

Onboarding 2H 2021 SuccessFactors Review

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The 2H 2021 release for SuccessFactors brings with it a multitude of enhancements to the Onboarding module. This article highlights the enhancements that customers have been waiting for. The main areas I will cover in this article refer to the internal onboarding process, the external onboarding process, the onboarding administration, and technical enhancements. I will not be covering any of the updates for Onboarding 1.0.

Internal Onboarding Process

Future Manager permission to complete onboarding tasks

A very useful update to the internal onboarding process is the permission to grant a future manager access to internal hire details in the Onboarding Dashboard and the To-Do tiles before the start date. The future manager can now perform tasks such as Assign Buddy, Recommend People, and Schedule Meetings before the employee's start date. Previously, the manager could only complete the internal onboarding tasks after the employee's start date, which was not a practical approach.

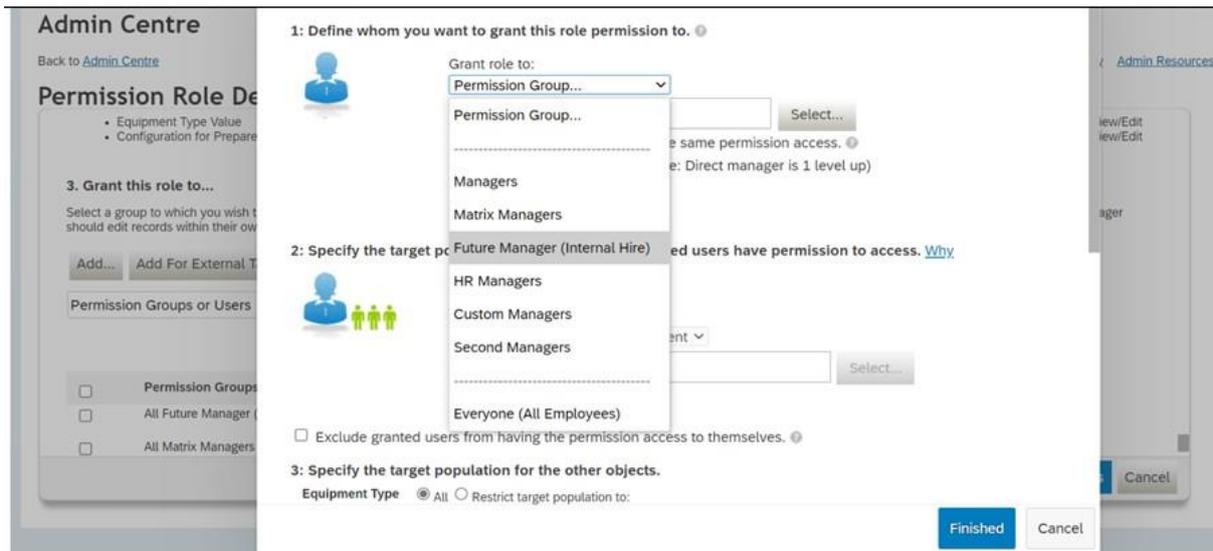


Figure 1 – Grant Future Manager permission in RBP

Qualtrics Survey

An interesting feature allows customers to send a Qualtrics email survey to employees when an internal hire step is completed in the onboarding process. The Qualtrics Integrations feature in Admin Centre allows customers to add a new email survey integration for the Internal Hire Process Completed event.

External Onboarding Process

External Hire Learning Courses

It is now possible to assign learning courses so that new hires will complete them before their first day. The assigned courses are now available on the new hire's onboarding homepage and accessed via the To-Do list. Additionally, the new hires can access the SuccessFactors Learning module from the main drop-down menu when the system is configured to permit this.

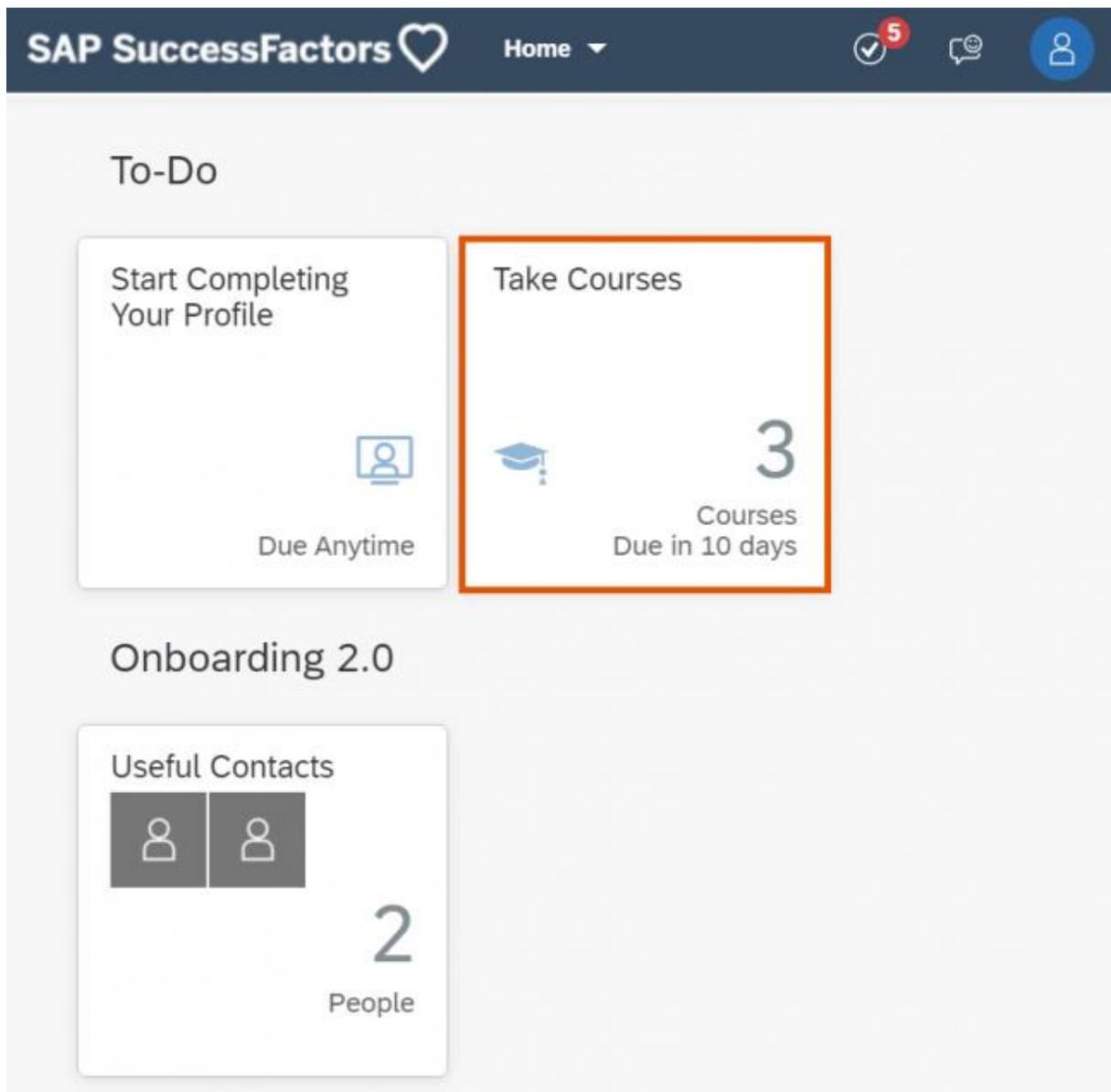


Figure 2 – Assign learning courses in onboarding

Onboarding Process Restart

A handy update to Onboarding is the ability to choose to retain the new hire information in Onboarding or update the information from Recruiting after restart based on the business requirement. Prior to this release, the information submitted in the new hire data review step or the personal data collection step was not retained in the system. A restart would have required the information to be added once more by the key participants of the onboarding process.

Onboarding General Settings

User Settings

Photo access for external users

Restart Settings

Listen to Recruiting Updates for Start Date and Hiring Manager

The switch allows you to determine if start date and hiring manager updates flow from Recruiting to Onboarding. If you enable the switch, start date and hiring manager changes in Recruiting reflect in Onboarding. Otherwise, the changes are not reflected.

Allow Recruiting Updates: OFF

Retain Onboarding Information After Manual Restart

The switch allows you to determine if new hire information must be updated from Recruiting or retain the existing information filled as part of the Onboarding process after manual restart is performed.

Retain Onboarding Information: OFF

Figure 3 – Retain onboarding information & recruiting update

Rehire on a New Employment

A minor update to the Rehire on New Employment flow has now been delivered with the aim to improve the user experience. It is now possible to see additional information on the Rehire Verification Step such as date of birth, national ID, legal entity, and user record matching to support identifying rehires through Onboarding. Among these updates, we can also see that the value No-Show has been added in the event reason field for a cancellation in the second rehire check. In addition, a new welcome email template, specifically for rehires, is now available.

Rehire Verification for June Pinto

MC Warehouse Operative
Date of Birth: 25 Aug NINO: ** ** * 00 A

June Pinto's profile matches with the following ex-employee profiles:

Matching Profiles	Additional Details	Previous Recruiting Manager	Recruiting Eligibility
<input checked="" type="radio"/> <p>June Pinto MC Warehouse Operative Model Company 3 UK (1100) Leeds Plant UK (MC_UK_LEE2) Last Working Day: 1 Oct 2019</p>	<p>Date of Birth: 25 Aug NINO: ** ** * 00 A</p>	<p>Jan Barnes MC Warehouse Manager MC_UK_LEE2 990068 Jan.Barnes@bestrun.com</p>	<p>Eligible for Rehire</p>
<input type="radio"/> No matching profiles found, consider onboarding as a new recruit.			

Rehire with New Employment Cancel onboarding Back

Figure 4 – Rehire on a new employment

Latest Homepage

More to-do tasks from across all SuccessFactors modules are now available on the latest home page. The new hire information and other tasks related to Onboarding have been included in this release. The onboarding tasks worth mentioning are: Let us know about you, Let us know more, Complete your eSignature, Welcome Aboard, Browse through the recommended links, Know your key people to meet.

Administration

Recruit-to-Hire mapping

You can now avoid mapping Pay Component Recurring and Pay Component Non-Recurring mandatory fields using Recruit-to-Hire Data Mapping to pass values from Recruiting Management to the New Hire Data Review page and the Manage Pending Hire page. Previously, if the pay components were not mapped in the Recruit-to-Hire, the first task in Onboarding was not triggered, resulting in an error message in the Business Process Engine (BPE) tile. This new enhancement allows you to overwrite Foundation Object values of the pay components depending on the customer's business processes.

Process Flow in the Business Process Engine

As an administrator, you no longer need to upgrade the default flow in Business Process Engine manually. The Default Onboarding Process flow in the Business Process Engine now automatically upgrades when a major or patch release is deployed.

Technical

Update Username of New Hires in OData API

It is now possible to use the updateUserNamePostHiring API to update the internal username of new hires after their hiring process is completed and before they are converted to employees. This feature has specifically been developed to allow the new hires' internal username to be updated with the name from Active Directory. Previously, the username was updated by the Active Directory on the new hires' start date.

Conclusion

In the 2H 2021 release for Onboarding, new functionality was limited to compliance forms and adjustments to the new homepage reflecting the new hire data collection. I can see significant progress with a couple of long-awaited enhancements, such as the future manager's ability to complete internal onboarding tasks before the employee's start date and the ability for new hires to complete learning courses before their first day. These highly anticipated features will bring significant value to customers and improve the current onboarding experience.

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