CHAPTER 2

Internal (Cross-Module) Integrations

The SAP SuccessFactors BizX Suite is comprised of many modules, such as Talent Management, Learning, Workforce Analytics, Employee Central, the Recruiting Execution (REC) Suite, and so on. In this context, a cross-module integration is an integration between at least two modules of SAP SuccessFactors.

One key advantage of the SAP SuccessFactors REC Suite is its unified cross-module integration. Figure 2.1 briefly describes the integration between Recruitment Management, Recruitment Marketing, Onboarding, and Employee Central.

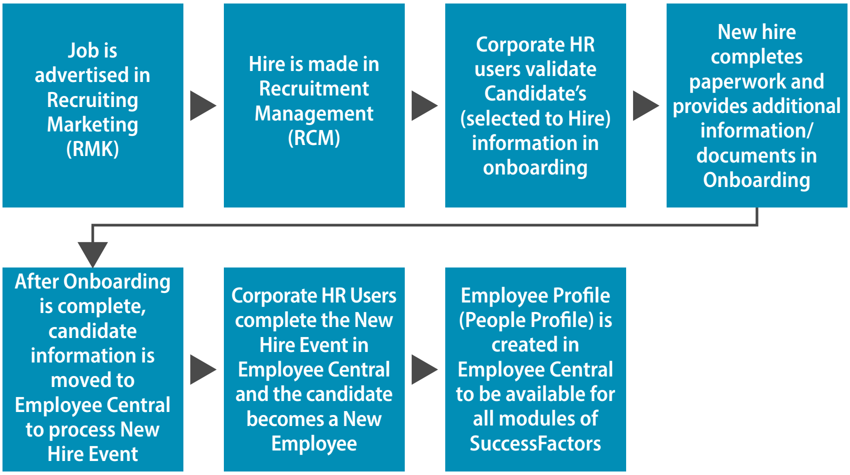

Figure 2.1 Cross-module integration flow of the SAP SuccessFactors REC Suite and other modules

As you can see in Figure 2.1, information (or data) flows from one module to the other. However, these integrations don't come pre-built and need to be configured based on a company's requirements. (I cover this in more detail later.) Figure 2.2 explains how a job is advertised in Recruitment Marketing, how the application data is received in Recruitment Management, the process for moving data to Onboarding once a candidate is selected, and, finally, how data is moved to Employee Central to convert a candidate to an employee.

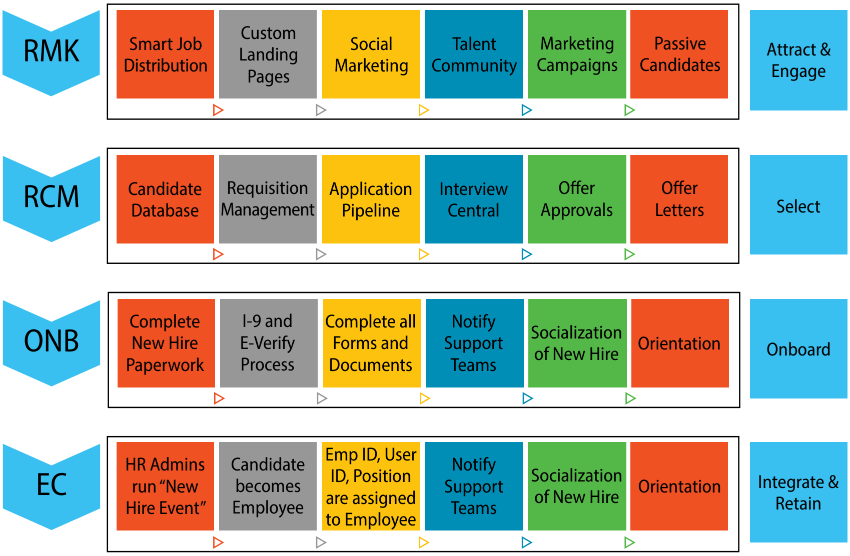

Figure 2.2 The cross-module integration of Recruitment Marketing (RMK), Recruitment Management (RCM), Onboarding (ONB), and Employee Central (EC)

In this chapter, I discuss these four main REC-related cross-module integrations:

- Recruitment Management and Onboarding
- Recruitment Management and Recruitment Marketing
- Recruitment Management and Employee Central
- Recruitment Management and on-premise SAP ERP HCM

2.1 Recruitment Management and Onboarding

Employee Central is the core HRIS module of SAP SuccessFactors. There are options (mostly manual ones) in SAP SuccessFactors for sending applicant data directly from Recruitment Management to Employee Central to hire employees. These are not fully automated or integrated options. Not every company implements or buys both the REC and Onboarding solutions. In my experience, I have come across many companies that chose to use a manual, paper-based format for onboarding of new employees, or another solution besides Onboarding.

However, if the company has bought and licensed both SAP SuccessFactors REC and Onboarding, it is an SAP SuccessFactors best practice to send applicant data from Recruitment Management to Onboarding, and then from Onboarding to Employee Central to take advantage of the direct data flow via Integration offered by SAP SuccessFactors. This streamlined process is, on its own, a very compelling reason for integrating the Recruitment Management and Onboarding modules.

2.1.1 Benefits of Integration

Mapping of the corporate structure from REC to Onboarding is very important since it populates information about the job's department, division, and location from the requisition to the new-hire information in Onboarding. Mapping of the corporate structure is helpful because it auto-populates most of these fields in the new-hire packet of the applicant and removes the manual effort of inputting those values by HR administrators.

2.1.2 Prerequisites of Integration

Here are some prerequisites for configuring integration between Recruitment Management and Onboarding:

- The V12 Framework should be enabled in Provisioning.
- Configure Onboarding before beginning the Recruitment Management-to-Employee Central integration.
- Enable the Role-Based Permissions (RBP) module.

- Configure field mapping between Recruitment Management and Onboarding in Admin Tools.
- Provide feature permissions for Onboarding in the Job Requisition XML Template. By using the feature permissions access-only option, the granted admin user is able to initiate the onboarding process for selected candidates.

Here is an example of XML code that grants the onboarding feature permissions to a recruiter role (R) and manager role (G):

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

- A key part of the Recruitment Management and Onboarding integration is to ensure the Initiate Onboarding button is displayed at the appropriate status in the Talent Pipeline, so that Recruiters can initiate the onboarding action for selected applicants. It is a best practice to display the Initiate Onboarding button (as shown in Figure 2.3) either in the Offer or Hired status. The process of adding the Initiate Onboarding button to any of the Talent Pipeline statuses is done in the XML code.

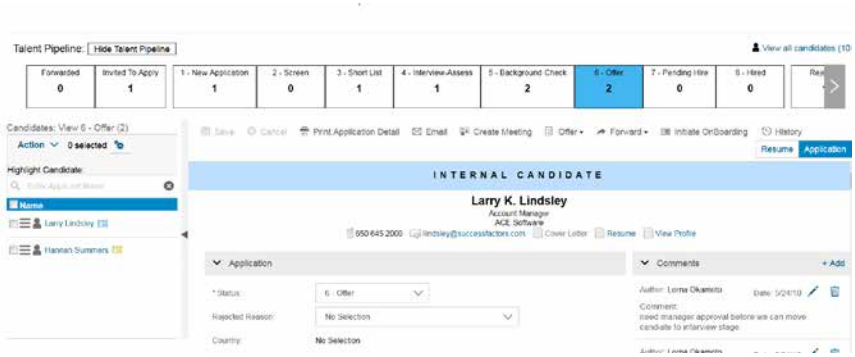

Figure 2.3 Initiate Onboarding

2.1.3 How This Integration Works

To better understand this integration, take another look at Figure 2.3. As you can see, the Initiate OnBoarding button permission was enabled for the status Offer in the Talent Pipeline.

1. Once Onboarding is configured and appropriately permissioned in the Recruiting XML Template, a recruiting user can click the Initiate OnBoarding button for a specific applicant in the Talent Pipeline. In Figure 2.3, the Initiate OnBoarding button is clicked for Larry K. Lindsley in the Offer status. This opens a pop-up message, as shown in Figure 2.4

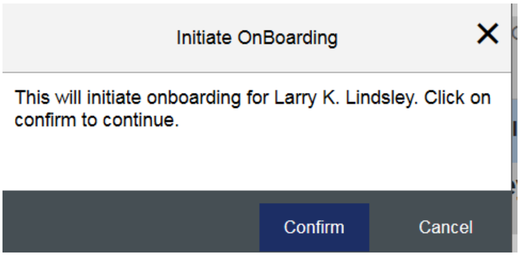

Figure 2.4 Confirm that Onboarding is initiated

2. Click the Confirm button in the Initiate OnBoarding pop-up and onboarding is initiated.
3. Once onboarding is initiated, the data is sent from Recruitment Management to Onboarding, based on the mapping previously configured in Admin Tools.
4. Once onboarding is successfully completed, when new hires log into SAP SuccessFactors they see the welcome message and other manager-assigned details, as shown in Figure 2.5.

Figure 2.5 Welcome message screen for new hires on first logging in to SAP SuccessFactors

2.1.4 Additional Integration Tips

Here are some key takeaways for the Recruitment Management-to-Onboarding integration:

- If a company wants to send certain applicant data from Recruitment Management to Employee Central directly, and data for other applicants from Recruitment Management to Onboarding, this requires two different workflows and two different requisitions.
- One of the essential steps to enable this integration is to map the different fields from Recruitment Management to Onboarding. (Do not map to the SSN field because the SSN field is stored with encrypted characters [wild characters] in Recruitment Management.)
- The Onboarding WOTCStartDate field must be populated, because Onboarding uses it as the hire date for new employees by default. It can be captured in Recruitment Management and mapped to Onboarding.
- Mapping of Corporate Structure from Recruitment Management to Onboarding is very important since it populates information about the job's department, division, and location from the requisition to the new-hire information in Onboarding.

- Do not sync the Corporate Structure information, because the sync only brings the label and code information, and leaves out some critical fields, such as the Corporate field attributes and relationships.
- When you add a new division, department, or location in SuccessFactors HCM, you have to manually add them in Onboarding as well. If Corporate Structure is not mapped, when a new hire is onboarded, only the first data field information listed in the division, department, or location is populated. Though it can be changed during the Post-Hire Verification step, it will create bad data in the system.
- When you map fields from Onboarding to Recruitment Management, each of the fields must be mapped to similar field types. For example, a text field in Onboarding must be mapped to a text field in Recruitment Management.
- The field values also should match, including case. For example, if Recruitment Management uses the value First Name, Onboarding must use the same value, including matching case.
- 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, a pop-up says the candidate has already been onboarded for a job.

For detailed configuration steps for this Integration refer to the Onboarding Implementation Guide available in the SAP help portal.

2.2 Recruitment Management-to-Employee Central Integration

The Recruitment Management-to-Employee Central Integration provides a unified way to convert an external candidate to a new employee, including issuing an employee ID. This integration is required for companies that have implemented only the Recruitment Management and Employee Central modules (and not Onboarding).

Tip! Note that there is an additional configuration step to enable the integration between Recruitment Management and the Position Management module of Employee Central. With this integration enabled, recruiters can create a requisition from the Position Org Chart. The details for this integration are beyond the scope of this book.

Note: As an SAP SuccessFactors best practice, it is advisable to pass applicant data from Recruitment Management to Onboarding and then on to Employee Central. However, in the absence of an Onboarding implementation, this integration can be used to pass applicant data to Employee Central to populate new-hire employee information.

2.2.1 Benefits of Integration

There are a number of advantages to the integration of Recruitment Management to Employee Central—the key one being transferring all application data from Recruitment Management to the employee profile section of Employee Central. Here are some other benefits of integration:

- Corporate HR users can review and edit new-hire account data pulled directly from the Recruitment Management module.
- Corporate HR users can submit new hires for approval (for example, creation and routing of new employee accounts) and receive automated notifications of the process progress (for example, final approval received).

- Corporate HR users can update the Candidate Profile with the employee ID.
- Companies using both Recruitment Management 2.0 and Employee Central 2.0 can hire internal and external candidates and automatically sync them into the Employee Central database.

2.2.2 Prerequisites of Integration

Let's look at the prerequisites required to enable Recruitment Management-to-Employee Central integration:

- Employee Central V2 must be enabled and configured.
- Configuration only has one Hired and one Ready to Hire (hirable) status per Applicant Status Set in order for the integration with Employee Central to work (as outlined in the Configuration Guide).

2.2.3 How This Integration Works

Here is a visual representation of how this integration works:

- Stage a candidate in Ready to Hire status in the Recruitment Management module. (Make sure this Ready to Hire status is marked as Hirable in the application status settings in Provisioning.)
- Access the Employee Central page for creating new employees. Candidates who are moved to the Ready to Hire (hirable) status in Recruitment Management show up under the Pending Hires transaction in Employee Central, as shown in Figure 2.6.

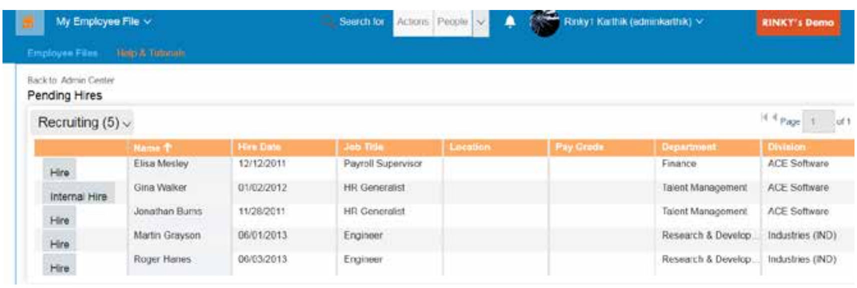

Figure 2.6 Manage pending-hire transactions in Employee Central

- Candidates are hired by clicking the Hire button to the left of their names. This launches the Add New Employee transaction in Employee Central, as shown in Figure 2.7.

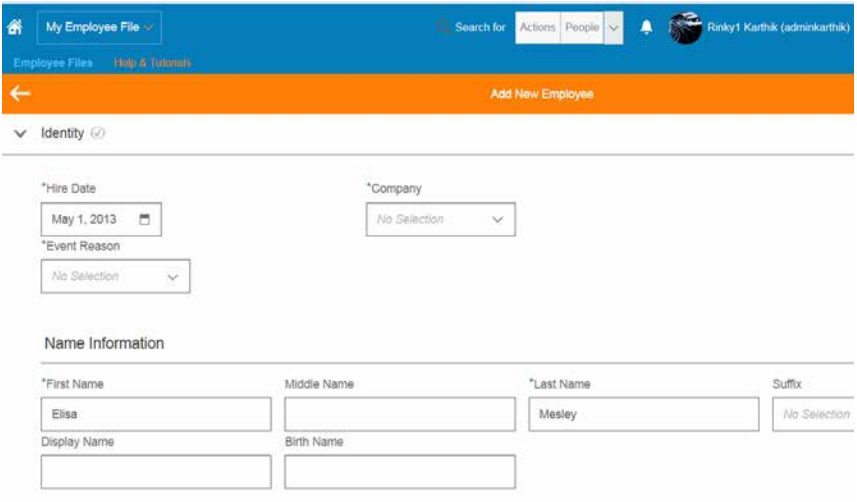

Figure 2.7 Add a new-hire transaction

2.2.4 Additional Integration Tips

Here are the key takeaways from the Recruitment Management-to-Employee Central integration:

- The Integration Template pulls data from the candidate application, job requisition, and offer letter. To maximize data transfer, make sure the Requisition, Application, and Offer Details XML Templates are configured to include the Employee Central fields supported in the Recruitment Management–Employee Central Transformation Template XML (see the next note).
- Because the Pending Hires list is populated based on the offer-approval information, a candidate must go through an approved offer-approval process prior to being set to Ready to Hire status.
- Permission to view applicants in the Manage Pending Hires section is based on the requisition operators, not the applicant data.

Note: The Employee Central-Recruitment Management Transformation Template is an XML-configurable template used to define and map field-level integration between Recruitment Management and Employee Central.

2.2.5 Important Configuration Steps

Here are some key configuration steps that must be performed for this integration to work successfully.

(For detailed configuration steps for this integration, refer to the Employee Central Implementation Guide and Recruiting Implementation Guide in help.sap.com.)

1. Map data from the Recruitment Management fields to the equivalent fields in Employee Central. External candidate profile background elements are synced to the People Profile automatically when correctly mapped. The mapping is done in Admin Tools.
2. Create one Hire and one Pending Hire (hirable) status in the Application Status Set of the Talent Pipeline. For example, in Figure 2.8, Pending Hire and Hired statuses are created.

Figure 2.8 Pending Hire (hirable) and Hired statuses are created in the Talent Pipeline

3. Configure the candidate-to-employee integration using the Recruitment Management-Employee Central Transformation Template XML code.
4. The Offer Approval step, once approved in Recruitment Management, populates the Pending Hires table in Admin Tools (see Figure 2.6). If an applicant's Offer Approval process is not completed and approved before the applicant is moved to Hired

status in the Talent Pipeline, the applicant will not show up in the Pending Hires list.

Additional Information:

For detailed configuration steps for this integration, refer to the Employee Central Implementation Guide and the Recruitment Implementation Guide in help.sap.com.

For more information about implementing Onboarding, refer to the Onboarding Implementation Guide available in the SAP help portal: http://help.sap.com/cloud4hr.

2.3 Recruitment Management and Recruitment Marketing

The Recruitment Management and Recruitment Marketing integration provides a number of advantages to companies, including employee referral, site branding, real-time job syncing, and single sign-on. Let's look at the benefits of each of these.

2.3.1 Benefits of This Integration

Here are some key benefits of enabling the integration between Recruitment Management and Recruitment Marketing:

- Employee referral: The employee-referral option is available in Recruitment Management. With the integration of Recruitment Management and Recruitment Marketing, employees can use LinkedIn or Facebook contacts within the referral process. These social connections can then be matched to open requisitions in the company's career portal.
- Site branding: Recruitment Marketing offers more detailed branding of career sites with the Career Site Builder (CSB) option. By associating Recruitment Management microsites with Recruitment Marketing brands with this integration, job branding can be made consistent between Recruitment Marketing and Recruitment Management. This allows users to view a job in Recruitment Marketing and then apply for the job in Recruitment Management and have the same brand experience.

- Real-time job syncing: For companies using real-time job syncing, jobs posted externally in Recruitment Management can be sent to Recruitment Marketing in real time. Recruitment Management also sends real-time Requisition detail updates and deleted Requisition data to Recruitment Marketing.
- Single sign-on: The recruiter single sign-on option gives recruiting users (with appropriate permissions) one-click access to the Recruitment Marketing dashboard from the Recruitment Management interface.

2.3.2 How the Integration Works

The Recruitment Management and Recruitment Marketing integration is pretty straightforward. Once it is enabled, recruiters can see the Recruitment Marketing dashboard option under the Recruitment Management home page, as shown in Figure 2.9. With the single sign-on functionality, one click of the RMK Dashboard option takes recruiting users directly to the Recruitment Marketing module.

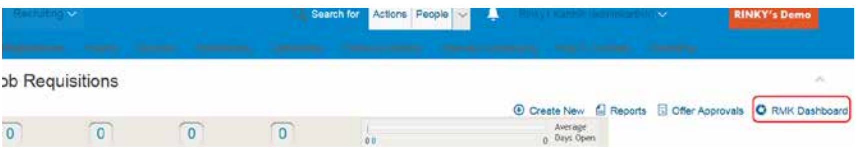

Figure 2.9 The RMK Dashboard option is added to Recruitment Management

If the Integration between Recruitment Management and Recruitment Marketing is turned on, the candidate also sees a View Profile link to Recruitment Management and is able to view his or her application status from the Recruitment Marketing home page, as shown in Figure 2.10. When users click the View Profile button, they are routed to the Recruitment Management application page directly, as shown in Figure 2.11.

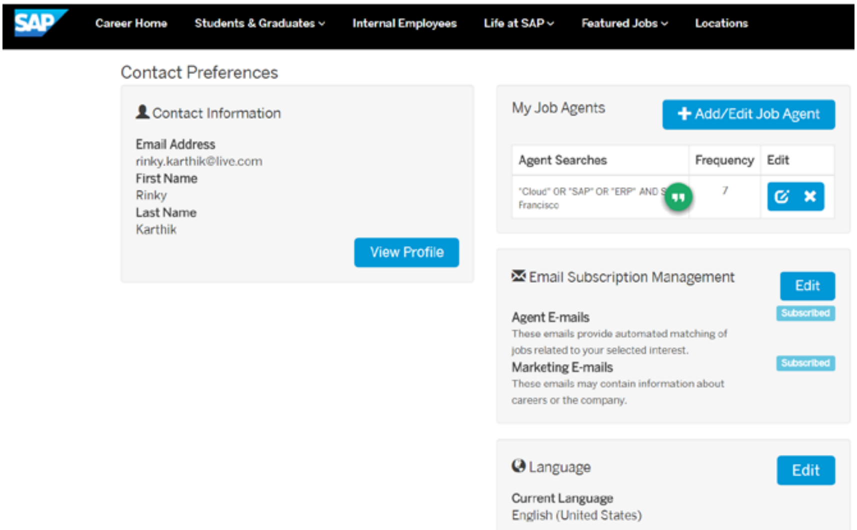

Figure 2.10 The On-Page Business Card in the Recruitment Marketing home page with the View Profile button

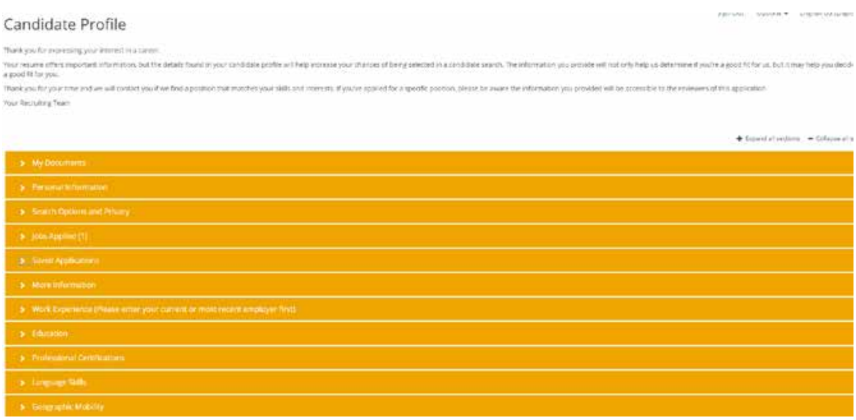

Figure 2.11 The Candidate Profile page in Recruitment Management after the candidate clicks View Profile in the Recruitment Marketing home page

2.3.3 Additional Integration Tips

Here are some more tips for making this integration work smoothly. These features are not mandatory for the REC integration to function, but are good-to-have functionalities.

2.3.3.1 Configure the On-Page Business Card

The On-Page Business Card feature allows REC Suite clients to create a smooth workflow for candidates from the Recruitment Marketing public site, through the single sign-on experience, and into Recruitment Management. Here's how it works:

- If candidates are already logged in to the Recruitment Marketing site, after they click the Apply button they are routed directly to the applicant-tracking system in Recruitment Management.
- If users (candidates) are new or not logged in to Recruitment Marketing, they are routed to the On-Page Business Card page that thanks the user for being interested in a particular job. Then, users are asked to fill out their information or click the sign-in option. After completing this step, users are routed to the applicant-tracking system in Recruiting Management.
- The On-Page Business Card in Recruiting Marketing (as shown in Figure 2.10) encompasses all the same functionalities as the existing Business Card under the Candidate Profile in Recruitment Management (as shown in Figure 2.12). It appears as a pop-up window on the page on which the candidate applies, rather than taking the candidate to a new page to complete the application process.

Figure 2.12 Business Card in the candidate's profile in Recruitment Management

2.3.3.2 Enable Social Apply (Rx) Functionality

SAP SuccessFactors recommends that the social apply (Rx) functionality be enabled. With this option, candidates can apply via their LinkedIn, Facebook, and Xing profiles when applying for jobs, as shown in Figure 2.13.

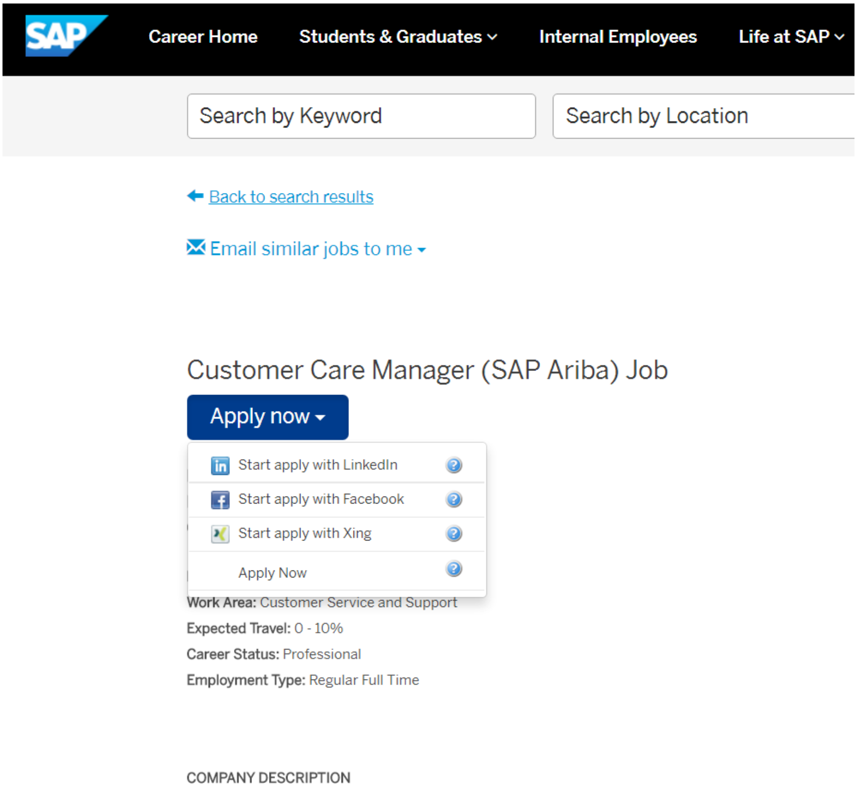

Figure 2.13 Social apply active with LinkedIn, Facebook, and Xing

All available Recruitment Marketing social profile fields need to be mapped to standard and custom client fields in Recruitment Management. If the mapping is not set up, then the full profiles of candidates are not sent from Recruitment Marketing to Recruitment Management.

For detailed configuration tips for Social Apply refer to the Recruitment Marketing Implementation Guide in SAP Help Portal.

2.4 Recruitment Management and SAP On-Premise ERP HCM Integration

SAP provides new-hire integration for companies that are using both SAP ERP HCM (as core HR master data) and SAP SuccessFactors Recruitment Management via an integration package. The integration package allows the transfer of hired applicant data from SAP SuccessFactors into SAP ERP HCM.

2.4.1 Benefits of This Integration

SAP provides this out-of-box integration package for on-premise SAP ERP HCM customers who continue to use SAP ERP HCM as their core HR module and use SAP SuccessFactors Recruitment Management as the recruiting solution. It's a built-in, out-of-the-box integration and requires minimal setup.

2.4.2 Prerequisites of Integration

There are just two prerequisites for this integration:

- SAP Process Integration (PI) middleware
- SuccessFactors API (SFAPI) Webservices are enabled in Provisioning

More documentation on SFAPI can be found at the SAP help portal: SFAPI Programing Guide

2.4.3 How the Integration Works

Let's get a better idea of how the Recruitment Management and SAP ERP HCM on-premise integration works. The process is described in the following sequence:

a. A scheduled job is set up in the SAP ERP HCM on-premise system that regularly queries SuccessFactors for applications with the applicant status SendToSAP. The SuccessFactors system then extracts the requisition and application, offers data for the resulting applicants, and transfers that data to the SAP ERP HCM system.

b. If this operation is successful, the integration updates the applicant status in SuccessFactors Recruitment Management to TransferredToSAP and enters a date into the Exported On field.

c. If this operation fails, the integration updates the applicant status in SuccessFactors Recruitment Management to TransferredToSAPError, and leaves the Exported On field blank.
d. The user can correct any issues with the data and change the status of the candidate back to SendToSAP and try this operation again.
e. After the successful completion of the transaction, the applicant record is transferred to a staging area in SAP ERP HCM. Once data entry and processing are completed on the SAP ERP HCM system side, the integration updates the applicant status in SAP SuccessFactors Recruitment Management to HiredAtSAP.

2.4.4 Additional Integration Tips

Now it's time to get an idea of the key takeaways from this integration. Let's review:

- This pre-built integration package contains the minimum required fields and a set of commonly used fields. Companies can choose to remove any fields or include additional fields that are not part of the default integration.
- Because the integration package uses SAP PI as its middleware, the company must have resources knowledgeable in all three technologies—SAP ERP HCM, SAP PI, and SAP SuccessFactors Recruitment Management—in order to make changes to the pre-built integration.
- Position-management integration to create requisitions automatically based on position vacancies is still not available. Companies must be able to create requisitions and maintain necessary position or organizational data on the requisitions manually.
- Once applicants are successfully transferred to the SAP ERP HCM system, their data cannot be changed and they cannot be transferred again.

For detailed configuration steps for this integration, refer to the Employee Central Implementation Guide and Recruiting Implementation Guide in help.sap.com.

Conclusion

This concludes Chapter 2, explaining some of the key cross-module integration between the REC Suite and other modules of the SuccessFactors BizX Suite. Apart from the described cross-module integrations, the REC Suite has available integration with other modules of SAP SuccessFactors, such as Performance Management, Position Management, and Career Development. In Chapter 3, I discuss the SAP SuccessFactors REC Suite and external (third-party) built-in integrations.