SuccessFactors: All aboard with ONB2018 – a simplified HR Onboarding experience!

SuccessFactors Onboarding is evolving

Yes, that's right, there will be a major transformation with SAP SuccessFactors Onboarding in 2018. These changes have created a lot of interest from customers who are asking lots of questions about what new features will be delivered and how this will support customers' processes. Having spent several years solutioning SuccessFactors Onboarding, I get many questions about it, the most common of which are:

- Should new customers wait for "Onboarding 2018" or deploy the existing solution and upgrade later?
- Will the User Interface be 'unified' with other parts of my SuccessFactors solution?

I hope that my article will help you get a deeper understanding of what is coming next and help you answer these and other questions:

- What is "Onboarding 2018"?
- Why "Onboarding 2018"?
- What is changing?
- What does it mean for customers and how will they benefit?
- How will "Onboarding 2018" workflow work?
- When is it available?
- Should new customers wait for "Onboarding 2018"?

The Current HR Onboarding Solution

The current solution is good enough for customers to give their new hires an impressive introduction to the organization. New hires are welcomed, guided, and connected with the right content and people even before their first day, ensuring they feel welcomed, valued and are productive faster.

However, even with all these great features, there is a need to simplify how the system is designed, built and administered. Additionally, the current user interface is so different from the rest of the SuccessFactors suite, it is not giving the user an integrated 'one platform' experience. To demonstrate the user experience as of today, I include some screenshots of the current Onboarding solution below, which we will contrast with the new 'look and feel' later.

Hiring Manager view of onboarding dashboard

Data entry panels

As you probably noticed, the Onboarding administration screens are neither attractive nor intuitive and are out of sync with the other SuccessFactors modules.
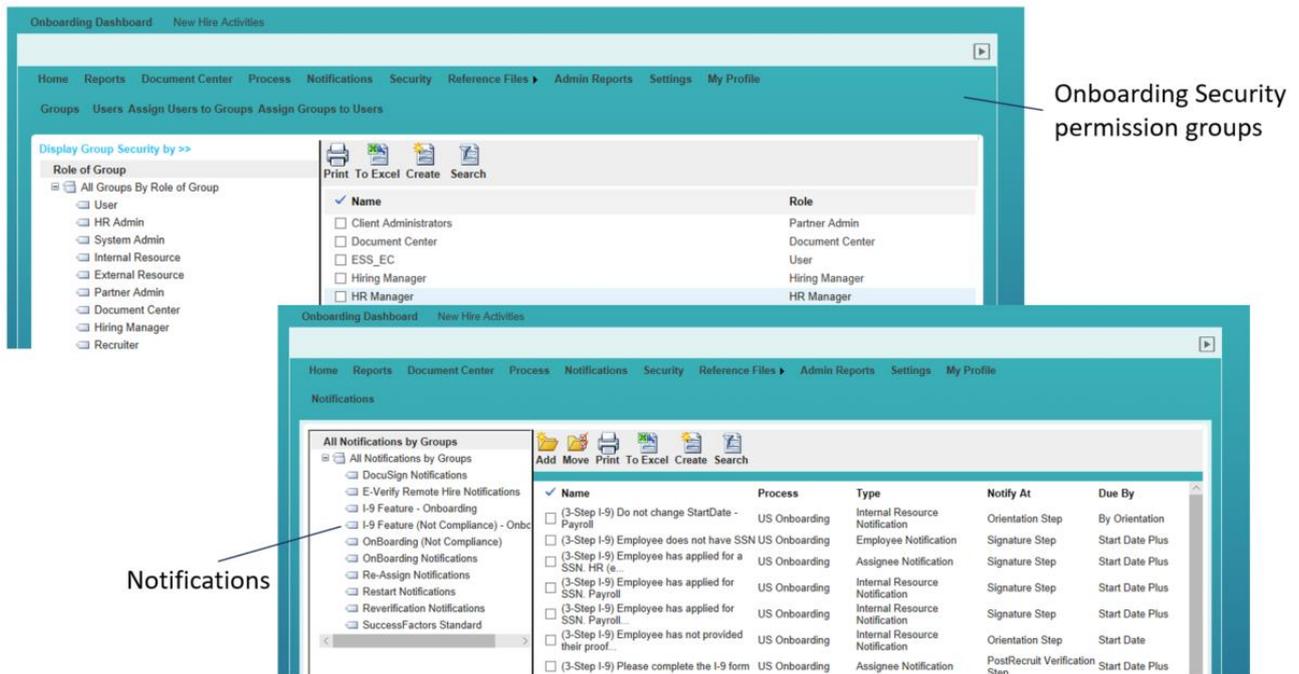
So what, you may ask, have SAP done about this to improve the overall user experience? Let's explore in more detail…

What is Onboarding 2018?

Onboarding Simplify (which I refer to as "Onboarding 2018" or "ONB2018" for short) is the redesigned and updated version of the existing SAP SuccessFactors Onboarding solution, which has undergone significant enhancement and improvement.

Why Onboarding 2018?

SAP is moving Onboarding from a '.Net' framework to a MetaData Framework (MDF) based one, to utilize the platform technologies such as Extension Center, Business Rule Engine, and External User. Using these platform technologies will provide a tremendous advantage to the customers and will also remove the duplicate functions that existed in Onboarding, which in the past caused problems around

'double maintenance'. Users will no longer have to go to multiple places to manage onboarding.

Onboarding Simplify will successfully deal with:

1. Removing duplicate functionalities a few of which are listed below:
   - Security – Permission Groups and Roles
   - User Accounts
   - Corporate Structure
   - Document Storage
   - Notifications
   - Localization
   - Reporting and Analytics

2. Providing a consistent user experience across the product using the SAP Fiori User Interface (UI)

3. Reducing implementation complexities (which are explained in more detail later)

4. Providing more flexibility and extensibility using Extension Center

5. Using the SuccessFactors 'Employee Central' structure and validation

6. Providing more flexibility in task assignment and tracking using Role Based Permissions (RBPs)

7. Delivering improved dashboards for status tracking

8. Enabling easier data integration with other SuccessFactors modules

9. Lifting the restriction which previously forced the 'three-step process' using the Business Process Engine

What is changing?

Quite a lot really! Almost everything is changing when it comes to administration and usability but many of the key functionalities will remain as before.

1. **No 'Super Admin'**

Because legacy onboarding was developed initially by KMS (the company that SuccessFactors bought) and later integrated with SuccessFactors, we use **Super Admin** which is an Onboarding specific backend tool along with **Provisioning** - a SuccessFactors HR 'backend' tool for integration and configuration, available only to partners like Gavdi.

With ONB2018 all relevant settings can be completed, for the main part, via the Admin Center and with only a little 'backend' configuration in provisioning. That is just so cool, that I, for one, am truly excited about this development!

2. **No Data Dictionary**

We will utilize the MetaData Framework and Employee Central (EC) structures and entities, aligning the platforms further.

3. **No Panels**

Onboarding currently uses panels for data collection. In ONB2018, panels are replaced with the '*Add New Employee*' EC wizard for data collection. Using EC pages gives us the benefit of using EC validation and localization, for example, validating and passing the National ID information in Onboarding which, before, was very challenging.

For collecting any additional onboarding information from new hire, we will use custom objects and Extension Center. The below screenshot is an example – collecting computer and phone preference earlier so it is available to the new hire on their first day of work. Not just that, if you have a procurement system to place the order, then you can use the Onboarding API to make the new hire's preference information

available. Also, the new hire's user ID is created immediately after onboarding is initiated making it easier to prepare for the new hire's arrival.

Oh, I forgot to mention – Employee Central is not a prerequisite for ONB2018. So, it can be used as a 'stand-alone' solution too.

4. **No Onboarding to Employee Central mapping tool**

That's right. Using the EC structures eliminates the need for mapping the onboarding and EC data fields for data flow. Not having to do data mapping will significantly reduce the implementation time, effort and cost. There will be a single mapping tool, '**Recruit-To-Hire'** tool shown in the below screenshot**,** to map the Recruiting and EC fields. This is a real time-saver or, should I say, "Project-saver".

5. No Employee Portal (Sharepoint)

Employee Portal will no longer be used in ONB2018. Just to give you an idea of the Employee Portal used in Onboarding currently:

Employee Portal will be replaced by Jam and Homepage tiles. Customers can use SAP JAM for a more engaging and social experience for new hires and/or the Homepage

(HP3) tiles can be customized to give a similar experience as well. Business Rules can be used on the tiles to define advanced conditions to customize the content for a specific set of hires. The Company Benefits tile in the screenshot below shows how HP3 can be used instead of Employee Portal. This is going to really simplify how things are now done in Onboarding.
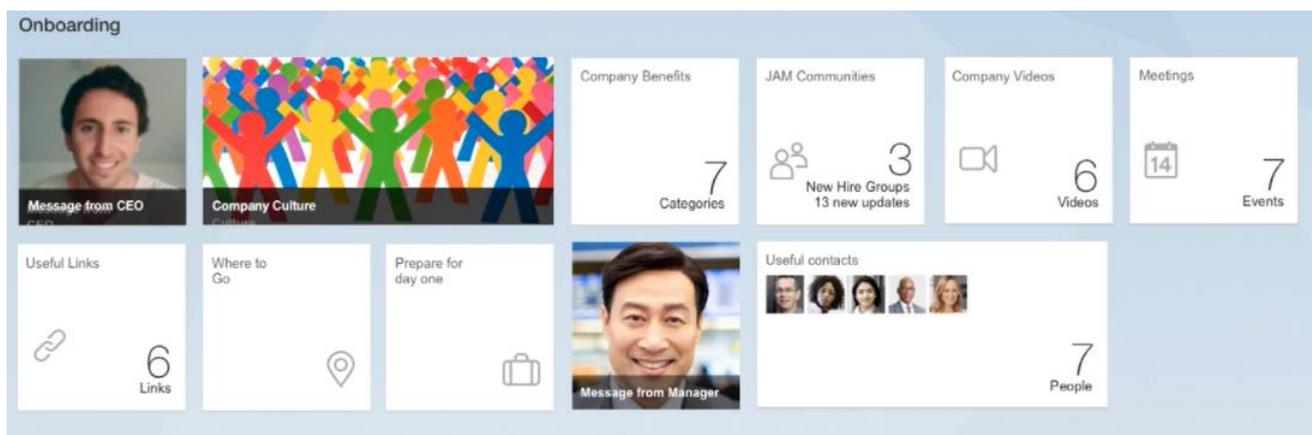
6. 'Click-to-Sign' to be replaced by DocuSign

'Click-to-Sign' will be replaced by 'SAP Signature Management by DocuSign' for digitally signing forms, with an additional benefit being that a new hire can also sign using mobile devices and tablets, enabling an end-to-end, fully digital transaction process. Customers will need to purchase additional licensing for SAP Signature Management if they do not already have a DocuSign license. An existing customer can switch to SAP Signature Management immediately.

7. Hiring Manager Activities

With ONB2018 we can assign different tasks to different onboarding participants using Role Based Permissions, meaning that it is no longer restricted to the Hiring Manager only. This is something I am always asked for by customers, so I am really pleased for this new functionality.

The screenshot below shows user's view of onboarding task assigned and can be accessed from the To-Do tile. In this example, all onboarding tasks are assigned to one user, however as mentioned earlier, with ONB2018 the tasks can now be assigned to different users.
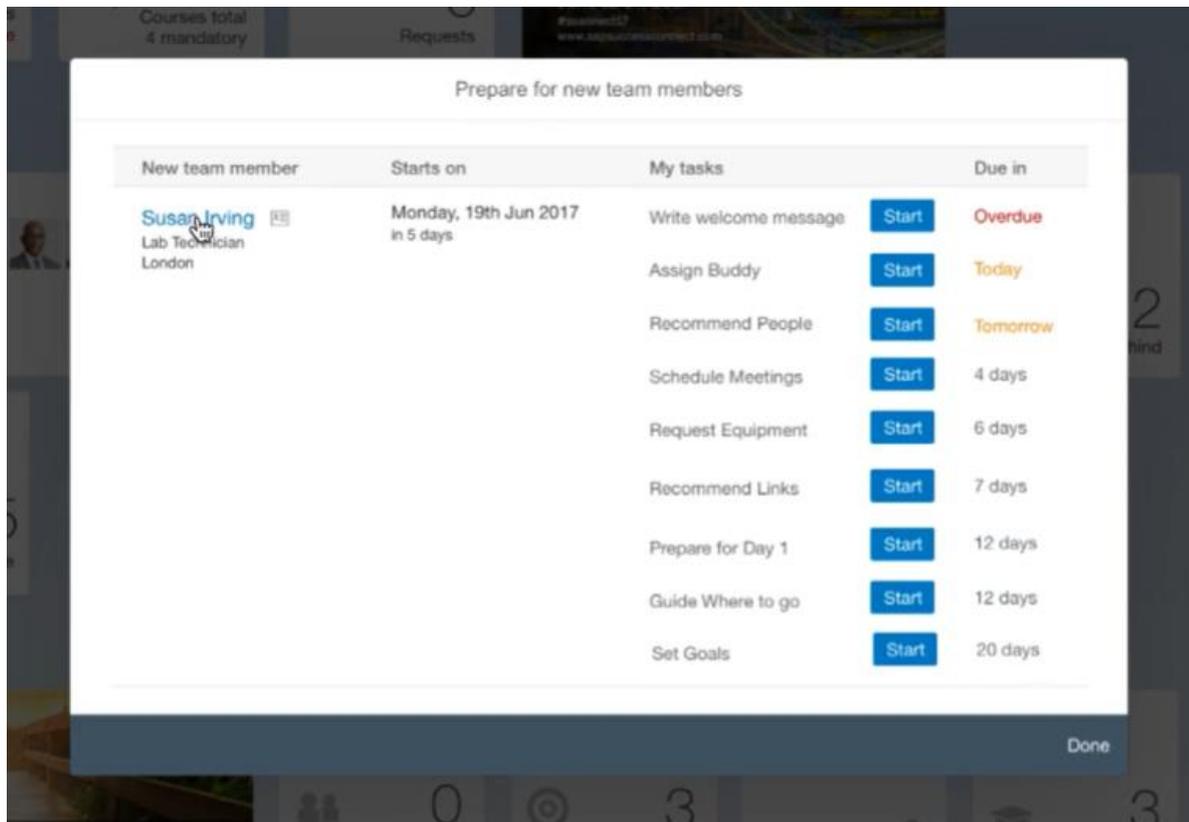
8.   **Pre-Day 1 'Temporary User'**

This has been replaced with 'External User', a secure way to provide new hires access to Onboarding content prior to their start date. External User provides a greater level of security and addresses the security concerns that onboarding customers had with Pre-Day 1 temporary user.

The EC record and the new hire user ID will be created immediately after Onboarding is initiated from Recruiting (or a non-SAP Applicant Tracking System – but I didn't say that!) but the new hire will have a restricted access until their actual start date, as the new hires will convert into an Internal User (employee) on their start date.
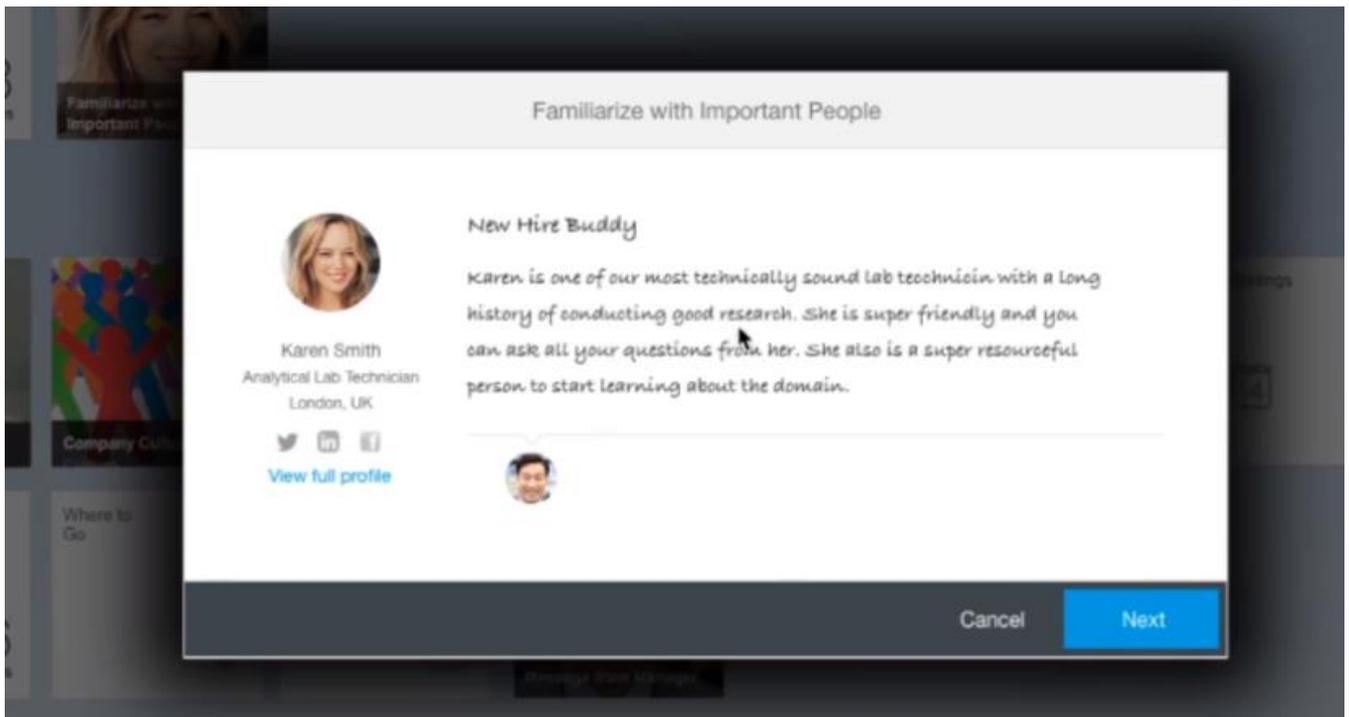
9. **PDF Forms**

PDF forms should be converted to XDP format and SAP provides free access to the Adobe LiveCycle designer to convert PDF to XDP format. Forms will be managed using 'Maintain Document Templates', a platform tool to upload forms, map fields and to add business rules to the form.

10. **Notifications**

Onboarding notifications will be replaced by a new notification framework built on MetaData Framework and will be used by all SuccessFactors products and not just unique to Onboarding.

11. **Document Center**

This will now be replaced by a Document Management Service which will give customers the flexibility to choose the service either from an external provider or via a native SuccessFactors Attachment Framework.

What does it mean for customers and how will they benefit?

For Implementation Consultants and Administrator:

It's a big relief to all Onboarding experts as the implementation is made simpler with ONB2018. These are some of the key reasons why:

1. **Legacy:** Consultants have to configure the scheduled sync jobs for user, permission, and all the corporate structure levels from platform to onboarding, which is double maintenance and very tedious.

ONB2018: We would no longer need these syncs. That's a big win already!

2. **Legacy:** Two different tools for integrating and synchronizing data across RCM-ONB-EC. It is tedious to have these modules integrated and fields mapped across, especially mapping the corporate structure data, because of the difference in the standard corporate structure levels in Recruiting, Onboarding and Employee Central.

ONB2018: Eliminating the need for Onboarding to Employee Central field mapping simplifies the RCM-ONB-EC integration by 50%.

3. **Legacy**: Configure Employee Portal and the different web pages within Employee Portal is tedious and not exciting.

ONB2018: Easy and simpler to use custom homepage (HP3) tiles to achieve most of the Employee Portal use cases.

Customer Benefits

With the above changes customers benefit in many ways:

1. A consistent User Experience with an SAP Fiori based design – Onboarding will now have the same look and feel as other SuccessFactors modules, improving the overall user experience.

2. The extensive use of Role Based Permissions, Extension Center, Business Process Engine and Rule Engine will provide greater flexibility and extensibility on how we design and build workflows.

3. All the onboarding administration settings will be available in a single place - Admin Center.

4. An intuitive dashboard to track onboarding progress and perform activities, which make the user experience more streamlined and easy, ensuring greater uptake and more business benefits.


Key Takeaways:

1. Onboarding can still be used as a standalone system and can also support integration with non-SAP E-Recruitment and HR systems.

2. Employee Central is not a pre-requisite.

3. Support for custom workflows with different employee types.

4. All third-party integrations will be done through the Integration Center – simpler, faster, cheaper.

5. Onboarding will continue to support compliance for US, UK, India, Australia, and Canada.
6. Crossboarding and Offboarding will also be supported.

How will Onboarding workflow work?

When ONB2018 is integrated with SuccessFactors Recruiting and Employee Central, the Onboarding workflow should work as follows:
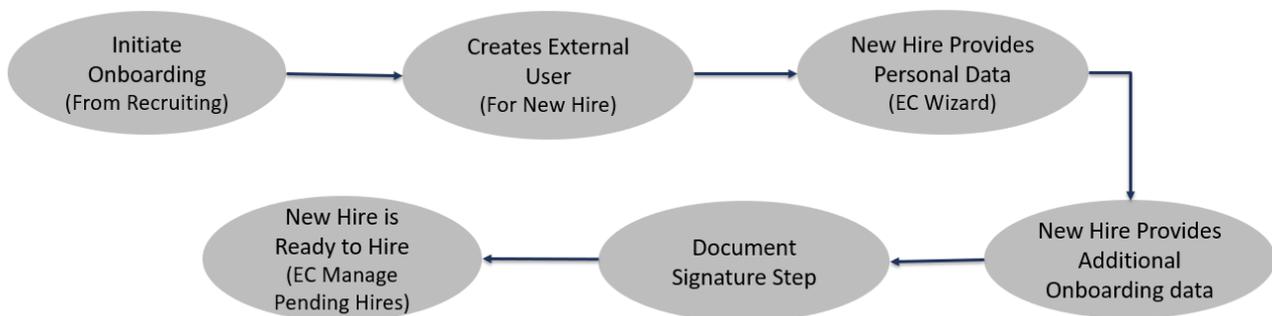
When is it available?

The current understanding from SAP is that the launch will occur in three phases:

1. Beta – Preview only (limited customer) *
2. Early Adopter – Production (limited customer) *
3. General Availability – All new implementation; Migration tool for legacy customer

For limited new customers – As of writing (December 2017) no further places are available, as communicated by SuccessFactors.

We are told that we can expect to see the new version of the solution as part of an Early Adopter ('beta') release by Release "1805" (Q2 2018) and the generally available version, including the migration tool, at the end of the year, but SAP is yet to officially communicate the general availability release date. So, watch this space!

Should new customers wait for ONB2018?

SAP says there is no need to wait for the release of ONB2018 as a migration tool will be made available to all legacy customers when ONB2018 is generally released.

For customers requiring more flexible workflows and extensibility, and with all the changes described above, it may pay to wait, but with expert advice. **Gavdi** provides assistance to customers in evaluating and determining the best course. Please contact us for more information on this service, along with other SuccessFactors options.

If you have liked and benefitted from this article, please comment, like and share. Also, I would appreciate any feedback you would provide.

P.S. As a Consultant working with Onboarding, I am very excited and looking forward to these changes. After all, isn't it Onboarding that gives a 'formal' first impression of your company's employment brand to a new hire?

I have compiled this article based on my knowledge working with SuccessFactors and the existing Onboarding solution for five years, and extending with the facts I have received from various sources like Product Update Calls from SAP, Partner Edge, private network with the development team, etc.