



PUBLIC

SAP SuccessFactors Onboarding Configuration Optimization Techniques

Document Details

Name	Objective	Audience
SAP SuccessFactors Onboarding Configuration Optimization Technique	This document covers topics such as business rules for Onboarding, compliance forms for UK and Australia. Additionally, this document demonstrates how to create custom objects for the data collection process in Onboarding	SAP SuccessFactors Customers: IT and HR professionals. SAP SuccessFactors Implementation Partners: Consultants, solution architects, and project managers

Change Log

Version	Date	Description
1.0	11.09.2020	Initial version

Supported Releases

Product	Release - From	Release-Valid till
SAP SuccessFactors Employee Onboarding	2005	

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The recommendations in this document are based on the functionality available up to SAP SuccessFactors release mentioned above. Future functionality can impact the recommendations provided by this document. We strive to keep these recommendations up-to-date, however, in case you find that recent new functionality has not yet been considered in the latest version of this document, please reach out to your Customer Success Manager / Partner Delivery Manager or send an email to SAPSuccessFactorsIDPDoc@sap.com.

Implementation Design Principles (IDPs) for SuccessFactors solutions are delivered by SAP for helping customers and partners on how to choose the most appropriate strategy and solution architecture for SuccessFactors implementations. IDPs are compiled taking into consideration the experience of many implementation projects and addressing frequent business requirements as well as real-life implementation challenges. They are continuously reviewed and updated as product functionality evolves. In addition, the reader is advised to read and familiarize with essential and additional product-related documentation which includes Implementation Guides, SAP Notes, SAP Knowledge Base Articles, and additional assets as referenced in this document, see chapter 5.8.6.

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1 TERMINOLOGY

The following table explains some abbreviations used in this document.

Abbreviation	Description
EC	SAP SuccessFactors Employee Central
ERP	SAP Enterprise Resource Planning often referred to in the document pertains to SAP HCM on-premise system
MDF	Meta Data Framework
RBP	Role-Based Permissions
UI	User Interface
ONB	Onboarding
CDC	Custom Data Collection
IC	Integration Center

2 ABSTRACT

There are many scenarios in Onboarding that need a thorough understanding of how to configure certain features efficiently. The first set of topics covered are related to the usage of business rules for Home page customization, email services, Onboarding programs, and process variants. This document also talks about activating compliance forms for the UK and Australia.

Additionally, this document demonstrates how to create custom objects for the data collection process in Onboarding based on PDF documents.

This document also covers how the data collected in custom objects in onboarding can be transferred to Employee Central.

3 INTRODUCTION

Onboarding relies on business rules to determine the user experience for new hires based on attributes such as organizational information. In this document, certain scenarios are listed where business rules can control the following

- The Home Page Tiles visible to the new hire
- Email Notifications and notification content that the new hire will receive.
- The Process Variant used for the new hire's specific scenario
- The Onboarding Program associated with the new hire's specific scenario

Additionally, there are some data collection requirements necessary to ensure the smooth flow of UK and Australian Compliance Forms as well as PDF forms referencing Custom Data Collection objects. Please note that this document will only cover the creation and generation of documents using a .pdf editor such as Adobe Pro DC.

Some customers also want the data collected during Custom Data Collection and then have the same data available in Employee Central through the People Profile.

4 BUSINESS REQUIREMENT

The following are the requirements that are covered in this document.

4.1 Functional Requirements

SI No	Topic	Description	Section
1	Onboarding Custom Home page Tiles- Visibility	The visibility of the custom time should be based on the country of employment Business rules can be defined to permit the tile to appear on the home page to the new hires in specific countries.	5.1
2	Onboarding Email Services for a specific country	Email notification should be designed in such a way as to trigger for the specific country during the Onboarding new hire process.	5.2
3	Choosing the process variant based on the country of employment	Based on the country of employment the process variant must be chosen.	5.3
4	Choosing the onboarding program based on the country of employment	Based on the country of employment the Onboarding Task must be chosen.	5.4
5	Compliance forms for UK and Australia	Activating and generating the compliance forms for the United Kingdom – Starter checklist and Australia – Tax file number declaration and Superannuation Standard choice forms.	5.6
6	Create custom objects for the data collection process in Onboarding for PDF forms	How to create and generate documents using a .pdf editor such as Adobe Pro DC. This document does not include information on creating forms using .dip and Adobe LiveCycle Designer (SAP version).	5.7
7	Onboarding data CDC to EC MDF objects	Data collected in custom objects in onboarding can be transferred to Employee Central.	5.8

4.2 Technical Requirements

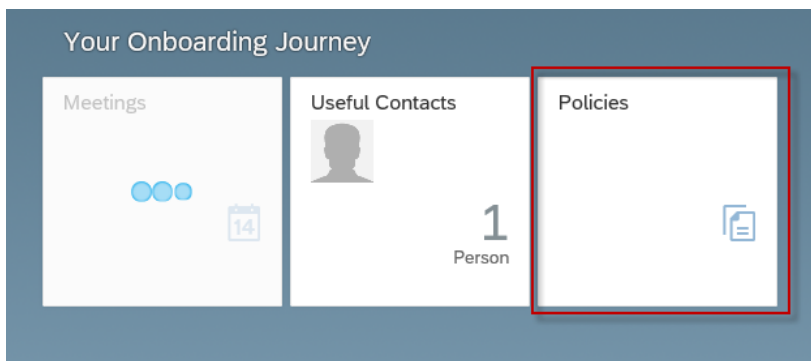
SI No	Topic	Description	Section
1	Tracing business rules	Ability to switch on the trace for business rules to check its execution.	5.5

5 DETAILED SOLUTION

5.1 Custom Home Page Title

Custom Home Page tiles can be configured to appear in the Onboarding section of the new hire's Home Page. One recommended use of these tiles is to provide policies or non-signature forms for the new hire to reference in a convenient location. Using business rules, we can determine which tiles and policies show up for a new hire based on their country or

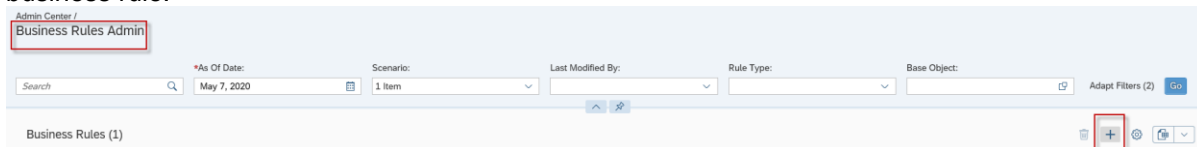
other attributes. Below is an example of how to restrict visibility based on the country of employment.



5.1.1 Configuring business rules to show custom tiles for a particular country

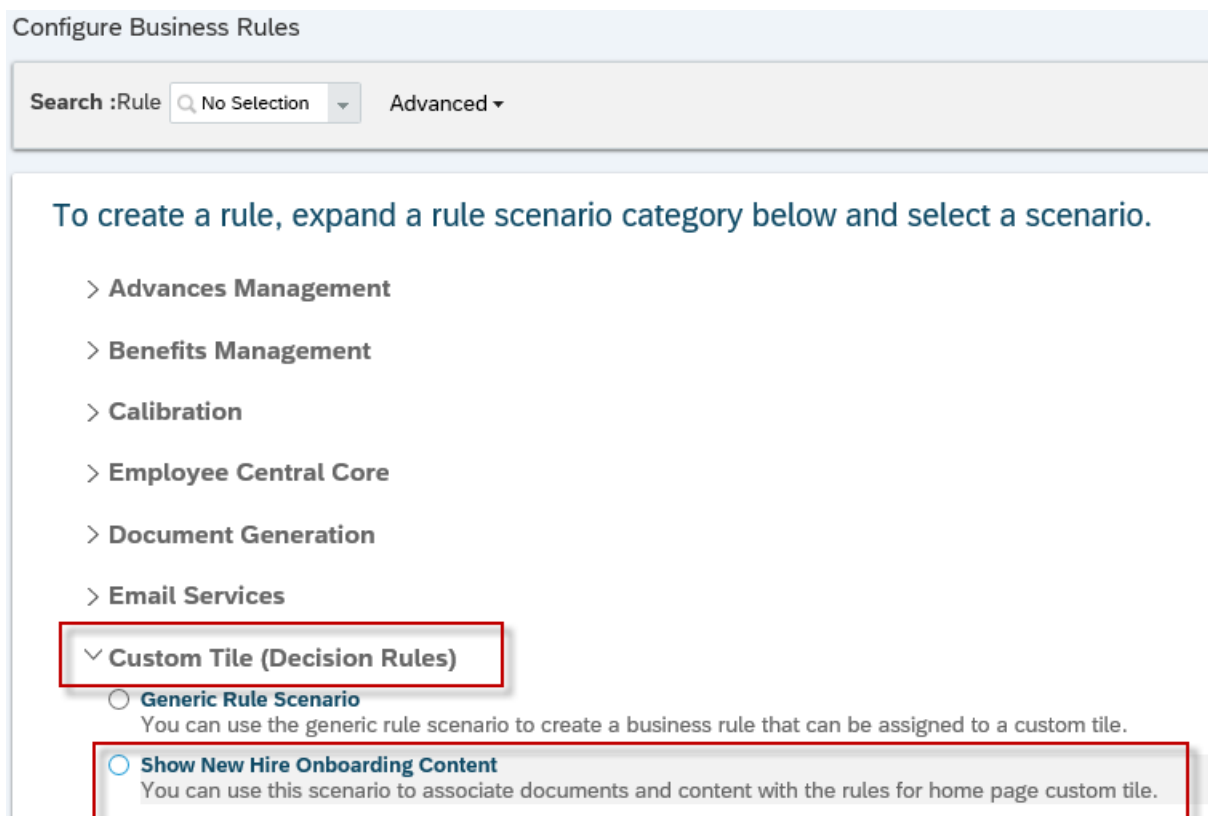
Step 1: Open transaction for creating business rules.

To create a business rule, navigate to Admin Center>Business Rules Admin and select the “+” to add the business rule.



Step 2: Select the right rule scenario.

In Configure Business Rules select rule scenario Custom Tile > Show New Hire Onboarding Content scenario.



Step 3: Enter the rule header.

Create your rule name as shown in the following example:

Show New Hire Onboarding Content

You can use this scenario to associate documents and content with the rules for home page custom tile.

Rule Name* ONB_Customer_Tile_Irel

Rule ID* ONB_Customer_Tile_Irel

Start Date* 01/01/1900

Description

[Continue](#)

Step 4: Add the 'If' condition

Create the rule for a specific country. In this example, we've considered the country of Ireland. Select Process and enter the criteria. Process Type is equal to Onboarding and the Process User Job information Legal Entity **Country** is equal to Ireland.

Note: The legal entity in Employee Central must be already associated with the country/region before creating this rule.

Back to Business Rules Admin
Configure Business Rules

Search Rule [No Selection] Advanced [Create New Rule](#)

History [01/01/1900 Rule created](#)

ONB_Custom Tile Ireland (ONB_Custom_Tile_Ireland) [Change Scenario](#) [Insert New Record](#)

Scenario: Show New Hire Onboarding Content

Basic Information

Start Date: 01/01/1900

Description:

Parameters

Name	Object
Context	System Context
Process	Process

[Collapse All](#) | [Expand All](#)

(0) Variables

If

and

- Process.Process Type is equal to Onboarding
- Process.User.Job Information.Legal Entity.Country is equal to Ireland (irel)

Then

[This action doesn't need to be specified.](#)

Step 5: Create the custom tile

Once the rule is created, go to the Admin center > Manage Home Page, and select Add Custom Tile. Enter a Tile name and select an icon for the custom tile as shown in steps 1 and 2.

1. General

*Tile Name:

Description:

2. Tile

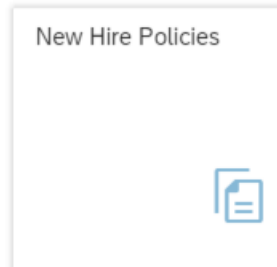
Type:

*Title:

Subtitle:

*Icon:

Preview



Step 6: Turn on the Rule-Based toggle.

Slide the Rule-based toggle to turn it ON, and select the rule base, and select Rule Scenario "Show New Hire Onboarding Content". Select the newly created business rule from the drop-down. In this example, the created rule is 'ONB_Custom Tile Ireland'.

☐ No Template

☐ Raw HTML

Rule-based: ☒

Rule Scenario:

Rule:

☒ ONB_Custom Tile Ireland (ONB_Custom_Tile_Ireland)

☒ ONB_Custom Tile Northern Ireland (ONB_Custom_Tile_Northern_Ireland)

Language:

*Content:

Step 7: Assign the business rule created earlier.

Select the correct tile. For example, to add content for the specific country/region tile, select ONB_Custom Tile Ireland. Click on the Document icon to insert the Document link to the tile.

Rule Scenario: Show New Hire Onboarding Content

Rule: 4 Items

Default: ONB_Custom Tile Ireland (ONB_Custom Tile Ireland) ONB_Custom Tile Northern Ireland (ONB_Custom Tile Nort >

Language: English US (English US)

*Content:

Paragraph 21pt

Title

Sub title

Body text here...

Cancel

Step 8: Select the document that must be a part of the custom tile

Select your document. Note you must have your policy uploaded before this step under Admin> Manage Documents.

Documents			
<input type="checkbox"/> Document Category	Document Name	Document Description	Document ID
<input type="checkbox"/> POLICY	SAPNextGENEmployeeConfidentialityAgreement.pdf	Employee Confidentiality Agreement	8100

Cancel Submit

In manage Documents, use the upload icon on the bottom right corner of the screen


Policy	1 KB
Others	36.52 MB

Upload

Select Policy document as the document category.

*Select a document: [Browse...](#)

Description:

*Document Category: 


Country/Region:

[Cancel](#)[OK](#)




































For more information such as type of attachments, limits, etc. Please refer to the guide on [document management](#).

Step 9: The system generates the link for the custom tile.

The system will then generate the link for your custom tile. We recommend that you move the link below the title, subtitle, and body text as the system generates the link above the Title.

Language: 

*Content:



4. Assignments

Section: **Your Onboarding Journey** ▼

User Group: **All Employees** ⓘ ▼ ...

Active: ☒ Always

☐ Date Range

☐ Based on Start Date

-180 180

Review

Cancel Save

5.2 Email Notifications

Onboarding Email Services can be triggered by specific business rules to send a notification to the new hire based on their job information, country/region, legal entity as shown in this example

This document provides the best practice solution for creating business rules for email notification to trigger for the specific country during the Onboarding new hire process.

5.2.1 Business Rules - Steps for configuration

Step 1: Create a business rule using the rule scenario

You want to begin the first step by creating your business rule first for the specific country. Begin from the admin center and select Configure Business Rules and enter Business Rules Admin and select the “+” to add the business rule.

Begin the first step by creating your business rule to specify the relevant country. From the admin center, select Configure Business Rules and enter Business Rules Admin. Next, select the “+” to add the business rule.

Select Email Services>Filter Email Template> Select Create New Rule

Back to Business Rules Admin
Configure Business Rules

Search (Rule) [No Selection] Advanced Create New Rule

To create a rule, expand a rule scenario category below and select a scenario.

- Employee Central Core
- Document Generation
- Email Services**
 - Filter Email Template**
You can use this scenario to filter email template during email triggering.
 - Select Email Message Locale
You can use this scenario to select email message language during email triggering.
- Custom Title (Decision Rules)
- Intelligent Services Center (ISC)
- Metadata Framework
- Onboarding 2.0
- Position Management
- Performance Management Weighted Rating
- Recruiting
- Time Management
- Basic

Filter Email Template
You can use this scenario to filter email template during email triggering

Rule Name* Testemail
Rule ID* testemail
Start Date* 01/01/1900
Description

Email Category (OAB) External User Welcome Me...
Email Category used for Email Message construction

Continue

The Business rule applied to trigger the Email notification to a specific country is “Process.User.Job Information. Legal Entity. Country” is equal to value Ireland (IRL) click save.

Back to Business Rules Admin
Configure Business Rules

Search (Rule) [No Selection] Advanced Create New Rule

Testemail (Testemail)
Scenario: Filter Email Template

Basic Information Edit

Start Date 01/01/1900
Description
Email Category (OAB) External User Welcome Message Category

Parameters

Name	Object
Context	System Context
Process	Process

Collapse All Expand All

Variables

If

Process.User.Job Information.Legal Entity.Country is equal to Value Ireland (IRL)

Then

Trigger email notification.

Cancel Save

Step 2: Navigate to email services

Go to the Email services from the admin center tool search

Tool Search Emails services

Click on Manage Template

Email Services



[Active Templates](#) [Email Status](#) [Configure Triggers](#) [Email Categories](#) [Email Settings](#)

These are the active email notification templates for your company

Manage Template Filter Refresh Up Arrow

Step 3: Copy the template.

Find the email template that you will use to apply the business rule towards and click on the paper icon to copy the email template.

	Trigger	Category	
<input checked="" type="checkbox"/> (ONB) External User Welcome Message Template	(ONB) External User Welcome Message Trigger	(ONB) External User Welcome Message Category	Once  
	(ONB) Furnish		

This pop-up window will appear, and you need to select a copy.

Enter New Template Title

Template Title

Copy (ONB) External User Welcome Message Template

☒ Disable source template

Copy

Cancel

Step 4: Edit the template.

In the copied email template, you can edit the template description if needed.

Admin Center / Email Services / Manage Email template /

Edit Template: Copy (ONB) External User Welcome Message Template

1

Title and Description

2

Define rules

3

Email Content

1. Title and Description

*Category:

(ONB) External User Welcome Message Category

Welcome Message notification to update onboarder with reset password link

*Template Title:

Copy (ONB) External User Welcome Message Template

Template Description:

Welcome Message notification to update onboarder with reset password link

Step 5: Assign the business rule to filter the email notification.

The next step within your copied email template (as seen below) is to apply your business rule to the email template. Within the Filter Business Rule field box, your new rule will appear in the dropdown for you to choose from.

2. Define rules

*Trigger:

(ONB) External User Welcome Message Trigger

Notification to update onboarder with reset password link

☐ Set Up Reminder

Filter Business Rule

Language Selection Business Rule

*Priority

High

After you have selected your business rule continue to complete the email template by customizing the body of the email template.

For creating a language selection business rule please refer to the [guide](#) for more details.

A screenshot of the business rule is shown below

● emailLocale (emailLocale)

Scenario: Select Email Message Locale [Change Scenario](#)

Basic Information

Start Date 01/01/1900

Description

Email Category (ONB) External User Welcome Message Category

Parameters

Name	Object
Context	System Context
Process	Process
EmailMessage	EmailMessage

Variables

If

Process.User.Job Information.Company.Country is equal to Ireland (IRL)

Then

Set EmailMessage.locale to be equal to en_IE

Step 6: Complete the template.

Fill in all other fields in the email content as applicable based on the customer requirement

3. Email Content

To Recipient Builder

Onboarding Role-Based Recipient Builder

Gets Onboarding recipients by role

Roles

Onboarder

CC Recipient Builder

BCC Recipient Builder

Default language

*Email Subject:

Welcome to the Onboarding Application

Body Text:

Insert token

Insert token

Verdana 11pt

Hello [[FirstName]] [[LastName]],

The forms needed for your orientation have been packaged electronically in our Onboarding system. Prior to coming to orientation, you will need to complete your New Hire paperwork.

Click [[LoginUrl]] to log on to the Onboarding Home page to complete the tasks related to your Onboarding. Your login credentials are:

This Configuration allows you to filter email templates based on the country of legal employment, In the same way, you could configure email templates based on other attributes like location, legal entity, or a business unit.

5.3 Process variant Manager

The Process Variant Manager is used to add flexibility to the standard Onboarding processes. This functionality can be used to create a specific business process that can be a better fit for your business requirements. This tool can be used to maintain different country processes as well as you can set Internal Hire process. This allows you to set Data collection steps in Parallel.

For example, you may need to bypass the New Hire Review step for only one specific Country. All other countries are required to use the New Hire Review step for all new hires. Using the Process Variant Manager and creating a business rule will enable you to meet this requirement.

The following steps provide steps to create a process variant and create a business rule to bypass the New Hire Review step for only one specific County (Ireland).

The following is an example of a best practice solution for creating business rules when using the Process Variant Manager for a business process in a specific country during the Onboarding new hire process.

5.3.1 Steps in configuration

Step 1: Add a new process variant.

The Process Variant Manager can be accessed from the Admin Center. Select “+ Process Variant” to add a new Process Variant.

Admin Center /

Process Variant Manager

Manage Process Variants and define Business Rules

Define Business Rules

+ Process Variant

ID	Process Variant	Description	Process Type	Status	Actions
Onboarding2ProcessCoreWorkflow	Default Onboarding Process	Default Onboarding Process	Onboarding	Active	

The Add Process Variant window will display, and you will be required to provide a unique ID for your Process Variant and the Process Variant Name. (In the example below, name and ID are the same). Enter in a Description and click Save. It is recommended to name the process something that clearly describes its purpose.

Add Process Variant

Add a new Process Variant

***ID:** ?

Process Type:

***Process Variant Name:** ?

Description: ?

The system will automatically return you to the Process Variant Manager page as the new process variant has just been added to the list of processes. Locate your new Process Variant and click on the process variant name to create the process flow. Note: The new Process Variant is currently inactive. This is expected behavior as you need to create the process flow and add a business rule before activating.

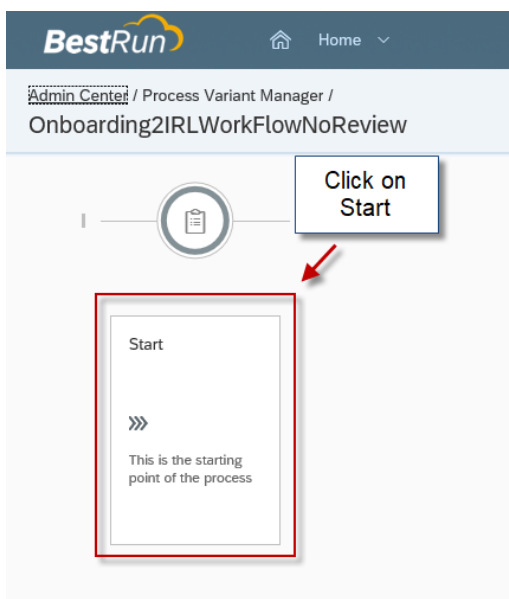
Admin Center / Process Variant Manager
Define Business Rules [+ Process Variant](#)

Manage Process Variants and define Business Rules

ID	Process Variant	Description	Process Type	Status	Actions
Onboarding2IRLWorkFlowNoReview	Onboarding2IRLWorkFlowNoReview	No New Hire Review Step	Onboarding	Inactive	Edit Delete
Onboarding2ProcessCoreWorkflow	Default Onboarding Process	Default Onboarding Process	Onboarding	Active	Edit

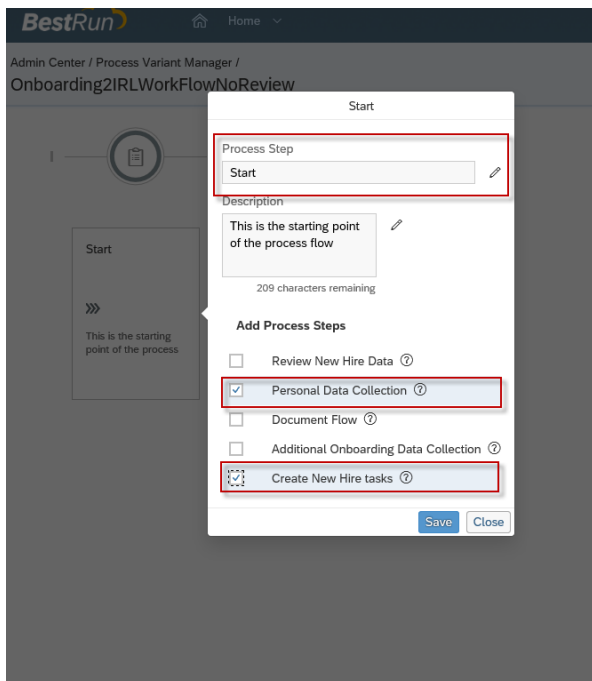
Step 2: Create process steps.

Create the process flow by clicking on the Start node to add the process step.



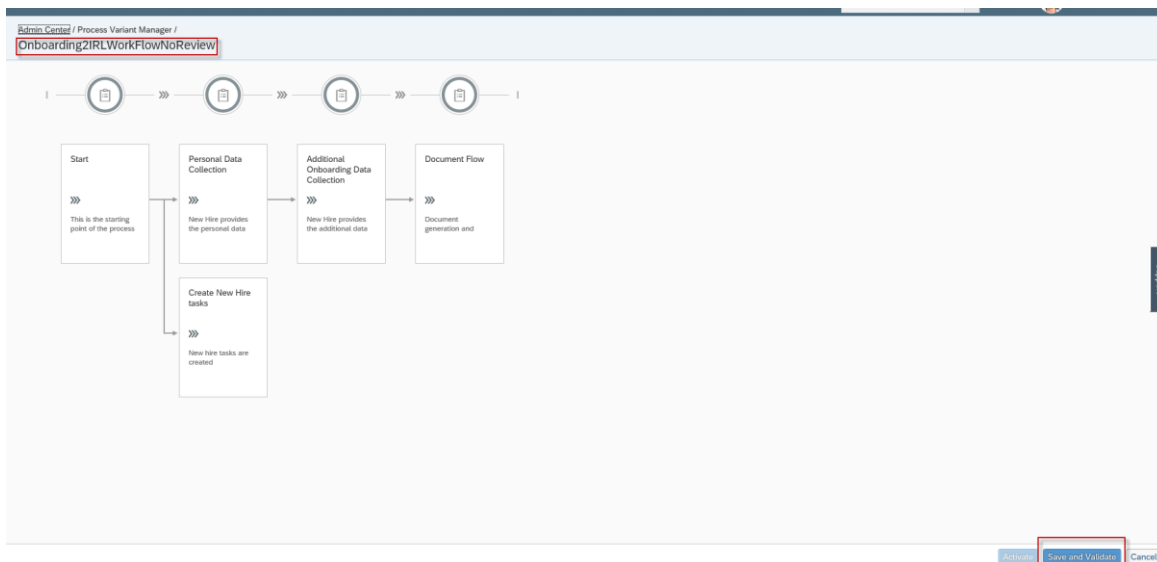
On the newly created Process Variant Onboarding2IRLWorkFlowNoReview, Review New Hire Data Step is removed. You will want to ensure you do not select that step to be a part of the process step. Begin by

checking the Personal Data Collection for the new hire and Create New Hire Tasks for the Hiring Manager to view the New Hire Task Tile.



Once you have added these 2 steps to your new process you will need to add the remaining steps of Additional Onboarding Data Collection and Document Flow from the process step dialog box. Once this has been completed your new Process Variant will look like the example below. Click Save and Validate. The process variant is saved and validated successfully. Click OK to return to the newly created process flow. Click Activate to deploy the process variant in the Business Process Engine.

Please note, the steps must follow the standard workflow. For example, you cannot place the Document Flow step before the Personal Data Collection step



Step 3: Create a business rule.






Create your Business Rule. The business rule that is going to be created will be specific for new hires in the country of Ireland and if the new hire's job information has the legal entity (company) that is in the country of Ireland. The business rule will direct the system to use the newly created Process Variant ONB2IRLWorkflowNoReview.

Navigate to the Process Variant Manager and click on Define Business Rules. Notice that your newly created process is Active.

Admin Center / Process Variant Manager

Manage Process Variants and define Business Rules

Define Business Rules + Process Variant




ID	Process Variant	Description	Process Type	Status	Actions
Onboarding2IRLWorkflowNoReview	Onboarding2IRLWorkflowNoReview	No New Hire Review Step	Onboarding	Active	  
Onboarding2ProcessCoreWorkflow	Default Onboarding Process 	Default Onboarding Process	Onboarding	Active	

Click on the “+” symbol to add a new business rule.

Admin Center / Business Rules Admin

*As Of Date: May 30, 2020 Scenario: Last Modified By: Rule Type: Base Object: Adapt Filters

Business Rules (471)

Select Process Variant Business Rule.

Onboarding 2.0

- ☐ **Configure Onboarding or Offboarding Process Flow**
You can use this scenario to configure the execution of steps or actions in the Onboarding or Offboarding process flow. The configuration should be based on fields under the process object.
- ☐ **Initiate Offboarding Configuration**
You can use this scenario to enable offboarding processes for specific areas of your business.
- ☐ **Select Offboarding Task Configuration**
Use this scenario to select an Offboarding Program for Offboarders
- ☐ **Select Onboarding Task Configuration**
Use this scenario to select an Onboarding Program for Onboarding Candidates
- ☐ **Update Onboarding or Offboarding Process Object**
You can use this scenario to set values for fields under the Onboarding or Offboarding process object. These values are used by subsequent steps in the process flow.
- ☐ **Assign Central Orientation Meetings**
You can use this scenario to assign Central Orientation Meetings to an Onboarding Candidate
- ☐ **Assign Forms**
You can use this scenario to assign forms during an Onboarding or Offboarding process flow
- ☐ **Select What-To-Bring Configuration**
You can use this scenario to select a Prepare for Day One List for an Onboarding Candidate
- ☐ **Configure the Period to Close and Archive Onboarding or Offboarding Processes and Tasks**
You can use this scenario to close and archive onboarding or offboarding processes and tasks based on the number of days past the start date.
- ☐ **Initiate Internal Hire Configuration**
You can use this scenario to enable Internal Hire processes for specific areas of your business.
- ☐ **Assign a responsible group to review New Hire data or Employee data.**
Use this scenario to select a responsible group for New Hire Data or Employee Data Review.
- ☐ **Select Process Variant**
Use this rule to select a process variant for the Onboarding process
- ☐ **Select Australia Compliance Configuration**
Use this scenario to select a configuration to prepopulate data for the Australia Superannuation form.

> Position Management

Add the Rule Name and Rule ID Along with the Description. Click Continue.

Select Process Variant

Use this rule to select a process variant for the Onboarding process

Rule Name* 2IRLWRKFLOWNoReview

Rule ID* ONB2IRLWRKFLOWNoRe

Start Date* 01/01/1900

Description No New Hire Review Step for Ireland

[Continue](#)

In the example business rule below, if the Job Information and Company(Legal Entity) located in the Country of Ireland exist then apply the new process variant workflow that was created.

(ONB2IRLWorkFlowNoReview). If the Country of Ireland does not exist, then use the default Onboarding Process. Click Save.

Back to Business Rules Admin
Configure Business Rules

Search :Rule No Selection Advanced Create New Rule

ONB2IRLWRKFLOWNoReview (ONB2IRLWRKFLOWNoReview)

Scenario: Select Process Variant

Basic Information

Start Date 01/01/1900

Description No New Hire Review Step for Ireland

Parameters

Name	Object
Context	System Context
Process Variant Rule Model	Process Variant Rule Model

[Collapse All](#) [Expand All](#)

Variables

[Add Variable](#)

If

Process Variant Rule Model.Process.User.Job Information Company.Country is equal to Value Ireland (IRL)

Then

Set Process Variant Rule Model.Process Variant to be equal to Value Onboarding2IRLWorkFlowNoReview...

[Add Else If](#)

Else

Set Process Variant Rule Model.Process Variant to be equal to Value Default Onboarding Process (On...

[Cancel](#) [Save](#)

5.3.2 Optimizing the rule for multi-country based on Company(Legal Entity)

Use Case: In the case of multiple country implementation, there could be situations where for different legal entities there could be different process variants. The business rule can grow longer with more combinations of process variants and the associated legal entity. Maintaining such rules post the implementation phase may become a challenge if too many process variants are used.

Solution:

A lookup table can be used to make maintenance easy. The customer must maintain only the lookup table rather than changing the business rule every time there is a new legal entity or update in the associated process variant.

Step 1: Create the Lookup table

Back to: [Admin Center](#)

Configure Object Definitions

Search Include Inactives: [Create New](#)

Object Definition: **LookupProcessVariant (cust_LookupProcessVariant)** [Take Action](#)

* Code **cust_LookupProcessVariant**

* Effective Dating **Basic**

API Visibility **Editable**

* Status **Active**

MDF Version History **No Selection**

Default Screen **LookupProcessVariant**

Description

API Sub Version **V1.1**

Subject User Field

Workflow Routing

Pending Data **No**

Todo Category **Generic Object Change Requests**

Fields

Name	Database Field Name	Maximum Length	Data Type	(21) More
externalCode	externalCode	38	Generic Object	Details
externalName	externalName	128	String	Details
effectiveStartDate	effectiveStartDate	10	Date	Details
cust_LookupProcessVariant	sfFields.sfField1	38	Generic Object	Details
mdfSystemEffectiveEndDate	effectiveEndDate	10	Date	Details
mdfSystemTransactionSequence	transactionSequence	255	Number	Details
mdfSystemInternalCode	internalCode	255	Number	Details

- Select Details for "externalCode" check that the Valid Values Source "LegalEntity". The label needs to be updated to a Legal Entity.

Details

Name **externalCode**

Database Field Name **externalCode**

Maximum Length **38**

Data Type **Generic Object**

Valid Values Source **LegalEntity**

Hide Old Value **No**

Decimal Precision

Include Inactive Users **No**

UI Field Renderer

Transient **No**

Help Text

Private or Sensitive Information **No**

Show Trailing Zeros **No**

Default Value

Hide Seconds **No**

Required **Yes**

Visibility **Editable**

Status **Active**

Label **Legal Entity**

Cascade **None**

Inactivated By **No Selection**

End Of Period **No**

Rules

External Code

Field Criteria

Source Field Name	Destination Field Name	Default Destination Value	Status
effectiveStartDate	effectiveStartDate	1900-01-01	Active

[Done](#)

Create a custom field for process variant

Details

Name	externalCode
Database Field Name	externalCode
Maximum Length	38
Data Type	Generic Object
Valid Values Source	LegalEntity
Hide Old Value	No
Decimal Precision	
Include Inactive Users	No
UI Field Renderer	
Transient	No
Help Text	
Private or Sensitive Information	No
Show Trailing Zeros	No
Default Value	
Hide Seconds	No
Required	Yes
Visibility	Editable
Status	Active
Label	Legal Entity ?
Cascade	None
Inactivated By	No Selection
End Of Period	No

Rules

External Code

Field Criteria

Source Field Name	Destination Field Name	Default Destination Value	Status
effectiveStartDate	effectiveStartDate	1900-01-01	Active

Done

- Select Details for cust_LookupProcessVariant field name. Check that the Valid Value Source is ONB2ProcessVariant and create a label name.

Details

Name	cust_LookupProcessVariant
Database Field Name	sfFields.sfField1
Maximum Length	38
Data Type	Generic Object
Valid Values Source	ONB2ProcessVariant
Hide Old Value	No
Decimal Precision	
Include Inactive Users	No
UI Field Renderer	
Transient	No
Help Text	
Private or Sensitive Information	No
Show Trailing Zeros	No
Default Value	
Hide Seconds	No
Required	No
Visibility	Editable
Status	Active
Label	Process Variant ?
Cascade	None

Step 2: Create data for the lookup table.

Navigate to Manage Data and in the Create New field, select the “LookupProcessVariant” from the dropdown. In this section, you can create your “LookupProcessVariant” and add all the legal entities that you want to bypass the new hire review step.

Select the Legal Entity, enter an effective date, then select the process Variant that you created. In the example above the name of the process Variant created is Onboarding2NewWorkFlowNoReviewStep. Click Save. To add more companies (Legal Entities) return to Manage Data and select create new find the LookupProcessVariant and keep adding all the companies as needed. So for every combination of the legal entity and process variant a new entry must be created.

SI Number	Legal Entity	Process Variant
1	Best Run Germany	Process variant DE
2	Best Run SE	Process variant 2
3	Best Run New York	Process variant 3
4	Best Run Canada	Process Variant 4

Once the lookup table entries have been created, you can create the business rule.

The screenshot shows the 'Admin Center' interface for 'Manage Data'. The main heading is 'LookupProcessVariant:'. Below it, there are search filters: 'Legal Entity' (No Selection), 'effectiveStartDate' (06/12/2020), and 'Process Variant' (No Selection). A 'Create New' button is highlighted with a red box. A dropdown menu is open, showing a list of lookup tables, with 'LookupProcessVariant' highlighted.

Step 3: Create the business rule.

In this step, the business rule created is a simple rule which reads the lookup tables and assigns the process variant based on the lookup table entries for the corresponding legal entity

The screenshot shows the 'ProcessVariant (ProcessVariant)' business rule configuration page. The 'Scenario' is 'Select Process Variant'. The 'Basic Information' section shows 'Start Date' as 01/01/1900. The 'Parameters' section shows 'Context' as 'System Context' and 'Process Variant Rule Model' as 'Process Variant Rule Model'. The 'Variables' section shows a variable 'var_LookupProcessVariant' defined as 'Lookup(LookupProcessVariant)'. The 'If' section contains a condition: 'Process Variant Rule Model.Process.User.Job Information.Company is not equal to Null'. The 'Then' section contains an action: 'Set Process Variant Rule Model.Process Variant to be equal to Lookup(LookupProcessVariant)'. The 'Else' section contains an action: 'Set Process Variant Rule Model.Process Variant to be equal to Default Onboarding Process (Onboarding2ProcessCoreWorkflow)'.

5.4 Selecting the Onboarding program using rules

The Onboarding program is a group of tasks configurable for an Onboarding participant. The objective of having multiple programs is to allow the flexibility to tailor the tasks based on different legal entities or countries.

In this section, a business rule is used to choose the Onboarding program for a particular country.

5.4.1 Steps to configure Onboarding program

Step 1: Navigate to the transaction Manage Onboarding and Offboarding Task

Click on the “New Program” or copy an existing program.

Enter the ID, Program Name, and brief description. Add tasks that are relevant to the program

Manage Onboarding Program: Onboarding Program 2

*ID *Program Name

Brief Description

Add tasks that the participants can complete to build the onboarding experience for new hires [+ Add Task](#)

Task	Required	Overdue (before start date)	Responsible Group	
Write Welcome Message	No			
Recommend People	No			
Where to Go	No			
Request Laptop	Yes	14 days	Equipment group	
Request Phone	Yes	14 days	Equipment group	

Step 2: Update the task properties

Write Welcome Message

Add default text that participants can use while writing the welcome message

Subject [+ Insert token](#)

Welcome

Your Message [+ Insert token](#)

Welcome aboard [[First Name]]! We are excited to start working with you. Our Onboarding process is pretty intuitive and you can do all your paperwork from here. You will also be seeing various tiles with your other team members, links I have picked for you and your initial introductory meetings.

1704 characters remaining

Task Attributes

Required task: ☐ Yes ☒ No

[Done](#) [Cancel](#)

Step 3: Finalize the tasks

If you have copied a program remove tasks that are not related and save the program

5.4.2 Create a lookup table for efficient usage of rules

A business rule is needed to select the variant based on the country for this scenario. You would need a lookup table to optimize the rule.

Step 1: Navigate to Create Object configuration

Object Definition: Onboarding Lookup Program (cust_lookup_ONB_Program)

Take Action

Code cust_lookup_ONB_Program

Effective Dating Basic

API Visibility Not Visible

Status Active

MDF Version History No Selection

Default Screen

Label Onboarding Lookup Program

Description

API Sub Version V1.1

Subject User Field

Workflow Routing

Pending Data No

Todo Category Generic Object Change Requests

Fields

Step 2: Create fields for the lookup object

The lookup table should mainly contain two fields, Country/Region and Onboarding program.

- Field "externalCode" is of type generic object and the source object is country/region.
- Field "externalName" is hidden and is not used.
- Field Cust_ONB2ActivitiesConfig is of the type generic object and the source object is ONB2ActivitiesConfig.

Name	Database Field Name	Maximum Length	Data Type	(21) More
externalCode	externalCode	38	Generic Object	Details
externalName	externalName	128	String	Details
effectiveStartDate	effectiveStartDate	10	Date	Details
mdfSystemEffectiveEndDate	effectiveEndDate	10	Date	Details
mdfSystemTransactionSequence	transactionSequence	255	Number	Details
mdfSystemInternalCode	internalCode	255	Number	Details
mdfSystemEntityId	entityId	255	String	Details
mdfSystemRecordId	recordId	255	String	Details
mdfSystemStatus	effectiveStatusStr	255	Enum	Details
mdfSystemObjectType	objectType	255	String	Details
mdfSystemId	id	255	Number	Details
mdfSystemCreatedBy	createdBy	100	User	Details
mdfSystemCreatedDate	createdDate	35	DateTime	Details
mdfSystemLastModifiedBy	lastModifiedBy	100	User	Details
mdfSystemLastModifiedDate	lastModifiedDate	35	DateTime	Details
mdfSystemProxyUser	proxyUser	255	String	Details
mdfSystemRecordStatus	recordStatusStr	255	Enum	Details
mdfSystemOptimisticLockId	optimisticLockId	255	Number	Details
mdfSystemOptimisticLockUUID	optimisticLockUUID	255	String	Details
mdfSystemExternalUserVisibility	externalUserVisibility	1	Enum	Details
mdfSystemVersionId	versionId	255	Number	Details
cust_ONB2ActivitiesConfig	sFields.sField2	38	Generic Object	Details

Step 3: Create data

Once the object is created, use the manage data transaction to maintain the values of Onboarding programs based on countries. This mapping would be used in the business rule.

5.4.3 Business rule to select the program

In this rule, you can use a lookup table to determine the Onboarding program based on the country of employment,

Step 1: Navigate to configure a business rule

Choose the scenario Select Onboarding Task Configuration. Create the rule by giving ID and name

> Email Services

> Custom Tile (Decision Rules)

> Intelligent Services Center (ISC)

> Metadata Framework

▼ Onboarding 2.0

- ☐ **Configure Onboarding or Offboarding Process Flow**
You can use this scenario to configure the execution of steps or actions in the Onboarding or Offboarding process flow. The configuration should be based on fields under the process object.
- ☐ **Initiate Offboarding Configuration**
You can use this scenario to enable offboarding processes for specific areas of your business.
- ☐ **Select Offboarding Task Configuration**
Use this scenario to select an Offboarding Program for Offboardees
- ☒ **Select Onboarding Task Configuration**
Use this scenario to select an Onboarding Program for Onboarding Candidates
- ☐ **Update Onboarding or Offboarding Process Object**
You can use this scenario to set values for fields under the Onboarding or Offboarding process object. These values are used by subsequent steps in the process flow.
- ☐ **Assign Central Orientation Meetings**
You can use this scenario to assign Central Orientation Meetings to an Onboarding Candidate
- ☐ **Assign Forms**
You can use this scenario to assign forms during an Onboarding or Offboarding process flow
- ☐ **Select What-To-Bring Configuration**
You can use this scenario to select a Prepare for Day One List for an Onboarding Candidate
- ☐ **Configure the Period to Close and Archive Onboarding or Offboarding Processes and Tasks**
You can use this scenario to close and archive onboarding or offboarding processes and tasks based on the number of days past the start date.
- ☐ **Initiate Internal Hire Configuration**
You can use this scenario to enable Internal Hire processes for specific areas of your business.
- ☐ **Assign a responsible group to review New Hire data or Employee data.**
Use this scenario to select a responsible group for New Hire Data or Employee Data Review.
- ☐ **Select Process Variant**
Use this rule to select a process variant for the Onboarding process

Step 2: Create the If and Else conditions

If and Else conditions are the content of the business rule. Using a variable to hold data helps in optimizing business rules. The lookup table which was created in the previous steps is now used to read and assign the correct Onboarding program based on the country of employment.

✓ SelectProgram (SelectProgram)


Scenario: Select Onboarding Task Configuration [Change Scenario](#)

Basic Information

Start Date 01/01/1900

Description

Parameters

Name	Object
Context	System Context 
Process	Process

Variables

```
var_OnboardingProgram = Lookup(Onboarding Lookup Program)
                        Select Onboarding Program
                        where...
                        Effective Date is equal to System Context.Effective Date
                        Onboarding Lookup Program. Country is equal to Process.User.Job Information.Company.Country
```

If

and

- Process is not equal to Null
- var_OnboardingProgram is not equal to Null

Then

Set Process.Onboarding Tasks Configuration to be equal to var_OnboardingProgram

Else

Set Process.Onboarding Tasks Configuration to be equal to Onboarding Program 1 (ONBPRG1)

5.5 Business Rule Execution Log to debug business rules

Often after the creation of business rules, the system may not work as desired. The Business Rule Execution Log can be used to check a business rule execution and to find the exact problem. By using the rule tracer, you can download the business rule execution log and review the content of the log to determine why the business rule is not working.

Below are the steps to create a business rule execution log.

Step 1: Navigate to the transaction Business Rule Execution Log

Select Rule Trace from the Create New dropdown.

Back to: Admin Center

Business Rule Execution Log

Search Include Inactives:

Create New

Rule Trace:

Step 2: Enter the details to create a rule trace.

Fill in the fields below.

Code name - can be any code name. In this example, the name of ONB2WrkflowNoReviewStep is being used to keep it clear as to why the trace is being performed.

Name - The name that you enter in the name field will be the business rule execution log name that gets downloaded.

Start Date - should be the date you are going to run a new test to find the errors with your business rule. It is recommended to use the next day after your start date as the end date.

Login User - recommend the name of the user who is executing the process during the time of the error. Click Save.

Back to: Admin Center
Business Rule Execution Log

Search **Rule Trace** No Selection Include Inactives: No Create New No Selection

Rule Trace:

* Code
 * Name
 * Start Date
 * End Date
 * Login User

Log
Rules to be Logged (If Empty, All Rules Will be Logged)

Step 3: Perform the test

After you have created the rule trace, run a test (Onboarding transaction that is related to the rule) in your system.

Step 4: Download the rule trace

Go back to Admin Center > Business rule Execution Log. Find the rule trace that you created earlier and then download the log as shown below. Review your log to determine how to possibly correct your business rule.

Back to: Admin Center
Business Rule Execution Log

Search **Rule Trace** No Selection Include Inactives: No Create New No Selection

Rule Trace: ONB2WrkflowNoReviewS (ONB2WrkflowNoReviewStep) Take Action

* Code ONB2WrkflowNoReviewStep
 * Name ONB2WrkflowNoReviewS
 * Start Date 06/11/2020
 * End Date 06/12/2020
 * Login User Aanya Singh

Rules to be Logged (If Empty, All Rules Will be Logged)

No data for Rules to be Logged (If Empty, All Rules Will be Logged) available or you do not have the necessary permission.

Updated by sfadmin on Thursday, June 11, 2020 9:04:04 PM EDT

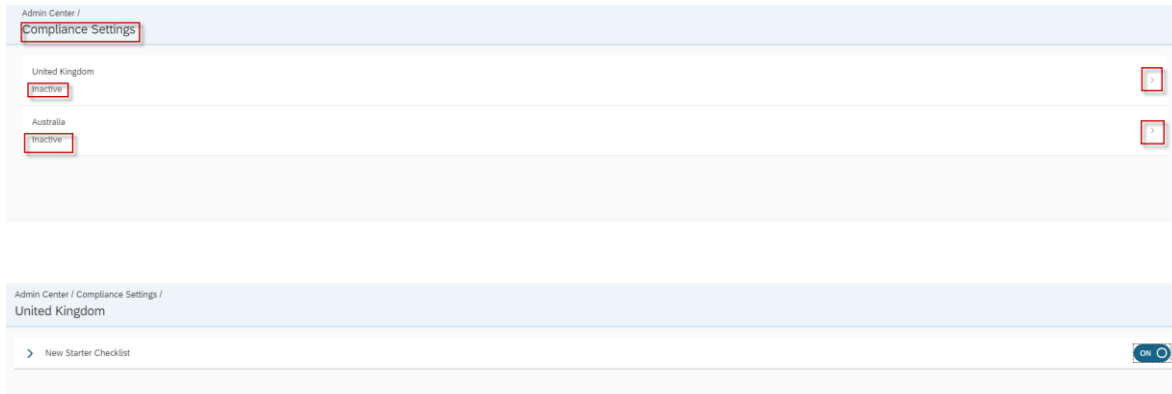
5.6 Compliance Forms for UK, Australia

This document provides instructions on activating and generating the compliance forms for the United Kingdom – Starter checklist and Australia – Tax file number declaration and Superannuation Standard choice forms. During the Provide Personal Data step for the new hire, these compliance forms have

mandatory fields that must present and be filled in. This will permit the forms to generate and the Compliance Tile to be present to the new hire.

These mandatory fields are required to have data before submitting the paperwork data on the compliance forms.

Once you have granted the admin permission you will need to activate the compliance forms. Start at the Admin Center>Compliance Settings. You will see that both the United Kingdom and the Australia compliance forms are inactive. Select ">" and slide the toggle switch to Activate the compliance forms for a country/region.



Once the forms are activated for both Australia and the United Kingdom. You may begin to use the forms.

5.6.1 Compliance Forms for the UK

The United Kingdom New Starter Checklist compliance form for the new hire.

The new hire must be hired in a company with the country the United Kingdom. There are two (2) different types of flows that are made available for the UK Starter checklist.

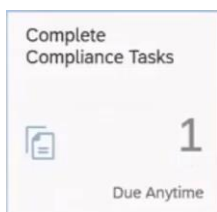
One of the flows is to collect data during the new hire step and capture the signature when the form has been filled during the compliance step.

In the second flow, the new hire can upload the P45 form instead of using the form data during the new hire step. By using the upload process the system will not capture a signature.

The following fields must be filled out by the new hire for these values to present on the UK Starter checklist form.

- Under PersonInfo> Date of Birth and Country of Birth.
- National ID Information, Note, the National Id that is captured in this section for the new hire will be prepopulated on the form.
- Personal Information > Gender is also a field that gets captured on the form.
- Home Address> Address Fields are other data that is captured on the form. Note. that this is very important that these fields are in the data model and configured to be mandatory so that the data is captured from the new hire allowing the compliance form to be generated.

Once completed, Submit the Paperwork Data. The new hire will see the Complete Compliance Tasks tile



Step 2: UK Starter Checklist option two uploading the document.

This section appears after the new hire has clicked on the Complete Compliance Tasks. The P45 form can be uploaded when you choose “Yes” to the answer to “Do you have form P45?”. The system will prompt you to upload the form and you can see the attachment. Once uploaded, click submit and the document flow completes without any signatures. The document will be available in the Document Management System(DMS).

The screenshot shows the 'Starter Checklist' for UK Compliance for New Hires. It includes instructions for the employee and employer. The question '*Do you have form P45?' has the 'Yes' radio button selected. To the right, under 'Attachments (1)', a PDF file named 'P45_ID-3044BC7E11A74BBF976F90BF48FB2716.pdf' is listed.

5.6.2 Compliance Forms for Australia

Step 1: Tax File Number Declaration

To activate the Tax file number declaration form, go to Admin Center>Compliance Setting. Locate the Tax file number declaration and toggle the off switch to On.

The screenshot shows the 'Tax file number declaration' toggle switch in the 'On' position. Below the toggle, there is a note: 'Use this form to complete a Tax file number declaration, so that the Employer can determine how much tax to withhold from payments made to the Employee.' and a status indicator 'No further configurations required.'

In the Superannuation Standard choice, you must add a new configuration to activate this form. This is so you can set up and provide the name of the super fund as seen below.

The screenshot shows the 'Add New Configuration' form. It includes fields for: Configuration Name, Description, Business Name, ABN, Name of Superannuation Fund, Unique Superannuation Identifier (USI), Phone Number (for product disclosure statement), Super Fund Website Address, and Responsible User. At the bottom, there is a checkbox 'Mark as Default Configuration' and 'Save' and 'Cancel' buttons.

Once the forms are activated, it is important to use the Australian Country Code AUS so that the Australian form can be assigned to the user.

Step 2: New hire provides data for the Australian form.

The following fields must be filled out by the new hire for these values to present on the Tax File Number Declaration and Superannuation Standard Choice form.

- PersonInfo-> Date of Birth and Country of Birth.
- National ID Information> Mandatory fields Tax File number must be captured
- Home Address fields

Once complete Submit paperwork Data.

Step 3: Superannuation Standard Choice Form.

Once the new hire completes and submits the first form of the Tax File Number Declaration, the system will redirect them back to the homepage where they will need to continue to click on the “Complete the Compliance Tasks” tile to complete the superannuation Fund details form.

The screenshot shows a web interface titled "Complete Compliance Tasks". It features a table with two columns: "Form Name" and "Actions".

Form Name	Actions
Tax File Number Declaration	Start
Superannuation Standard Choice	Start

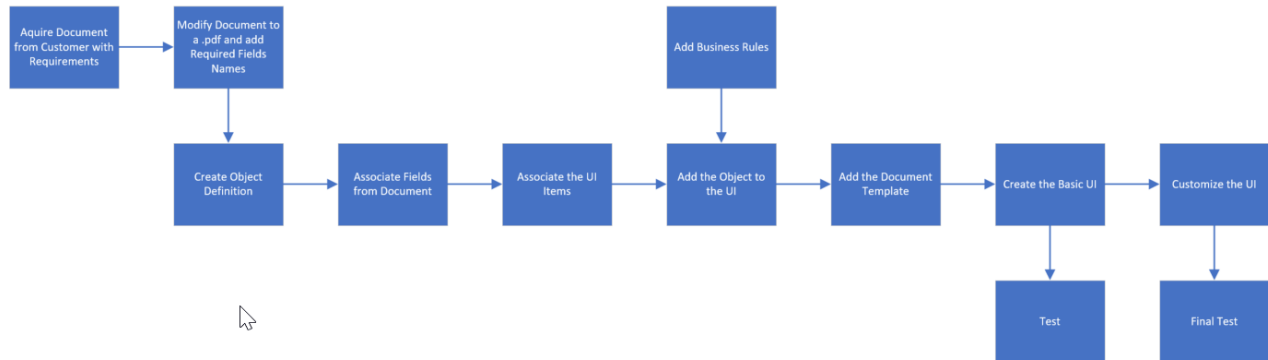
At the bottom right of the interface is a "Done" button.

5.7 Custom data collection objects

This section will demonstrate how to create custom objects for the data collection process in Onboarding. Mapping both custom and standard objects to forms will be covered. Note that several steps in the process

are one-time steps, and you will not need to do them for each form or document. These one-time steps will be noted. Below demonstrates, the process steps to building out the document and the configuration.

This document only refers to creating and generating documents using a .pdf editor such as Adobe Pro DC. This is the recommended third-party software. This document does not include information on creating forms using .xdp and Adobe LiveCycle Designer (SAP version).



5.7.1 Step 1: Creating fields in the document

The customer must provide a finalized document in an unlocked .docx or .pdf format. If the document is a .docx it will need to convert into a .pdf before mapping fields.

In Onboarding, there is no longer a need to use the actual field name that was created in Onboarding to map. However, as a best practice use the label as the field name. As an example, the field in the document is called 'OtherEmployer'. Whereas, in Onboarding, the field under the Object Definition is actually 'cust_OtherEmployer'.

Note - Do not add spaces in the field name on the document or when creating in the Custom Object.

Example of Customer Form:

IN ORDER TO ENSURE THAT ACME IS NOT IN BREACH OF THIS ACT, THE FOLLOWING information is required from all employees:

Name:

Address:

DETAILS OF EMPLOYMENT OUTSIDE ACME:

Do you work for any other employer?

Example of Custom Object:

Name	Database Field Name	Maximum Length	Data Type	(21) More
externalCode	externalCode	38	Auto Number	Details
externalName	externalName	128	String	Details
cust_OtherEmployer	stFields.stField1	5	Boolean	Details
mdfSystemEffectiveStartDate	effectiveStartDate	10	Date	Details

Create fields in the document using Adobe DC in the 'Prepare Form' mode. Create both your standard fields, such as name and address, and your custom fields that you will create as an MDF Object Definition.

Note - When you save the document make sure not to include numbers or special characters in the file name as you will get an error when loading the document.

5.7.2 Step 2: Create the Object Definition

Note – Step 4 to step 7 is the same process to configure Custom Data Collection for data that will reside in Onboarding that may not be needed to map to a document.

Once the document is prepared, create the Object Definition. In the search box, type **Configure Object Definitions**. Once on the screen navigate to *Create New* and select *Object Definition*.

You will create a separate Object Definition for each document you have. The Object Definition will house all the fields for that individual document.

Enter the fields Code for the form name and the label. Please remember that it always begins with *cust_* (System enforced). Effective Dating should be *None*.

The screenshot shows the 'Configure Object Definitions' interface. At the top, there's a search bar with 'Object Definition' selected and a search term 'cust_DoubleEmployment'. Below this, the title is 'Object Definition: cust_DoubleEmployment (cust_DoubleEmployment)'. The configuration details are as follows:

- * Code: cust_DoubleEmployment
- * Effective Dating: None
- API Visibility: Not Visible
- * Status: Active
- MDF Version History: No Selection
- Default Screen: (empty)
- Label: cust_DoubleEmployment
- Description: (empty)
- API Sub Version: V1.1
- Subject User Field: (empty)
- Workflow Routing: (empty)
- Pending Data: No
- Todo Category: Generic Object Change Requests

In the space below add the custom field names from the document. Remember, the name does not have to match the document, but it is helpful. **Do not delete or alter** the “*externalCode*” and “*externalName*” fields. The system will automatically add in the ‘*cust_*’ for you. For example, you can simply type in ‘*OtherEmployment*’ and the system will auto-create ‘*cust_OtherEmployment*’. These are required for the mapping to work.

Fields	
Name	Database Field Name
externalCode	externalCode
externalName	externalName
cust_OtherEmployment	sfFields.sfField1
cust_PleaseGiveDetails	sfFields.sfField2
mdfSystemEffectiveStartDate	effectiveStartDate
mdfSystemEffectiveEndDate	effectiveEndDate

The Data Type for the “*externalCode*” field must be changed to Auto Number. This is the unique identifier for the document. By adding the Auto Number, the system will automatically create the external code. Click on Details and update the *Visibility* to ‘*Read Only*’ so that the code is not changed.

Details

* Name:

* Database Field Name:

Maximum Length:

* Data Type: ☐ Generic Object

Valid Values Source:

Hide Old Value:

Decimal Precision:

Include Inactive Users:

UI Field Renderer:

Transient:

Help Text:

Private or Sensitive Information:

Show Trailing Zeros:

Fields

Name	Database Field Name	Maximum Length	Data Type	(21) More
externalCode	externalCode	38	<input type="text" value="Auto Number"/>	Details
externalName	externalName	128	String	Details
cust_OtherEmployment	sfFields.sfField1	5	Boolean	Details
cust_PleaseGiveDetails	sfFields.sfField2	250	String	Details

Once you've completed adding your fields you will need to associate them to *Onboarding Custom Object Definition*. In the last '*cust field*' add a new one with the name of '*cust_userConfig*'. Data Type should be '*Generic Object*' and under Valid Values, Source add '*ONB2DataCollectionUserConfig*'. Please note that this is case-sensitive.

Scroll down and add the label '*cust_userConfig*'.

Details

Transient

Help Text

Private or Sensitive Information

Show Trailing Zeros

Default Value

Hide Seconds

Required

* Visibility

* Status

Label

Cascade

Inactivated By

End Of Period

Done

The Label can be without space. The above is just an example.

5.7.3 Step 3: Associate the Fields through associations

This ensures that the object created in the previous step is part of the data collection activity.

This is a one-time step. Navigate back to the top of the page and search for *Onboarding data collection user configuration*

[Back to: Admin Center](#)

Configure Object Definitions

Search

Object Definition:

Process

- Prepare for Day One Task Responsible Object
- Prepare for Day One Task
- Onboarding Program
- Onboarding data collection user configuration**
- Onboarding data collection configuration
- Onboarding Admin Configuration Item

Scroll down to the *Associations* section and add the Name '*cust_ONBFormFields*'. This provides one place to map the fields of the document in a later step. Under *Destination, Object* adds the *Custom Object* for the document. Then use '*Join By Column for Type*'. This creates columns of data that will be joined together in a later step.

Name	Multiplicity	Destination Object	Type	(13) More
cust_ONBFormFields	One To One	cust_DoubleEmployment	Join By Column	Details
cust_	One To One	Absence Counting Method	Composite	Details

Under *Details* map the *Destination Object* by selecting the object name (document name). *Type* should be 'Join By Column', *Destination Object Column* should be 'cust_userConfig', and *Source Object Column* should be 'internalId'. Also, add the Label.

Note- that the Source and Destination fields are case sensitive.

Details

Name

cust_ONBFormFields

Multiplicity

One To One

Destination Object

cust_DoubleEmployment

Type

Join By Column

Destination Object Column

cust_userConfig

Source Object Column

internalId

Is Transient

No

UI Association Renderer

Click or focus to edit

Required

No

Visibility

Editable

Status

Active

Label

cust_ONBFormFields

Cascade

None

Done

5.7.4 Step 4: Associate the User Interface items

Navigate to *Object Definition* and select '*Onboarding data collection configuration*'. Scroll down to *Associations* and ensure the set up for '*configUIItems*' is present and the Destination Object is set to '*ConfigUIMeta*'.

Back to: Admin Center

Configure Object Definitions

Search

Object Definition

Onboarding data collection con...

Include Inactives: No

Object Definition: Onboarding data collection configuration (ONB2DataCollectionConfig)

Code

ONB2DataCollectionConfig

Effective Dating

None

API Visibility

Editable

Status

Active

MDX Version History

None

Associations				
Name	Multiplicity	Destination Object	Type	(13) More
configUIItems	One To Many	ConfigUIMeta	Valid When	Details

5.7.5 Step 5: Add the object to the User Interface

Navigate to *Manage Data* from the Search Bar. Under Manage Data search for *Onboarding Data Collection Configuration* and select *Default_Data_Collection_Config*. Add the User interface created in steps 8 to 11 to the list of UI items Configured. Select *Save*.

The screenshot shows the 'Manage Data' interface. At the top, there is a 'Back to: Admin Center' link and a 'Manage Data' button. Below this is a search bar with the text 'Onboarding data collection con...' and a dropdown menu showing 'DEFAULT_DATA_COLLECTION_CONFIG'. To the right of the search bar are 'Include Inactives: No' and 'Create New' buttons. The main section is titled 'Onboarding data collection configuration: DEFAULT_DATA_COLLECTION_CONFIG (DEFAULT_DATA_COLLECTION_CONFIG)'. It features a 'List of UI Items Configurations' section with a search bar and a list of items. The list includes 'onbUniformUI (onbUniformUI)', 'onb2ParkingUI (onb2ParkingUI)', and 'cust_'. A dropdown menu is open for 'cust_', showing a list of custom objects including 'Accident_Illness (Accident_Illness)', 'baseObjectType: cust_work_Acciden...', 'authorized_sign (authorized_sign)', 'baseObjectType: cust_auth_sign', 'counselingHistory (counselingHisto...', 'baseObjectType: cust_counseling_req', 'cust_CommunitingAllowanceUI (cus...', 'baseObjectType: cust_CommunitingAll...', 'cust_DoubleEmployment (cust_D...', 'baseObjectType: hrmt_DoubleEmplo...', and 'cust_EmpLetter (cust_DoubleEmployment (cust_DoubleEmployment)'. At the bottom right, there are 'Cancel' and 'Save' buttons. A status bar at the bottom indicates 'Updated by sfadmin on Thursday, November 14, 2019 10:46:17 AM EST'.

5.7.6 Step 6: Upload the document template

Prepare to load the document. Navigate to *Maintain Onboarding Document Templates*. Select *Add New Document Template* and search for the document. Tip: be as descriptive as possible with your Document ID so that you can easily identify it later (example – GLOBALMOBILEACCESSPOLICY). The Document Name is what will appear to the New Hire in the UI (example – Global Mobile Access Policy).

The screenshot shows the 'Maintain Onboarding Document Templates' interface. On the left, there is a 'Modify Document Template' form. It includes fields for 'ID: GLOBALMOBILEACCESSPOLICY', 'Locale: US English', '*Process Type: Onboarding', '*Name: Global Mobile Access Policy', and '*Category: Policy Agreement'. There are 'Cancel' and 'Update' buttons at the bottom of the form. On the right, there is a table with columns 'Process Type' and 'Actions'. The table lists several 'Onboarding' process types. A red box highlights the '+ Add New Document Template' button in the top right corner of the interface.

The custom and standard fields that are set in the .pdf document will appear in the Template Mapping. For custom fields use the Base Object of 'Process' and the Target Field will be 'toDataCollectionUserConfig'. Select the plus symbol to expand the list of Custom Objects created built created for the documents. The fields will appear under each form listed.

Based on chosen Base Object that the required field can be selected.

Back to: Admin Center

Manage Document Template Mapping

Select Template

Placeholder	Mapping Type	Base Object	Target Field	Rule
CompanyName	Direct	<input type="text" value="Job Information"/>	<input type="text" value="Company.Description.US English"/>	<input type="text" value="No Selection"/>
Employee	Direct	<input type="text" value="Process"/>	<input type="text" value=""/>	<input type="text" value="No Selection"/>
JobPosition	Direct	<input type="text" value="Job Information"/>	<input type="text" value=""/>	<input type="text" value="No Selection"/>
ManagerName	Rule	<input type="text" value="No Selection"/>	<input type="text" value=""/>	<input type="text" value="ManagerFullName"/>
CompanyName1	Direct	<input type="text" value="Job Information"/>	<input type="text" value=""/>	<input type="text" value="No Selection"/>
EmployeeSignDat...	Rule	<input type="text" value="No Selection"/>	<input type="text" value=""/>	<input type="text" value="CurrentDateforDoc"/>
Location	Direct	<input type="text" value="Job Information"/>	<input type="text" value=""/>	<input type="text" value="No Selection"/>

Cancel Save

Target Field dropdown menu:

- Process Status
- Process Tasks
- Process Trigger
- Process Type
- Process Variant
- Reason for Offboarding Cancellation
- Reason for Onboarding Cancellation
- Target Date
- Tasks Status
- toAssetActivity
- toAssignedForms
- toBuddyActivity
- toChecklistActivity
- toDataCollectionUserConfig
- cust_ONBFormFields
- cust_userConfig
- Do you work for any other employer?
- externalCode
- externalName
- If yes, please give details

5.7.7 Step 7: Create a Business rule

Create the business rule for the Data Collection Configuration. Navigate to *Configure Business Rules* and search for *ONB2_DataCollectionConfigSelect*. Ensure that this rule is preconfigured in your system. This is the basic rule that will allow the document to display.

ONB2_DataCollectionConfigSelect (SAP_ONB2_DataCollectionConfigSelect)

Scenario: Update Onboarding or Offboarding Process Object

Basic Information

Start Date: 10/16/2019
Description: Rule to fetch data collection config meta object

Parameters

Name	Object
Context	System Context
Process	Process

Variables

If

Process.Process Type is equal to Onboarding

Then

Set Process.customDataCollectionConfig to be equal to DEFAULT_DATA_COLLECTION_CONFIG (DEFAULT_DATA_COLLECTION_CONFIG)

Add Else If Add Else

Additional Business Rules can be added to display select documents based on Legal Entity or Country. Simply, create an additional rule based on the Assign Forms Scenario.

01/01/1900 [Take Action](#)
Rule created

Scenario: Assign Forms [Change Scenario](#)

Basic Information

Start Date 01/01/1900

Description

Process Type Onboarding

Parameters

Name	Object
Context	System Context
Process Rule Model	Process Rule Model

[Collapse All](#) | [Expand All](#)

Variables

If

and

- Process Rule Model.Process.User.Job Information.Legal Entity.Country is equal to United Kingdom (GBR)
- Process Rule Model.Process.Internal Hire is equal to No
- Process Rule Model.Process.User.Job Information.Legal Entity is not equal to 120/P30287

Then

- Set Process Rule Model.Form Data 1 to be equal to Food and Saftey Guidance (UKFOODANDSAFTEYGUIDANCE1 en_GB)
- Set Process Rule Model.Form Data 3 to be equal to Business Conduct Policy (UKBUSINESSCONDUCTPOLICY1 en_GB)
- Set Process Rule Model.Form Data 4 to be equal to DPA Summary Sheet (UKDPASUMMARYSHEET1 en_GB)
- Set Process Rule Model.Form Data 5 to be equal to Medical History Questionnaire (UKMEDICALHISTORYQUESTIONNAIRE en_GB)
- Set Process Rule Model.Form Data 6 to be equal to Life Assurance Form (UKLIFEASSURANCEFORM en_GB)

Note - In the "Then" statement there is room for 10 Data Forms. To add more than 10 forms, create a second rule.

5.7.8 Step 8: Create the Configuration UI

Configuring the UI allows the object to be displayed differently than configured in the object definition consistently whereas, the fields can be reordered in the configuration UI, so adjusting the Custom Object is not needed.

Note – Configuration to the UI is unique. The changes made to the steps must be repeated.

Once all the fields are set for the document, navigate to the search field and look up *Manage Configuration UI*. Select *Create New*. Add in an ID and select your form name from the Base Object.

Back to: Admin Center

Manage Configuration UI

Search : No Selection [Create New](#)

* Id Double Employment Select Base Object cust [Export](#) [Save](#) [Cancel](#)

[cust_DoubleEmployment](#)
[cust_lookup_Seniority](#)
[cust_DoubleEmployment](#)

The fields from the object will appear. Make sure the external code for each field and the *cust_userConfig* are set to 'not visible'. Hover over the field until a black pencil icon appears. Click on the pencil to edit the field.

* externalCode Click or focus to edit [Edit Properties](#)

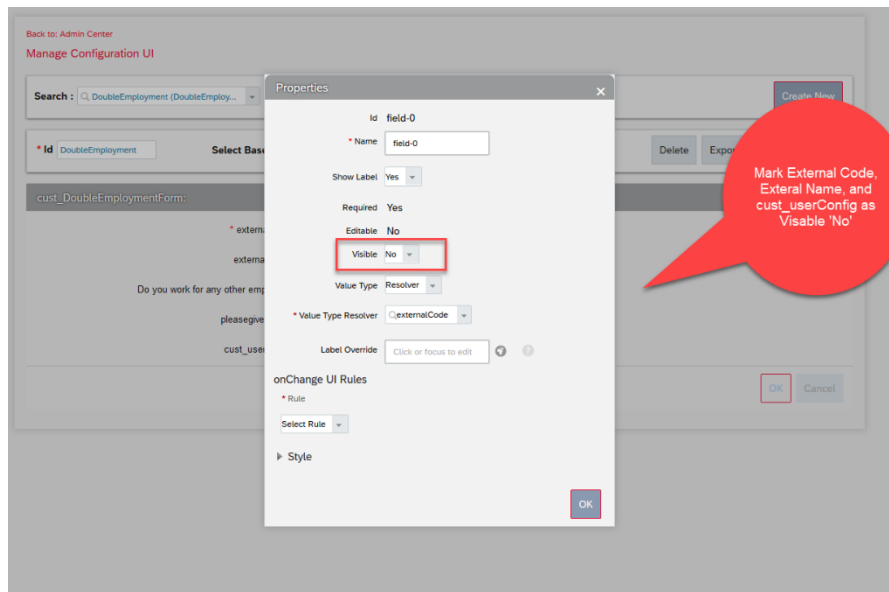
externalName Click or focus to edit

Do you work for any other employer? No Click or focus to edit

If yes, please give details Click or focus to edit

cust_userConfig No Selection [+](#)

Click on the *Visible* attribute and select 'No'. This action ensures the New Hire will not see the field code.

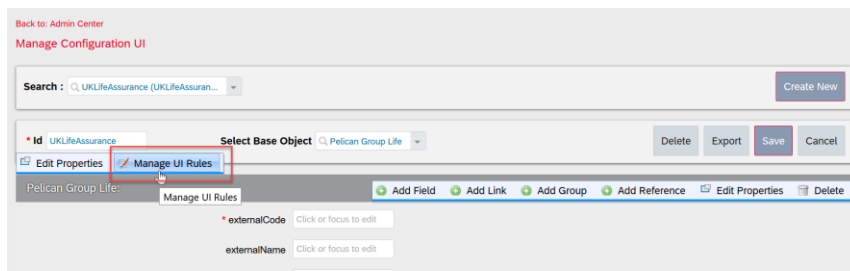


Note - Before customizing the UI, it is strongly suggested to test the current document that was created and ensure mappings work as expected.

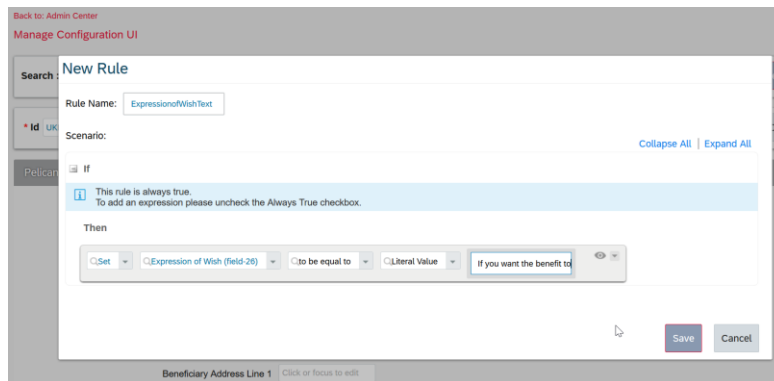
5.7.9 Step 9: Adding additional instructional text to the UI

To add additional instructional text to the UI as shown in the example below, create a custom field on the Object and mark it as read-only. If the added text is 255 characters or less, it can be created in the default value of the object. Navigate to the object you created the document for; *Configure Object Definitions*. In the search feature select *Object Definition* and then choose the object for the document. Add a new string field and click on *Details*. In the Default, Value add your text (up to 255 characters) and add a Label for the display section.

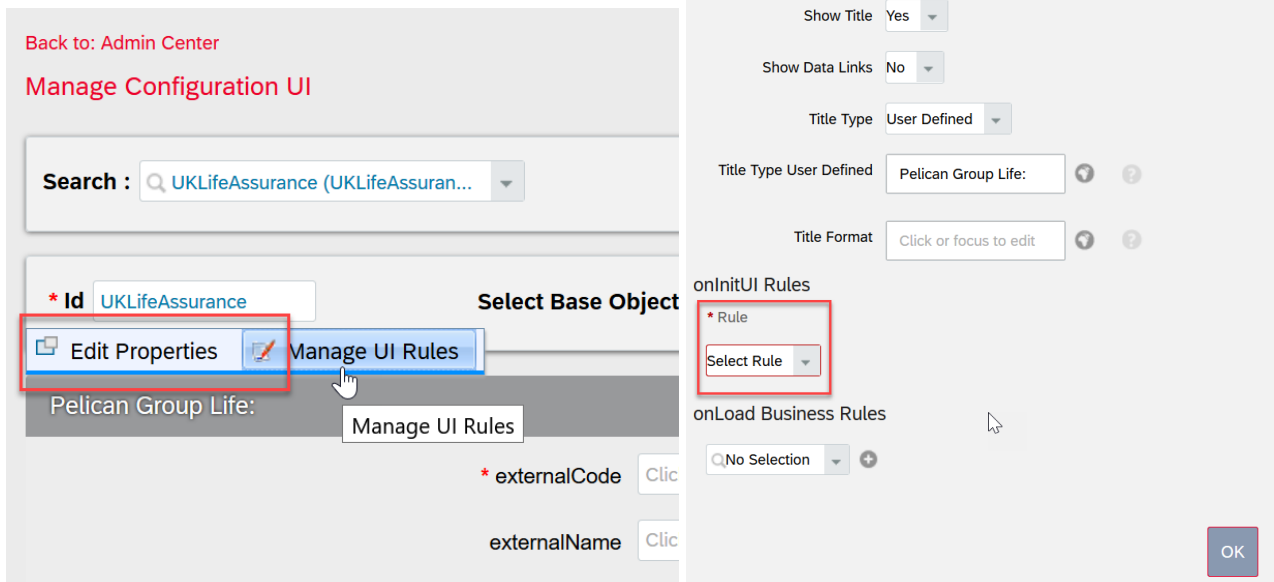
If the text is greater than 255 characters, then on the document object create a string field with a character limit of up to 4000 and make it read-only. Once created, navigate to *Manage Configuration UI*. Search for the UI Configuration for the required document and click on *Manager UI Rules*.



Provide a name for the rule and set the rule to *Always True*. Type in or copy and paste your text value into the rule.



The rule will need to be set to trigger. Under *Manage Configuration UI* select *Edit Properties* and select the rule that was created.



5.7.10 Step 10: How to Create Sections in the UI

Expression of Wish

A benefit is paid if you were to die while you're included in your employer's scheme. The trustees will decide who to pay your benefit to. When they decide they'll consider your circumstances at the time of your death, and your wishes recorded on this form. Please fill in this form to tell the trustees who you'd like to receive your benefit. You'll need to give your completed form to your employer for safekeeping. If you want to update your expression of wish, please fill in a new form and give it to your employer. Please speak to your employer if you have any questions.

*Employer's Name
aaa

*Scheme
aaa

Person 1

*Beneficiary Name
aaa

*Relationship

*Beneficiary Address Line 1

Beneficiary Address Line 2

*Beneficiary Postcode

*Beneficiary Date of Birth

*Beneficiary Percentage

Navigate to *Manage Configuration UI* and search for the UI based on the Object created for the required document. The control bar with *Edit Properties* will move with the cursor to the bottom of the screen where you choose to place your *group*. Click on the *Add Group* button to lock the location.

Search : Pelicanv2 (Pelicanv2) Create New

* Id Select Base Object Group Life Delete Export Save Cancel

Pelican Group Life: Add Field Add Link Add Group Add Reference Edit Properties Delete

* externalCode Click or focus to edit

externalName Click or focus to edit

Expression of Wish

* Employer's Name Click or focus to edit

* Scheme Click or focus to edit

Person 1

* Beneficiary Name Click or focus to edit

* Relationship Click or focus to edit

* Beneficiary Address Line 1

Beneficiary Address Line 2 Click or focus to edit

* Beneficiary Postcode Click or focus to edit

* Beneficiary Date of Birth MM/DD/YYYY

* Beneficiary Percentage Click or focus to edit

Additional Benefit

Link Display Text

< >

Person 2

cust_userConfig No Selection

Expression of Wish

extra

Reference

Add Field Add Link Add Group Add Reference Edit Properties Delete

Title

Input Click or focus to edit

Once the location is set click on *Edit Properties* in the control bar. Update the Layout Flow and other options include font type, size, and color.

Properties

Id: group-3

* Name: group-3

Layout: Flow

Visible Fields Count: 99

Border: Yes

Collapsible: No

Editable: Yes

Style: Theme Based

Title Type: User Defined

Title Type User Defined: Person 1

Title Format: Person 1

Is Collection: No

Display Options

Title Style

OK

Layout – Flow will show the field going across the page rather than down.

Collapsible - Yes/No will allow the section to be collapsed

> Person 2

> Person 3

If you select Yes – you can choose how the field loads on the screen.

Style 'Theme Based' will use the Theme system

Title Format is the name of the Group

▼ Title Style

Font color: Body Text

Font type: Title/Header

Font size: Large

☐ Bold

☐ Italic

☐ Underline

☐ Strikethrough

This allows you to format the text as shown

Thank you for completing the form.

5.7.11 Step 11: Adding a URL Link into The UI or Text

Navigate to *Manage Configuration UI* and search for the UI based on the Object created for the required document. In the control, bar select *Add Link*. A properties window will open where a URL can be added. Make sure to add *Link Display Text* if desired.

Employer's Name

Scheme

Person 1

Beneficiary Name

Relationship

Beneficiary Address Line 1

Beneficiary Address Line 2

Beneficiary Postcode

Additional Benefit

Link Display Text

Person 2

Person 3

Title

cust_userConfig

Input

OK

Cancel

Properties

Id: field-35

* Name: field-35

Show Label: No

Link Display Text: Link Display Text

Link Type: Open URL

Open In: New Window

* Enter URL: http://www.successfactors.com/

URL Tokens

* Token

* Value Resolver

Click or focus to edit

OK

5.7.12 Step 12: Making Fields Required Based on Values from Another Field

Example A shows there are no required fields for the new hire to complete in the UI.

In Example B when the UI is displayed to the new hire when data is added to “*Beneficiary Name 2*”, then the remainder of the fields in Example B becomes required. A business rule can be added to accomplish this.

Example A:

Person 2

Beneficiary Name 2

Relationship

Beneficiary 2 Date of Birth

Beneficiary 2 Address Line 1

Beneficiary 2 Address Line 2

Beneficiary 2 Postcode

Beneficiary 2 Percentage

Example B:

Person 2

Beneficiary Name 2

*Relationship

*Beneficiary 2 Date of Birth

*Beneficiary 2 Address Line 1

Beneficiary 2 Address Line 2

*Beneficiary 2 Postcode

*Beneficiary 2 Percentage

Navigate to *Manage Configuration UI*. Search for the UI Configuration for the required document and click on *Manager UI Rules*. Provide a name for the rule and set the *If*, *Then*, and *Else* statements as shown in the example below. Build the ‘reverse Else logic’ to set the required value back to no required just in case the user deletes the name from the *Person 2* field.

Note: Refer to section -Adding additional text to the UI under customize the UI.

Edit Rule

Rule Name: BEN2

Scenario: Collapse All Expand All

If

Beneficiary Name 2 (field-11).Value is not equal to Null

Then

Set Relationship (field-12).Required to be equal to Boolean Yes

Set Beneficiary 2 Address Line 1 (field-13).Required to be equal to Boolean Yes

Set Beneficiary 2 Postcode (field-15).Required to be equal to Boolean Yes

Set Beneficiary 2 Date of Birth (field-16).Required to be equal to Boolean Yes

Set Beneficiary 2 Percentage (field-17).Required to be equal to Boolean Yes

Add Else If

Else

Set Beneficiary 2 Address Line 1 (field-13).Required to be equal to Boolean No

Save Cancel

5.8 Copy data from Onboarding Custom Data Collection objects to Employee Central

This section explains how to copy data, which has been collected with a Custom Data Collection object during the onboarding process to an EC object and can be made available in People Profile with Employee Central application. The below steps include creating the EC objects along with UI, adding UI to the People Profile, granting necessary permissions, and configuring jobs to copy such data using Integration Center have been covered in necessary details here.

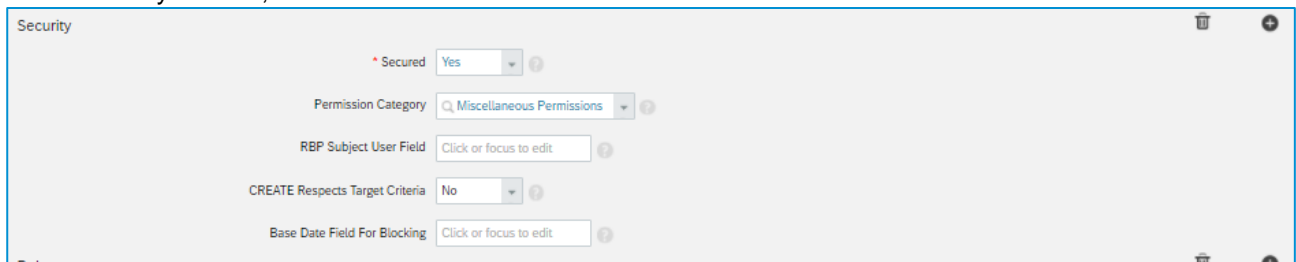
5.8.1 Creating EC object definition

Once the CDC object for Onboarding has been created, a copy of that object needs to be created in EC too. Please use the feature **Configure Object Definitions** via action search and navigate to 'Create New' and select the 'Object Definition' option on the screen.

For every Onboarding object that needs to be copied into EC, a copy of that object has to be created with the externalCode having data type as "User".

Enter the fields 'Code' with the form name and corresponding label for the Object. Please remember, it always begins with *cust_* (System enforced). Set API Visibility as "Editable".

In the security section, choose Secured as "Yes" and set Permission as "*Miscellaneous Permissions*"



The screenshot shows the 'Security' section of a configuration form. It includes the following fields:

- Secured:** A dropdown menu set to 'Yes'.
- Permission Category:** A dropdown menu set to 'Miscellaneous Permissions'.
- RBP Subject User Field:** A text input field with the placeholder 'Click or focus to edit'.
- CREATE Respects Target Criteria:** A dropdown menu set to 'No'.
- Base Date Field For Blocking:** A text input field with the placeholder 'Click or focus to edit'.

All the fields, which need to be synced from the Onboarding object definition should have the matching Data Type in the Source and Target Object. Please use the same picklist for both Onboarding and EC Object Definitions in the system.

Note! In case, an EC portlet need to be Effective Dated, please choose '*Basic*' in the field Effective Dating.

Object Definition: cust_ (cust_)

* Code: ?

* Effective Dating: ?

API Visibility: ?

* Status: ?

MDF Version History: ?

Default Screen: ?

Label: ? ?

Description: ? ?

API Sub Version: ?

Subject User Field: ?

Workflow Routing: ?

Pending Data: ?

Todo Category: ?

Object Category: ?

Fields

* Name	* Database Field Name	Maximum Length	* Data Type	(21) More
<input type="text" value="externalCode"/>	externalCode	<input type="text" value="128"/>	<input type="text" value="User"/>	Details

5.8.2 Creating UI for EC object definition

Once the object has been in place, an UI has to be created for the object. This can be done by following the steps below.

Navigate to the “**Manage UI**” tool and create a new UI for the custom object created in step right above this. It’s a portlet that will be available in the People Profile. Please provide a suitable ‘Id’ and select the base object that had been created in the previous step.

* Id: Select Base Object: ?

Export Save Cancel

Uniform:

Size:

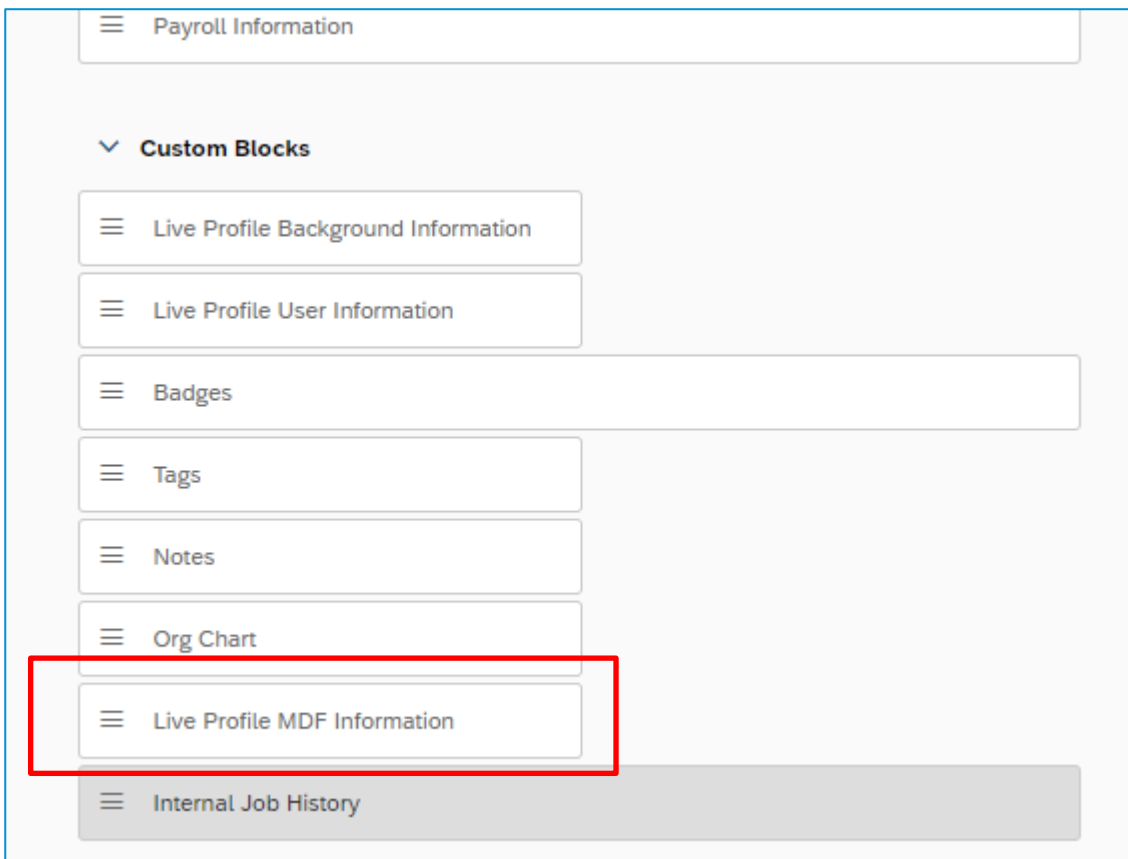
Color: ?

Is needed?: ?

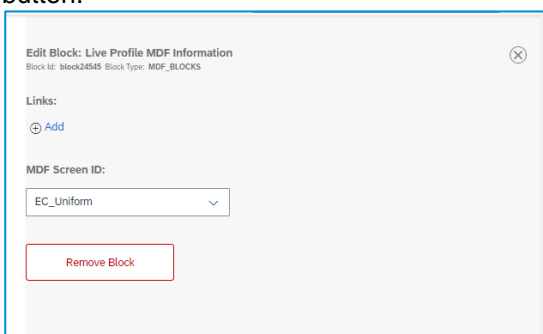
OK Cancel

5.8.3 Add the portlet to People Profile

Navigate to **Configure People Profile** tool, and choose a block called ‘Live Profile MDF Information’ from the list on the right, and drop that block to the section which needs to be displayed.



After that, please select the UI which was created in 5.8.2 with the block settings and click on the Save button.



5.8.4 Provide permissions to view/edit EC portlet

Navigate to Role-based permissions tool, choose an appropriate role which needs to be granted permissions for accessing EC portlet, having data captured from Onboarding application.

With permissions settings, please navigate to *Miscellaneous Permissions* and grant permissions as per business requirements.

Permission settings

Specify what permissions users in this role should have. ⓘ ★= Access period can be defined at the granting rule level.

[Payroll Integration Permission](#)

[Continuous Performance Management](#)

[MDF Recruiting Permissions](#)

[Onboarding or Offboarding Object Permissions](#)

Miscellaneous Permissions

[Data Retention Management](#)

[Apprentice Management Permissions](#)

[Time Management Object Permissions](#)

TourPath
 Visibility: ☐ View
 Actions: ☐ Edit ☐ Import/Export
☐ Field Level Overrides

TransportConfigRequest
 Visibility: ☐ View
 Actions: ☐ Edit ☐ Import/Export
☐ Field Level Overrides

Uniform
 Visibility: ☒ View
 Actions: ☒ Edit ☐ Import/Export
☐ Field Level Overrides

Voluntary Separation Request †
 Visibility: ☒ View Current ☒ View History*
 Actions: ☒ Create ☒ Insert ☒ Correct ☒ Delete ☐ Import/Export
☒ Field Level Overrides

Field Permission

Done Cancel

Once all necessary actions have been completed, the portlet will be visible in People Profile (considering the user has been granted the required permissions)

Uniform ✎

No data

Uniform

Do you need a uniform?

No Selection ▾

Size

Color

No Selection ▾

5.8.5 Configure Job to copy from Onboarding to EC Object definition

Once *Uniform* data has been collected from the new hire, the next step is to define a sync job in Integration Center which will update the data in the EC MDF Object 'Health and Uniform Portlet'.

Go to 'Integration Center' and choose *My Integrations*

My Integrations
Build a new integration or view/edit your saved integrations or browse integration content catalog

Monitor Integrations
View the execution history of all integrations with Execution Manager

Data Model Navigator
View and manage diagrams of your data model

Click on choose 'More integration types', and set the following details before further clicking a 'Create' button down here:

Choose Integration Type

Trigger Type

☐ None selected

☒ Scheduled

☐ Intelligent Services

☐ Application / UI

Source Type

☐ None selected

☒ SuccessFactors

☐ SFTP

Destination Type

☐ None selected ☐ SFTP

☐ REST ☒ SuccessFactors

☐ SOAP

Format

☐ None selected ☐ CSV

☐ True CSV ☐ Simple Delimited

☐ Simple Fixed Field Width ☐ EDI/Stacked Delimited

☐ EDI/Stacked Fixed Width ☐ XML

☐ JSON ☐ Attachment

☒ OData v2

Create Clear All Cancel

Choose the source object as the custom ONB object where data needs to be copied from (i.e. Uniform object with below sample example). Click Select and Click *Select*, and provide an Integration Name and description under 'Options.'

Under 'Configure Fields', click on the 'mapping view switch' button (highlighted in red) and delete the object in the destination column by choosing its name and clicking on the delete icon.

Field Mapping View
Starting Entity: Uniform (cust_uniform)

Source Fields (Drag and Drop to associate with destination fields)

Search by Field Name

externalCode Int64

Created By (createdBy) String(100)

Created On (createdDateTime) DateTimeOffset

Do you need a uniform? (cust_yesNo) String(yesNo)

Preferred color (cust_color) String(UniformColor)

Size (cust_uniformSize) String(128)

userConfig (cust_userConfig) String(128)

externalName String(128)

Last Modified By (lastModifiedBy) String(100)

Destination Fields

API Option Profile ID

Uniform (cust_uniform)

externalCode Int64

Do you need a uniform? (cust_yesNo) String(yesNo)

Preferred color (cust_color) String(UniformColor)

Size (cust_uniformSize) String(128)

userConfig (cust_userConfig) String(128)

externalName String(128)

Do you need a uniform? (cust_yesNoNav) to Picklist Value (PickListValueV2)

Preview

Maximum Preview Items 25

```
{
  "entityName": "cust_uniform",
  "payload": {
    "_metadata": {
      "type": "shodata.cust_uniform",
      "uri": "cust_uniform"
    }
  },
  "_metadata": {
    "type": "shodata.cust_uniform",
    "uri": "cust_uniform"
  },
  "_metadata": {
    "type": "shodata.cust_uniform",
    "uri": "cust_uniform"
  },
  "_metadata": {
    "type": "shodata.cust_uniform",
    "uri": "cust_uniform"
  },
  "_metadata": {
    "type": "shodata.cust_uniform",
    "uri": "cust_uniform"
  }
}
```

Then, click on the + icon, choose the destination object (the EC object you created with the initial step from 5.8.1 and click on the 'Add' button.

Add entity

EC_

Tags

☐ Uniform (cust_EC_Parking)

☒ Uniform (cust_EC_Uniform)

Add

Map fields from the source column, i.e., ONB Custom Object with the EC Custom Object, by drag and drop mechanism from the source column to the fields in the destination column.

Important! Always map field “external code” with “subjectUser” field (userConfig->subjectUser) and if the EC object as Effective dated, always map “Effective Start Date” with “Target Date” from onboarding object (userConfig->Process->Target Date)

Source Fields (Drag and Drop to associate with destination fields)

Destination Fields

Search by Field Name

Operation: Upsert Multiple

Purge Type: [Dropdown]

API Option Profile ID: [Text Box]

Preview: Maximum Preview Items: 25

Uniform (cust_uniform)

Last Modified By (lastModifiedBy) String(100)

Last Modified Date (lastModifiedDate) DateTimeOffset

Record Status (mdfSystemRecordStatus) String(255)

Process Object (process) String(128)

Subject User (subjectUser) String(100)

> Created By (createdByNav) (to User)

> Last Modified By (lastModifiedByNav) (to User)

> Record Status (mdfSystemRecordStatusNav) (to MDFEnumValue)

> Process Object (processNav) (to Process (ONB2Process))

Uniform (cust_uniform)

% externalCode String(100) <- Subject User (subjectUser) from Onboarding data collection user configuration (ONB2DataCollectionUserConfig)

% color (cust_color) String(color) <- Preferred color (cust_color) from Uniform (cust_uniform)

% needed (cust_needed) Boolean <- Do you need a uniform? (cust_Veslo) from Uniform (cust_uniform)

% size (cust_size) String(255) <- Size (cust_uniformSize) from Uniform (cust_uniform)

externalName String(128)

> color (cust_colorNav) to Picklist Value (PicklistValueV2)

> externalCode (externalCodeNav) to User

```
{
  "entityName": "cust_EC_uniform",
  "payload": {
    {
      "externalCode": "180241",
      "cust_color": "BLUE",
      "cust_needed": null,
      "cust_size": "12",
      "metadata": {
        "type": "SP0Data.cust_EC_uniform",
        "url": "cust_EC_uniform(externalCode=180241)"
      }
    },
    {
      "externalCode": "180241",
      "cust_color": null,
      "cust_needed": null,
      "cust_size": null,
      "metadata": {
        "type": "SP0Data.cust_EC_uniform",
        "url": "cust_EC_uniform(externalCode=180241)"
      }
    },
    {
      "externalCode": "180241",
      "cust_color": "GREEN",
      "cust_needed": null,
      "cust_size": null,
      "metadata": {
        "type": "SP0Data.cust_EC_uniform",
        "url": "cust_EC_uniform(externalCode=180241)"
      }
    }
  }
}
```

In the filtering section, such options can be defined under the ‘Filter and Sort’ criteria available. We recommend creating a Filter “Modified since last run time” , to make sure it doesn’t sync all the records with every run but only takes care of changed records.

Last, schedule sync job based upon business requirements (for example, daily with below sample case)

Options

Configure Fields

Filter and Sort

Scheduling

Review and Run

Scheduled Version Occurs

Suspended/Not Scheduled

Suspended/Not Scheduled

Once

Multiple Executions Per Day

Daily

Weekly

Monthly

Yearly

With last section *Review and Run*, you can have an overview look at your sync job and save it for necessary scheduled runs.

Integration Center - Create New Scheduled ODATAV2 COAPI Input Integration

Options

Configure Fields

Filter and Sort

Scheduling

Review and Run

Scheduled

SuccessFactors

Query

Map

Validate

SuccessFactors

Starting Entity: cust_uniform

Number of Fields: 1

Sorted By: No Sort Applied

Filtered By: No Filter Applied

Time Based Filter: No Time-Based Filter Applied

Last Run Time: [Text Box]

Last Run Version: [Text Box]

Integration Name: cust_uniform Scheduled

Scheduled Version: <Not Scheduled>

Current Version: <Not Saved>

Integration Format: ODATAV2

Delimiter Character: Not Applicable

Header Type: No Header

Host Address: [Text Box]

File Location: [Text Box]

File Name: [Text Box]

Execution Schedule Frequency: Suspended/Not Scheduled

The integration is not scheduled.

Data Fields

1. externalCode from Uniform (cust_EC_uniform) <- Subject User (subjectUser) from Onboarding data collection user configuration (ONB2DataCollectionUserConfig)

2. color (cust_color) from Uniform (cust_EC_uniform) <- Preferred color (cust_color) from Uniform (cust_uniform)

3. needed (cust_needed) from Uniform (cust_EC_uniform) <- Do you need a uniform? (cust_Veslo) from Uniform (cust_uniform)

4. size (cust_size) from Uniform (cust_EC_uniform) <- Size (cust_uniformSize) from Uniform (cust_uniform)

5. externalName from Uniform (cust_EC_uniform)

Save

Cancel

Previous

Run Now

Set Schedule

Once the Onboarding completes and the new hire has been hired via the Manage Pending Hire Tool, the Onboarder becomes a New Employee. At this stage, whenever IC job has been completed after a successful run on daily basis, the data collected during Onboarding could be found in the People Profile of the new hire employee record. Such New Hire's are converted to an Internal User from an external user on the Day 1, and subsequently users can see this data from custom objects based on the assigned permissions.

5.8.6 Limitations for data transfer via this approach

Custom Data Collections objects can have fields with type 'Attachments'. Please note such attachments can't be copied to the EC objects with the same job run for actual data. This would have to be either handled manually or leveraging a middleware platform.

6 REFERENCES

SAP Help Portal

- [Implementation Guide](#)
- [Integration Center](#)

7 ADDITIONAL RESOURCES

SAP Notes/KBA

SAP Blogs

[SAP SuccessFactors Onboarding \(2.0\): New Hire's Access to Company Documents](#)

[Blog on Additional data collection UI configuration](#)

[Creating Custom Data Collection Object in Onboarding 2.0](#)

[Collecting Vaccine Data from Onboarder with SAP SuccessFactors Onboarding](#)

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