SuccessFactors HCM Suite

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SuccessFactors Onboarding, Recruiting Management, and Employee Central

Administration Guide

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Content

1 Change History

This table provides a historical overview of the most important changes made to this document since its initial publication.

Version	Date	Description
1411	December 5, 2014	Initial Publication

2 Integrating Recruiting Management and Employee Central

To create a seamless flow of user data, clients can choose to integrate the Recruiting Management, Onboarding, and Employee Central modules. This passes data gathered from candidates during recruiting through the onboarding process and into their new employment.

> **Note**
>
> Some aspects of the Recruiting - Onboarding- Employee Central integration **must** be configured by SuccessFactors Professional Services and cannot be configured by the customer.

To map fields from Onboarding to Recruiting or Employee Central, the fields must be mapped to fields of corresponding types. For example, an Onboarding text field must be mapped to a Recruiting text field. The field value must also match exactly, including case. For example, if Recruiting uses the value `FullTime`, Onboarding must use the same value, including matching the value's case and spacing.

2.1 Recruiting to Onboarding Integration

You cannot send date from Recruitng to Employee Central, then send additional data to Employee Central once the candidate has been onboarded. It is best practice to pass candidate data from Recruiting to Onboarding, then from Onboarding to Recruiting when customers have all three modules integrated.

If a customer wants two separate workflows - for example, to send data for certain candidates from Recruiting to Employee Central, and data from other candidates from Recruiting to Onboarding, each workflow requires a separate requisition.

Prerequisites:

- Enable V12 framework
- Configure the Onboarding module before beginning the Recruiting or Employee Central Integration. The same Onboarding Prerequisites apply for this integration.
  - *Employee Profile For more information, see https://confluence.successfactors.com/display/PRODINFO/Employee+Profile Recommendation Including a photo for every employee is recommended.*
  - *Enable Provisioning > Company Settings > Enable Generic Objects and Provisioning > Company Settings > Project Teams.*

- Enable Role-Based Permissions
- Grant feature permissions for Onboarding on the Job Requisition XML template

```
<feature-permission type="onboarding">
        <role-name><! [CDATA [R]]></role-name>
        <role-name><! [CDATA [S]]></role-name>
        <role-name><! [CDATA [O]]></role-name>
        <role-name><! [CDATA [T]]></role-name>
        <role-name><! [CDATA [G]]></role-name>
        <role-name><! [CDATA [GM]]></role-name?
        <status><! CDATA[Hire]]></status>
    </feature-permission>
```

Related Information

Onboarding Implementation Guide

2.1.1 Configure the Recruiting to Onboarding Integration

Configuring the Onboarding and Recruiting Integration requires initial configuration and field mapping for information to move from one system to the other.

Procedure

1. Permission the appropriate users to initiate Onboarding. Navigate to *Admin Tools* > *Manage Permission Roles* > *Role* > *User Permissions* > *Recruiting Permisisons* > *Onboarding Initiate Permisison*

2.1.1.1 Mapping Fields from Recruiting to Onboarding

Context

Procedure

1. Ensure that all the correct fields are available for mapping. Navigate to SuccessFactors HCM *Onboarding* > *Account Settings* > *Data Dictionary* > *Namespace* > *Integrations* > *RX.* Fields included in the RX folder are included in the integration mapping.
2. To add or remove a field, click *Fields.* Fields on the right are available for mapping. To add a field, move it to the right. To remove a field, move it to the left. Only remove fields you know are not part of Recruiting.
3. Ensure that the fields are associated with the correct template under *Data Dictionary* > *Namespace* > *Entities.* Here you can see which fields are associated with the Job Requisition, Job application, or Job Offer mapping. Add or remove fields by moving them between the menus for each template.
4. Map Job Requisition, Job Application, or Job Offer fields. Navigate to *Admin Tools* > *Setup Onboarding Integration* and select each template to map. Fields marked with a red asterisk require a job mapping. Fields marked with a blue asterisk show up on more than one form, but can only be mapped to one location. Do not map these fields to multiple templates.

Recommendation

Initially, map only the required fields for each Recruiting template. Once the mapping is executed successfully, map any additional fields.

Table 1: Default Onboarding Field mapping - Job Requisition

Onboarding Field ID	RCM Template Field	Notes
RecruiterID	recruiter operator	recruiterName
RecruiterFullName	N/A	Onboarding will fetch these fields automatically
RecruitingTitle	N/A	
RecruiterEmail	N/A	
ManagerID	N/A	
ManagerFullName	N/A	
ManagerTitle	N/A	
ManagerEmail	N/A	

Table 2: Default Onboarding Field mapping - Job Application

Onboarding Field ID	RCM Template Field
Basic Employee Data	
LastName	lastName
FirstName	firstname
MiddleName	middleName
Suffix	No Mapping
EMail	contactEmail/primaryEmail

Onboarding Field ID	RCM Template Field
Address1	address
Address2	address
City	city
Country Township	No Mapping
State	state
Zip	zip
Zip4	zip
Country	country
PostCode	zip
PhoneAC	cellPhone/homePhone
EveningPhoneCountryCode	No Mapping
DaytimePhoneCountryCode	No Mapping
PhoneNum	cellPhone/homePhone
MailAddress	address
MailAddress2	address
MailCity	city
MailZip	zip
IsMailingAddressSamePhysical	No Mapping
MailAddressState	state
MailAddressState_Text	state
MailCountry	country
MailCountry_Text	country
MailZip4	zip
EEO Information	
DateofBirth	dateofBirth
HispOrLat	race
EthnicGroupCode2	No Mapping
Ethnicity_text	ethnicity
Gender	gender
GenderDesc	gender
VeteranVietnam	No Mapping
VeteranRecentlySeparated	

Onboarding Field ID	RCM Template Field
VeteranDisabled	
VeteranAnother	
Campaign	
MilitaryEra	
SeparationDate	
ArmyBranch	
VeteranStatus	veteranStatus
Emergency Contact Details	
EmergencyCountry	No Mapping
EmergencyState	
EmergencyFirstName	
EmergencyLastName	
EmergencyAddress	
EmergencyCity	
EmergencyZip	
EmergencyZip4	
EmergencyDaytimePhoneCountry	
EmergencyDaytimePhoneNum	
EmergencyDaytimePhoneAC	
EmergencyEveningPhoneCountry	
EmergencyEveningPhoneAC	
EmergencyEveningPhoneNum	
EmergencyWorkPhoneCountry	
EmergencyWorkPhoneAC	
EmergencyWorkPhoneNum	
EmergencyEmail	
EmergencyRelationship_Code	
Standard Disability	
DisabledPerson	disabilityStatus
NeedAccomodation	No Mapping
DisabilityStatusText	disabilityStatus
Job Information	

Onboarding Field ID	RCM Template Field
JobReferralSource	referralSource
JobReferralSourceOther	No Mapping
JobReferredByEmployee	
HireDate	
OrientationDate	
OrientationTime	

> **Note**
>
> There are 54 hard-coded fields, which come from the Onboarding Module. These fields show on the Requisition and Application and are not updated based on the customer.

2.1.1.2 How to Map Picklists and Lookups Using Panel Designer

Context

Users no longer need to map SuccessFactors HCM picklists to legacy Onboarding lookups. This feature is available only for fields in user-defined panels. A control named "BizX picklist" control is available in the panel designer.

Procedure

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

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

.

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

2.1.2 Initiate Onboarding

Once Onboarding is configured, a recruiting user can click *Initiate Onboarding*on the application. Only users in roles tha have been granted the appropriate Initiate Onboarding button permissions in the XML will see this Initiate Onboarding option.

For applications where the applicant is in a status configured to support the initiate onboarding feature, a recruiting user can click "Initiate Onboarding" on the application once Onboarding is configured.

Once onboarding is initiated, data is sent once, based on the mapping configured between Recruiting and Onboarding in Admin Tools. The Onboarding portlet then appears in Recruiting, showing the user who initiated the request, when the request was submitted, the status of the submission (success or failure) and a link for more details.

> **Note**
>
> A candidate can only be sent to Onboarding once within the period defined in *Admin Tools* > *Setup Onboarding Integration* > *Settings* . If a user attempts to onboard a candidate more than once before this period has expired, they will see a pop-up saying the candidate has already been onboarded for a job.

2.2 Onboarding to Employee Central Integration

Onboarding to Employee Central integration allows customers to convert candidates into employees, with or without an integration with Recruiting.

There are two ways to convert a candidate to an employee: a Recruiting to Employee Central integration and a Recruiting to Onboarding to Employee Central integration.

You can configure both of these scenarios in the same customer instance. The candidate data is wholly extracted from either Recruiting or Onboarding. It is not possible to have some data elements from Onboarding and some data elements from Recruiting for the same candidate.

If propagation rules are configured from Employee Central, these rules will overwirite data that comes to EC from Onboarding. Propagation rules are configured in the Employee Central XML.Do not configure propagation rules for Onboarding - Employee Central integrations. *You define propagation rules to have the system automatically fill* *in fields in employment data. For example, if the user selects a certain location in Job Information, the time zone for that location can be filled automatically. Or if the user selects a job code, the job title to it will automatically be displayed in the job title field. This way, you reduce the amount of data the user has to enter manually, and it improves the consistency of data, which is vital for accurate reporting. Propagation is only possible from certain foundation objects to certain employment objects.*

Related Information

Employee Central Implementation Guide

2.2.1 Enable Onboarding to EC Integration

To enable the Onboarding to EC integration, you must set up BizX message notifications.

Procedure

1. Navigate to *Onboarding Super Admin* > *BizX Integration* and enable *SF_Notifications.*
2. To enable a specific message, select the checkbox of the message on the feature activation screen. There are three notification messages available: CanddateCreate message to BizX once new-hire is created, PostPHV message to BizX after PHV is completed, and PaperWorkDone message to BizX after NES is completed by new-hire.

2.2.2 Make Onboarding Fields Available for Mapping

Before configuring the Onboarding to Employee Central integration, you must make Onboarding fields available for mapping.

Procedure

1. Navigate to SuccessFactors HCM *Onboarding* > *Account Settings* > *Data Dictionary.*
2. Select a folder in the navigation area on the the left, then select the fields you want to map on the right.
3. Click the *Fields* folder at the top of the window.
4. Select the namesapce *Integrations*, then select a subfolder (for example the product you are integrating with). Move the fields you want to map from the left list (*Available Fields)* to the right list (*Fields attached to the Tag*).

> **Note**
>
> The field type must be the same in Onboarding as in Recruiting (RCM) or Employee Central (EC). For example, if the field you select is a string in Recruiting, it must also be a string in Onboarding.

2.2.2.1 How to Configure Repeating Fields

Configuring repeating fields allows you to send multiple values for a single field from Onboarding to Employee Central. For example, when listing dependants, a user can send multiple names.

Prerequisites

- Navigate to *Provisioning* > *Company Settings* > *Employee Central* > *Enable Dependents Management*.

Context

You can configure three types of repeating fields: Emergency Contacts, Dependents Information, and Work Permit. Configuration is the same for all three types.

Procedure

1. Create a multipanel. Navigate to SuccessFactors HCM Onboarding *Settings* > *Panels* > *Create.*
2. Check **`Yes`** next to *Is this a multi-panel?*
3. Enter the number of panels in the multipanel.
4. Enter the start index.
5. Select the panel from the list on the left. Choose the field from the list and click *Edit Field.*
6. Enable the *Repeating Field* checkbox.
7. Map the new repeating fields to the corresponding Employee Central fields, either using *Admin Tools*, or manually in the XML file.
    - Navigate to *Admin Tools* > *Manage Onboarding* > *Filed Mapping tool for Onboarding EC Integration*. Fields with brackets around the type icon to the left are array fields. For dependent information, enable the checkbox in the *Dependent* column. Select a *Category, Field Mapping,* and *Variant* for the field and proceed with the mapping.
    - Manually map repeating fields in the XML. Repeating fields cannot be mapped in Admin Tools. The **`#`** in the `<target variant>` field is required as a placeholder. For repeating fields set, `multi-valued` to **`true`**.

```
<mapping-attribute>
<source multi-valued="true" refid="EmergencyFirstName"/>
```



```
<target variant="" refid="emergencyContactPrimary.[#].name"/>
</mapping-attribute>
```

2.2.3 Set up Onboarding to EC Integration (New Hire Processing)

How to set up an Onboarding to Employee Central Integration, also known as new hire processing.

Procedure

1. Set up the transformation of data between Onboarding and Employee Central. You can do this in one of two ways.
   - Using the BizX Mapping tool. Navigate to *Admin Tools* > *Field Mapping tool for Onboarding to EC Integration* and use this tool to make changes to the mapping. Changes made in this tool are updated in the XML file.

2.2.3.1 How to Map Onboarding to EC Fields

You can use SuccessFactors HCM Admin Tools to map Onboarding to EC fields.

Procedure

1. Navigate to SuccessFactors HCM *Admin Tools* > *Manage Onboarding* > *Field Mapping tool for Onboarding to EC Integration.*
2. All Onboarding fields display in the left column. You can select a category for the field and choose a matching Employee Central object in the variant column.
3. Click the *Fields* menu in the upper left corner to sort the Onboarding fields by their assigned category. Only categories with at least one field mapped to them will display. Fields without a category appear as *Unmapped Info.*
4. When mapping is finished, click *Validate* to check that field mapping is accurate. Click *Show Warning* next to highlighted fields to display errors.
5. Click *Finish* to finalize the mapping.

2.2.4 Admin Alerts

The Admin Alerts tile is available to users in BizX.

The number of onboarded employees who are ready to be converted to employees is displayed on the Admin Alerts tile. The list is filtered by role-based permission based on the manager of the onboarding candidate.

If Recruiting and Onboarding are both enabled, there are two separate links on the Admin Alerts tile.

2.2.5 Manage Pending Hires

The Manage Pending Hires process allows uses to consolidate candidates coming from Recruiting and Onboarding.

In order for candidates to appear under *Pending Hires*, they must be set to both hired=No and readyToHire=Yes.

Access to *Pending Hires* is controlled with role-based permissions. The role-based permissions in this case are enforced through the manager, meaning the user managing hires should have access to the manager of the candidates being hired.

Under *Manage Pending Hires*, you can toggle between candidates from Onboarding and candidates from Recruiting.

After clicking *Hire*, you are taken to the *Add New Employee* screen, where the candidate's data from Onboarding is populated.

3 Mapping Recruiting-Onboarding Picklists

Picklist mapping is required to match Onboarding dropdown menus (for fields like Ethnicity, Marital Status, etc) to SuccessFactors HCM picklists. This ensures the picklist values in SuccessFactors HCM are properly matched to the corresponding Onboarding values.

Context

Mapping enum fields and picklists is required for all Recruiting to Onboarding integrations. Customers with Employee Central do not need to perform any additional mapping. The same mapping is used when data is moved from Onboarding to Employee Central, so if picklist names are not identical in Recruiting and Employee Central, values may not be matched and therefore will not appear in a drop-down, but rather just below the drop-down

Before executing the mapping, you will need to downlod the RCM XML files from Provisioning for the JobRequisition, Job Offer and Application objects. Then, search the XML files for the "picklist-id" tag to identify picklists used by RCM that need to be mapped to the lookup drown-downs in Onboarding.

You can also use the data dictionary XML files from Onboarding for Recruiting Execution and Employee Central to determine the list of fields with the tag `<lookupName>` or `<lookupKey>`. Lookup name and picklist name may be identical across the two applications.

The HRIS system (such as EC) is the system of record. Values in Recruiting must match those in Employee Central in order for mapping to work.

Procedure

1. For picklists, the description (label) in SuccessFactors HCM must made the *Code* value in Onboarding. Before beginning the mapping, the picklists you want to map must be adde to the Data Dictionary and the job requisition. Then check the Provisioning lists for the pickilist text and code. You must also add the corresponding dropdown to a panel.

A	B	C	D	E	F	G	H	I
^picklistId	OptionId	minValue	maxValue	value	status	external_code	parentOption	en_US
yesNo	380	0	0	0	ACTIVE		-1	No
yesNo	381	1	1	1	ACTIVE		-1	Yes

2. Navigate to *SuccessFactors Onboarding* > *Admin Tools* > *Metadata Framework* > *Import and Export Data.* Select **`Download Template`** and choose the **`RCM2KMSLookupMapping`** object. Download the template and unzip the resulting .csv file.

   Note

   If you are unable to find the *Import and Export Data* option, try using legacy Admin Tools, or searching for the menu in the advanced Admin Tools.

3. Navigate to *Admin Tools* > *Employee Files* > *Monitor Job*. Find the RCM2KMSLookupMapping file and click *Download Status* to download the file.

4. Remove the first column (*externalCode*) and the last column (*MDFSystemStatus*).

	A	B	C	D	E
1	externalCode	optionId	lookupCode	lookupName	mdfSystemStatus
2	externalCode	optionId	lookupCode	lookupName	status

5. Generate the input data for both field types (enum and picklist) from the Job Requisition.
   - For enums, navigate to *Provisioning* > *Managing Recruiting* > *Import/Update/Export Job Requisition Template.* Click the arrow icon next to the template you wish to map.
   - For picklists, navigate to *Admin Tools* > *Company Settings* > *Picklist Management* and select *Export all picklist(s)* and *Include System Generated Job Codes.*
6. Values for the optionID column can come from both enum fields on the JobRequisition template(s) or SuccessFactors HCM picklists.
   - To populate the optionID for enum fields, search the Job Requisition XML template for fields of the type "enum." The enum-value attribute gives you the value for optionID. For example:

```
<field-definition id="classificationTime" type="enum" required="false"
custom="false">
    <field-label>< ! [CDATA[Full Time/Part Time]]></field-label>
    <enum-value value="null">
        <enum-label>< ! [CDATA[No selection ]]></enum-label>
    </enum-value>
    <enum-value value="FULLTIME">
        <enum-lavel>< ! [CDATA [Full-time]]></enum-label>
    </enum-value>
</field-definition.
```

     Enter the optionID (in the example, "FULLTIME") into the lookup mapping template.
   - To populate the optionID column for picklists, Filter column A (optionID) of the picklist file in order to filter on the picklist you want to map, for example Ethnicity. Note the optionIDs for the relevant picklists. For mapping picklist information, the *picklistId* column corresponds to the *LookupName* column of the RCM2KMSLookup file.The Option ID columns between the two files should also match.

Picklist file

^picklistId	Option	minVal	maxVal	value	status
Ethnicity	5111	-1	-1	1	ACTIVE
Ethnicity	5112	-1	-1	1	ACTIVE
ethnicity	5107	-1	-1	-1	ACTIVE
ethnicity	5108	-1	-1	-1	ACTIVE

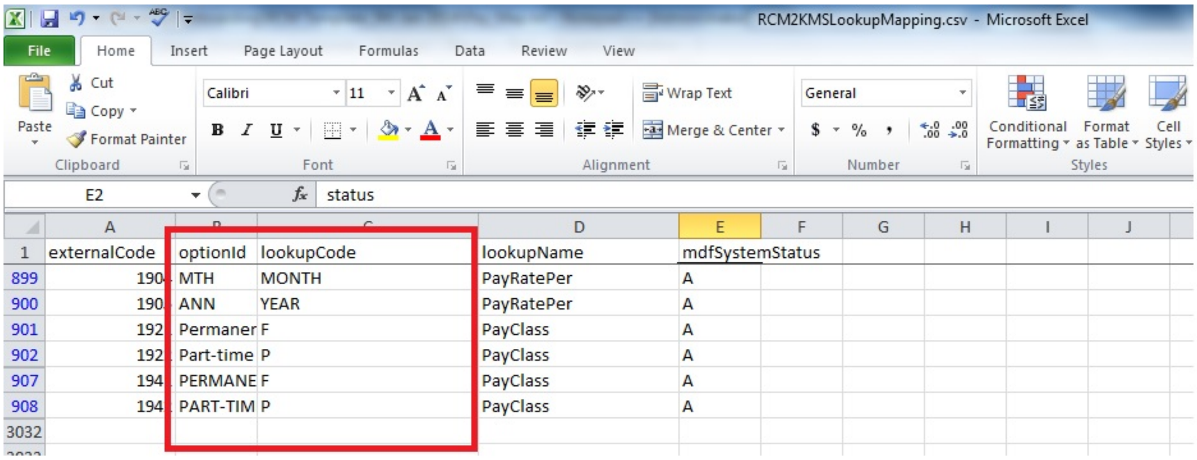
RCM2KMS Lookup file

optionId	lookupCode	lookupName
optionId	lookupCode	lookupName
	M	MaritalStatus
	S	MaritalStatus
	A	Ethnicity
	I	Ethnicity

You may also need to filter out inactive picklists, for example, filter column F (status) to `ACTIVE`. Inactive picklists come from previous uploads of picklists data, but you will only need active picklists for this mapping.

You may also want to temporarily include more detailed information corresponding to the optionIDs in one of the empty columns in the picklist download. This will help you quickly identify the corresponding Onboarding entries.

7. Identify the corresponding information from Onboarding. Navigate to *Onboarding* > *Reference Files* > *Data Lists.* For the results, click on the entry corresponding to the picklist you want to map to.
8. Add the appropriate code from Onboarding to the *lookupCode* column in the RCM2KMSLookupMapping template.
9. Enter the appropriate LookupName from the Onboarding data dictionary XML into the *lookupName* column.



10. Remove any temporary information you have entered to identify the lists being mapped.
11. Save the template as a .csv file
12. Upload the mapping data to SuccessFactors HCM. Navigate to *Admin Tools* > *Employee Files* > *Import and Export Data.*
13. Select *Import Data*, choose *CSV File* and then navigate to the modified RCM2KMSLookup file. Click *Import.*
14. When the import job has finished, you can find your lookup mappings in *Manage Data* by viewing the RCM2KMSLookupMapping object (or by simply exporting the data in *Import and Export Data*, using the generic object RCM2KMSLookupMapping. If you export the data from this menu, you can view the file by navigating to *Process Job Monitor* > *Monitor Job* Here you can view the progress of the data export and download the file.

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