SAP SuccessFactors Onboarding

Technical and Functional Specifications

This specifications document describes key features and functionalities of SAP SuccessFactors Onboarding, as of the Q2017 release.

Key Features and Functionalities:

- Forms Management
- Task and Process Management
- New Hire Portal
- Document Center
- Reporting
- SAP SuccessFactors HCM Suite Integration
- Third Party Integration

Forms Management

Forms Management is the ability to capture the new hire data that is necessary to complete relevant new hire forms, electronically sign the forms, and track and route the forms to system users.

Key Feature	Description
Standard Forms	US State and Federal Compliance forms that are supported by SAP: Federal Form I-9, Federal Form W-4 and, State Withholding Forms, NY Wage Theft Prevention Act, CA Wage Theft Prevention Act, PA Residency Act.
Standard Global Forms	Supports forms for India, Canada, the UK, and Australia, including Canadian national and provincial Personal Tax Credit form, Australian tax file number declaration and superannuation standard choice form, UK starter checklist and P45, and Indian Provident Funds Declaration and Nomination Form and Transfer Claim Form.
Custom Forms	Customer-specific forms available for data entry.
e-Signature	Supports click-to-sign Adobe® PDF® forms, including user authentication.

Smart Data Entry Panels	Allow to collect all unique data necessary to populate forms, and create the files that are necessary to send to other applications (for example, core HR). These panels help prevent duplicate data entry across multiple forms and perform data validation on certain fields.

Task and Process Management

Key Feature	Description
E-Verify	E-Verify is an online system that compares information from an employee's Form I-9 to US government data to confirm an employment eligibility. E-Verify provides an automated link to federal databases to help employers determine employment eligibility of new hires and the validity of their Social Security numbers.
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 Notifications can be sent for different steps in any Onboarding process.
Hiring Manager Activities	Hiring managers can complete their new hire activities including assign buddy, welcome message, equipment provisioning, schedule meetings, recommended links, and goal setting.either via an iPad, iPhone, or an android device, The hiring manager activities are only available for hiring managers.
Localization Support	The Onboarding user interface is available for localization via a drop-down menu in the user interface.

New Hire Portal

This is a secure online destination for content and information geared towards the new employee (displayed in the 'About Us' tab). Information can be maintained by Customers and can include things like training content, benefits information, policies and procedures, or company values and cultural information.

Note: The 'About us' tab is not available on HP3.

Key Feature	Description
Permission Access	The 'About Us' content can be accessed either from within the SAP SuccessFactors HCM Suite, or directly (for example, through an e-mail link).
Content Management	The portal can contain content, documents, and videos for new hires, transferring employees, and exiting employees. The content is uploaded and managed by the Customer.
Personalized	As configured, content is driven by business rules so that it is specific to each User, based on the User profile.

Document Center

The document center facilitates document management by maintaining corporate and employee documents in a secure online environment.

Key Feature	Description
Virtual Electronic File Cabinet	Ability to access documents via any index, such as last name, employee ID, or document name.
Secure Storage and Access	Document-level security allows the Customer to set up specific groups to determine who can view which documents.
Audit Logs	Allows to track access of stored documents. Information retained includes identification of the authenticated party, the date and time of each access event, records of which documents were accessed, and action taken.

Key Feature	Description
Document Upload	Allows to automatically upload and index documents from SAP SuccessFactors Onboarding. Paper documents can be scanned, uploaded and indexed by the Customer to the document center.
Document Download	Allows to automatically download all the documents associated with a new hire, or download all documents of the same type. Using the Onboarding API, Customer can create a scheduled bulk download job to run at regular intervals.
Document Purge	Allows to automatically delete documents on a schedule basis according to company policy.

Reporting

SAP SuccessFactors Onboarding includes a report builder that allows Customers to create reports based on the data collected during the onboarding process. Customers can export the reports to a spreadsheet and save them as private or public templates.

Key Feature	Description
Standard Reports	Allows for preconfigured reports that can be filtered in various ways, such as by activity completion status.
Advanced Reports	Ability to create customized reports using a report wizard that allows Customer to build search criteria and determine sort order of the report results.
EEO Reports	Provides three predesigned EEO report templates that can be used to generate EEO reports based on data collected during the onboarding process.
Audit Trail Reports	Allows to create reports on system activities.
Signature Transaction Reports	Allows to produce reports that display the dates when the new employee and the corporate representative signed any onboarding documents.

Key Feature	Description
Ad Hoc reporting for Hiring Manager Activities	Enables to configure Ad Hoc reports for different parts of the Hiring Manager activities.

SAP SuccessFactors HCM Suite Integration

SAP SuccessFactors HCM Suite integration incorporates other SAP SuccessFactors HCM processes, if subscribed to, into the onboarding workflow and passes data to other SAP SuccessFactors HCM products.

Key Feature	Description
Home Page	Allows to include onboarding tiles on the home page side by side with key modules such as SAP SuccessFactors Learning and SAP Jam, so that employees have a single user experience across the suite.
Goals Management	Ability to create short term goals within the onboarding workflow.
Recruiting	Allows to create new hire records created from SAP SuccessFactors Recruiting Management, which then initiate the onboarding workflow.
Employee Profile	Allows to show public profile data of employees in the organization to the new hire.
SAP HCM (on premise)	Allows to create pre-hire and employee records from SAP's on premise Onboarding solution, and to initiate offboarding when terminations occur.
Employee Central	Allows to automatically create crossboarding and offboarding activities. When Hiring Manager or job classification data changes in Employee Central, the changes are maintained in Onboarding.
Pre-Day 1 Access	Ability to grant new hires access to certain areas of SAP SuccessFactors HCM before their start date.

Key Feature	Description
Intelligent Services	Allow to automatically reassign or restart steps in Onboarding based on changes to key fields. Intelligent Services can also trigger step restart or reassignment for Offboarding based on changes in Employee Central. Intelligent Services also trigger crossboarding events in Employee Central.
Foundation Import	Supports data population on panels and keeps the corporate structure up-to-date. This allows User data to flow from Onboarding to Employee Central to create the employee (User).

Third-Party Integration (may be subject to additional third party terms, as applicable)

Key Feature	Description
Standard New Hire Integration	Allows for integration to any ATS or HRIS via the standard import/ export template.
Integration to Tax Break	Supports Work Opportunity Tax Credits (WOTC) integration with SAP's partner - Tax Break.
Standard Document Management Integration	Enables integration to any document management system using the Document Center standard export.
DocuSign	Supports use of DocuSign which digitally captures signatures on forms that require a single signature step.
Secure FTP for Data Export	Allows additional pgp encryption for data transfers to SFTP sites.

User Scoping

Population of workers/employees eligible to be Onboarded into the customer organization. Population is typically limited to employees but can be expanded to include 3rd party, external resources if the customer views these as part of one contiguous workforce to Onboard. This User count is equal to the highest number of Users, excluding Employee Central, Functional Use, and Learning, Functional Use, in the Customer's subscription. It is also typically equal to that of Recruiting if also part of the Customer's subscription as it is considered the same population.

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