in the Job Requisition to the Onboarding `Position` field.

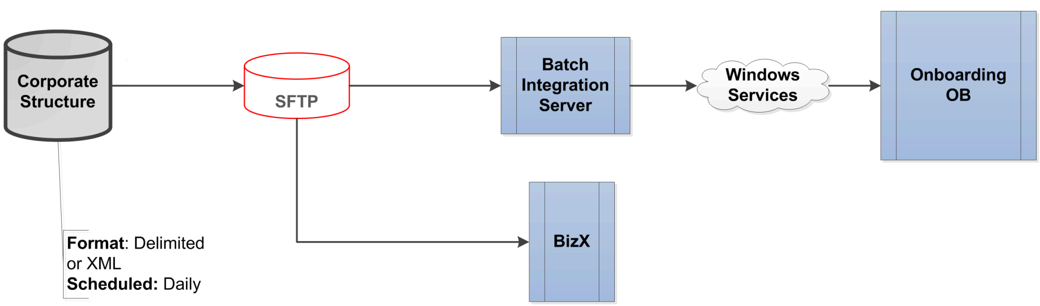
   Now when you “Initiate Onboarding” from RCM, the “Position Number” from the Job Req should come over and populate the Position field on the ONB panel
8. Navigate to *SuccessFactors HCM* > *Onboarding* > *Settings* > *Data Dictionary*. Select the namespace under *Integrations* > *EC*.
9. Click *Fields* and add the new `Position` field to the tag.
10. Navigate to *Admin Center* > *Onboarding* > *Field Mapping tool for Onboarding EC Integration*
11. Map the Onboarding `Position` field to the appropriate Employee Central field, and click *Validate*, then *Save Changes*.

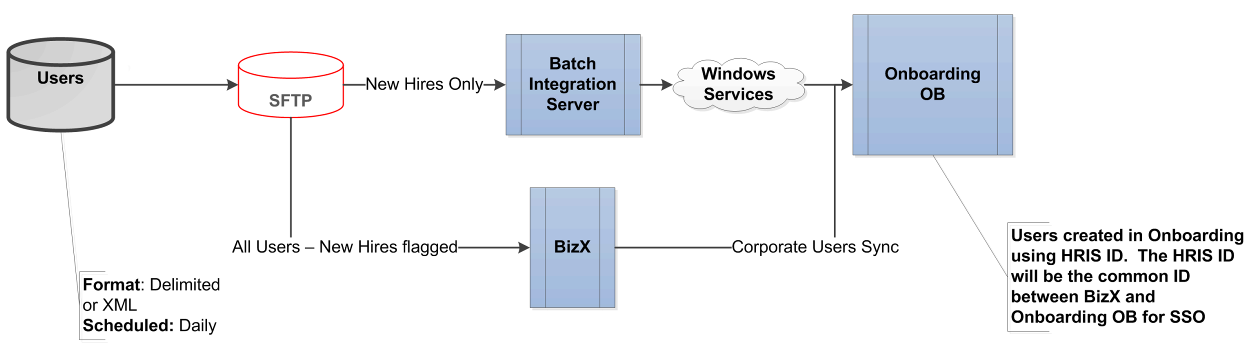
A Appendix: Data Flow Diagrams

A.1 Creating and Updating Foundation Data

The diagram shows the data flow for the creation or update of foundation data (corporate structure and user data). There are two separate feeds to SuccessFactors HCM and Onboarding.

Why separate feeds? SuccessFactors HCM requires far less information for foundation data than SF Onboarding does. The feeds should come from the same source, as indicated here, however SuccessFactors HCM Onboarding foundation data may be significantly more robust, with addresses, tax IDs, etc which is not needed for SuccessFactors HCM. Having independent user feeds for new hires allows for SuccessFactors HCM Onboarding to be accessed outside the firewall, prior to granting SuccessFactors HCM access for customers who wish to hold SuccessFactors HCM access until day 1. The user records are linked by user ID, which does not have to be, but is typically the employee ID.



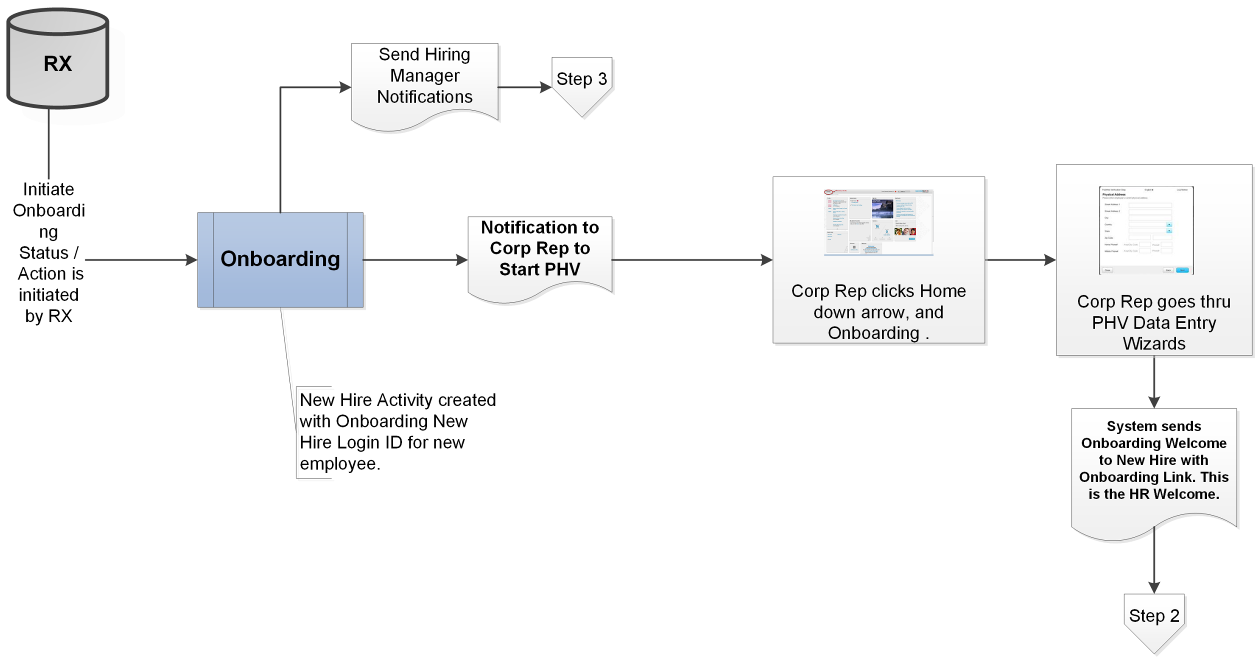


The SuccessFactors HCM user feed is a single feed for all users, both Corporate and New Hires. New Hires / Cross Hires are indicated via a flag in the file. Corporate Users are sync'd between SuccessFactors HCM and OB as a push from SuccessFactors HCM so there is a common ID

A.2 Integration with Recruiting and Employee Central

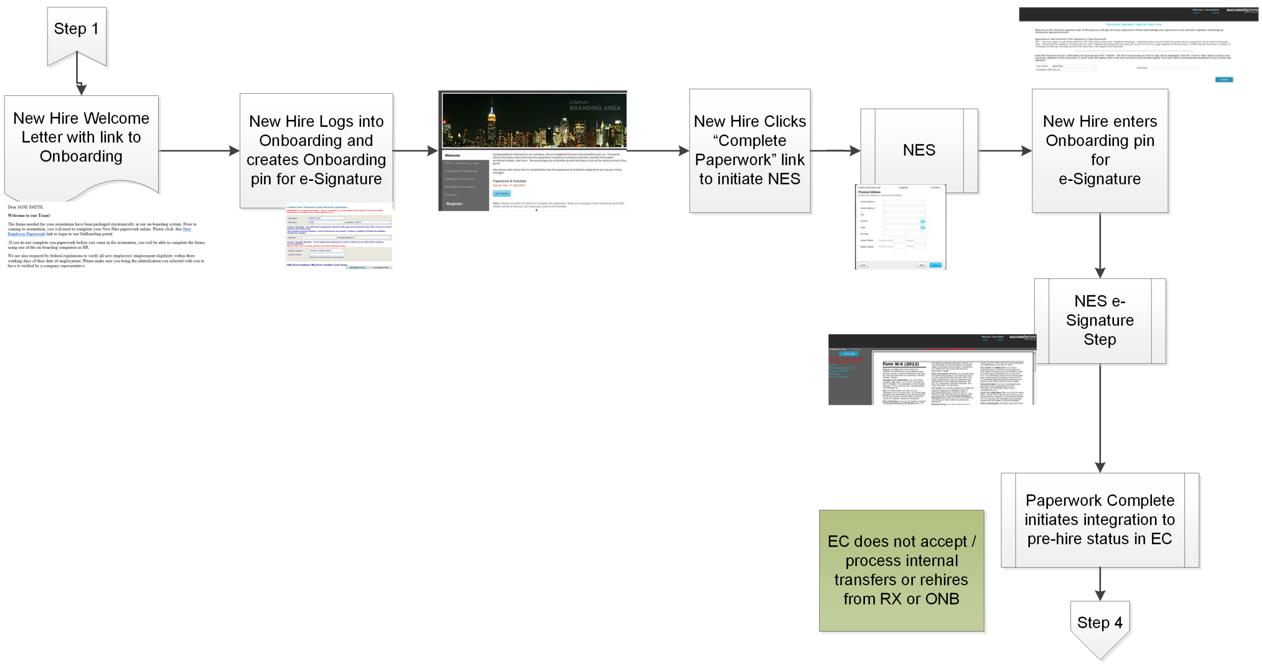
A.2.1 Step 1: New Hire Activity

The diagram shows the creation of a new hire activity in Onboarding with a new hire login ID. A corporate representative executes the post-hire verification step.



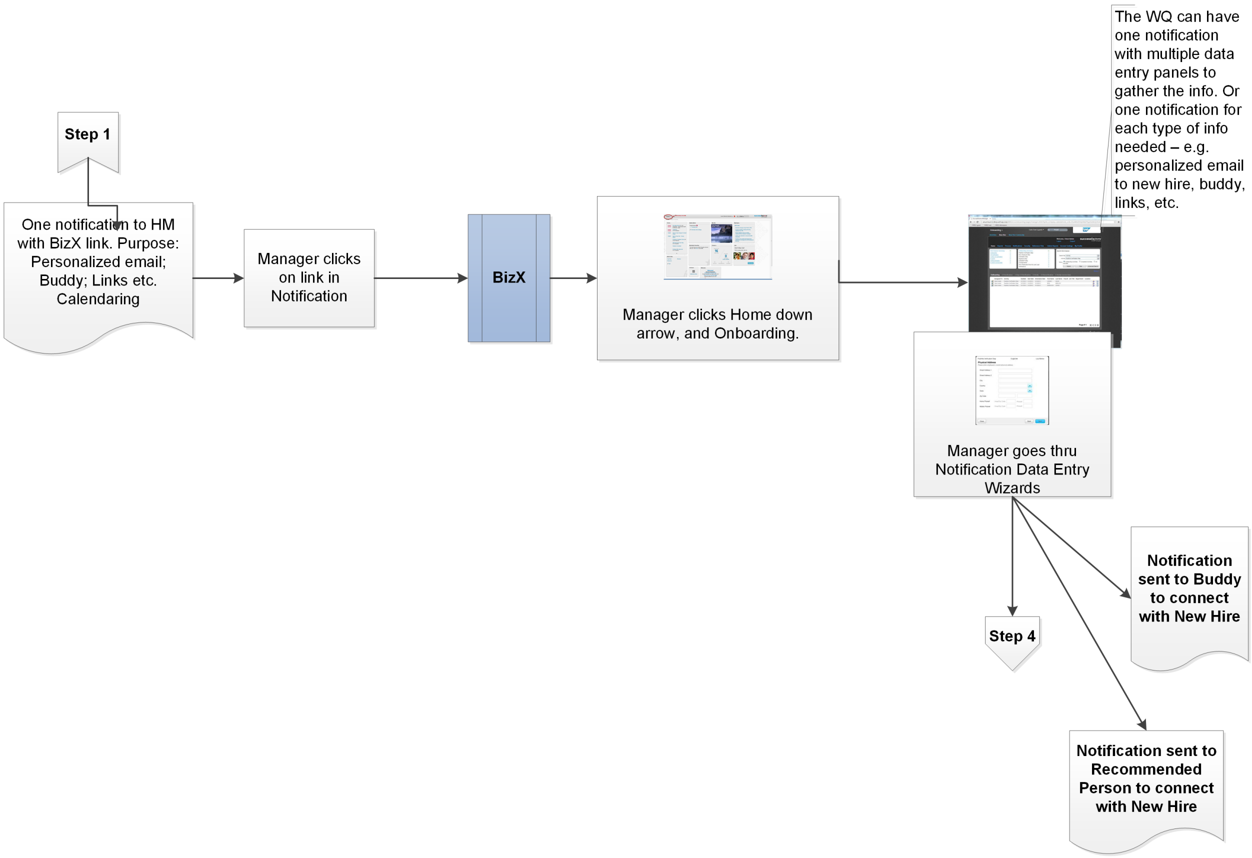
A.2.2 Step2: New Employee Step

The new hire executes the new employee step (NES) in Onboarding from the browser outside SuccessFactors HCM. Optional, it can be executed within SuccessFactors if the customer desires.



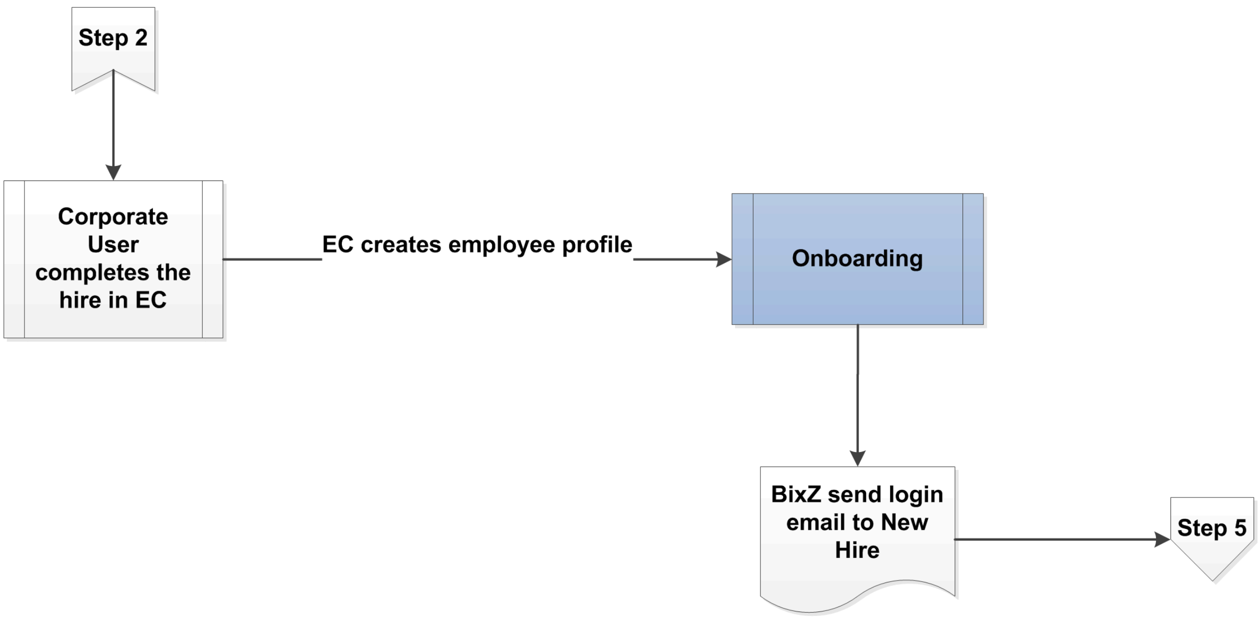
A.2.3 Step 3: Notification to Select Recommended People

Onboarding sends a notification to the manager to select recommended people to follow, a buddy and so on.

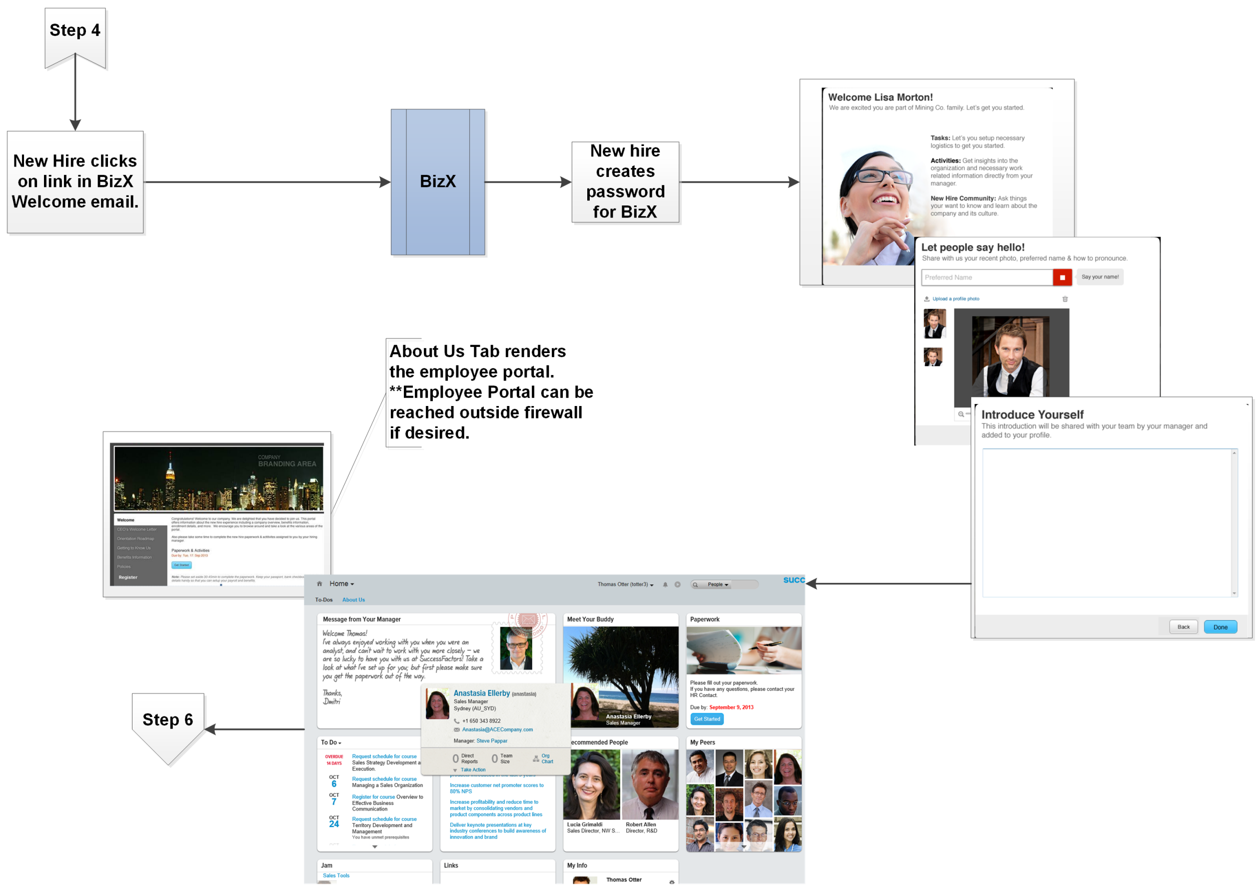


A.2.4 Step 4: Pre-Hire Record

The pre-hire record in is created in Employee Central. Once the pre-hire step is completed, EC creates the new hire user profile.

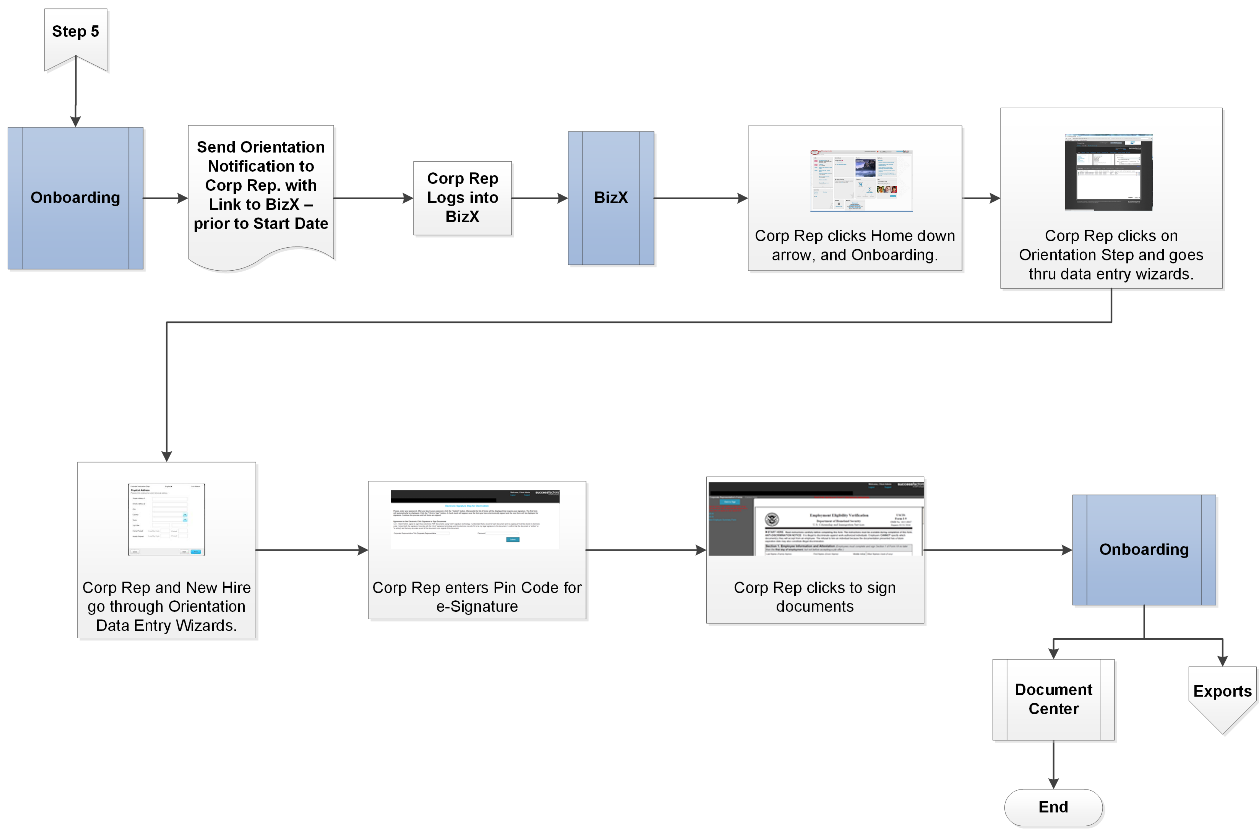


A.2.5 Step 5: New Hire Experience



A.2.6 Step 6: Completion of Paperwork

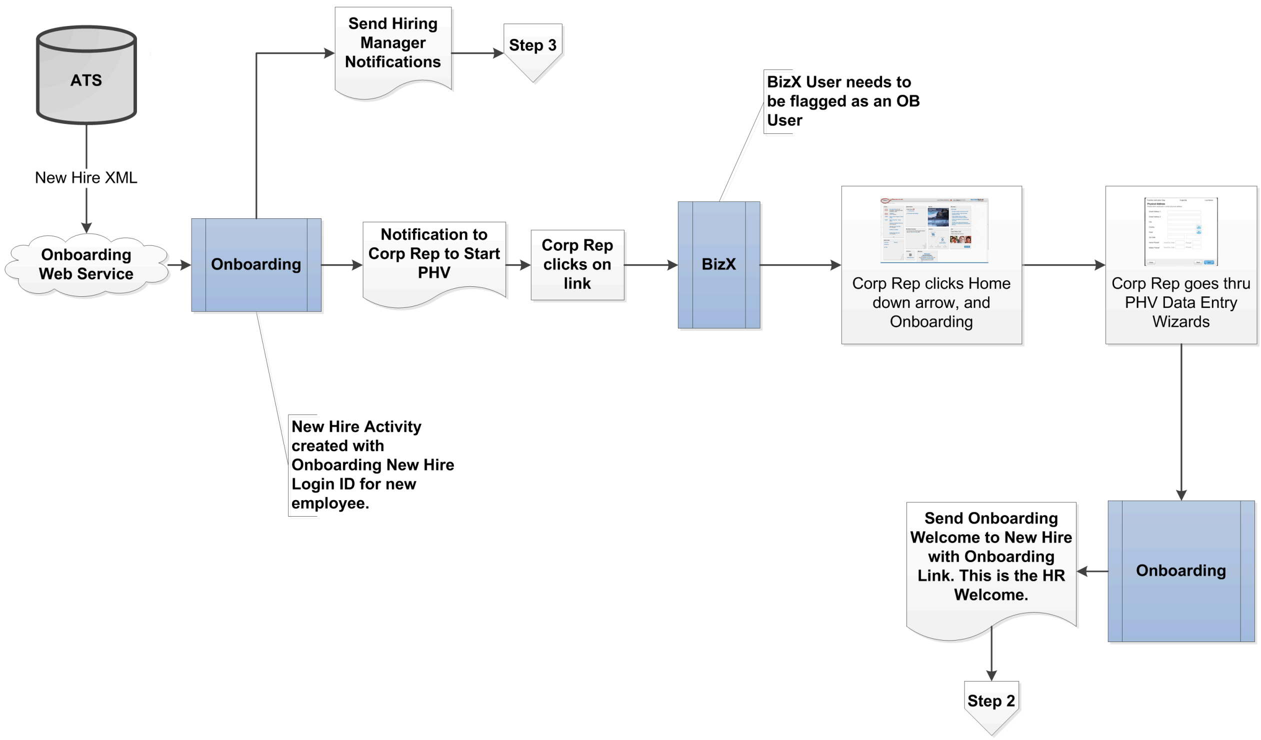
The new hire and the corporate representative complete the Onboarding paperwork.



A.3 Integration with Third-Party Applicant Tracking System (ATS) and Human Resource Information System (HRIS)

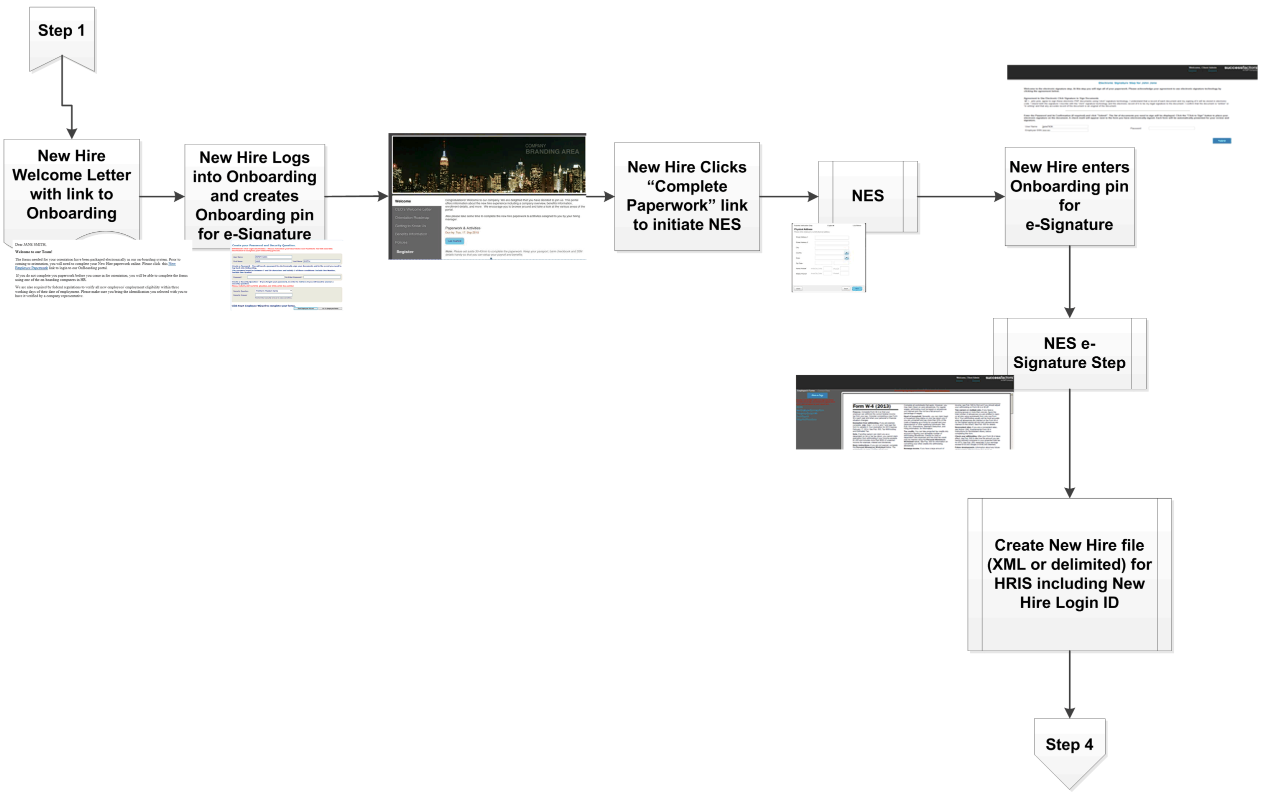
A.3.1 Step 1: New Hire Activity

The diagram shows the creation of the new hire activity in Onboarding with new hire login ID. A corporate representative executes the post-hire verification (PHV) step.



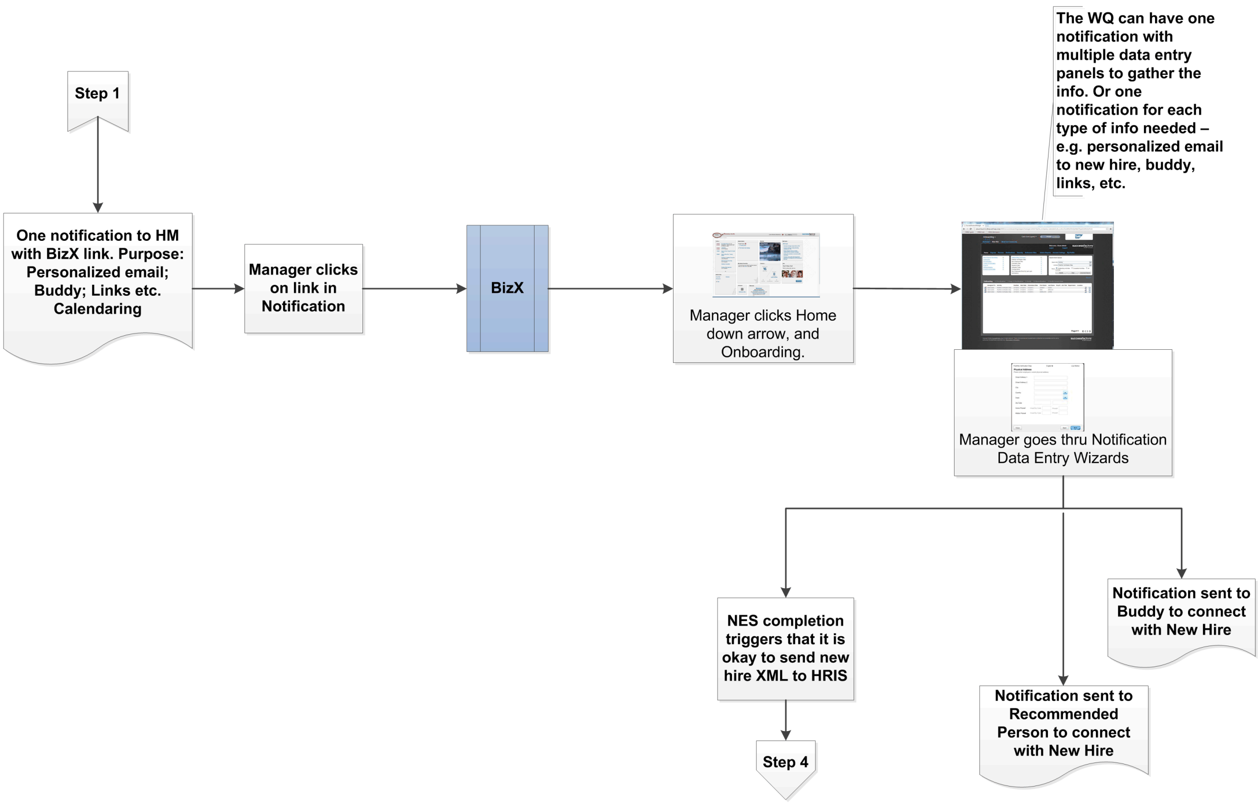
A.3.2 Step 2: New Employee Step

The new hire executes the new employee step (NES) in Onboarding from a browser outside of SuccesFactors HCM. Optionallly, it can be executed within SuccessFactors if the customer desires.



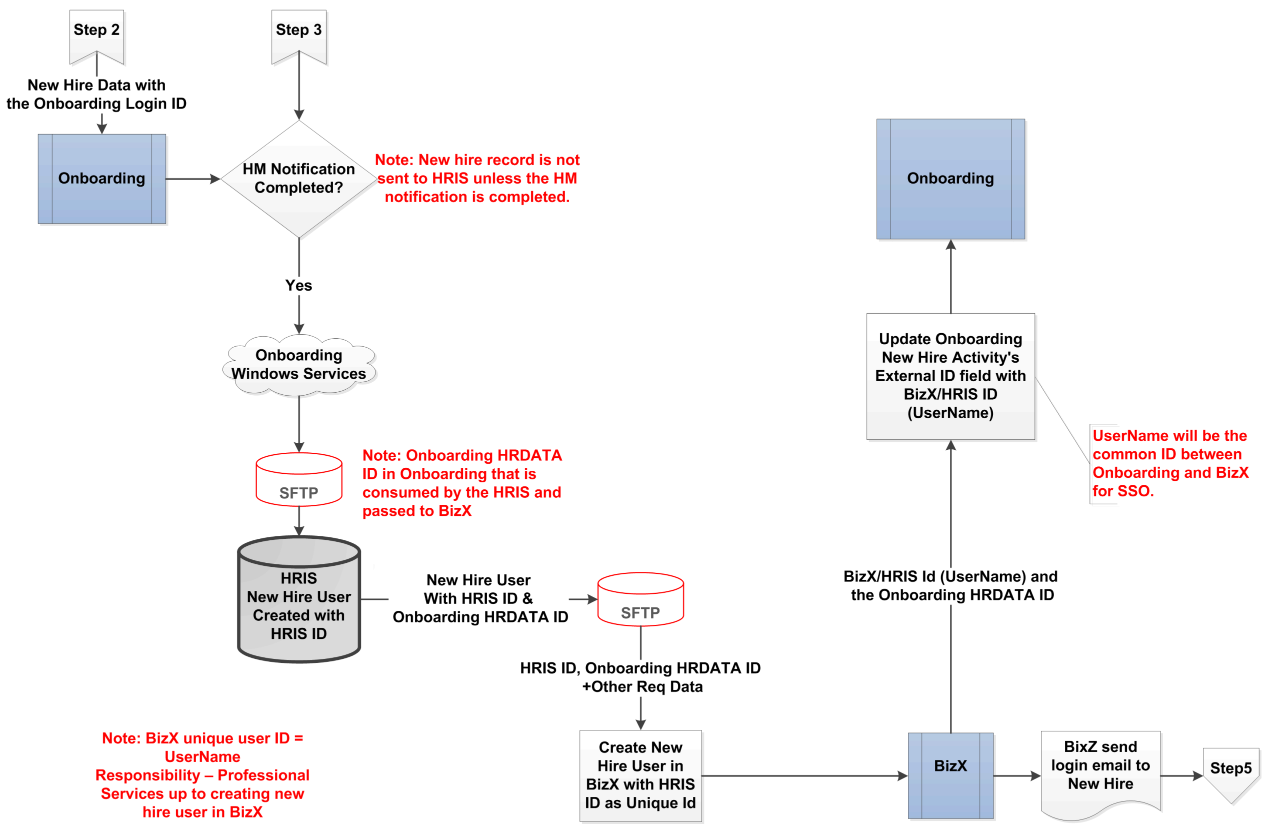
A.3.3 Step 3: Notification to Select Recommended People

Onboarding sends a notification to the manager to select recommended people to follow, a buddy and so on.

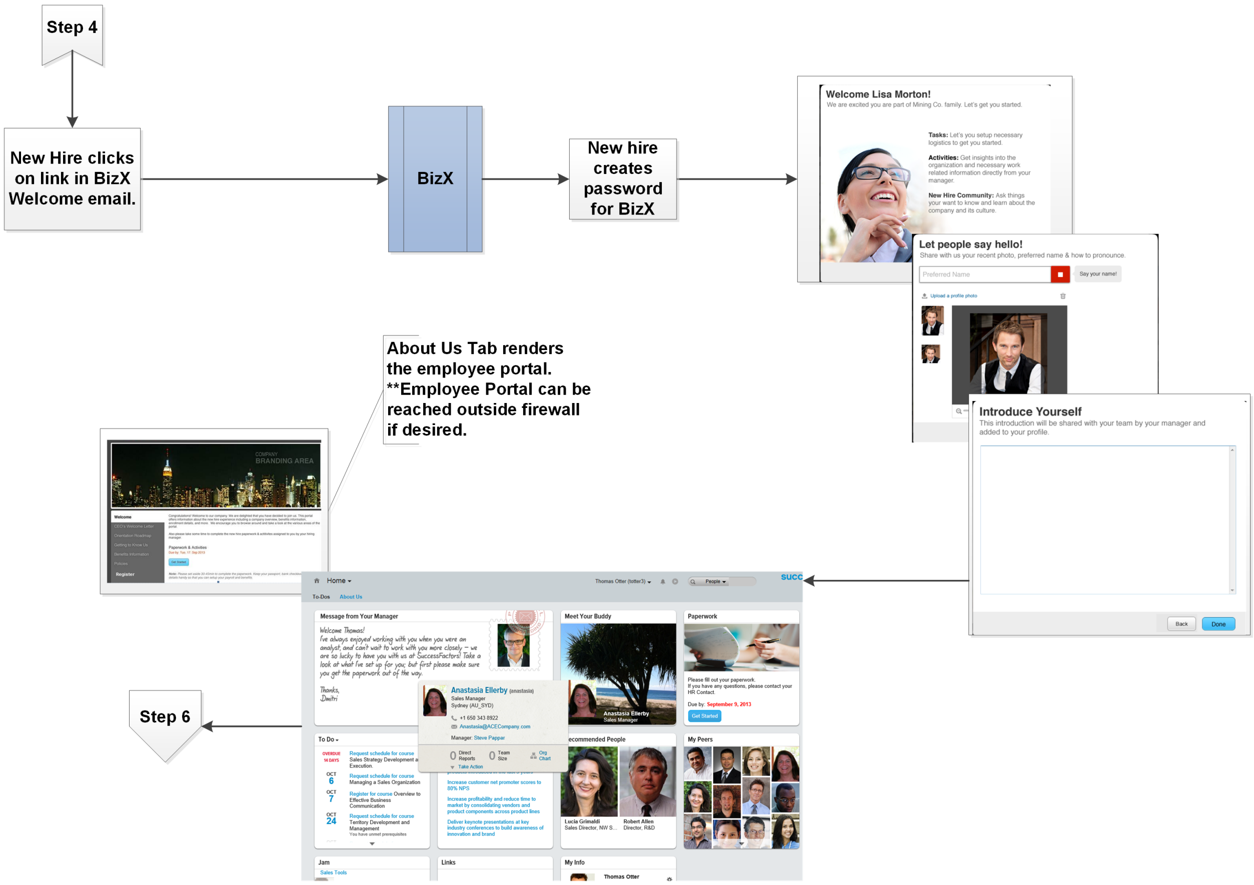


A.3.4 Step 4: New Hire Record

Onboarding sends new hire data, including SSN, to HRIS. The HRIS triggers the creation of a new hire user in SuccessFactors HCM, which updates Onboarding with the user name.

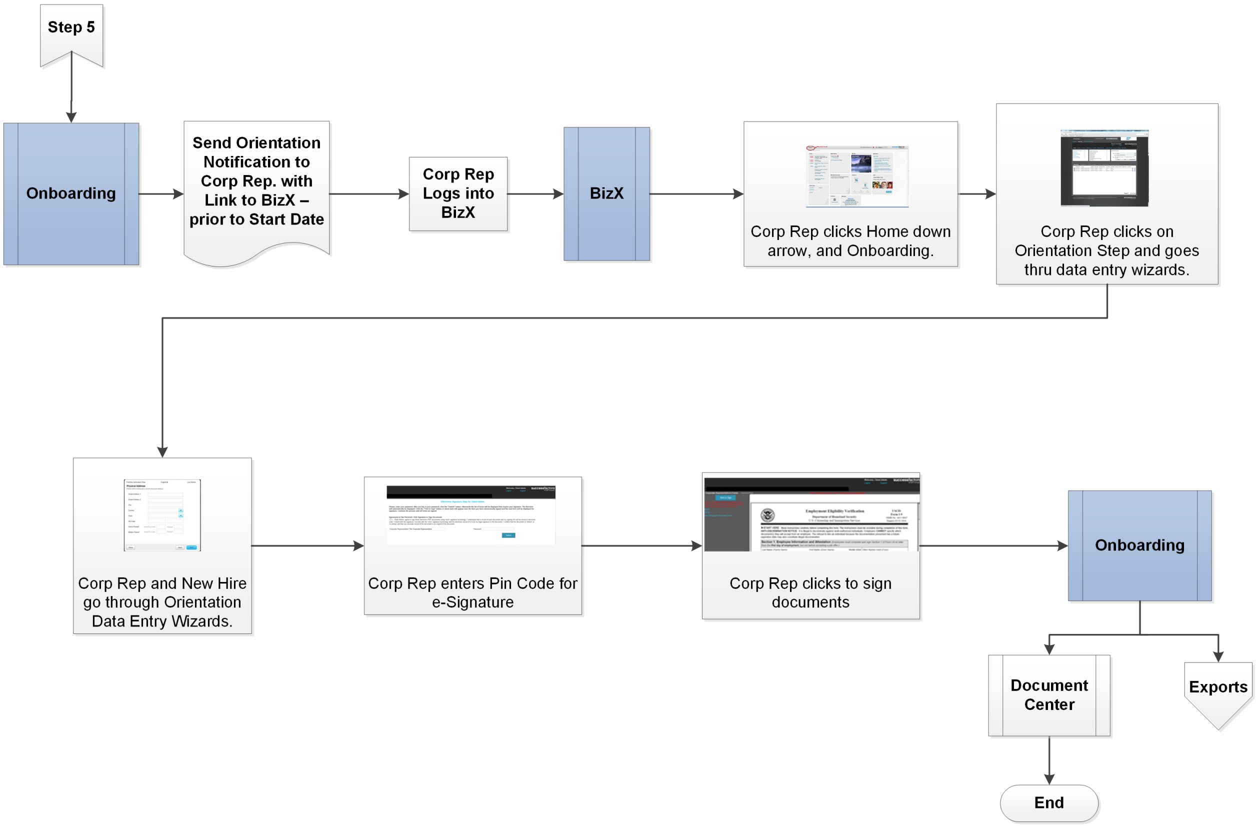


A.3.5 Step 5: New Hire Experience



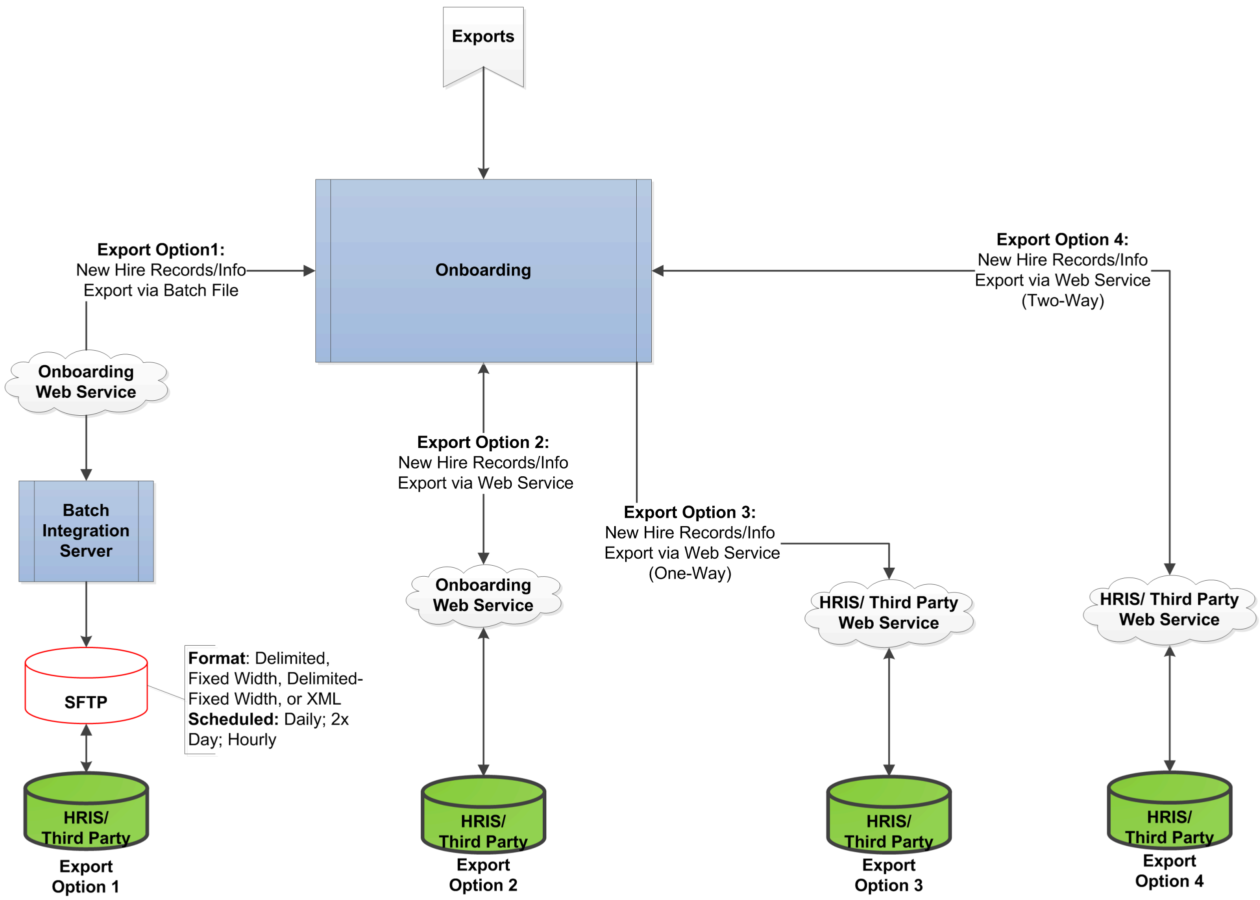
A.3.6 Step 6: Completion of Paperwork

The new hire and the corporate representative complete the Onboarding paperwork.



A.4 Export Options

These are the various ways to export Onboarding data to other backend systems.



B Appendix: Configuring Onboarding for Demo Instances

B.1 Scenario A: Onboarding Standalone (Onboarding and SuccessFactors HCM)

Preparations Before the Demo

Before the demo, you prepare the system as follows:

1. You setup the synchronization reports for the corporate user, division, department, location, and permissions. <SCHEDULED SYNC>
   For more information, see Synchronizing User, Permission, and Foundation Data [page 96]
2. You perform the basic user import for users with the new hire flag in SuccessFactors HCM (flag IsOnboardingUser = YES). <ON DEMAND>
   1. You use the OnboardingImportPath import to upload candidates into Onboarding (OnboardingCandidateInfo created, Onboarding candidate created). <REAL TIME NOT SCHEDULED>
      The OnboardingImportPath file includes the USER ID and passes the Onboarding Candidate ID back to BizX.
   2. The OnStartDateStatusChange job syncs the onboarding candidate info (the 2 user IDs) <SCHEDULED SYNC>

During the Demo

New hires receive credentials from both systems for paperwork. By receiving both, the Solution Consultant can choose to show paperwork from within SuccessFactors HCM or externally based on the customer's use case. The *Paperwork* tile and the *About us* tab exist and can be used from SuccessFactors HCM even if the N1 is incomplete. Managers can logon to Onboarding with Single Sign-On to set up activities for candidates.

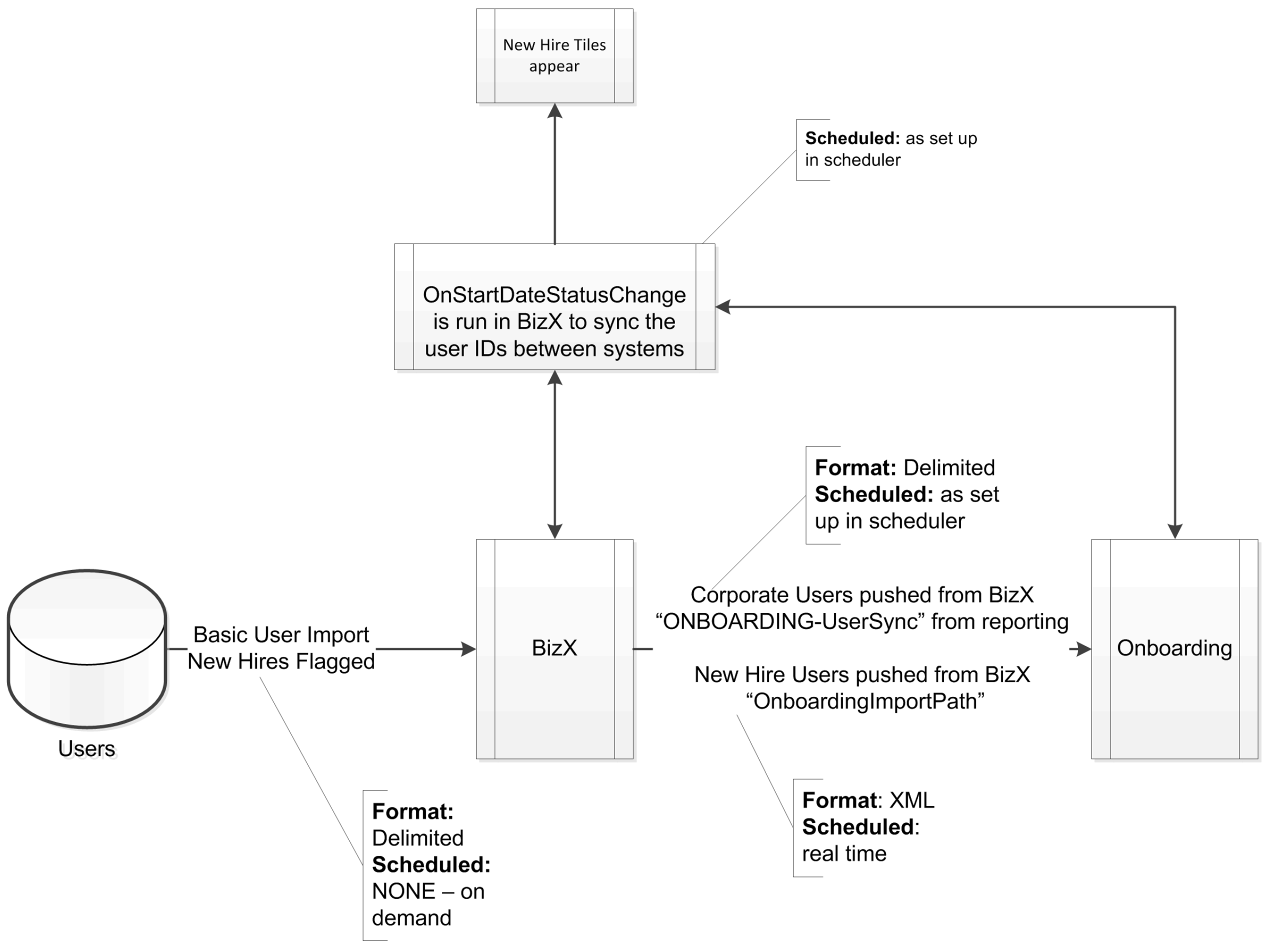


Figure 4: Demo User Creation - Onboarding Standalone

B.2 Scenario B: Onboarding Integrated with Recruiting

Preparations Before the Demo

1. You set up the synchronization reports for the corporate user, division, department, location, and permissions. <SCHEDULED SYNC>
   For more information, see Synchronizing User, Permission, and Foundation Data [page 96]
2. You set up the Recruiting to Onboarding Integration (map fields to all Recruiting template fields).

During the Demo

1. You initiate Onboarding from RX. This triggers the creation of the OnboardingCandidateInfo, the Onboarding candidate, and the SuccessFactors HCM user.

2. The Recruiting record is updated with user ID and the status of the new hire. <REAL TIME>
3. New Hires receive credentials from both systems for the paperwork. By receiving both, the Solution Consultant can choose to show the paperwork from within BizX or externally, based on the customer's use case.
4. The new hire can complete the paperwork from the SuccessFactors HCM homepage.
5. Managers logon to Onboarding using Single Sign-On to setup activities for candidates.

B.3 Scenario C: Onboarding Integrated with Recruiting and Employee Central

Preparations Before the Demo

1. You set up the synchronization reports for the corporate user, division, department, location, and permissions. <SCHEDULED SYNC>
   For more information, see Synchronizing User, Permission, and Foundation Data [page 96]
2. You set up the Recruiting Onboarding Integration (map fields to all RX template fields).
3. You set up the Onboarding to Employee Central integration (map fields to all EC fields).

During the Demo

1. You initiate Onboarding from Recruiting. This triggers the creation of OnboardingCandidateInfo and new hire. <REAL TIME>
2. Managers can log on to Onboarding using Single Sign-On to setup activities for new hire.
3. The new hire receives the link to Onboarding to complete the paperwork external to SuccessFactors HCM.
4. Post PaperWork done notification is sent out, candidates appear in EC *Manage Pending Hires* screen.
5. A corporate user completes the hire in EC, the SuccessFactors HCM new hire user is created <REAL TIME>. The credentials for SuccessFactors HCM are sent by mail to the new hire.
6. New hires can log into the system and view the *Home Page* tiles.
7. RX is updated with the User ID of the new hire and status as hired. <REAL TIME>.

B.4 Scenario D: Onboarding Integrated with Employee Central

Preparations Before the Demo

1. You set up the synchronization reports for the corporate user, division, department, location, and permissions. <SCHEDULED SYNC>
   For more information, see Synchronizing User, Permission, and Foundation Data [page 96]
2. You set up the Recruiting Onboarding Integration (Map fields to all RX template fields. All Onboarding fields **must** be mapped to fields of the same type, picklist to picklist, text to text, etc.).
3. You set up the Onboarding to Employee Central integration
   - In Onboarding Super Admin, enable the *SF_Notifications*. To enable specific messages, check the checkbox of the message on the feature activation screen.
   - In SuccessFactors Onboarding Admin, identify the onboarding fields that will show up in the mapping table. Navigate to *Onboarding* > *Settings* > *Data Dictionary* Select a folder, then choose a field and click on the *Fields*folder. Change the namespace to "integration," then select your tag (i.e. the product you are integrating with) and move the fields desired for mapping from the left menu to the right. The field type **must** be the same in Onbaroding as in Recruiting or Employee Central. For example, an Employee Central string field must be mapped to an Onboarding string field.
4. You initiate Onboarding from Recruting. This triggers the creation of OnboardingCandidateInfo, and the new hire. <REAL TIME>

During the Demo

1. Managers use Single Sign-On to log on to Onboarding to setup activities for the new hire.
2. The new hire receives a link to Onboarding to complete the paperwork outside of SuccessFactors HCM.
3. The PaperWorkDone notification is sent out, candidates appear in the *Manage Pending Hires* screen of EC.
4. A corporate user completes the hire in EC. A new hire user is created in SuccessFactors HCM. The new hire receives the credentials for SuccessFactors HCM by mail.
5. The new hire can log into the system and view the *Home Page* tiles.
6. Recruiting is updated with the User ID of the new hire and the status as hired. <REAL TIME>

B.5 Demo Instances Only: Create Division Sync Report

Prerequisites

You have the permission to create Employee Profile ad hoc reports.

Context

> **Note**
>
> **Tool: SuccessFactors Onboarding**

Procedure

1. Under *Analytics* > *Reporting* > *Ad Hoc Reports*, click *Create New Report*.
2. Under *Report Definition Type*, select *Employee Profile* and click *Create*.
3. On the *General Info* tab, enter a meaningful name such as 'Division Sync' or 'ONBOARDING-DivisionSync'.
4. On the *People* tab, click *Refine Criteria*, select *Other Filters* and click *OK*.
5. On the *Columns* tab, click *Select Columns*.
6. From *Employee Information*, select:
   - User SysID
   - Division
7. Click *Done*.
8. Still on the Columns tab, select *Group By*.
9. Click *Add another aggregate column* and ensure the *Aggregate Column* is set to *User SysID* and the *Function* is set to *COUNT*. The Division will automatically be selected under the *Detailed Columns*. Click *OK*.
10. Click *Save* and then generate the report to check that you see employee user counts by each division.

B.6 Demo Instances Only: Department Sync Report

Prerequisites

You have the permission to create Employee Profile ad hoc reports.

Context

Note

Tool: SuccessFactors Onboarding

Procedure

1. Under *Analytics* > *Reporting* > *Ad Hoc Reports*, click *Create New Report*.
2. Under *Report Definition Type*, select *Employee Profile* and click *Create*.
3. On the *General Info* tab, enter a meaningful name such as 'Department Sync' or 'ONBOARDING-DepartmentSync'.
4. On the *People* tab, click *Refine Criteria*, select *Other Filters* and click *OK*.
5. On the *Columns* tab, click *Select Columns*.
6. From *Employee Information*, select:
   - User SysID
   - Department
7. Click *Done*.
8. Still on the Columns tab, select *Group By*.
9. Click *Add another aggregate column* and ensure the *Aggregate Column* is set to *User SysID* and the *Function* is set to *COUNT*. The Department will automatically be selected under the *Detailed Columns*. Click *OK*.
10. Click *Save* and then generate the report to check that you see employee user counts by each department.

B.7 Demo Instances Only: Location Sync Report

Prerequisites

You have the permission to create Employee Profile ad hoc reports.

Context

> **Note**
>
> **Tool: SuccessFactors Onboarding**

Procedure

1. Under *Analytics* > *Reporting* > *Ad Hoc Reports*, click *Create New Report*.
2. Under *Report Definition Type*, select *Employee Profile* and click *Create*.
3. On the *General Info* tab, enter a meaningful name such as 'Location Sync' or 'ONBOARDING-LocationSync'.
4. On the *People* tab, click *Refine Criteria*, select *Other Filters* and click *OK*.
5. On the *Columns* tab, click *Select Columns*.
6. From *Employee Information*, select:
    - User SysID
    - Location
7. Click *Done*.
8. Still on the Columns tab, select *Group By*.
9. Click *Add another aggregate column* and ensure the *Aggregate Column* is set to *User SysID* and the *Function* is set to *COUNT*. The Location will automatically be selected under the *Detailed Columns*. Click *OK*.
10. Click *Save* and then generate the report to check that you see employee user counts by each location.

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