

SuccessFactors Onboarding Specification Sheet

Key capabilities and descriptions:

- Forms Management
- Task & Process Management
- New Hire Portal
- Document Center
- Reporting
- SuccessFactors HCM Suite Integration
- Third party integration

Forms Management

Forms Management is the ability to capture new hire data necessary to complete relevant new hire forms, electronically sign the forms and track and route the forms to system users. Key capabilities of Forms Management include:

Key Feature	Description
Standard Forms	Forms maintained by SuccessFactors: US State & Federal Compliance forms: Federal Form I-9, Federal Form W-4 and Federal Form 8850, State Withholding Forms, NY Wage Theft Prevention Act, CA Wage Theft Prevention Act, PA Residency Act and CO Affirmation.
Custom Forms	Ability to have customer-specific forms available for data entry - Professional Services Scoping Required.
e-Signature	The ability to click-to-sign PDF forms including user authentication
Smart Data Entry Panels	Ability to collect all unique data necessary to populate forms and create files necessary to send to other applications (e.g. core HR). Prevents duplicate entry of data across multiple forms and performs data validation on certain fields.

Task and Process Management

Task and process management provides the ability for business rule specific workflows to be enabled and tracks the progress of each task. Key capabilities of task and process management include:

Key Feature	Description
E-Verify Workflow & Integration	Incorporates the workflow for employers who voluntarily choose or are required by federal/state laws or regulations to verify a new employee's eligibility to work in the U.S. using a Web Services interface with the U.S. the Department of Homeland Security's E-Verify program. SuccessFactors is appointed to act as the customer's Web Services E-Verify Employer Agent.
Notifications	Ability to configure specific steps in the process to send a notification automatically to internal departments or external vendors, including automatic reminders via email.

Task definition	Ability to define tasks for different end users
Configurable Workflows	Ability to define triggering events and process flow for each task and to monitor the status.
Dashboard	Provides an overview of new hires and the status of onboarding tasks
Pre-configured hiring manager activities	Guides hiring managers through specific activities to ensure new hire success – e.g. assigning a buddy, identifying people to meet or content to work through

Company Specific Content

This is a secure on-line destination for content and information geared towards the new employee (showing up in the 'About Us' tab). Information can be maintained by each customer and can include things like training content, benefits information, policies and procedures or company values and cultural information. Key capabilities include:

Key Feature	Description
Permissioned Access	The 'About Us' content can be accessed either from within the SuccessFactors HCM Suite, or directly (e.g. through an email link).
Content Management	The portal can contain content, documents, and videos for new hires, transferring employees and exiting employees. This content is managed by the customer.
Personalized	Content is driven by business rules so that it's specific to each user, based on their profile.

Document Center

The document center facilitates document management by maintaining corporate and employee documents in a secure on-line environment. Key capabilities include:

Key Feature	Description
Virtual electronic file cabinet	Provides the ability to access documents via any index – such as last name, employee ID, document name, etc.
Secure storage and access	Document level security allows the customer to set up security groups to determine who can view which documents.
Audit logs	Tracks each access of stored documents. Information retained includes identification of the authenticated party, the date and time of each access event, as well as records of which documents were accessed, and action taken.
Document upload	Ability to automatically upload and index documents from SuccessFactors Onboarding. Paper based documents can be scanned, uploaded and indexed by the customer to the document center.

Reporting

SuccessFactors Onboarding includes a report builder that allows you to create reports based on the data collected during the onboarding process. The reports can be exported to Excel and saved as private or public templates.

Key Feature	Description
Standard Reports	Standard reports are pre-configured reports that can be filtered in various ways such as activity completion status.
Advanced Reports	If customized reports are required, they can be created in Advanced Reports using a report wizard which allows you to build search criteria and determine sort order of the report results.
EEO Reports	Onboarding includes three pre-designed EEO report templates that you can use to quickly generate EEO Reports based on data collected during the onboarding process
Audit Trail Reports	Ability to create reports for audits
Signature Transaction Reports	Onboarding includes the Signature Transactions Report Builder that allows you to produce reports that represent the dates of the New Employee and Corporate Representative signatures of signed documents.

SuccessFactors HCM Suite Integration

SuccessFactors HCM Suite integration is the ability to incorporate other SuccessFactors HCM processes as part of the onboarding workflow and to pass data to other SuccessFactors HCM products. Key capabilities include:

Key Feature	Description
Home Page	Ability to include onboarding tiles on the home page side by side with key modules such as SuccessFactors Learning and SAP Jam, so that employees have a single user experience across the suite.
Goals Management	Creation of short term goals within the onboarding workflow.
Recruiting	Ability to have new hire records created from SuccessFactors Recruiting that will then initiate the onboarding workflow
Employee Profile	Ability to display public profile data / information of employees in the organization to your new hire

Third Party Integration

Third party integration is the ability to pass data between SuccessFactors Onboarding and third party systems. Key capabilities of third party integration include:

Key Feature	Description
Standard integration	Integration to any ATS and HRIS via our standard import/export template
Integration to Tax Break	WOTC integration with our partner Tax Break