

Q3 2018 SuccessFactors Review

Onboarding

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Onboarding 2.0 is now in early development release for those customers who signed up to access it; but for those who have not, this quarter's release contains more information about what Onboarding 2.0 will look like and how it will operate differently from the current Onboarding solution. Speaking of the current Onboarding solution, it continues to tick over with SuccessFactors doing their part to keep it legally compliant across multiple countries. Let's look at the updates included in this quarter.

Compliance Updates

- US Maine W-4ME state withholding – previously operating on an older version, this has been updated to line letters on the personal allowance worksheet (line B)
- US Missouri MO W-4 state withholding – previously operating an older version, the values for filing statuses have been updated, and the instruction text has also been modified.
- US Kentucky I-4 state withholding – previously the employee could claim deductions, but as Kentucky has moved to a flat tax, the employee now selects exceptions instead. This comes with a complete panel overhaul.
- US remove Kentucky K-4M form and panel – as this has been combined on the new K-4 form, the K-4M has been removed.

- US Georgia GA_G4 state withholding – also operating on an older version, the calculation on the worksheet has been updated for single/head of household and each spouse values.
- US Washington DC D-4 state withholding – again previously on an older version, the calculation here has been updated on additional withholding allowance worksheet – with text updates in the instructions.
- US Oklahoma W-4 state withholding – a new state withholding form has been released for Oklahoma which includes a new data entry panel as well.
- Canada British Columbia TD1 – this previously had 12 sections to populate but now sections 8 and 9 have combined (with the previous version of 9 being removed), and the numbers have updated accordingly.
- Canada Quebec TP-1015-3-V – the age on Panel 9 has changed from 62 to 61. Also, the links to worksheets have updated to the new version.
- Canada Nova Scotia TD1ns – Sections 6 and 7 have text and value updates, and there are overall instructional updates too.
- Liberians have been added to the list for TPS countries in the US i-9 Panel.
- From the Orientation step, the verify social security number panel has been removed. See *Figure 9.1*.

Notable fixed issues

From compliance updates, we move onto the updates made by fixing issues reported by customers.

- For the Australian compliance panels, Jervis Bay has been removed from the territory list, the title field on the review panel is no longer all caps. The state now shows as a state letter code, and the date format on the form is now consistent however because of the formatting issue with DocuSign the date will appear underneath the date field boxes on the form, but in the correct format.

Employee Name & SSN Information

Our company participates in the Federal government's E-Verify program. The E-Verify program requires us to ask for your social security number. Please ask the employee to verify that the social security number listed below is correct.

SSN

The Employee agreed to apply for an SSN.
The Employee has applied for an SSO Receipt #

Verify the employee's name.

*The name must be spelled exactly as it appears on the employee's Social Security Card.
The name is spelled exactly as it will appear on the employee's Social Security Card.*

First Name:

Middle Name:

Last Name:

Suffix:

Figure 9.1



- The disability form has been updated to the new version which will expire in 2020.
- For the Onboarding country list, Taiwan's code is now TW, Hong Kong is now 'Hong Kong Special Administrative Region of China', and Macao is 'Macao Special Administrative Region of China'.
- Yugoslavia has been removed from the country list.
- The rich text editor will now consistently appear whereas previously it would sometimes not.
- The standardised country and state lists, when used in custom panels, did not work for 12 states. This has been corrected.
- For the NY LS_57 WTPA form, the employee pay type was not calculating correctly. This has been fixed.
- The DocuSign/ClickToSign on the Signature page previously did not load correctly for custom processes; it will now load signature as configured.
- The option for the manager to skip print package was not working; it is now.
- Previously, importing new hire records did not create OCI objects for internal hires. This means that the 'signed' status was also being copied over for new hires who have an existing ONB record. From now on, 'signed' will not be utilised or copied.
- The Document Center Audit area would not load after Page 1, but pagination now functions.
- Candidates would get stuck at signing with DocuSign Outside Signing as Onboarding didn't process the 'Downloaded' status from DocuSign. Now it will process signatures if all documents are in 'Downloaded' status.
- The Pennsylvania Residence panel previously would not show any data. It now populates as normal.
- The eVerify summary would miss critical information such as first and last names. This has been corrected.
- The New Employee Step would not complete after DocuSign, as the DocuSign request needed to be adjusted for some sensitive fields. Now, the NES will consistently complete after DocuSign is completed.
- The data purge (introduced in Q1 this year) would fail for some specific countries. This has been corrected.
- Some special characters such as '?' and '~' would not work on Advanced Conditions for Forms; now all character values function as Form Advanced Conditions.
- When DocuSign outside signing was enabled, the US I9 All Sections form would not load; this has been fixed.
- When using the Onboarding Audit trail, it would only show the original user in the Audit Trail. It can now show the proxied user as well.
- When converting a JPG into a PDF, it would break the DocuSign file delivery limit. It now converts into the same size file.
- Offboarding a user would result in the user's manager being offboarded, as it incorrectly inherited the manager's ID. This has been corrected.
- And finally, the I9 form was missing the Signature Step when set to ClickToSign, and DocuSign enabled for other forms. The workflow will now allow the recruiter to sign the I9.



Onboarding 2.0

Now we move onto the further insights into the Onboarding 2.0 solution which will be released next year. This I imagine is the main area of interest for readers of this blog – including myself as an Onboarding consultant. Onboarding 2.0 is promising to radically change how we even think of Onboarding in a SuccessFactors context as well as use it, so these ‘teasers’ that SuccessFactors are releasing with each quarter serve to both whet the appetite and give customers an idea of how much Onboarding will be improved with this new solution. Let’s first look at the enhancements.

Firstly, there will be a new provisioning opt-in called ‘Furnish Equipment Intelligent Services Event and OData API’, which will extend onboarding workflow by integrating with external procurement and provisioning systems.

I have always found the current Furnish Equipment workflow setup to be very restrictive (as you can only use users related to the requester rather than the incoming employee) and complicated to set up (utilising EC Business Rules). Now, we can use Intelligent Services to create workflows in an easier dynamic fashion. See *Figure 9.2*.

Looking at the OData API, the entity name will be ‘ONB2EquipmentActivity’ and support the following operations: Query, Upsert, Insert, Merge, Replace and Delete. The external key will be ‘activityId’, and the related entities will be User, ONB2EquipmentValue and ONB2EquipmentType.

Next, the Onboarding Start Intelligent Services Event will extend the Onboarding workflow to external systems (for example those with an on-premise core HR system). See *Figure 9.3*.

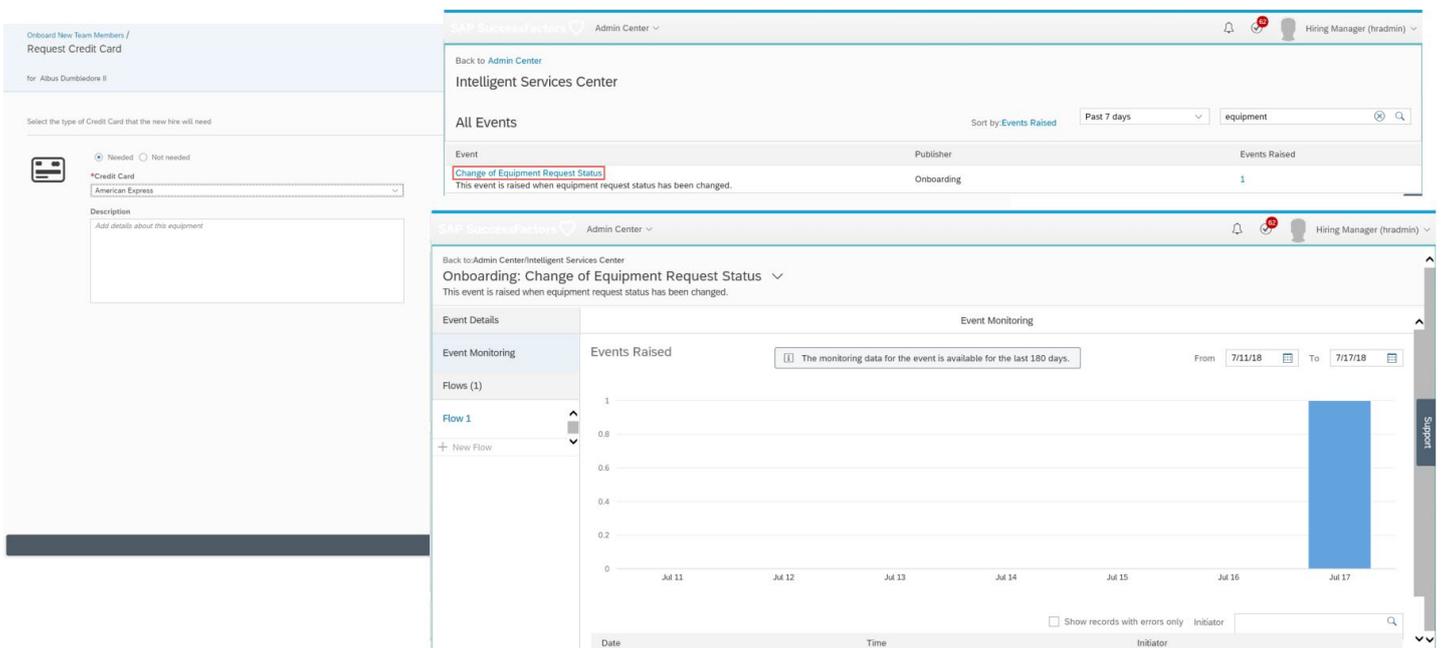


Figure 9.2



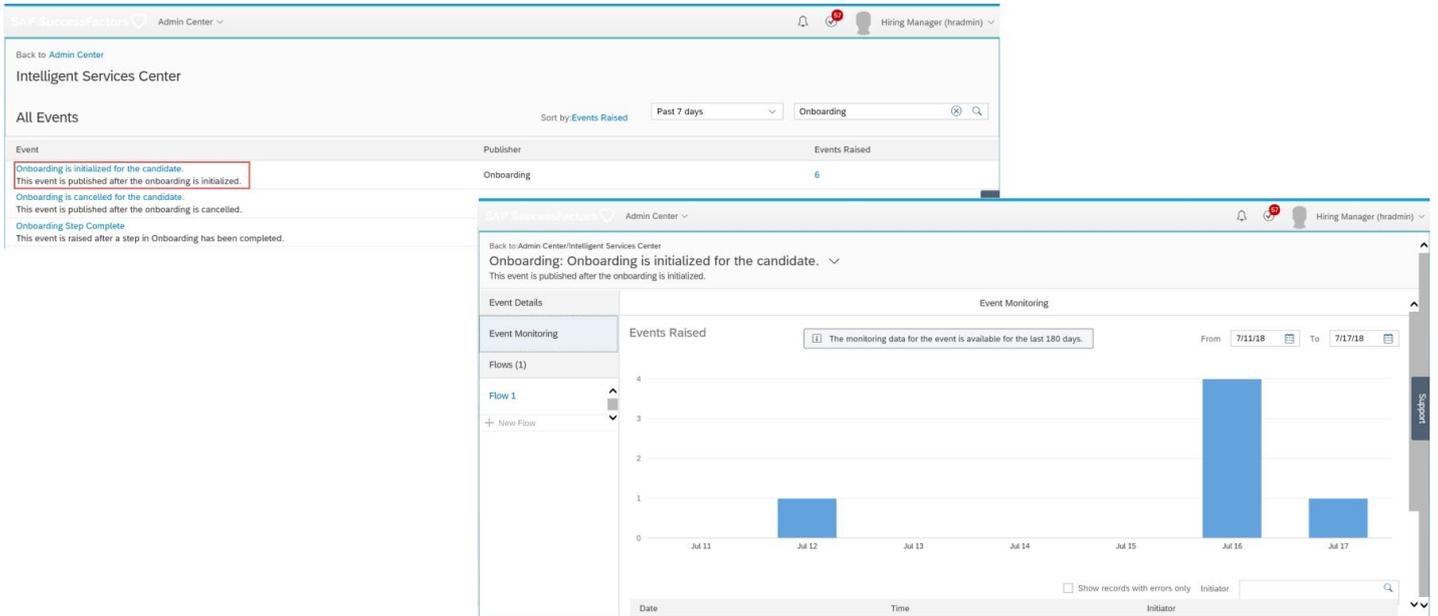


Figure 9.3

Continuing the overall theme for this year (data privacy and security), Onboarding 2.0 will provide tools for customers to be compliant with any data privacy and security regulations. All upgrades introduced this year will be carried over, including Change Logging for Personal Data, Read logging for Sensitive Personal Data, Data Purge, Consent, and Information Reporting. See Figure 9.4.

Important Information

Finally, some notes on the Home Page3 Universal Roll Outs impacts on the current Onboarding solution:

- The HP3 tiles do not support the legacy N1 HM Activities notifications. This is because HP3 only works with MDF based new hire activities, and customers need to migrate to this with the roll-out of HP3.

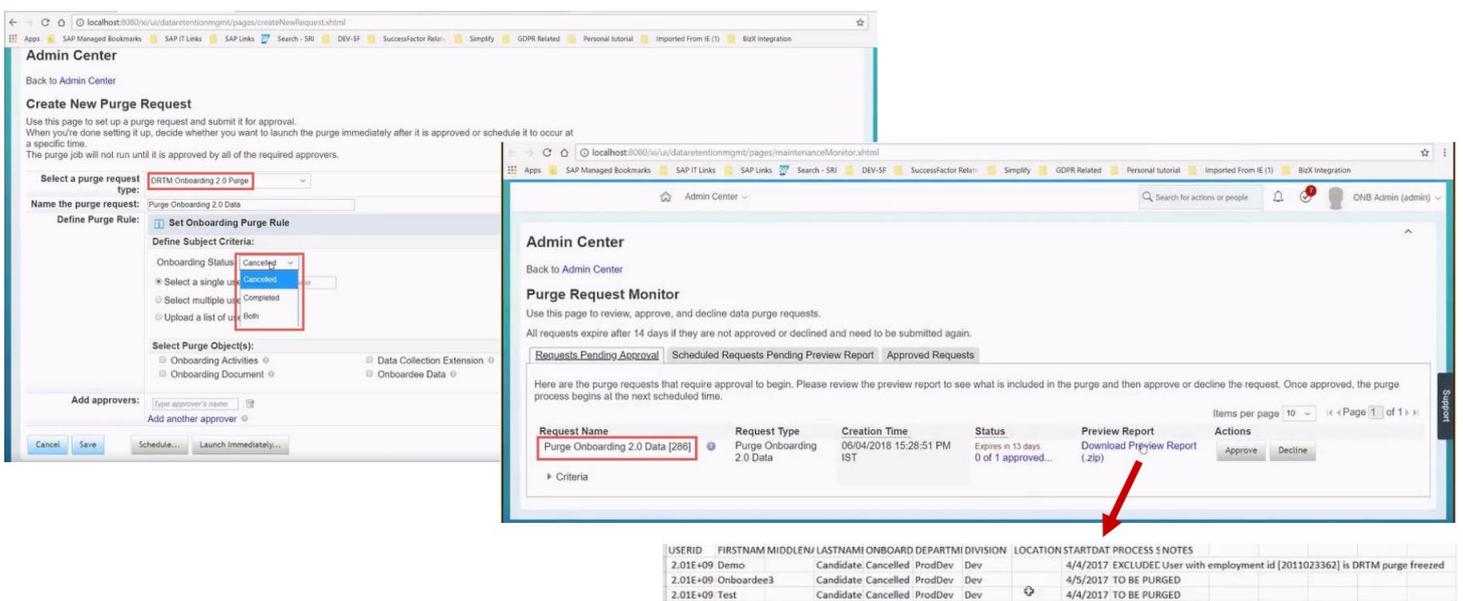


Figure 9.4



- The 'About Us' link will be removed from HP3, and a custom tile will need to be configured to show an 'About Us' link to the employee portal.
- The homepage tour will need to be reconfigured in HP3.

And at this year's SuccessConnect in Las Vegas there will be Onboarding sessions with an overview and roadmap for next year.

Conclusion

In summary, we've seen that SuccessFactors are continuing to keep the current Onboarding solution legally compliant while Onboarding 2.0 is being beta tested by early adopters. These further glimpses into Onboarding 2.0 are showing both consultants and customers how it will radically change their existing ways of working and even thinking about Onboarding, on its full release. It's an exciting prospect. Thanks for taking the time to read and see you next time.



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