SCHOOL BOARD ACTION REPORT

DATE: April 17, 2018
FROM: Dr. Larry Nyland, Superintendent
LEAD STAFF: Clover Codd, Assistant Superintendent of Human Resources,
clcodd@seattleschools.org, 206-252-0027

For Introduction: May 23, 2018
For Action: June 6, 2018

1.   TITLE

Approval of contract for implementation services from LSI Consulting for HR's Success Factors Recruiting/Onboarding project

2.   PURPOSE

This Board Action Report is to request approval for a $385,000 professional services agreement to implement SAP's Success Factors modules for Recruitment and Onboarding. The SAP Success Factor software will modernize and automate HR's recruitment and onboarding processes. The project must begin immediately in order for the software and new business processes to be ready in time for HR to use it for staffing for this next school year (2018-2019).

3.   RECOMMENDED MOTION

I move that the School Board authorize execution of a contract with LSI Services in the amount of $385,000, for software implementation services and process redesign consulting in the form of the draft Agreement attached to the School Board Action Report, with any minor additions, deletions, and modifications deemed necessary by the Superintendent, and to take any necessary actions to implement the contract.

4.   BACKGROUND INFORMATION

    a. **Background** It is the HR Organization's goal to have a high quality teacher in every classroom on the first day of school (and, ultimately, every day of school). Through general process improvement we have significantly reduced the number of empty classrooms in September, but to make more significant gains, we must modernize and automate our recruitment and our onboarding processes. We have reached the limit of what we can improve because we have reached the limit of how quickly, and how accurately, a team can manually recruit and onboard teachers using antiquated, paper-based processes. Each year the District has a limited timeline in which to find, offer and onboard four to five hundred teachers. With our existing processes, we start each year with a backlog of teachers whom we have not been able to onboard in timely manner. Even when we are able to complete the activities necessary for them to start in the classroom, many go for weeks without system access and months not knowing their salary. These teachers begin their career at the District with a bad experience from the very start, and it leads to a general skepticism about the District's ability, and will, to support them. Our goal is not only to find and hire the best teachers – but to make their

first weeks with the District productive and rewarding. We want them to be glad they accepted a job with Seattle Schools and eager to begin a long and rewarding career with us. To that end, the funds requested in this Report will allow us to implement industry standard software to automate our onboarding and recruitment processes.

A formal RFP process was followed to select a vendor that was within our budget and had proven, hands-on experience implementing this software in a K-12 setting. The implementation vendor we have chosen is a nationally recognized SAP consulting team who will lead us through the implementation, share best practices and ensure we make appropriate and timely decisions as we implement and configure the new system.

b. **Alternatives** We have gone as far as we can leveraging existing technology. Further gains depend on significant improvements to our technology infrastructure.

c. **Research** DoTS and HR worked together to explore industry standards and best options. The software chosen is routinely ranked as the leading HCM (Human Capital Management) solution. It was recently acquitted by SAP; therefore, another benefit is that it will integrate with our other core systems. The implementation vendor (the subject of this Report) was chosen through an RFP process.

d. **Services Description**

5. FISCAL IMPACT/REVENUE SOURCE

Fiscal impact to this action will be the use of $385,000 from the infrastructure funds provided by the Board in March 2018 to support HR and Finance projects.

The revenue source for this motion is specially allocated funds for operational infrastructure projects approved by the Board in Spring of 2018.

Expenditure: ☒ One-time ☐ Annual ☐ Multi-Year ☐ N/A

Revenue: ☒ One-time ☐ Annual ☐ Multi-Year ☐ N/A

6. COMMUNITY ENGAGEMENT

With guidance from the District's Community Engagement tool, this action was determined to merit the following tier of community engagement:

☐ Not applicable

☒ Tier 1: Inform

☐ Tier 2: Consult/Involve

☐ Tier 3: Collaborate

The overall effort in HR to automate and modernize recruitment and onboarding processes in order to ensure quality teachers in classrooms has been discussed with the Board during public meetings as part of the recent approval for the operational infrastructure funds to support this project. Teachers have provided input regarding our lack of automation and the cumbersome nature of our onboarding processes. These "stories from the field" have informed our thinking and our approach to process improvement.

7. EQUITY ANALYSIS

Unfilled classrooms on the first day of school have a disproportionate impact on our Title I, high need schools. While Title 1 schools make up 29% of our schools, 41% of openings are in Title I schools. Title I schools historically have higher turnover rates and larger percentages of new to profession teachers. Our efforts to automate will make it easier for teachers to apply to Seattle, and ensure they have a smoother experience as they transition to the classroom.

8. STUDENT BENEFIT

A high quality teacher is the most important single factor in a student's learning. It is HR's responsibility to recruit the best teachers and to place those teachers in the schools where they are needed most. We cannot reach these goals with our antiquated systems. This initiative will provide the infrastructure we need to attract and onboard high quality teachers in a timely manner.

9. WHY BOARD ACTION IS NECESSARY

☒ Amount of contract initial value or contract amendment exceeds $250,000 (Policy No. 6220)

☐ Amount of grant exceeds $250,000 in a single fiscal year (Policy No. 6114)

☐ Adopting, amending, or repealing a Board policy

☐ Formally accepting the completion of a public works project and closing out the contract

☐ Legal requirement for the School Board to take action on this matter

☐ Board Policy No. _____, [TITLE], provides the Board shall approve this item

☐ Other: _____

10. POLICY IMPLICATION

Policy no. 6220 requires that any contract over $250,000 in value receive Board approval.

11. BOARD COMMITTEE RECOMMENDATION

This motion was discussed at the Audit Finance Committee meeting on May 14. The Committee reviewed the motion and moved it forward for approval.

12.   **TIMELINE FOR IMPLEMENTATION**

After a formalized scoping activity to decide precisely how the system should be configured (e.g., which online forms we will use, how the new hire portal should be designed, the extent of system integration across other SPS platforms, etc.), the vendor will facilitate a series of workshops to learn our business processes and design an end-to-end system configuration to accommodate our requirements and business objectives. The project team will then work together to configure the new system, develop system integrations, test the new system (including end-to-end business process testing), and learn how to maintain the system ongoing. The vendor will assist with training, system launch and post launch support. The full effort is expected to take ten months, with at least one vendor resource supporting the project full time and several others dedicated part-time through the full project duration.

The project timeline begins immediately in order for the software to be in place for recruitment this Fall for the 2019-2020 school year.

13.   **ATTACHMENTS**

- LSI-SPS Agreement for SAP Success Factors Recruitment Onboarding Implementation Services (for approval)
- Statement of Work
- Exhibit D_Rates, Fees, Timeline
- RFP 02851 Exhibit B RFP Response
- RFP 02851 Exhibit C General Conditions
- RFP 02851 Exhibit E SPS Vendor Travel Guidelines

AGREEMENT
SAP SUCCESS FACTORS RECRUITMENT ONBOARDING
IMPLEMENTATION SERVICES

This agreement, Contract No. RFP02851, is effective _____ by and between Seattle School District No. 1, a Washington municipal corporation (District), and Labyrinth Solutions, Inc. dba LSI Consulting (Contractor). The District and Contractor agree as follows:

1. SCOPE OF WORK AND SCHEDULE

Contractor shall provide services as described in Exhibit A, Statement of Work. Contractor is authorized to proceed upon receipt of this signed Agreement. Either party may terminate this Agreement at any time upon thirty (30) days written notice.

2. CONTRACT PRICE

District agrees to pay Contractor an amount, on a time and materials basis, estimated to be $385,000. This amount constitutes the "Maximum Authorized Compensation" as shown in Exhibit D, Fees, for services to perform the work identified in the Request for Proposal No. RFP02851.

This amount shall constitute complete compensation for all costs and fees incurred, including any expenses for meals, travel, lodging, and Washington State sales tax, if applicable. Any increase above this amount will require agreement by the parties.

Compensation will be paid monthly to the extent that Contractor presents documented evidence of fees earned and expenses incurred during the period for which payment is requested, and in no case shall the total compensation exceed the Maximum Authorized Compensation. Contractor shall submit its invoices in the form and according to the schedule prescribed in the General Conditions, to the address listed in paragraph 3.

3. COMMUNICATION

The District's representative for this contract is Donna Schmidt, Director Human Capital Business Transformation. All correspondence, requests, notices and other communications to the District, in relation to this Agreement, shall be in writing and shall be delivered to:

To the District:	To Vendor:
Nancy Peterson	Shyam Jajodia
Director Enterprise Apps & Data Services	Executive Vice President
Mail Stop 21-350	Labyrinth Solutions, Inc. dba LSI Consulting
Seattle School District No. 1	303 Wyman Street, Suite 300
P.O. Box 34165	Waltham MA 02451
Seattle, WA 98124-1165	

Either party may from time to time change such addresses by giving the other party notice of such change in accordance with the provisions in Paragraph 3 above.

4. CONTRACTOR'S REPORTS

Contractor shall provide reports as requested by District and as specified in Exhibit A, Statement of Work.

5. PERSONNEL

Contractor shall assign the personnel listed in Exhibit B, for the performance of the Work and shall not (for so long as they remain in Contractor's employ) reassign or remove any of them without the prior written consent of District.

6. **THIS AGREEMENT INCLUDES THE FOLLOWING ATTACHMENTS:**

Exhibit	Topic
A	Statement of Work
B	Proposal response sections for RFP02851 dated March 16, 2018
C	General Conditions of Personal Services Contract (Short Form)
D	Fees

LABYRINTH SOLUTIONS, INC. DBA LSI CONSULTING

SEATTLE SCHOOL DISTRICT NO. 1

_____
Signature

_____
Signature

_____
(Contractor Representative)

_____
Dr. Larry Nyland

Superintendent
_____
Title

_____
Title

_____
Date Signed

_____
Date Signed

_____
Company Name

_____
Employer I.D. No. or Social Security No.

Statement of Work

SAP Software Consulting Services

Seattle Public Schools is committed to making its online information accessible and usable to all people, regardless of ability or technology. Meeting web accessibility guidelines and standards is an ongoing process that we are consistently working to improve.

While Seattle Public Schools endeavors to only post documents optimized for accessibility, due to the nature and complexity of some documents, an accessible version of the document may not be available. In these limited circumstances, the District will provide equally effective alternate access.

For questions and more information about this document, please contact the following:

Clover Codd
Assistant Superintendent of Human Resources
Clcodd@seattleschools.org

This document provides an overview of all project deliverables, timelines and responsibilities of the vendor. The SOW provides for the project objectives, glossary of all terms, scope of the project, configuration expectations, and implementation services.

Seattle Public Schools

Appendix A (Statement of Work)

SAP Software Consulting Services

Version: 1.0.0

Release Date:

Table of Contents

1. Introduction

This Appendix A ("Statement of Work") to the LSI Consulting - SPS - Professional Services Agreement ("Agreement") sets forth the Services and Deliverables that Labyrinth Solutions Inc. dba LSI Consulting ("LSI" or "Contractor") shall provide to the Seattle Public Schools, Washington (hereinafter "SPS" or "District"), and includes a detailed description of the scope, roles, responsibilities, tasks and timeframe for the implementation of SAP Enterprise Financial applications and related technologies at the District. The Statement of Work will be the governing project document outlining project scope and milestones as mutually agreed to by both parties.

1.1 Background

Seattle Public Schools, is the largest school district in Washington, educating over 53,000 preK-12 students every year. During school year 2016-17, SPS had 62 elementary and 10 K-8 schools; 12 middle schools; 11 high schools (including two continuation schools and an independent study school); and 8 service schools. Seattle Public Schools is committed to ensuring equitable access, closing gaps and excellence in education for every student.

SPS is undertaking a Human Resource (HR) transformation because having a high-quality teacher in the classroom is the single most important in-school factor correlated to positive student outcomes. Therefore, HR has a foundational role and responsibility for ensuring each classroom has a high-quality teacher on the very first day of school and throughout the year.

1.2 Project Objectives

The objective of this project is to automate and modernize the Districts recruitment and onboarding processes to improves its candidates' experience, its ability to vet candidates in a timely manner and produce useable candidate pools, reduce the work effort on principals for selecting candidates, shorten the time to staff and onboard, eliminate paperwork and reduce data errors. The automation will be supported by implementing SAP SuccessFactors Recruiting and Onboarding with integration to the District's on-premise SAP Human Capital Management and Payroll system.

The project goals and objectives will focus on the following:

1. Decrease manual effort in recruitment and onboarding.
2. Increase quality by reducing errors and rework.

3. Improve scalability.
4. Improve affordability of support and maintenance.

The District has selected LSI for the SAP SuccessFactors Recruitment and Onboarding implementation and integration services (the "Project") based on LSI's SAP specific expertise. In addition to the stated project objectives, the District's goal is to implement the SAP software included in the Software Scope (3.1) using standard configuration and public-sector business process best practices when they meet the District's requirements. LSI and SPS will partner to minimize the number of modifications and/or customizations to the base application, which will enable the District to meet its needs and administer the system without becoming heavily dependent upon external consulting resources.

2. Glossary

Term or Acronym	Explanation
API	Application Programming Interface
EC	Employee Central – a core component of SuccessFactors software
ERP	Enterprise Resource Planning
FTP	File Transfer Protocol An FTP site can be used to stage files to be imported to or exported from an SAP system and uploaded/downloaded from/to other locations using FTP compliant software
GUI	Graphical User Interface
HANA	Database software used by SAP software
HCI	HANA Cloud Integration
HCM	Human Capital Management
HRIS	Human Resources Information System
HTML	Hyper Text Markup Language – a computer language used to create web pages
Infotype	A grouping of data fields that describe an object (e.g. Position, Employee, etc.)
Interface	A process of data exchange between systems that does not transfer the data in real time.
Integration	A mechanism for real-time exchange of data between two systems
Jam	Collaboration component of SuccessFactors software
LAN	Local Area Network
LOA	Leave of Absence
LMS	Learning Management System
LSI	Labyrinth Solutions, Inc.
MDF	Master Data Framework
OCC	Organizational Competency Center
OCM	Organizational Change Management
PCR	Project Change Request
PGP	Pretty Good Privacy – Encryption Software
PMO	Project Management Office
PTO	Project Team Orientation
RFP	Request for Proposal
RICEF	Reports, Integrations, Conversions, Extensions and Forms
SF	SuccessFactors – HCM software suite
sFTP	Secure File Transfer Protocol

Term or Acronym	Explanation
SME	Subject Matter Expert
SSO	Single Sign On
SUI	State Unemployment Insurance
Template	A configuration that can be copied and changed to create additional variants
WFA	WorkForce Analytics – analytics component of SuccessFactors
WFP	WorkForce Planning – planning component of SuccessFactors

3. Scope of the Project

This section describes the scope of the project. The scope of the implementation will be governed by the SAP modules listed in Table 3.1. Software Licenses and the content of this Statement of Work including the Interface and Integration Scope and Functional Requirements Matrix in the appendices.

The project will kick-off with an Onsite workshop where the team will define the scope with significantly more granularity than contained in this document. After the onsite the parties will decide whether an addendum is necessary to this document (particularly if decisions are made which significantly contradict any content in this document) or whether the Onsite outcomes can simply be documented as part of the project's general analysis and design efforts.

Accordingly, the sections of this document which list specific functionality (such as specific forms that will be configured, use of mobile, etc.) should be considered place holders which will be validated, reduced or expanded through the discussions of the Onsite workshop.

Throughout this SOW, wherever it is estimated that LSI will configure a certain level of effort or a particular feature, and SPS will then learn how to do the configuration so that they can, ultimately, do more on their own, SPS might find the task easy enough to absorb earlier. In these circumstances, SPS will configure more than originally planned and LSI would be relieved of the tasks, even if it is stated here that it would be their obligation. Similarly, wherever it states that LSI will lead certain discussions, the project team may decide it is more efficient for SPS to lead certain ones (such as process improvement). These decisions can be made between the parties throughout the project without it being considered a change in scope as long as the decisions are documented and do not increase project costs.

3.1.   Software Scope

This effort is to implement SAP Success Factors Recruiting and SAP Success Factors Onboarding, and the District will have licenses for these two modules in-hand per the project schedule.   LSI will advise the District should other licenses be necessary in order to move forward with the implementation (middleware, etc.)

3.2. Implementation Services

LSI shall perform implementation Services necessary to enable the SAP and third-party applications proposed by LSI to operate in a production environment in accordance with the District's functional requirements and other requirements identified in this SOW. Such Services shall include:

1. **Fit Gap Analysis, Requirements Analysis, and Solution Verification:** The Fit Gap Analysis will be a light weight deliverable that summarizes the results of workgroup sessions and documents at a high level which out-of-the-box functionality the District will use, where the out-of-the-box functionality does not meet District requirements, and where the District expects additional development in order to meet the requirement. Where needed, the deliverable will include recommended business process that would enable the District to use out-of-the-box functionality and follow industry best practices, or, if the decision is to customize the product, then the deliverable will reference the District process that is requiring the custom change. References in this deliverable to business processes would be high level and not intended as detailed process flows or requirements. This deliverable can be as straight forward as a matrix in Excel. Develop backlog of configuration activities and values and gaps to be addressed.

2. **Training and Knowledge Transition:** As detailed in Section 3.6.2

3. **Introduction and Explanation of Best Practices:** While a full business process redesign is out of scope, LSI will introduce and explain best business practices supported by the system and make recommendations for changes in business processes to better align them with best practices.

4. **System Configuration, Building, and Testing:** Using a series of iterations to incrementally build and test an integrated business and system environment that is based on the business scenarios and process requirements necessary to make the system ready for the District. Planning, creation of test plan, and implementing final tests, cut-over activities, and readiness plans for go-live steps.

5. **Cutover and Deployment:** Prepare and deploy the system to the live production environment, support for critical first days and weeks of live operation, system monitoring, and optimizations as needed.

6. **Post Go-Live Implementation Support:** As detailed in Section 3.6.3

7. **Data Conversion and Migration**: As detailed in Section 3.4.2.

The District will be responsible for the following activities:

1. **Project Planning and Management:** Establishing the necessary charter, governance, tools, resources, and risk mitigation strategy to create and maintain a sustaining environment including coordination and collaboration with the District's project management team.

2. Business Analysis. The District will supply an HRIS Analyst to serve as the project's business analyst and who will be responsible for documenting District requirements, designing process flows (as-is and/or to-be, as needed), making sure current business processes are understood and that the team is considering end-to-end processes, representing detailed subject matter expertise across HR, customizing training documentation, etc.

3. **Organizational Change Management:** The District is responsible for those activities related to stakeholder engagement, communication, and user adoption. The District will also lead process re-design activities and will look to LSI to provide insights, suggestions and best practices.

4. **Project Preparation, Definition, and Design:** Working with key District and LSI project team members to plan the project taking into account goals, constraints, success factors, project organization, requirements, analysis, and artifacts.

3.2.1. Business Process Transformation and Fit-Gap Analysis

LSI will assist the District in designing and implementing processes that represent leading practices in HCM. SAP applications come standard with built-in best practices. LSI's objective is to implement the SAP software without custom development to the extent possible. This may require changes to SPS business processes and operating procedures. The project team will evaluate use of standard functionality to meet the District's requirements and will only suggest custom development when absolutely necessary. Where use of standard business process flows is not possible, LSI shall provide the District with alternative solutions and recommendations based on industry best practices to facilitate use of standard SAP functionality and therefore avoid customizations.

Cases in which the proposed standard functionality deviates from the way in which the District chooses to address specific requirements (while still reaching the same outcome) may result in additional development effort. Any such instances will be discussed and the details mutually agreed upon by the District and LSI.

In some cases, it may not be possible to meet certain requirements due to the lack of availability of data, limitation of the development tool, or for system architecture reasons. And this infeasibility may not become apparent until the Explore Phase. In such cases, LSI will provide help and guidance to the District concerning alternative methods to meet its business requirements which may include implementing process changes, manual steps, or developing a customization.

During the Explore Phase for each module and/or Realize Phase, LSI will fully define the requirements for potential customizations -- called extensions-- with the intent to find alternative solutions, which would allow the District to meet the same requirement without customization.

LSI shall provide to the District a Fit-Gap Analysis Report for each module. See deliverable definition above in section "**Fit Gap Analysis".**

3.3. Functional Scope

LSI shall implement the SAP SuccessFactors applications and related technologies in accordance with the District's functional requirements and other requirements identified in this SOW. The implementation will cover approximately 8,000 District employees recruited by HR including approximately 4,000 certificated teachers.

3.3.1. Common Configuration

1. Sign On, FTP, etc. (The following will be verified and updated through the initial Onsite)

    1. Single Sign On with integration to Active Directory.: LSI will assist with the configuration of SAP SuccessFactors Single Sign-On (SSO) using SAML2.0 protocol by working with the Seattle PS technical/network team. The Seattle PS team will be responsible for active directory team
    2. sFTP site to send data files: All sFTP sites will be provided by SAP SuccessFactors for all data files required by SAP SuccessFactors Recruiting
2. System wide configuration settings (i.e., password policy).: LSI will be responsible for setting up all the required configuration for SAP SuccessFactors Recruiting and related sub-modules
3. Implementation of language packs for English only.: LSI will be responsible for implementation of the default English (US) language pack is installed by SAP.
4. Country configuration only for United States: LSI will be responsible for Country specific configuration of United States
5. State configuration only for Washington: LSI will be responsible for all configuration for Washington state based on the specific requirements
6. Upload SPS created, custom welcome pages (HTML content):
    a. External welcome page for Recruiting, and
    b. Internal welcome page for the Employee platform

LSI will be responsible for configuration of External welcome page for Recruiting and Internal welcome page for the Employee platform.

3.3.2. Mobile Applications

1. All features of SAP SuccessFactors can be accessed using a browser on a mobile device.
2. LSI shall implement the SAP SuccessFactors mobile applications provided by SAP.

3. SuccessFactors mobile applications provide a subset of the features provided in the main SuccessFactors application and do not contain (without customization) any custom data fields added for the District.

4. All mobile applications, will be configured for online usage (i.e. use while connected to the internet). Offline usage (i.e. usage while not connected to the internet) is out-of-scope.: LSI will be responsible for the configuration of Mobile applications.

3.3.3. Recruiting Management

3.3.3.1. Core Deliverables

LSI will deliver the following core configuration elements as part of a standard implementation:
- Job Requisition template with associated workflow
- Candidate Application form template
- Candidate Profile
- Candidate portals
- Job event template
- Job event application
- Seattle Public Schools (SPS)-specific question library
- SuccessFactors competency library
- Dashboard and Analytics
- Base product features such as user management and administration

3.3.3.2. Configuration Scope

LSI team will facilitate the following meetings/work sessions:
- Business process discussions to map desired future state processes for recruiting management
- Recruiting Management permissions and layout design session
- Regular team checkpoints/working sessions

LSI team will configure the following:
- Job Requisition form template (2 for the organization)
- Requisition Workflow configuration to support participation by multiple parties (2 for the

organization)
- Candidate Application Form template (up to 3 for the organization)
- Candidate Selection Workflow to support candidate statuses and communication (up to 2 for the organization)
- Candidate Profile (up to 2 for the organization)
- Multiple Candidate portals
- Offer approval template (up to 2 for the organization)
- Job event template (up to 2 for the organization)
- Job event application (up to 2 for the organization)
- Role based permissions
- Agency portal setup
- Custom SPS question library (if content is provided in required file format)
- Activate dashboard and standard reports

Additional implementation tasks not included in base scope:
- Configuration of additional templates (these can be configured by District Administrators)
- Configuration and training for offline use
- Integration outside of standard connectors to job boards in attachment.
- Migration of data from another recruiting solution (will be verified in onsite workshop)
- Recruiting Marketing Career Site Builder configuration

3.3.4. Onboarding

3.3.4.1. Core Deliverables

LSI will deliver the following core configuration elements as part of a standard implementation:
- Standard US State and Federal Processes/Forms
- Federal Form: I-9, W-4, and 8850 (WOTC)

- Form I-9 Reverification
- Form I-9 for Existing Employees
- State Forms: State Withholding Forms and Military Spouse Residency Relief Act Forms.
- Standard Hiring Forms: Direct Deposit
- New Employee Summary Form, New Employee EEO Information, and Emergency Contact

- SPS-Specific Forms & Processes (see configuration Scope definition below)
- eVerify
- Document Center (storage for onboarding documents: I9, EE Data, W4, etc.) or OpenText integration. The selected approach will be determined in the onsite workshop.
- New Employee Portal
- Standard System Notifications
- Standard Security Groups

3.3.4.2. Configuration Scope

LSI team will facilitate the following meetings/work sessions:
- Onboarding Solution Workshop
- Business process discussions to map desired future Onboarding processes
- Onboarding permissions
- Regular team checkpoints/working sessions

LSI team will configure the following:

- Standard US State and Federal Processes/Forms
- Standard Hiring Forms
- SPS specific forms (up to 10)
- SPS specific Data Entry Panels (up to 6)
- District specific Fields (up to 30)
- Standard and [up to 5] SPS specific Email Notifications
- Workflows (up to 2)
- Setup / Configuration of New Hire XML file using SuccessFactors Onboarding standard file format
- Setup / Configuration of HRIS/Payroll Export File using SuccessFactors Onboarding standard xml file format.

Additional implementation tasks not included in base scope:
- Additional forms and panels (District can configure these with its own resources)
- Configuration and training for offline use

3.3.4.3. General Assumptions

- Only US English language packs will be used
- Country configuration will be for United States
- State configuration will be for the State of Washington

3.4.   Technical Scope

The parties agree that, where possible, the preferred approach to achieve the objectives of the Project is to use out-of-the-box SAP functionality and to refine business processes to match delivered functionality. The objective of this approach is to lower the overall total cost of ownership over the life cycle of the solution. Any requirement to modify or create any Reports, Interfaces, Conversions, Extensions, and Forms (RICEF) not already identified below and in the applicable appendices shall be subject to explicit prior written approval by the District and LSI. This will facilitate adoption of standard SAP delivered processes and functionality without resorting to non-essential development effort.

During the Explore phase, the requirements for technical development shall be identified based on the fit/gap analysis. All requirements for technical development shall be mutually approved by the District and LSI. A determination will be made as to whether the requirement will be met with a delivered SAP object or will require a new custom object, then an estimate of the effort level required will be made and will be submitted for approval prior to being assigned for development as mutually agreed by both parties.

The following table will be used to aid the Project Team in assessing the complexity for each RICEF Object Type. During the project, LSI will maintain a comparison of what was included in the scope versus what needs to be developed based on the Fit-Gap analysis. Any changes will be reviewed by LSI and The District and may result in an overall increase or decrease Change Order to be executed. If the changes are of high or very high complexity, the changes may require an increase in the implementation services fees by drawing down on the additional bucket of hours proposed. LSI and SPS will review the Statement of Work scope and Fit-Gap analysis holistically to assess areas where increased complexity in one module is offset by decreased complexity in another.

For purposes of this paragraph complexity definitions are provided below:

Table 3.4 Complexity definition by RICEF Object Type

Object Type	Low	Medium	High	Very High
Reports	Simple layout and sorting, single database table access with simple selection and single total/subtotal	Simple layout and sorting, multiple database table access with simple selection and single total with multiple subtotals	Drill Down reports with Multiple line layouts with up to 4 sort criteria, maximum of 4 selection criteria, single total with multiple subtotals	Drill Down reports with Multiple line layouts with > 4 sort criteria or dynamic sorting, > 4 selection criteria, multiple totals with multiple subtotals Grid or Tree Display with advanced features like filters, exporting to excel
Interfaces	Single transaction, single screen flow, no data file pre-validation, simple data selection, one input/output file, simple data field validation, Simple Remote Function Calls	Maximum 2 transactions and 2 screen flows, maximum 2 record types, maximum 2 input/output files, no data file pre-validation, simple data field validation	Maximum 3 transactions and 3 screen flows, maximum 3 record types, maximum 3 input/output files, limited data file pre-validation, medium complexity data field validation	> 3 transactions and > 3 screen flows, > 3 record types, > 3 input/output files, substantial data file pre-validation, high complexity data field validation
Conversions	Single transaction, single flow, simple data pre-validations, single destination dataset, single input file	Maximum of 2 transactions and data flows, medium complexity data pre-validations, maximum of 2 destination datasets, maximum of 2 input files	< 4 transactions and data flows, high complexity data validations, < 4 destination datasets, < 4 input files	> 4 transactions and data flows, high complexity data validations, > 4 destination datasets, > 4 input files
Enhancements	Enhancement method is pre-determined, simple processing logic,	Enhancement method is **predetermined**, medium complexity	Enhancement method has to be researched, high complexity	Enhancement method has to be researched, high complexity

Object Type	Low	Medium	High	Very High
	append structures exist, no screen changes	processing logic, append structures exist, simple screen changes (Less than 5 screen fields)/logic	processing logic, append structures exist, medium complexity screen changes/logic	processing logic, append structures exist, high complexity screen changes/logic
Forms	Minimum change to SAP Standard form, no pre-printed paper or watermarks, fixed fields, single page and simple selection and logic in custom print program (if any).	Limited changes to SAP standard form, limited to 2 pages, maximum of 2 dynamic fields, medium complexity formatting and data selection	Substantial changes to SAP standard form, < 5 page layouts, < 5 dynamic fields, medium complexity formatting and data selection	Substantial changes to SAP standard form, > 4 page layouts, > 4 dynamic fields, high complexity formatting and complex data selection, logic in custom print program (if any)

Any requirements for custom objects discovered after the District Explore phases shall be identified, estimated, assessed, and managed in the same manner, including explicit approval by LSI and the District for inclusions within scope

3.4.1. Interface and Integration Development

An integration is defined as a mechanism for real-time exchange of data between two systems. An interface is defined as a process of data exchange between systems that does not transfer the data in real time. LSI shall be responsible to plan, design, deliver, and implement the approved integrations and interfaces identified in **Appendix 4** (Interface and Integration Scope) of this Statement of Work. If the non-SAP system allows API integration, LSI shall configure, test, and implement system integration via API. In the case of incoming interface files, LSI will provide the process for uploading data to or extracting data from the SAP system using the file format required by the interfacing system. Also included with the upload or download process will be validation of files and reporting of errors contained in the files. Security options are available for interface processing and will be discussed during interface design

During the Explore phase, LSI will work with the District to further review interface and integration requirements.

- The District and LSI will jointly be responsible for determining the best method of interfacing data to and from the District's systems, external systems, and the SAP solution. The best method depends on volume of data, frequency, and openness of each application to APIs.
- The District will be responsible for:
  - developing programs to extract data from non-SAP, SPS systems in the required SAP application format, and
  - developing programs required to update other District systems with data from the SAP applications.
- Except as otherwise specified in the Statement of Work, the SAP Cloud Services General Terms and Conditions, or the LSI Cloud Services Agreement, the District shall be responsible for any required coordination, customizations to and ongoing maintenance of non-SAP incumbent systems. The process of developing the required interfaces or integrations is an iterative process that shared by both District and LSI resources.

3.4.2. Data Conversion

The Explore phase includes a review of historical data and identification of feasibility and harmonized data for historical conversion. The District and LSI will discuss business rules and data mapping requirements so that the District can deliver flat file(s) in SuccessFactors-specified format.
- The District shall be responsible for data extraction from the legacy systems and any data cleansing to fit the data format to be provided by LSI.
- The District must provide experts who understand the history, structure and meaning of all source data to assist LSI in data conversion mapping.
- Infotypes and field mappings from the legacy system to SAP will be jointly developed by the District and LSI. The District will provide interpretation of legacy system fields based on SAP field definitions provided by LSI.
- LSI shall be responsible for the data conversion into the SAP systems.
- LSI will run data conversion tests in the development/test tenant, either during system integration testing (partial load), user acceptance testing or independently, to validate the data conversion process prior to the production run. LSI will also assist the District in identifying errors by running appropriate reports that show the exceptions and converted data.
- The District will verify converted data during testing and will provide guidance and assistance with conversion error recognition and resolution. Test data conversion must be approved by the District before the production run.
- The District will ensure that the data on legacy systems that will be converted into the SAP Software will be fully compliant with designed mapping rules. The District is responsible for maintaining the crosswalk table entries, if needed, for data conversion and interfaces. The District is further responsible for data extraction and data cleansing.

- The District is responsible for the entry and reconciliation of data that will be input manually. The District functional team will have ownership of all reconciliation of converted data.
- The District will be responsible for reconciling and approving the results of the conversion process.

3.4.3. Reports Development

SAP provides a large number of SuccessFactors standard reports which can all be executed online by authorized users. All SuccessFactors Standard reports allow a variety of selection criteria as well as the ability to change report layouts. In most cases, selections, sorts and subtotals are based on user-maintained hierarchies.

As part of the scope of implementation, LSI shall deploy the available SAP standard SuccessFactors reports that are required to meet the District's requirements.

The District will use SuccessFactors Standard Reports for global reporting needs, including all regulatory reporting, wherever possible. All data mapping and codes required for government and legal compliance will be supplied by the District.

As with the other RICEF items, the final list of custom SuccessFactors reports and dashboards to be developed at the end of the phase will be part of the solution design agreed to by both LSI and the District.

3.4.4. Extensions

Extensions, customizations of SAP product functions, add considerable time and effort to project scope and total cost of ownership as they must be specified in detail, developed and tested during the project and retested and potentially adjusted with future upgrades. Therefore, except for extensions considered critical to effective operation of business processes the District and LSI will make a joint effort to limit technical development.

3.5.   Testing

Testing the system to ensure that it meets the functional and technical design, data accuracy, security access, and integration requirements is essential to the success of this project.

3.5.1. Test Types

LSI and SPS will conduct the following types of testing during the project, based on project activity:

- Unit testing
- Integration testing
- Performance and Stress testing
- Regression testing
- User Acceptance Testing

3.5.2. Testing Process

- LSI will describe the testing methodology and strategy.
- SPS will develop test cases, test scripts and test data; LSI will be available if needed to review and advise
- SPS will execute integration tests, log defects, ensure user participation, and validate test results.
- SPS shall test the system to validate:

    o **Functionality.** Did the application or process do what it was intended to do?
    o **Accuracy.** Did the process or user action return a correct result?
    o **Completeness.** Did the process or user action do everything it was intended to do?
    o **Responsiveness.** Did the process or action return a value in an appropriate time frame?

- LSI will:

    o Assist SPS in chaining test cases into end to end test cycles,
    o Resolve defects that do not comply with approved designs,
    o Migrate code and configuration fixes,
    o Assist with coordination of test activities.

Testing will not be considered complete until both parties agree that any remaining issues are either:

1. Due to technical or business process issues within the District that are not in LSI's control; or
2. Minor enough that they can be included in a post-launch backlog and completed during post launch support

3.5.3. Training

3.5.3.1. Configuration Documentation, Project Team Orientation and Knowledge Transfer

LSI will be sharing knowledge with District project team members throughout the project. Additionally, before launch, LSI will provide comprehensive system documentation based on the final configuration. The system documentation will be reviewed by the District before it is considered approved and final.

These tasks will be considered concluded when:

1. Identified District project team members are prepared to customize Success Factors training materials, including documentation of any new business processes. (This must occur in time for the materials to be created.)

2. Identified District project team members are fully versed in the configuration design and have participated in review and acceptance of LSI's Configuration Documentation.

The District may elect to have LSI spend onsite time before one or both deployments to make sure this knowledge transfer is complete. To that end, travel funds will be reserved for this function, and the parties will discuss options if other needs begin to compete for these funds.

Project Team Orientation (PTO) materials for Functional Leads will be provided in the SuccessFactors Community for users with an SAP S-user account. SAP S-user accounts will be provided to the Functional Leads so that they are able to access and download PTO materials, Admin Guides, and Job Aids from the SAP Community for distribution as appropriate.

3.5.3.2. End User Training

As early in the project as possible, LSI will provide standard (non-customized)

training materials including Job Aids, Tutorials, Classroom training guides, and other materials as available on the Success Community Portal at http://community.successfactors.com/t5/Training/ct-p/Training (requires S-user account). The District can use these materials as a starting point to develop its own user training materials. The District is responsible for any reproduction and/or distribution of the material. LSI can also provide presentation of the material to District SuccessFactors administrators. The District will be responsible for training delivery.

3.5.4. Post Go-live Support

Post go-live support includes support for correction of defects in the system identified after the go-live or that were identified before the go-live if the team decided they could be resolved post go-live.

 LSI will provide one month of post go-live support.

3.6.   Locations

1. LSI shall provide services onsite at the District premises located at 2445 Third Avenue South Seattle, WA 98134 and remotely as allowed.
2. The designated connectivity will be ready and available within three (3) business days of each LSI team member's start date on the project.
3. The District will be responsible for making facilities available and required infrastructure ready for tasks like training, conference room pilots, system testing and other events.

4. Technology Architecture

The SAP System is accessed through a browser accessible portal in the Cloud. Client applications are available for Android and Apple mobile devices.

1. All SAP application software is available in the Cloud.

2. The District is responsible for providing desktop, laptop, and/or mobile devices with appropriate software (browser, antivirus, etc.) installed on these devices.

3. Security Software: No special security software is required for use of SAP systems. The District may require use of the following types of security software based on their technology standards. In each case the District will need to acquire the licenses.

    i. Single Sign On – LSI will configure single sign on with integration to Active Directory software.

    ii. Active Directory –The District is responsible for installation and maintenance of Active Directory services. LSI will assist in integration with SAP.

    iii. Virtual Private Networking – The District is responsible for installation of Virtual Private Networking (VPN) software. No special SAP integration is required as SAP system IP addresses (except the external vendor portal) will be inside the virtual private network.

    iv. Antivirus Software – The District is responsible for identification and installation of antivirus software. LSI will assist in integration of the software into SAP systems.

4. Legacy SAP Systems: The District will be responsible for setting up system connections to the legacy SAP system and/or middleware systems required for integration to the legacy SAP system.

5. Project Phases, Milestones and Deliverables

5.1.   Prepare Phase

The Prepare Phase kicks off the project and provides further granularity on scope, including a high level understanding of requirements, configuration choices, gaps and where the scope may require interfaces and custom development. It includes review of business process, demonstration of standard functionality and a few explore workshops plus Iteration 1 of the Configuration Workbook.

5.1.   Explore Phase

The Explore Phases concludes requirement gathering, business process mapping and business process re-design. It produces detailed specifications for all system configuration, including any custom development for extensions and interfaces.

Table 5.1.1 Deliverables in the Explore Phases

Deliverable	Type	Description
Fit-Gap Analysis*	**Document**	**The Fit/Gap analysis is based on solution walkthrough workshops to determine if the solution addresses the requirements documented in the Requirements Matrix. For areas where there is a gap, alternative approaches to address the gap are explored and a recommendation provided.**

Deliverable	Type	Description
Access to learning materials	Training	The purpose of this deliverable is for the District to learn different elements of the SAP system using self-paced enablement materials. Access may be provided online or in electronic document form.
Business Roles	Document	The authorization roles control access to data and functions in the system. Business roles are groupings of authorization roles that will be configured in the system. This deliverable identifies applicable authorization roles and related settings and maps them to the business user roles
Configuration Workbook	Document	The configuration workbook captures the configuration values determined based on solution walkthroughs. The workbook is maintained throughout the project iteratively.
Data Load Plan	Document	This deliverable defines an overall load plan including sequence, expected data volumes and expected load times
Extension specifications	Document	This deliverable specifies all of the field extensions and related logic. The documentation includes attributes such as screens, data type, and validation logic.
Extensions	Application	The purpose of this deliverable is to realize the development of the solution extensions as per the specifications that have been defined. The extensions will be validated through unit testing and solution walkthroughs.
Integration Specifications	Document	This deliverable specifies the processes, field mappings, transformation logic and other details of integrations.
Report Requirements	Document	Specification of any report customization

*Indicates Project milestone

5.1.   Realize Phase

The Realize Phase is where the actual configuration, development, testing and training (for staff who will be supporting the system) occur.

Table 5.1.2 Deliverables in the Realize Phase

Deliverable	Type	Description
Solution Configuration*	Application	The solution will be configured based on the District's solution requirements as captured in the application design. The configuration will be validated through unit testing and solution walkthroughs.
Solution walkthrough*	Application	The purpose of solution walk-through is to demonstrate the configured solution to the District project stakeholders and gain first approval that the solution satisfies the business needs. Multiple solution walkthroughs are conducted to validate the solution iteratively. The approval of the final solution walkthrough is also the trigger for the beginning of a more comprehensive testing stream.
Adapted Forms	Application	The purpose of this deliverable is to adapt the standard forms included in the SAP system for use by the District. The final forms will be validated by the District.
Initial Test of Integration	Application	The purpose of this task is to perform initial testing of the integration data transfer processing logic and possible transformations.

Deliverable	Type	Description
Provide Test Execution Training	**Training**	**In this activity training is provided to the District on how formal test execution will be performed. Test users, test data, test logging and results documentation procedures are explained. The procedure for logging defects and resolution and retest of the solutions provided are described.**
Report Configuration/ Development	**Application**	**Validation of reports per the specifications. The reports will be validated through unit testing and solution walkthroughs.**
Test Incident Resolution	**Application**	**In this activity, as defects are identified through testing they are investigated and resolved.**

Indicates Project milestone

5.2. Deploy and Support Phase

In the Deploy and Support Phase, code and configuration is moved to the Production environment and the system is made ready to go live with end users. This Phase includes activities post go-live to ensure the system is stable and that post-launch issues are resolved.

Table 5.1.3 Deliverables in the Deploy Phases

Deliverable	Type	Description
Approved system for live use*	**System**	**This deliverable is the result of activities performed to cutover to the production software in accordance with the cutover plan. At the finalization of the production cutover the organizational, business, functional, technical, and system aspects of the project are ready to be used in production.**
Production System*	**System**	**The production system created by transporting development and configuration to the production tenant.**
Integration execution in production	**Application**	**All integrations are set up in the production system. This includes the possible installation, configuration and setup of any of the integrated systems. The testing and validation of the connectivity and data transfers between related systems is performed by executing the integrations.**
Solution extensions in production	**Application**	**The purpose of this activity is to deploy and validate any solution extensions into the District landscape**
Validated Legacy Data in production	**Application**	**This deliverable is the result of activities performed to execute integrated data loads into the production system. This includes any manual data loading activities and automated load processes. Resolution of any load errors is included in this deliverable.**

*Indicates Project milestone

5.1.   Deliverable Acceptance Criteria

The deliverable acceptance criteria are based on the type of deliverable and are described below:

1. Document Deliverables: The purpose of project document deliverables is to provide a description of a various aspects of the project including strategy, requirements, proposed solutions, issues and completed settings and configurations, etc. The deliverables will be reviewed to ensure that:
   a. The content adequately covers the subject of the deliverable.
   b. The deliverable does not contain any material or substantive errors.
   c. The language, spelling and format are of acceptable quality.

2. Training: The purpose of training is to provide expedite the acquisition of knowledge by trainees so as to enable them to perform a set of tasks. Training will be evaluated based on the completion of training activities and trainees' perception of their ability to complete the task for which training is provided. It is recognized trainees will gain expertise over time as they use their training to perform the task in multiple iterations.

3. Application/System Deliverables: Application/System deliverables provide a function or capability within the application(s) in scope. These deliverables will be evaluated through walkthrough, demonstration and/or testing. Acceptance of these deliverables will be based on successful completion of these activities. For testing to be considered complete, there should be no "Major" defects remaining to be addressed, where "Major" defects are those that significantly impair the customer's ability to use the system to support its business operations.

5.1.   Deliverable Acceptance & Tracking

The District PM will manage a matrix of all deliverables listed in this SOW and will track completion and acceptance, communicating to the project team as each deliverable is accepted by the District. Discussions around project health, particularly Steering Committee discussions around project status and managing to budget, will use the matrix to review overall deliverable status. Ongoing issues with deliverable status, or issues with a key deliverable, may trigger ad-hoc Steering Committee discussions to examine underlying project issues and identify mitigation strategies. The District may elect to suspend further activities until a mitigation plan is in place depending on the severity of the issues.

6. Project Change Control Process

6.1.   Scope Changes

After the Explore phase and onsite scoping workshop, the parties will decide to what extent the scope described in this SOW needs to be changed and will do so through an Addendum.

After that time, as changes arise, the parties will discuss whether it is a change that requires a change request and, if so, will use the Project Change Request Form provided in Appendix 2. The changes could include:

1) Customizations
2) Extensions
3) Amendments
4) Additional Reporting
5) Additional Requirements
6) Other Changes that are not currently stated as in scope for this project.

(During governance activities the parties will more formally detail the Change Control process including who has approval to decide what is a change request, approve a change request, etc.)

6.2.   Project Change Request Form

The Project Change Request (PCR) Form contains a description of the desired change, the business reason for the change, alternatives to the desired change, and estimates of resources, time, and cost to incorporate the change as well as any other pertinent information. This will allow the District to make a decision whether to approve and incorporate the change into the project or not.

6.3.   Change Control Process

 The following is a suggested framework for the change control process. The actual process will be confirmed during project governance at the start of the project.

1) A Project Change Request (PCR) initiates the process and will be the vehicle for communicating each change. The PCR must:
    a) describe the change, the rationale for the change, and the effect the change will have on the project.
2) include the scope of the change, a description of the activities to be completed as part of the project change request, an outline of the responsibilities of the parties involved, and the estimated level of effort and cost, including hour estimates by Project Role, to complete.
3) If a Project Change Request does not have an impact on budget or schedule, the District Project Manager shall be authorized on behalf of the District to approve the Project Change Request.
4) If a Project Change Request has an impact on the budget or schedule, it will be presented to the District Steering Committee for review. The District Steering Committee will determine whether the benefits of the proposed change merit the investment, and whether they are willing to provide additional funding.
    a) If the proposed Project Change Request is approved by the District Steering Committee and does not exceed the available Additional Fixed Price Hours (section 9.2), the Project Change Request may continue through the Project Change Control Process.
    b) If the proposed Project Change Request is approved by the District Steering Committee but exceeds the available Additional Fixed Price Hours, LSI and the District will:
        i) follow District procedures for securing additional funding, including the necessary Board of Education approvals, and
        ii) complete a written, signed modification to the Statement of Work.
5) Acceptance or rejection of each PCR will be documented in the PCR within the Resolution section.
6) If approved, a written Project Change Request (PCR) will be signed by the LSI and the District Project Managers to authorize implementation of the requested change.
7) Approved Project Change Requests will be incorporated into the Project Work Plan and assigned to the appropriate resources.
8) Upon receiving an approved Project Change Request, LSI shall promptly commence performing the Services described therein.

7. Issue Escalation and Dispute Resolution

The Dispute Resolution process agreed to by The District and LSI Consulting is detailed in Section 27 of LSI Consulting – SPS – Professional Services Agreement.

8. Project Assumptions

8.1.   Other Assumptions

At this stage of the Project it is not possible to know with certainty all factors that will ultimately determine the project schedule, effort and price. Moreover, the performance of the project team and events outside of any party's control can impact the schedule and price of the Project.

For these reasons, the proposed schedule, effort and price developed by LSI Consulting are based on a set of key participation requirements regarding the scope of the Project, the Project environment, performance of Project personnel and certain other factors (the "Requirements").

The following project assumptions have been made to prepare this Statement of Work:

1. The District and LSI will follow the LSI provided methodology (known as Activate), where appropriate, to implement the software. The LSI provided methodology will take precedence over any other methodology introduced by the District or 3rd party consultants (unless it is in conflict with any District process required by statute to make decisions, maintain compliance, or enforce quality or security standards.). The LSI methodology may be modified in order to meet Project requirements, subject to mutual agreement between LSI and the District.
2. A District Steering Committee will be established and meet regularly to review Project status and resolve open issues. Such meetings will be held at least monthly. The LSI Project Manager and LSI Executive Sponsor will be invited to participate in meetings unless the District Steering Committee determines in its sole judgement that participation would not be in the best interests of the District for a particular session or portion of a session.
3. The District and LSI Project Management will conduct joint resource reviews. If the Project Managers agree that an LSI or other team resource is not performing at the required level, they will promptly develop and execute a plan to replace that resource within a reasonable timeframe.
4. The District's full-time Project Manager will have authority to make decisions on Project direction and resources in accordance with the Project schedule in consultation with the LSI Project Manager. The District Project Manager is responsible for informing District management of any Project concerns or issues that may be communicated by LSI. In case of sickness or vacation, the key decision-makers will have an alternate assigned as designees.
5. Both LSI and the District agree that decisions reached in completing milestones, tasks and stages

cannot ordinarily be revisited without associated increases in overall price and /or offsetting changes to the Project schedule.

6. The parties assume a continuous, linear progression through the phases of the LSI Activate Methodology (i.e., Explore, Realize, etc.) It is the District's responsibility to coordinate the proactive Change Management effort within the District as the implementation of the SAP Software will affect individual job functions and some reorganization is likely.

7. Implementation resources will be a mixture of both onsite and remote as agreed upon by LSI and The District.

8. District Project team members must have a thorough understanding of the District's business requirements, as they relate to the SAP implementation. District team members selected to participate should be key members of the areas that we are affecting with the implementation of the SAP Software. Project team members will be empowered to act and make decisions in a timely manner as they relate to implementing the SAP system so as not to negatively impact the timeline or Project schedule. Not only must they understand the current and future business requirements, but they must also be good communicators in order to draw information from others in the organization as well as provide feedback on the goals and progress of the Project.

9. The core District Project team members will be responsible for delivering work products consistent with the schedule in accordance with the agreed upon Project Work Plan.

10. No significant change to the District organization structure is factored into the scope of this Project. Any impacts upon the Project (including on LSI's obligations) caused by any such organizational changes after the commencement date are out of scope and will be addressed through a Project Change Request to the Statement of Work.

11. LSI staff will be able to use the District common areas for their work. This includes tables and chairs which can be configured for individual or team work. LSI staff will be able to use District telephones where one is available, LAN connections, photocopiers, printers, and fax equipment.

12. The District and LSI will jointly evaluate Project progress on an agreed upon regular and continuing basis. LSI is responsible for status reporting. The District and/or LSI agree that each may need to provide additional resources to the Project to meet deadlines or complete work as required by this SOW.

13. Failure to begin on the scheduled start date may impact the overall timeline as well as resource availability.

14. Should the Project team need to work outside normal business hours, SPS guidelines and labor contract stipulations shall be followed.

15. Full-time LSI Project staff will generally be on site four (4) days per week from Monday to Thursday with changes for holidays and vacations as appropriate.

16. The District will provide Project administrative support for scheduling of meetings, project correspondence and communications, operations and logistics.

17. The District will provide a high-speed connection to the SAP Software within 30 days of Project start-up to facilitate access to SAP Service Marketplace.

18. All required hardware will be available when required by the Project schedule as detailed in the

Project Work Plan so as not to adversely affect other aspects of the Project. Hardware will be installed by District staff.

19. The District is responsible for network availability within and between District facilities and offices.

20. The LSI team comes equipped with laptop computers capable of running the SAP GUI and other PC software used on the Project. Either the District will support the use of the LSI team laptops on its network or the District will provide PCs with the Microsoft Office Suite and email capability for the LSI Project team.

21. Project team members will be given local and remote access to the SAP environment. Secure dial-in and/or direct access to the District networks will be granted as necessary.

22. Full time, on-site Project technical support (e.g. telephone, desktop, printer, network, and email) for the Project team will be available.

23. The District will correct faults and outages in any component of the technical environments or other equipment, software and materials made available by the District to the Project Team in a manner that will not impact the Project schedule.

24. All materials will be developed in English. The District is responsible for any translations required.

25. LSI will provide a single paper copy and a single electronic copy of all deliverables. The District is responsible for all further reproduction of the deliverables for its internal needs.

26. Any changes in the defined project scope must be agreed to in writing between the parties using the Project Change Request Form and Process. Work will not proceed on any new requirements outside of the original budget and scope without prior written agreement between the parties.

27. Postponements and delays of scheduled events due to lack of District staff availability will likely result in an extended project schedule and/or additional fees.

28. Major issue resolution will not impair project progress. If issue resolution or scope changes occur, LSI and the District will jointly evaluate the impact on fees and schedules, utilizing the agreed upon Dispute Resolution process and the Project Change Request Process.

29. Major changes to data fields, functional design and payroll calculation requirements after the system design phase may impact project timeline, schedule and cost.

30. Configuration and development of the system will be per the approved decisions and specifications in the Configuration Workbook, using best practices to the fullest extent possible.

31. Project Team Members have the authority to make project decisions -- that do not impact the project scope --on behalf of the District rand to make them in a timely manner.

32. The District will provide access to its current organizational information, operations, and personnel required for this implementation.

33. LSI's implementation plan is based on a hybrid of onsite and offsite team members. Onsite coverage will be consistent throughout the duration of the project. All offsite/remote team members are based in the United States.

34. The District will perform all scheduling and logistics for SPS resources based on the defined Project Work Plan tasks and activities. SPS resources will be managed entirely by the District.

35. LSI will provide their own computer hardware (laptops, PCs) free of malware and conforming to The District's network standards.

36. The District will make available documentation detailing existing IT and Security policies and procedures for functions within the scope of this project.
37. The District will provide any existing District processes, templates, and development standards.
38. The District will be prepared to walk LSI through all current business processes and answer any questions about our systems. If we have current documentation available such as questionnaires, process flows, functional specifications, technical specifications, inventories, key decision documents, process definition document, business design documents, etc. then they will be supplied; however, LSI should not expect to receive much in the way of currently available and updated documentation.
39. District leaders and key stakeholders will be engaged in and supportive of change management activities and will be responsible for adoption of newly redesigned business processes & structures, utilizing the change management strategies and plans developed during the project.
40. Standard Authorization objects will be used. Role Mapping (Roles to Positions) will be performed by the District Project Team member and formally approved.

9. Project Fees, Payment Schedule and Tracking Budget to Project Performance

9.1.   Project Fees

Project Activity	Project Description	Fee
Total	Recruiting Management and Onboarding Implementation Services	$385,000

See *Exhibit D, Hourly Rates and Fees, Payment Schedule and Timeline* for detailed breakdown of:

- Project timeline
- LSI Resources, including monthly hourly time and expense
- SPS Resources

LSI will charge the District on a time and materials basis up to the amount of the budget. LSI will not exceed the budget without approval from the District. Approval will be granted in the form of change orders.

Note: The fees are for professional services/contingency only and do not include software licenses, project team training (except as stated in Section 3.6), sales tax or any other optional costs.

9.1.   Tracking Budget to Project Performance

As each milestone is approached , the Steering Committee will discuss the following:

- Deliverable status
- Whether the spend-to-date matches the estimated spend

The District may elect to suspend further activities until a mitigation plan is in place if the project is not tracking to budget.

10. Appendix 2 Project Change Request Form

The project change request form template is attached below.

Requestor : *<name of person requesting change>*		**Request Date** : *<Enter Date>*
Change # : *<Reference for CC Master List>*		**Target Release:** *<Enter Date>*
Priority : *<Indicate high, low or medium Priority>*		
Functional Area:		
Description of Change: *<This section may be a cross-reference to a spec but a summary should nevertheless be contained here>*		
Reason for Change:		
Impact if not implemented:		
Alternative Solutions: *<State if alternate solutions were considered>*		
Recommendation Solution: *<State the proposed solution with reason for choosing the same>*		

Schedule Impact:			
Milestone/Task	Orig. Date	New Date	Change
Resource impact			

Cost Impact ● Documentation ● Development ● Testing			
Approvals:			
Name	Title	Initials	Date Approved

11. Appendix 4   Interface and Integration Scope

Interfaces or Integrations to be delivered by LSI

System Name	Exchange Type	Function	Description of Data Exchanged

12. Appendix 5 Standard Recruitment Job Board Connectors

SuccessFactors Recruiting-Integrated job boards-Q217.xlsx

13.   Appendix 7   Additional SAP Documentation

Onboarding Metrics Packs

Exhibit D Rates, Fees, Timelines

Seattle Public Schools is committed to making its online information accessible and usable to all people, regardless of ability or technology. Meeting web accessibility guidelines and standards is an ongoing process that we are consistently working to improve.

While Seattle Public Schools endeavors to only post documents optimized for accessibility, due to the nature and complexity of some documents, an accessible version of the document may not be available. In these limited circumstances, the District will provide equally effective alternate access.

For questions and more information about this document, please contact the following:

Clover Codd
Assistant Superintendent of Human Resources
Clcodd@seattleschools.org

This document outlines the detailed costs associated with each part of the project through the phases of: explore, realize, cutover, deploy and support. It provides an overview of the timeline for each phase, and breaks down the cost associated with the project.

Phases			Jul-18	Aug-18	Sep-18	Oct-18	Nov-18	Dec-18	Jan-19	Feb-19	Mar-19
Explore											
Realize											
Cutover											
Deploy											
Support											

Note: Separate go-live dates are considered for Recruiting and Onboarding

The following is the above timeline, including expected monthly hourly expenses and running totals for each month and for each project phase.

			REALIZE		CUT-OVER	DEPLOY RECRUITMENT	SUPPORT	DEPLOY ONBOARDING	SUPPORT			
	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18	Dec-18	Jan-19	Feb-19	Mar-19	Total Hrs	Rate	Rate Totals
Project Manager	12	12	12	12	12	12	12	12	12	108	$ 210.00	$ 22,680.00
Onboarding/Recruitment Consultant	160	160	160	160	160	160	160	160	160	1440	$ 190.00	$ 273,600.00
Integration and Data Imports Development	32	32	32	32	32	32	32	32	32	288	$ 185.00	$ 53,280.00
												$ 349,560.00

	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18	Dec-18	Jan-19	Feb-19	Mar-19
PM cost	$ 2,520.00	$ 2,520.00	$ 2,520.00	$ 2,520.00	$ 2,520.00	$ 2,520.00	$ 2,520.00	$ 2,520.00	$ 2,520.00
Onboard/Recruit Cost	$ 30,400.00	$ 30,400.00	$ 30,400.00	$ 30,400.00	$ 30,400.00	$ 30,400.00	$ 30,400.00	$ 30,400.00	$ 30,400.00
Integration Dev Cost	$ 5,920.00	$ 5,920.00	$ 5,920.00	$ 5,920.00	$ 5,920.00	$ 5,920.00	$ 5,920.00	$ 5,920.00	$ 5,920.00
Monthly Cost	$ 38,840.00	$ 38,840.00	$ 38,840.00	$ 38,840.00	$ 38,840.00	$ 38,840.00	$ 38,840.00	$ 38,840.00	$ 38,840.00
Running Total - Hourly	$ 38,840.00	$ 77,680.00	$ 116,520.00	$ 155,360.00	$ 194,200.00	$ 233,040.00	$ 271,880.00	$ 310,720.00	$ 349,560.00
Est Travel			$ 10,137.60			$ 10,137.60		$ 10,137.60	
RUNNING TOTAL - Hourly & Est Travel	$ 38,840.00	$ 77,680.00	$ 126,657.60	$ 165,497.60	$ 204,337.60	$ 253,315.20	$ 292,155.20	$ 341,132.80	$ 379,972.80

The following is the estimated SPS resources to support the project.

	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18	Dec-18	Jan-19	Feb-19	Mar-19	Total Hrs
Project Manager	160	160	160	160	160	160	160	160	160	1440
Change Management	24	24	48	96	48	48	48	48	48	432
Onboarding/Recruitment	160	160	160	160	160	160	160	160	160	1440
Integration and Data Imports Development	32	32	32	32	32	32	32	32	32	288
										3600

RFP 02851_Exhibit B_ RFP Response

Seattle Public Schools is committed to making its online information accessible and usable to all people, regardless of ability or technology. Meeting web accessibility guidelines and standards is an ongoing process that we are consistently working to improve.

While Seattle Public Schools endeavors to only post documents optimized for accessibility, due to the nature and complexity of some documents, an accessible version of the document may not be available. In these limited circumstances, the District will provide equally effective alternate access.

For questions and more information about this document, please contact the following:

<div align="center">

Donna Schmidt
HR Director
djschmidt@seattleschools.org

</div>

This Exhibit is the vendor's response to our RFP.

Seattle Public School District

LSI Response to RFP #02851 SAP Success Factors Recruiting Onboarding Implementation Consulting Services

LSI Consulting Response

Due Date: Friday, March 16, 2018 at 10AM PST

Western Region Office

550 B Street, Third Floor San Diego, CA 92101

PRESENTED TO SEATTLE PUBLIC SCHOOLS

LSI Authors/Contact information:

Nader Tirandazi	National Vice President	ntirandazi@lsiconsulting.com

OFFICE LOCATIONS

LSI Consulting HQ Location
303 Wyman St, Ste 300
Waltham, MA 02451

Southeast Region Office
Industrious, 555 Fayetteville Street
Raleigh, NC 27601

Western Region Office
550 B Street, Third Floor
San Diego, CA 92101

Table of Contents

A. Signed Proposal Certification Form

REQUEST FOR PROPOSAL NO. RFP02851

PROPOSAL CERTIFICATION FORM

TO: Diane T. Navarro, Contracting Services Manager

The undersigned provider hereby certifies as follows:

1. That he/she has read the Seattle School District's Request for Proposal No. RFP02851 and the following Addenda and to the best of his/her knowledge has complied with the mandatory requirements stated herein:

   Addenda Number   Issue Date

   _____   _____

   _____   _____

   _____   _____

2. That he/she has had the opportunity to ask questions regarding the Request for Proposal, and that if such questions have been asked; they have been answered by the District.

3. That the proposer's response is valid for 90 days.

Dated at _____2PM_____, this ___thursday___ of ___March___ 2018.

_Nader Tirandazi_____   National Vice President_____
(Signature)   (Title)

Nader Tirandazi_____   ntirandazi@lsiconsulting.com_____
(Print Name)   (Email Address)

Labyrinth Solutions, Inc. d/b/a LSI Consulting   858-342-6665_____
(Company Name)   (Telephone Number)

550 B Street, Third Floor_____   978-295-2038_____
(Address)   (Fax Number)

San Diego,_____   04-3419715_____
(City)   (UBI Number)

CA_____
(State)

92101_____
(Zip)

B. Written Responses

Executive Summary

> 1. Provide a brief Executive Summary highlighting the firm's qualifications, areas of specialization and expertise to provide the services requested in the Request for Proposal.

Founded in 1998 from the first two SAP Public Sector implementations in the U.S., the City of Phoenix and Massachusetts Institute of Technology, LSI Consulting is a SAP System Integrator, and certified Services and Development Partner that was created with the intent of offering high impact SAP services for the Public Sector market, with specific focus on Public Sector finance, procurement, statutory reporting (GASB 34 and CAFR), HR/Payroll and SuccessFactors, Business Intelligence, and Enterprise Performance Management (budget formulation and control). LSI has grown over the last 19 years into a national practice while expanding our capabilities of SAP Public Sector services to State, County, Municipal, K-12, and Higher Education & Research organizations.

With over 40 dedicated public sector consultants, and access to hundreds of certified contractors, LSI is well positioned to deliver its services on time and on budget.

LSI, as the first and most experienced SAP State, Local and K-12 government implementer, presents the Seattle Public Schools with the right choice to get the job done on time, in scope and on budget through a careful, thoughtful, well-articulated approach to a SuccessFactors implementation, according to the most recent SAP methodologies. We bring important and unique strengths and capabilities to the County and this complex project including:

- Our business and IT thought leadership and knowledge of the public sector
- Our re-useable intellectual capital from years focused solely on the US Public Sector as industry professionals and as consultants, crystallized in our peerless on time and on budget track record of SAP ERP and SuccessFactors sector implementations.
- Our proven ability to provide deep support for the scope of services in the RFP
- Our long standing executive relationship with SAP Public Services, Inc., SAP Labs (product development), SAP Global Support Services, and SuccessFactors product and services.

LSI's customers (past and current) include the following (representative list):

State and Local Government (including School Districts as Component Units)	Higher Education/ Research and Healthcare (* Component Unit of respective State)
Miami-Dade Public Schools	Boston University
City of Phoenix, AZ	Broad Institute of MIT and Harvard Medical
Travis County, TX (Austin)	Central Michigan University*
City of Houston, TX	Duke University and Health System

Duval County School Board (FL)	Eskenazi Healthcare Indianapolis
Prince George's County, MD	Johns Hopkins Healthcare
Commonwealth of Pennsylvania	Johns Hopkins University
State of Colorado Department of Transportation	Los Angeles Community College District
Houston Independent School District	MetroSouth Medical Center Chicago
	San Francisco United School District *currently under contract
	Weill Cornell Medical College
	University of Arkansas
	University of Cincinnati
Sedgwick County, KS (Wichita)	Montefiore Medical Center (New York, NY)
City of San Diego, CA	Purdue University
San Diego Metro Transit System (MTS)	Texas State University*
Port Authority of San Diego	University of Kentucky*
Monroe County, NY (Rochester)	University of Mississippi and Medical Center
Collier County, FL (Naples)	University of Nebraska*
State of California – Trial Court System	University of Tennessee and UT Health System*
Federal/DoD	
U.S. Navy	U.S. Army Materiel Command
NASA	U.S. Department of the Interior
MIT Lincoln Laboratory (U.S. Air Force)	USDA

LSI Consulting has had a preferred vendor status with SAP Public Services since our inception in 1998, and remains a certified SAP Services and Development Partner today as a niche vendor specializing exclusively in the implementation and support of SAP Public Sector functionality.
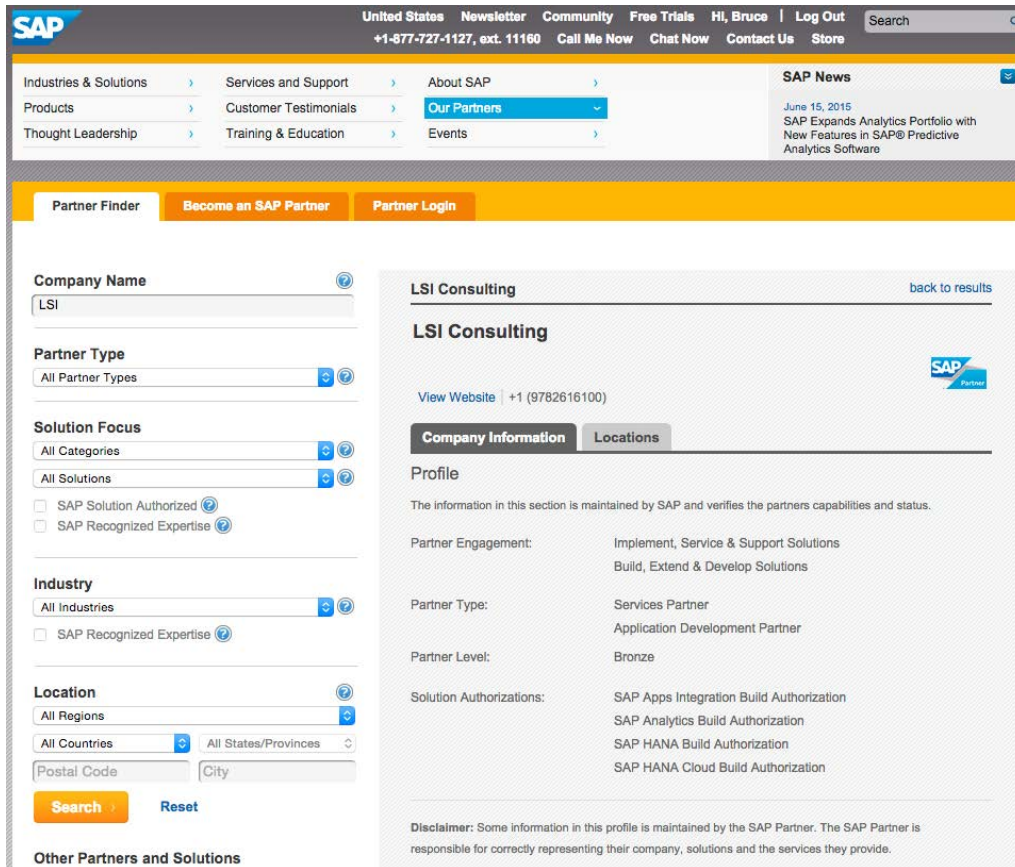
LSI, on the recommendation of SAP executive management, was brought in to support SAP America at the City of Phoenix, the first local government implementation of SAP in the U.S.

In addition to LSI's HCM and SuccessFactors expertise, we bring a cadre of public sector budgeting experts to our implementation team as required, featuring implementation experience from such clients as City of San Diego, South Florida Water Management District, State of South Carolina, Amtrak, Santa Clara County, CA, and the Australian Federal Government, among others. LSI is the only SAP partner that has implemented SAP Budgeting and Planning for public sector based on SAP's revolutionary HANA platform. LSI has implemented many operational and strategic solutions over the years, recycling business process and technical expertise into future iterations of SAP solutions and implementations, as well as LSI accelerators.

Built specifically to serve public sector organizations, LSI is organized by Centers of Excellence (CoE's) or functional and technical practices that are designed to bring high impact and value added services to our clients in a cohesive, well managed approach.

Figure 1: LSI Organizational Structure
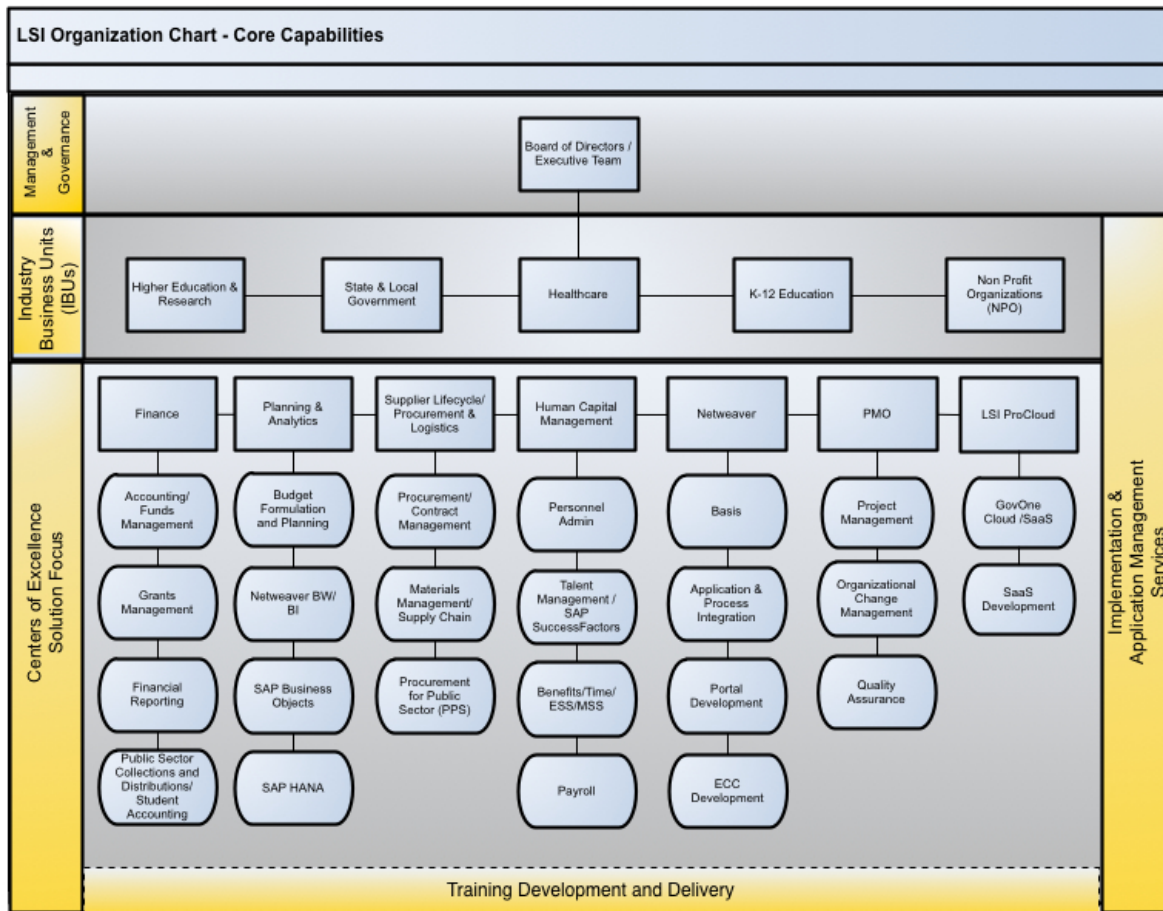
LSI Consulting has provided product design, training design and delivery, and implementation consulting services for SAP customers since the establishment of SAP Public Services Inc. We are frequently referred to within SAP circles as "the consultants' consultants."

2. How many implementations of Success Factors Recruitment and Onboarding has your company led?

LSI Response: 4

3. Of those implementations referred to in Question No. 2:
   a. How many have been for public school districts (not including Federal or State Department of Education)?

LSI Response: 2

   b. Which districts?

LSI Response: San Francisco United School District and Eskenazi Hospitals Indianapolis

   c. How many employees worked at the company(ies) where you implemented Success Factors Recruitment and Onboarding? (you may provide a range)

LSI Response: 2,000 to 5,000

   d. What was your company's role in the implementation?

LSI Response: Implementation Partner

   e. How large was the project team that you provided?

LSI Response: 5-10

   f. What was the duration of the project?

LSI Response: 1-2 years

   g. What was the overall budget of the project (if known)?

LSI Response: Confidential

   h. What were the biggest risks and challenges of the project?

LSI Response:
   1. Migrating from the existing system. Includes legacy recruiting data, candidate repositories, job requisitions and employee data
   2. ATS (Applicant tracking system) integration if required
   3. Slow Change Management adoption generated delays and user adoption rollout impacts.
   4. Adoption of Cloud required additional project management methodology, landscape strategy and support approach.

   i. What were its biggest achievements?

LSI Response:

1. Large Scale Data Migration of recruiting related data which includes, job requisition from various legacy recruiting systems
2. Provided simple solutions for complex recruiting requirements, this included consolidation of complex As-Is business processes into simple SuccessFactors Recruitment process of Source, Engage and Hire
3. Post Jobs to multiple Global Job boards and Universities, Use of integrated Job Boards and marketing Channels around the globe to connect with Qualified Candidates

j. Would these clients serve as a reference for you?

LSI Response: Yes

4. For any other Success Factors Onboarding Recruiting projects you have led (i.e., which were not for public school districts):
   a. What kind of client was it and how many employees?

LSI Response:
1. Manufacturing: 7000
2. Retail: 80000
3. Oil and Gas: 18000

b. Was this public sector or private?

LSI Response: Private

c. Provide client name if possible.

LSI Response:
1. Cardone Industries
2. Walmart
3. LyondellBasell Chemicals

d. What was your company's role in the implementation?

LSI Response: Implementation Partner

e. How large was the project team that you provided?

LSI Response: 10-15

f. What was the overall budget of the project (if known)?

LSI Response: $600,000 - $1.1 million

g. What were the biggest risks and challenges of the project?

LSI Response:

1. Migrating from the existing system. Includes legacy recruiting data, candidate repositories, job requisitions and employee data
2. ATS integration
3. Slow Change Management adoption generated delays and user adoption rollout impacts.
4. Adoption of Cloud required additional project management methodology, landscape strategy and support approach.

h. What were its biggest achievements?

LSI Response:

5. Leveraged High availability Cloud environment for the customers who does not have a proper Recruitment or Applicant Tracking System
6. Managed to handle Many duplicate records issue and opts the process for Internal and External Applicants

i. Would these clients serve as a reference for you? (If you have many of these projects, you may select the most relevant ones to highlight here.)

LSI Response: Yes

5. Are there other projects not yet mentioned which involved working with HR staff and HRIS systems? If so:
a. What kind of client was it and how many employees?

LSI Response: Various. 1,000-14,000 employees. For a sample, please see references.

b. Was this public sector or private?

LSI Response: Public Sector

c. Provide client name if possible.

LSI Response: Various. For a sample, please see references.

d. What was your company's role in the implementation?

LSI Response: Prime Implementation Partner

e. How large was the project team that you provided?

LSI Response: Various sizes.

f. What was the duration of the project?

LSI Response: 4 months to 2-3 years

g. Was this an SAP project?

LSI Response: Yes

> h. What was the overall budget of the project (if known)?

LSI Response: Confidential. Please contact Nader Tirandazi to request specific budget information.

> i. What were the biggest risks and challenges of the project?

LSI Response: Various risks and challenges are presented within each project. Some included migrating from the existing system including legacy recruiting data, candidate repositories, job requisitions and employee data, slow Change Management adoption generated delays and user adoption rollout impacts, adoption of Cloud required additional project management methodology, landscape strategy and support approach.

> j. What were its biggest achievements?

LSI Response: All projects have been completed on time and within budget.

> k. Would these clients serve as a reference for you? (If you have many of these projects, you may select the most relevant ones to highlight here. Please note we are not interested in projects which were solely around timekeeping and/or payroll.)

LSI Response: Yes.

LSI has been working with HR and HRIS staff in many projects. A sampling of these can be reviewed in the references.

> 6. In addition to providing professional services, does your company (including any parent company) also sell software products, apps or other non-services products? If so, what are they? How much of your business is in the public sector (percentage-wise and number of clients)?

LSI Response:

LSI Consulting is also a Value-Added Reseller of SAP Public Sector Software systems. Over 90% of our business is in the public sector with over 50 clients from all levels of public sector agencies.

> 7. Describe the expected project participation level of your senior management overall.

LSI Response: 50%. Participation varies depending on the phases of the project, and LSI consultants will work with you to fit the project activities within the team's day-to-day duties.

> 8. What would you see as the largest challenges we might face in this implementation?

LSI Response:

Key challenges to be mitigated are:

- Organizational Change Management, to ensure optimal User Adoption. The best system implementation is only relevant if users leverage the new system. Because of SuccessFactors' implementation speed, it is important to address the Organizational Change Management early on in the project.

- Ensure adequate preparation of the project team, through methodology sharing and Project Team Orientation activities

- Avoid functional silos. Recruitment and Onboarding must be part of an overarching Talent and HR strategy, and share many points of contact with HCM data management, Budgeting and other applications.

- Data migration, data cleansing and validation

9. What is your suggested meeting cadence, and with whom, specifically, how often would we meet with the most senior team member, how often would we meet with the PM, etc.?

LSI Response:

Monthly review of status and participation to kick-off and decision workshops.

Meeting frequency will follow different cadence depending on the phase of the project. Senior/executive representatives are required for kick-off; during the workshops (launch workshop, approx. one week, and 3 iteration walkthroughs, 2 to 4 days each) and testing periods (End to end, testing integrations if applicable, and User Acceptance Test), it is best to plan a full-time involvement as it is decision-making time; otherwise, once-a-week updates and occasional reviews, data collections are all that is typically expected.

10. Who writes, reviews and submits project status reports?

LSI Response:

LSI consultants and/or project manager, in agreement with SISD's project manager.

Escalation Process

> 11. Describe your Escalation process (both your internal process when Vendor staff have an issue as well as recommended escalation for District staff when working with your team on the project).

LSI Response:

There will be a repository for project issues and documentation of resolution. The repository provides detailed logging of issues and defects and a robust reporting system based on configurable project scope, categorization, and nomenclature. Guidelines are established for what constitutes an issue, for severity level classification, and escalation procedures. All team members have access to the issues database; project managers are expected to review issues regularly and review aging open issues for possible escalation. Escalation procedure process are developed in the initial stages of project preparation.

A sample of the project governance project that manages much of the escalated issues can be found below:

This section describes a sample methodology and governance structure proposed for an SAP Project. Key elements of SAP Project Governance are outlined below:

1. LSI Project Manager plans, directs and executes all SAP implementation activities. With active support and participation from ERP Program Manager, he is responsible for the overall delivery of the work products and outcomes as described in LSI Statements of Work and other contract documents. In conjunction with ERP Program Manager, SAP Project Manager collaborates with EAG in resolving Team and Project issues.

2. SAP PMO consists of LSI Project Manager and ERP Program Manager (with LSI Engagement Manager visiting). SAP PMO seeks input from EAG (as needed) in order to make necessary decisions needed to execute all SAP Implementation activities outlined in the SAP Project Plan. SAP PMO meets bi-weekly or as needed.

3. SAP Project Teams, consisting of Functional, Technical, Hosting and Cross-phase Teams (such as: Change Management and Training) will be managed by respective LSI Team Leads. SAP Project Team meetings are held weekly or as needed.

4. Engagement Managers (and LSI Project Manager, as necessary) will provide the ESC with the overall weekly project status, decisions to be made, known risks and escalated issues that deserve ESC attention. In addition, face-to-face interactions will be, jointly planned by ERP Program Manager and SAP Engagement Manager, as needed; they will have a published agenda and accompanying support material.

5. Figure 1 below depicts the governance model that will be used for the Project and the roles and responsibilities for each of the groups will be described in more detail in the sections below.

SAP Project Management Governance

ERP Sponsor

Engagement Management

ERP Steering Committee

ERP Program Manager

LSI Engagement Manager

SAP Project Management

ERP Advisory Group

SAP PMO

LSI Project Manager

Team Management

SAP Project Teams

Functional	Technical	Hosting	Other Teams
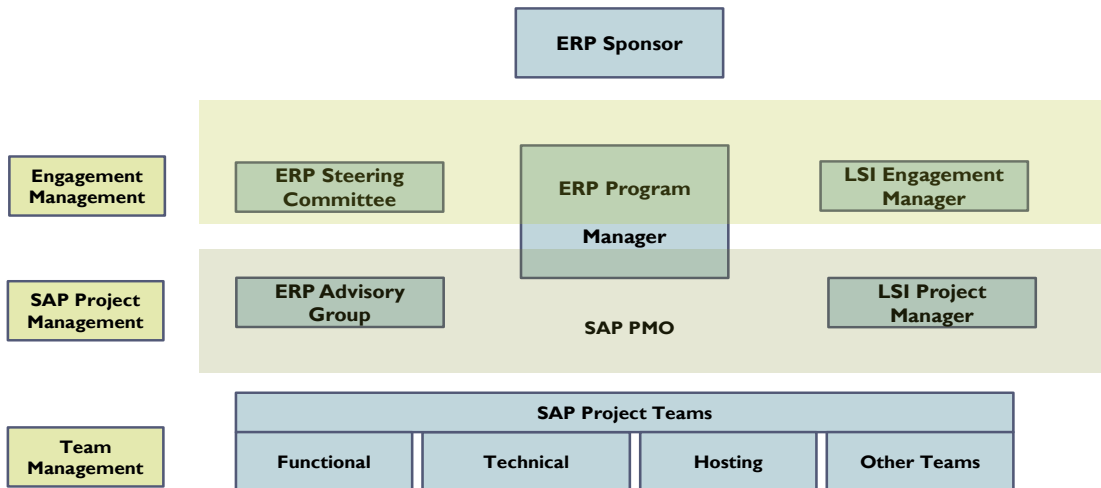
Team Management Meetings:	Weekly
SAP Project Management Meetings:	Bi-Weekly
Engagement Meetings (with ESC)	As Needed

LSI Implementation Approach

> 12. Describe your firm's preferred approach for working with clients from business process discussion through requirements, design, development and testing. Include your preferred SDLC methodology. Are there particular online collaborations, project management or tracking tools your company leverages as part of its project approach? Would you expect the customer to use these with you?

LSI Response:

LSI follows the preferred SAP and SuccessFactors methodology, ACTIVATE.

Methodology Overview
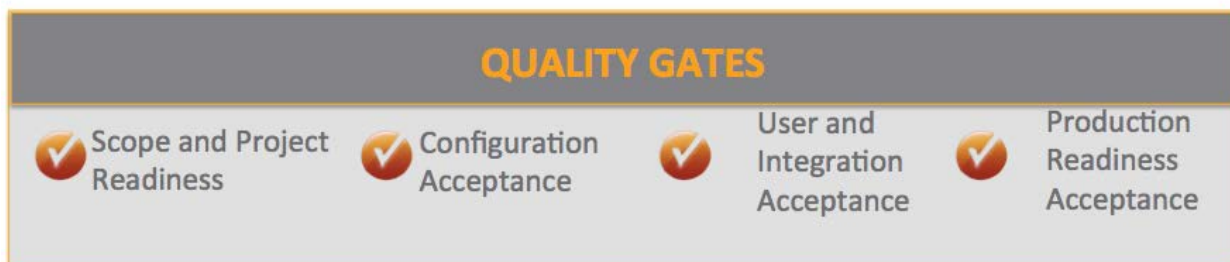
SAP's Activate Methodology

SAP Activate is the implementation methodology applied by LSI in delivery of SAP implementations. This methodology prescribes which implementation activities must be performed and the resulting deliverables. The SAP Activate methodology is structured into four implementation phases with one Quality Gate in each phase.

SAP Activate is a very prescriptive and predictable methodology that is lean and fast, while at the same time incorporating the iterative and agile approach where it makes sense, like with configuration and testing. This allows us to lead with best practices yet involve the Customer in the configuration and testing cycles to ensure that the solution fits your business.

The SAP Activate methodology has four phases for the implementation project lifecycle: Prepare, Explore, Realize, and Deploy.

Figure: SAP Activate Methodology Overview
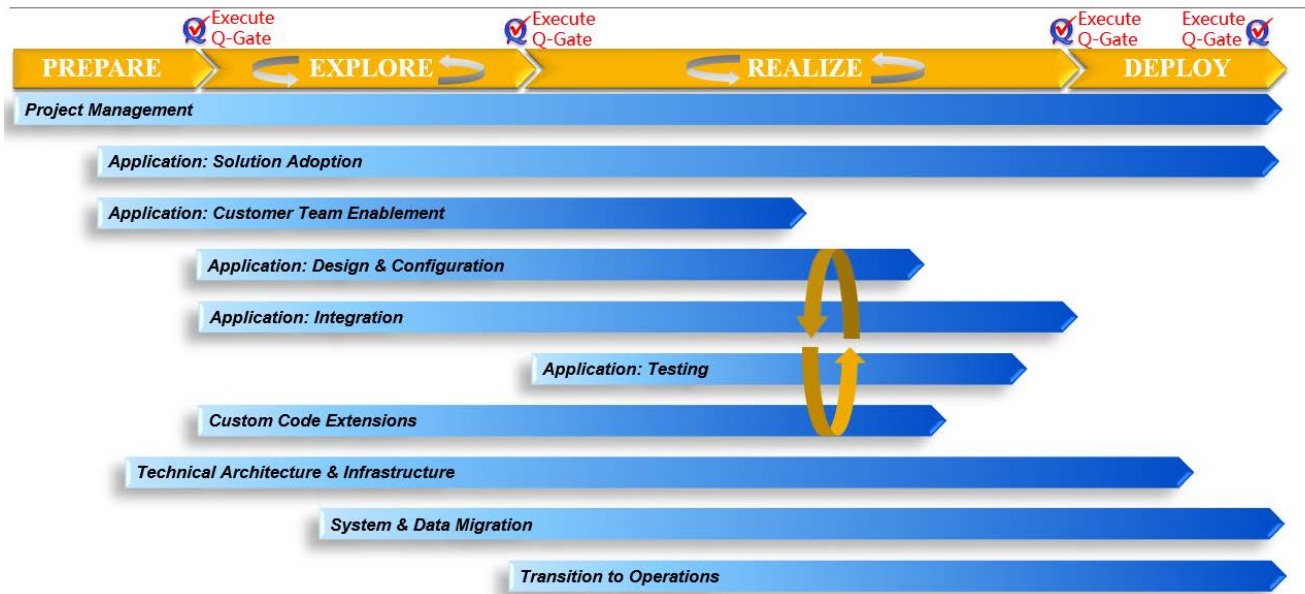
The main components of the methodology are streams. Streams are collections of tasks required to achieve one or many deliverables. Streams can span many phases.

LSI fully utilizes the SAP Activate methodology and the SAP accelerators to implement the solution. The SAP Activate methodology is structured into four implementation phases PREPARE, EXPLORE, REALIZE and DEPLOY with one Quality Gate in each phase.

Figure: SAP Activate Methodology Phases
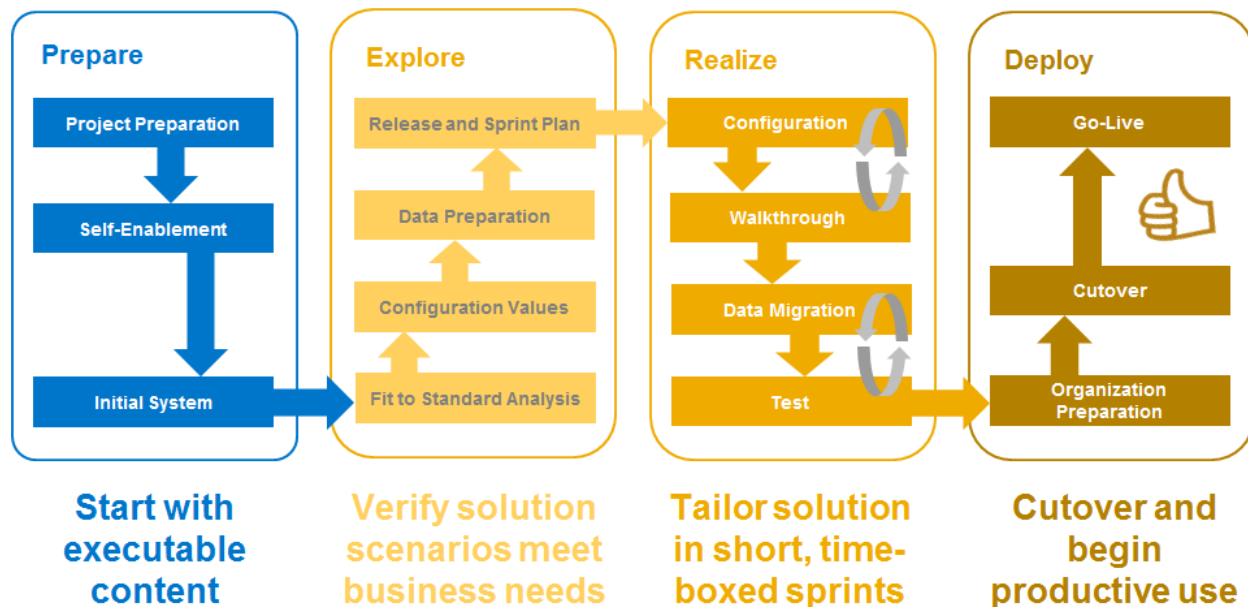
There are four Quality Gates, also called Q-Gates, executed during the implementation. Quality Gates are performed to confirm that all stakeholders of the implementation project agree that specific deliverables meet the requirements and consequently that the project can continue.

Figure: SAP Q Gates

Project Verification ☑	Solution Acceptance ☑	Readiness Acceptance ☑	Go-Live ☑
All stakeholders agree to the scope to be delivered during the implementation of the SAP solution. When necessary, a change order is executed.	All stakeholders agree that business scenarios demonstrated in the solution meet the requirements to be delivered by the project and that all configuration questions have been addressed.	All stakeholders agree that the systems, data, and people are ready to execute the cutover from the legacy system(s) to the new system(s).	All stakeholders agree that the cutover is complete and the organization is prepared to use and support the new solution.

Each phase is described in greater detail below:

Prepare Phase

During the Prepare phase the project manager works with the Customer to finalize the project schedule, identify project resources, procure tenant(s), create the project document repository, and initiate the project status calls/reports. The project is formally kicked off with the entire team via a workshop that may be held remotely or onsite.

In the Solution Design stream, the best practices for the to-be business processes are reviewed with the Customer and configuration values are acquired. The end result is that the project scope is confirmed. If the project scope varies from the Statement of Work, then a change order is executed.

The team prepares for integration by confirming that the integration, security, and infrastructure prerequisites have been met. Where relevant, the data replication requirements are reviewed and any necessary mapping is completed.

Specific to cloud applications, in this phase LSI starts-up the initial system ready for the "Fit to Standard Analysis". They do some initial solution enablement with Customer and provisioning settings. The LSI provides training content and interactive learning prior to the project kick-off to the Customer's team. This strategy accelerates learning and provides team members with a self-phased path for acquiring the skills and knowledge needed to complete the project successfully. SAP delivered accelerators for each task will be used.

Figure: Prepare Phase

The Project Verification Q-Gate confirms that all stakeholders agree to the implementation scope before proceeding with the project.

Explore Phase

During the Explore phase the focus is on the realization of the agreed-upon scope within the SAP solution. The purpose of this phase is to perform a fit/gap analysis to validate the solution functionality included in the project scope and to confirm that the business requirements can be satisfied. Identified gaps and configuration values are added to the backlog for use in the next phase.

The project execution deliverable continues as the project manager continues with project status meetings, status reports, and risk management.

Enablement begins with the initiation of the project, as project team members receive numerous details to prepare for the project and working with the solution. Some of the enablement is delivered via workshops.

Realize Phase

The purpose of the Realize phase is to use a series of iterations to incrementally build and test an integrated business and system environment that is based on the business scenarios and process requirements identified in the previous phase. During this phase, data is loaded, adoption activities occur, and operations are planned.
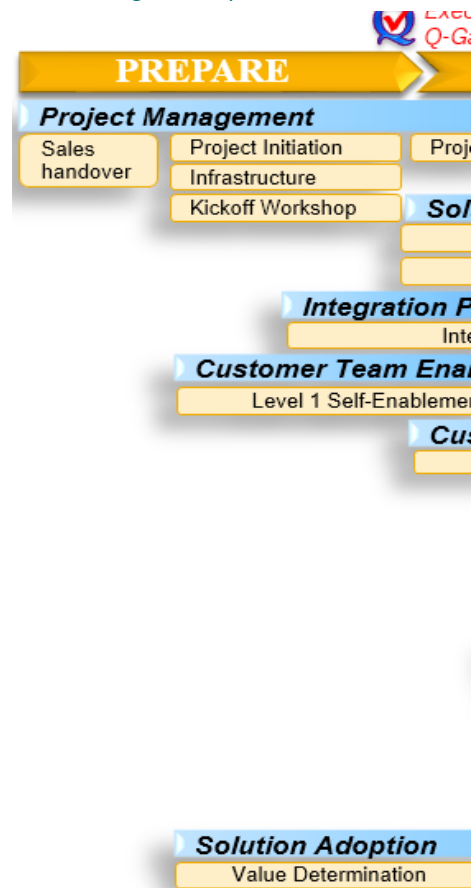
Realize Activities:

- Establish the solution landscape

- Implement the solution in the development environment using incremental build in time-boxed iterations

- Conduct overall end-to-end testing of the solution within the QA environment

- Setup production environment

- Prepare for data migration and data archiving

- Conduct performance testing

- Conduct project team and key user training

- Finalize end user training materials and documentation

- Track and report on value delivery

Figure: Realize Phase
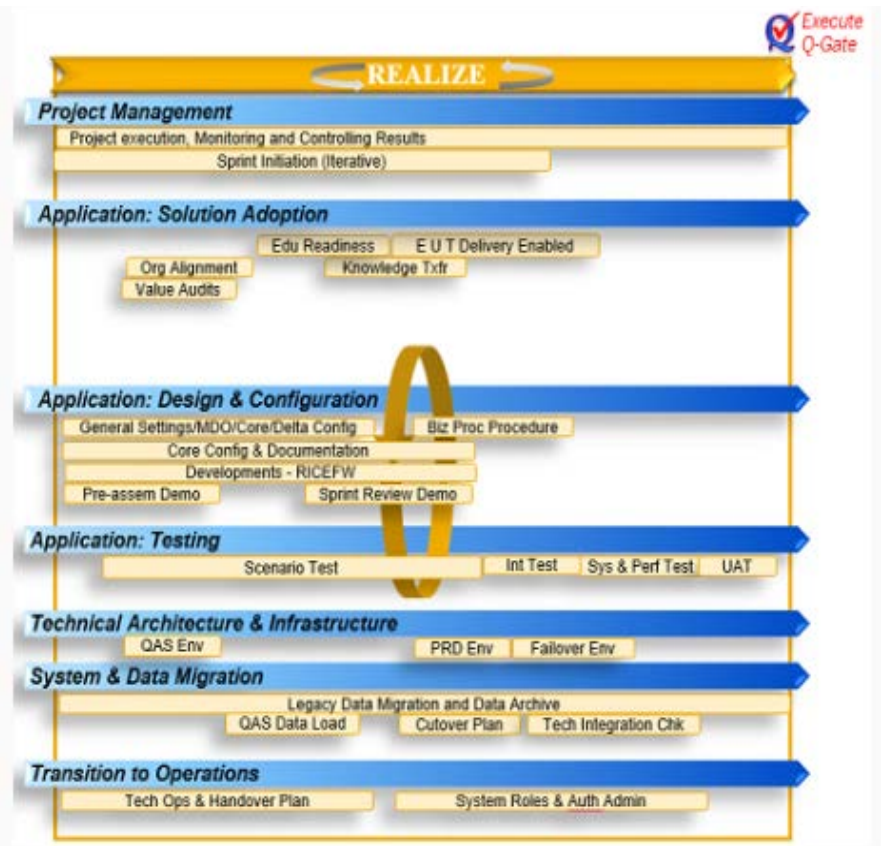
During Realize phase, the project team uses a series of iterations (in the form of Agile sprints) to incrementally configure, test, confirm, and document the entire end-to-end solution and to create legacy data conversion programs. The project team actively works with business representatives to ensure a good fit of the built solution to the requirements from the backlog. Our project team releases results of multiple iterations to the business users to accelerate time to value and provide early access to finalized functionality. Each release is thoroughly tested in end-to-end integration test and user acceptance test.

The project team documents the configuration decisions and solution in the SAP Solution Manager tool. They also document all development – including interfaces, integration points, data conversion programs, reports, and any required enhancements – in SAP Solution Manager. Once these activities are complete for particular release and the team has obtained business approval, they make the release available in the production environment.

Sprint 1

The Customer team members in consultation with LSI consultants perform unit testing of standard transactions and updating the unit test log. LSI's Project Manager prepares the Unit Test Summary

Report; the Customer Project Manager is responsible for review and feedback prior to presentation to executive leadership.

The Customer is responsible for definition and development of test cases, test scenarios and test scripts representing the comprehensive success criteria for this test phase. LSI assists with test case and scenario definition and script preparation.

The LSI is responsible for the overall training plan; the Customer is responsible for providing appropriate schedules for end user training delivery, train-the-trainer candidates, and attendee lists.

The LSI Project Manager has responsibility for the overall project schedule; the Customer Project Manager is responsible for providing updates of the specific tasks assigned to the Customer.

Sprint 2

Organizational Change Management (OCM) and training activities ramp up significantly during this phase of the project. At the conclusion of Sprint 1, the OCM team has a solid framework on which to base course outlines, organizational impact assessments, and communications.

Any requests for change at this stage are strictly controlled and evaluated by the PMO for inclusion based on complexity, resource availability, and lead-time for testing.

The Customer is responsible for execution of tests (with LSI's assistance) and logging of defects. LSI is responsible for management/coordination of test activities and correcting defects identified during testing (in components within LSI responsibility) that did not comply with the Customer. The LSI's Project Manager prepares the Summary Report; the Customer Project Manager is responsible for reviewing and providing feedback prior to presentation to executive leadership.

Sprint 3

Sprint 3 tests business processes from end-to-end including all technical developments to ensure that functionality in the system, together with custom developments, works as required. Configuration documentation and functional/technical specifications are updated to reflect any changes to the "as built" system.

Results of complex calculations such as payroll results are tested by comparison to the legacy system results. This requires parallel testing. A separate client with restricted access is used for payroll parallel testing, to preserve confidentiality of employee data. All employee data is converted to this client and payroll executed for selected periods. Any errors found are traced back to the source. If payroll configuration is the source of the errors, it is corrected. Source data or legacy system errors will be corrected by the Customer in the legacy system. This process is then re-executed.

A preliminary cutover plan is developed in this phase including the steps needed to build the production system, all automatic and manual steps, the data conversion steps, final checks and approvals for entering live data. Timing for the actual cut over and conversion process and down time estimates is validated in Final Prep.

The final activity in this phase is to review the results of Sprints testing, UAT, and organizational and training readiness assessments and confirm the decision to proceed with training and preparations for the transition to production support mode.

Figure: Deploy Phase

Deploy Phase

During the Deploy phase the Customer prepares for final system deployment.

New deliverables occur in the Project Management stream, in addition to the day-to-day project execution. Towards the end of the project, the service delivery team hands the Customer over to SAP Support and closes out the project.

In the Solution Adoption stream, the Customer prepares the transition plan that is used to roll out the new solution within the organization and with other impacted parties. This includes activities to train users, initiate productive use of the new solution, and push adoption within the organization. Then the planned activities are executed.

The Cutover Execution stream delivers a production system that is ready for real transactions. Once the Go-Live Q-Gate is executed, operational transactions are entered and processed in the production environment.

Deploy Activities:

- Finalize the solution and its supporting tools and processes for production go-live

- Resolve all crucial open issues

    - Conduct system tests
    - Check that system management is in place
    - Proceed with cut-over activities, including data migration

- Execute transition and cutover plans including organizational change management (OCM) plans

- Complete all scheduled end user training

- Identify and document all issues encountered in the transition to the new solution

- Monitor business process results and the production environment

- Establish OCC** or a "extra-care" center of excellence for support that provides:

    - Production support processes
    - Exceptional business monitoring processes
    - Extraordinary technical support
    - System enhancements

- Track and report on value delivery

References

> 13. References. Provide the client name, address, email address, and client's project representative and telephone number for the firm's three (3) most recent projects that most closely relate to the firm's qualifications for this project. Ideally, these would be references from the above questions. If a joint venture or other form of association, provide reference information for each member firm.

Client Name	Contact Information	Project Scope
San Francisco United School District	*Due to applicable policies, governing privacy and personal information, we have only provided the company names here for our reference customers. To request a meeting between yourselves and these references, or to attain appropriate permission to obtain in-confidence information, please contact Nader Tirandazi, our National Vice President at* ntirandazi@lsiconsulting.com *who will facilitate these reference requirements on your behalf.*	SAP Budget Planning and SuccessFactors Suite, HCM including Onboarding and Recruiting
Houston Independent School District	Please see note above.	Reimplementation of SAP Finance and re-design of Chart of Accounts with core with HCM Functionality
Seattle Independent School District	Nancy Petersen Director of Enterprise Applications 206-252-0480 nlpetersen@seattleschools.org	- Position Budgeting and Control - Recruiting and Onboarding discovery Sick Leave Time Changes

Client Name	Contact Information	Project Scope
Prince George's County	Please see confidential note above.	SAP ERP- Finance, HCM, Procurement, Finance and BW Reporting, Treasure and Budget Planning, Various SuccessFactors Modules
Cardone Industries	Please see confidential note above.	SAP SuccessFactors- Onboarding/Recruiting
Eskenazi Hospitals Indianapolis	Please see confidential note above.	SAP S4, SuccessFactors Suite including Onboarding and Recruitment, and Ariba

C. Attachments

Staffing Options

1. **Staffing Options.** Review the Project Approach section above (see Section 4.2 on page 6 of this RFP) and then provide several staffing options which would enable us to reach our objective. Title each option, i.e., "Option 1…", "Option 2…", etc. For each option, include the following:

LSI Project Staffing Plan

a. Project staffing plan, including bio for each team member with the following (include the identifiers below for ease of reference):

1. Their role at your company
2. Their role in the project
3. Whether they would be considered the most senior team member
4. Percentage
5. How many other clients that team member might be supporting while on the project
6. Expected 2018 availability
7. Standard hourly rate
8. Number of years as a consultant

LSI Response:

Projected Go-Live for all options is Dec 1, 2018. Final details are sorted during project planning. Please see Sample Timeline for the SPS projected timeline. All hours noted are subject to change and will be finalized during project planning process.

Option 1 – LSI Full Staffing

This option includes LSI Project team resources for Project Manager, Recruiting/Onboarding Consultant, Change Management Consultant and Integration & Data Imports Development Consultant with a 1:1 ratio of SPS Project team members expected.

Option 1-Full Staffing
LSI Resources

	Apr-18	May-18	Jun-18	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18	Dec-18	Total Hrs
Project Manager	80	80	80	80	80	80	80	80	20	660
Change Management	0	48	48	0	0	0	48	0	0	144
Onboarding/Recruitment	160	160	160	160	160	160	160	160	160	1440
Development	0	32	32	32	32	32	32	32	0	224
										2468

Staffing Criteria	Aswin Rajeswaran	Pavan Abraham	Doug Sietsema	Kiran Mehendale
Role at LSI	Recruiting/Onboarding Consultant	Project Manager	Change Management Consultant	Integration and Data Imports Development Consultant
Project Role	Recruiting/Onboarding Team Lead and Consultant	Project Manager	OCM expert	Integration
Senior Team Member?	No	Yes	Yes	No
% of time dedicated to the project	100%	30%	30%	20%
# other clients that team member might be supporting while on the project	~1	1-2	N/A	1-2
Expected 2018 availability	Upon start of project	Upon start of project	Upon start of project	Upon start of project
Standard Hourly Rate	$185	$210	$185	$175
# of Years as Consultant	10+ years	10+ years	10+ years	15+ years

Option 2 – LSI Minimal Staffing

This option includes LSI Project team resources for Recruiting/Onboarding Consultant and Integration & Data Imports Development Consultant with a 1:1 ratio of SPS Project team members expected.
This option would require Project Management and Change Management tasks to be covered solely by the School District, supported and advised by LSI consultant. This is not unusual with a single module SuccessFactors implementation and we project this would not be optimal but manageable in the case of this project.

Option 2-Minimal Staffing

LSI Resources

	Apr-18	May-18	Jun-18	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18	Dec-18	Total Hrs
Project Manager										
Change Management										
Onboarding/Recruitment	160	160	160	160	160	160	160	160	160	1440
Development	0	32	32	32	32	32	32	32	0	224
										1664

Staffing Criteria	Aswin Rajeswaran	Kiran Mehendale
Role at LSI	Recruiting/Onboarding Consultant	Integration and Data Imports Development Consultant
Project Role	Recruiting/Onboarding Team Lead and Consultant	Integration
Senior Team Member?	No	No
% of time dedicated to the project	100%	20%
# other clients that team member might be supporting while on the project	~1	1-2
Expected 2018 availability	Upon start of project	Upon start of project
Standard Hourly Rate	$190	$185
# of Years as Consultant	10+ years	15+ years

Each bio should also include their years of experience for each of the following, stating the exact nature of that experience, i.e., *Configurator, Developer, Business analyst, HRIS Manager, Salesperson, etc.*

9. HRIS systems
10. Public sector
11. K-12 school districts
12. SAP
13. Success Factors Recruitment and Onboarding
14. OpenText SAP Connector (nice to have; not required)

LSI Response: Please see Appendix D for resumes that include the above referenced information.

Project Organizational Chart

b. Project org chart with points of escalation (this can be combined with the staffing plan)

Option 1 – Full Staffing
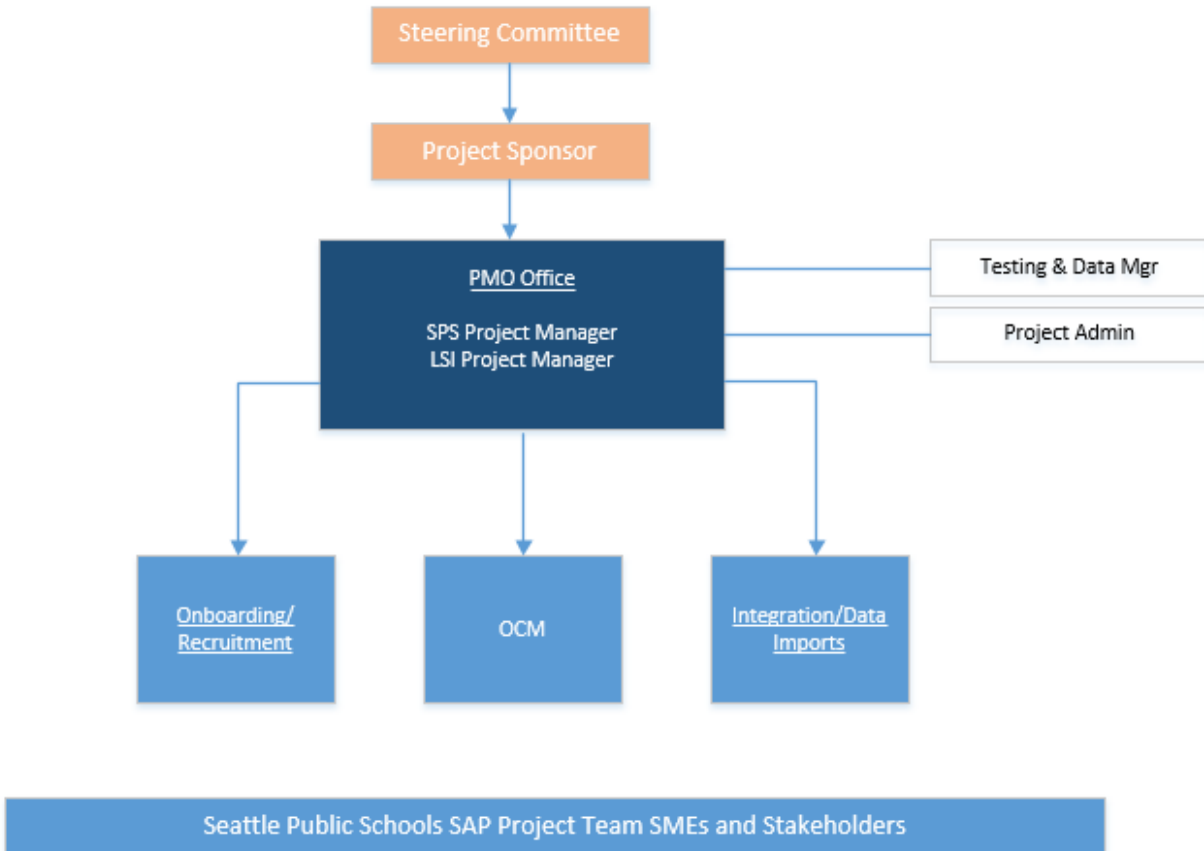
Option 2 – Minimal Staffing
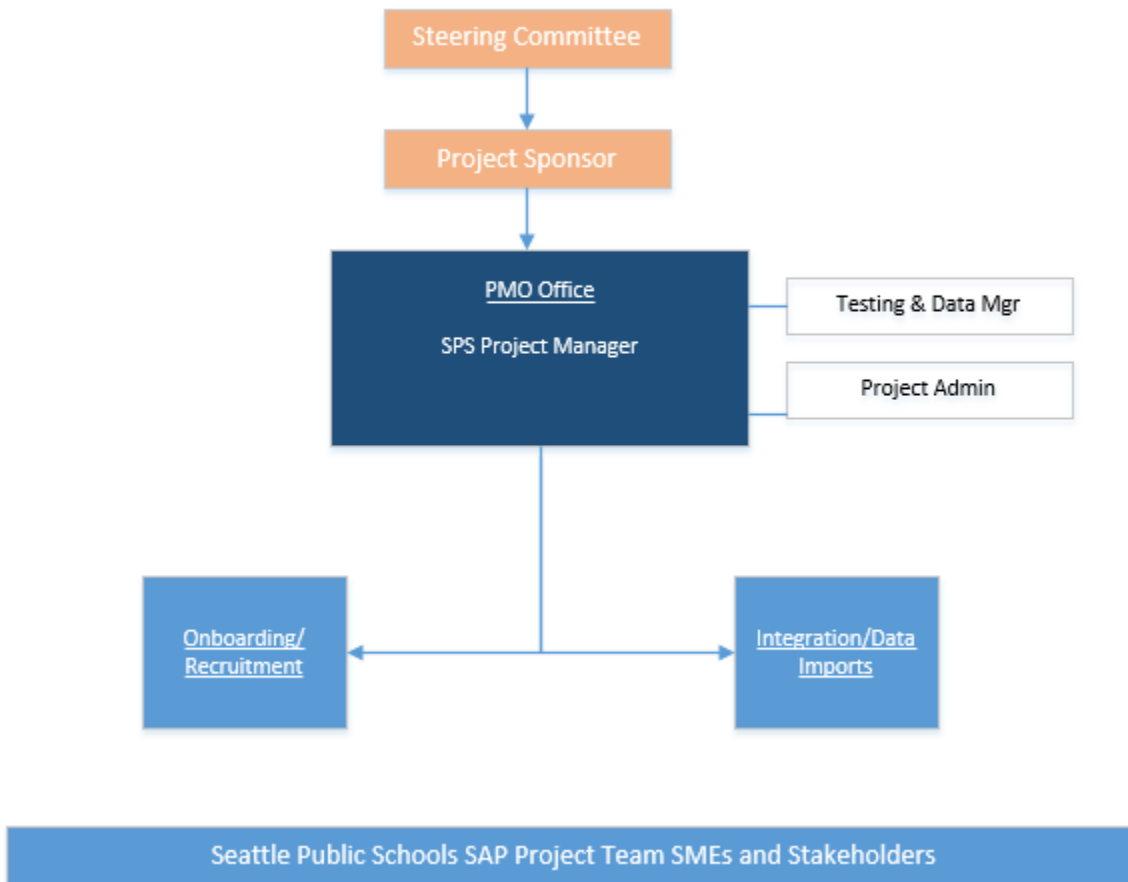
SPS Project Staffing Plan and Roles and Responsibilities

> c. Recommended org chart for SPS project staffing that fits this particular *Staffing Option* so that all necessary roles are filled, including accountability and responsibilities for each role and percentage of time that the staff should be dedicated to the project

Projected Go-Live for all options is Dec 1, 2018. Final details are sorted during project planning.

The District and LSI will provide knowledgeable resources that are available to work on the project as part of the project team. These resources in their role can make informed tactical decisions required to move through project tasks, or have direct access to decision makers through established project governance. The major roles, responsibilities and time commitments for District and LSI resources are outlined below.

A detailed District staffing plan is located below.

LSI and the District shall provide resources with the appropriate skill set to be responsible for the roles and responsibilities identified in Table below:

Key District users shall be made available during the project for interview, system demonstrations, system testing, decision-making and other tasks related to this project.

SPS Staffing Plan Option 1

SPS Resources

	Apr-18	May-18	Jun-18	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18	Dec-18	Total Hrs
Project Manager	80	80	80	80	80	80	80	80		640
Change Management		48	48	24	24	48	48	48		288
Onboarding/Recruitment	160	160	160	160	160	160	160	160		1280
Development	0	32	32	32	32	32	32	32		224
										2432

SPS Staffing Plan Option 2

SPS Resources

	Apr-18	May-18	Jun-18	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18	Dec-18	Total Hrs
Project Manager	160	160	160	160	160	160	160	160		1280
Change Management		96	96	24	24	48	96	48		432
Onboarding/Recruitment	160	160	160	160	160	160	160	160		1280
Development	0	32	32	32	32	32	32	32		224
										3216

Project Roles, Responsibilities and Time Commitment

Role	Responsibility	District %FTE	LSI %FTE
Project Steering Committee	• Key element to Project governance structure, providing overall Project direction. • Demonstrates senior level commitment through active and visible participation in the process. • Provides the context for translating District organizational objectives into process goals. • Establishes strategy and policies, and resolves major issues, not involved day to day • Monitors project scope, timeline, resources and progress	5%	5%
Project Sponsors	**District Project Sponsor** • District Executive Management responsible for the business areas impacted by the Project. • Provides executive direction and approval for the Project.	10%	

Role	Responsibility	District %FTE	LSI %FTE
	• Monitors project scope, timeline, resources and progress and ensures proper Project funding.		
	LSI Executive Sponsor • Serve as District's Executive contact with LSI leadership. • Has ultimate authority over LSI Project staff and resources. Responsible for assisting in issue resolution, as well as addressing and approving change control issues in conjunction with the District Project Director.		10%
Project Manager	**District Project Manager** • Manages project direction and overall plan to ensure that the Project Steering Committee expectations are fulfilled. • Reports Project status to the Project Sponsor and project governance bodies including financial and risk management. • Defines expectations and success indicators. • Creates the environment and provides direction for cultural changes. • Accountable for Project delivery with assistance from the LSI Project Manager. • Accountable for scope control with assistance from LSI Project Manager • Makes final Project business planning decisions. • Advises on quality assurance processes to ensure that the business rules, business processes and data integrity remain high. • Schedules regular meetings to review and approve Project status. • Allocates Project resources required for success. • Ensures Project Plan is managed to determined milestones, determines when milestones are met and approves deliverables associated with milestones. • Monitors timely issue resolution and appropriate issue escalation. • Monitors Project costs and timelines for budget adherence. • Manages project administration activities to include expenditures approval process. • Approves Project Deliverables from LSI. • Ensures alignment of IT direction and business objectives throughout the Project.	50% Option 1 100% Option 2	

Role	Responsibility	District %FTE	LSI %FTE
	• In conjunction with LSI Project Manager reports Project status to the Project Steering Committee. • Jointly develops with LSI Project Manager the Project Work Plan and assigns resources and priorities. • Works with the LSI PM to confirm the fit of business requirements with the SAP solution. • Works with functional leads in coordinating project activities. • Acts as the day to day contact for the LSI Team. • Provides daily management of the Project Team (District) resources. • Manages execution of the approved Project Work Plan, monitors progress and reports Project status • Manages issue resolution and ensures timely escalation process. • Monitors compliance with standards for documentation, and training. • Ensures standards for appropriate use of data. • Monitors Project costs and timelines for budget adherence.		
	LSI Project Manager • Accountable for project delivery. • Makes final LSI Project business planning decisions. • Assures overall quality project outcomes. • Participates in Steering Committee meetings. • Serves as liaison between LSI executive sponsor and District Project Management. • Monitors and helps resolve escalations. • Monitors project financial viability. • Assures alignment of project direction and activities. • Contract performance accountability. • Focal point for LSI methodology, and transfers LSI Project Management methodology and knowledge to the District Project Manager. • Creates Project Work Plan after evaluating input and recommendations from District Project Manager, Sponsors and IT to ensure compliance to fixed price contract. • Manages all activities and maintains the Project Work Plan and work schedule.		50% Option 1 0% Option 2

Role	Responsibility	District %FTE	LSI %FTE
	• Maintains project dashboard. • Develops critical path and dependencies, and assigns priorities to critical Project tasks to ensure meeting fixed price obligations. • Reports Project status to the District Project Manager including variance from Project Work Plan, issues, and risk management. • Manages performance of LSI Consultants. • Serves as liaison with District, and provides coordination support on all functional aspects of the Project. • Recommends, establishes, and monitors compliance with standards for coding, documentation, data, and technical objects • Manages any gaps, issues, and risks that have a direct impact on the fixed price contract and are the responsibility of Project Team. • Manages and validates Project Deliverables, which are identified within this SOW • Monitors plan to Deliverables. • Monitors timely issue resolution and appropriate issue escalation.		
Functional Team Leads and Members	**District Functional Team Leads by Area** • Provides significant business process experience in a relevant functional area. • Coordinates multiple Project contributors from the business side, technical side, and LSI Project side. • Schedules and helps run Blueprint review work sessions in conjunction with Project Management and the LSI Functional Consultants. • Responsible for issue resolution management in a functional area. • Responds to Project Management regarding progress and issues. • Identifies areas that provide opportunities for business process improvements and implements the best practice. • Assists the LSI Project Manager and the District Managers with the creation of the overall Project Work Plan. • Complies with Project Change Control Procedures put in place to escalate issues, risks and change requests. • Oversees and manages knowledge transfer effort for District within their respective areas	Option1: Change Mgmt – 20-30% Onboarding/Recruiting – 100% Integration/Data Imports – 20% Option 2: Change Mgmt – 50-60% Onboarding/Recruiting – 100% Integration/Data Imports – 20%	

Role	Responsibility	District %FTE	LSI %FTE
	LSI Functional Leads/Functional Area Consultants • Works with Team District business, data, and applications analyst project resources. • Provides detailed understanding and in-depth knowledge of the LSI functionality for each application, sub-system or technical area. • Provides implementation experience in recommending and assessing design solutions and alternatives; determines system design of required business scenarios/reports with a goal to use embedded business processes in LSI solution and minimize custom program or hooks. • Provides input on process improvements recommendations based on business experience. • Provides recommended solutions for functional gaps. • Provides input on technical implications of specific design solutions, and, scrutinizes design for integration requirements and provides integrated system and design expertise in designated functional area. • Performs setup and configuration in the SAP System. • Resolves all configuration issues in assigned functional areas. • Determines master file and table configuration requirements. • Assists the LSI Project Manager and the District Managers with development of the overall Project Work Plan. • Provides input on training approaches where required. • Responsible for functional unit and integration testing, including documentation and resolution of assigned testing issues. • Responsible to the LSI Project Manager for the timely delivery of respective team Deliverables. • Provides input into Project status updates and issue resolution with District counterpart. • Transfers knowledge to the assigned the District resources.		Option1: Change Mgmt – 20-30% Onboarding/Recruiting – 100% Integration/Data Imports – 20% Option 2: Change Mgmt – 0% Onboarding/Recruiting – 100% Integration/Data Imports – 20%

Role	Responsibility	District %FTE	LSI %FTE
	• Complies with Project Change Control Procedures put in place to escalate issues, risks and change requests. • Defines integration dependencies between projects to achieve a common process and system integration. • Reviews, reconciles and validates process integration points. • Assesses the impact of newly discovered integration points. • Manages the integration point life cycle. • Facilitates identification and resolution of integration issues. • Communicates progress/status of integration activities. • Serves as a liaison between the Integration Team and the Process team. • Reviews process area work plans to maintain consistency and standards on integration events and tasks. Leads and oversees knowledge transfer effort for District within their respective areas		
Business and Data Subject Matter Expert (SME)	**District Business and Data Subject Matter Experts (SMEs)** • Provides business expertise and help identify the functionality required to fulfill the business requirements associated with each area. • Participates actively in workshop sessions and other functional meetings. • Provides knowledge and subject matter expertise of respective functional or technical area and existing business processes to LSI Team. • Assists in resolving business and system integration issues. • Develops, validates, and tests business process procedures in SAP. • Works closely with the LSI Consultants to enable skills transfer and effective shadowing. • Works closely with other application teams to facilitate Project progress and to integrate the systems solution. • Provides insight into the organizational change management requirements associated with the end users affected by the implementation of respective business areas.	As Needed	

Role	Responsibility	District %FTE	LSI %FTE
	• Serves as a communication point for the end user community as part of the change management process. • Provides insight into the training requirements associated with the end users affected by the implementation of the SAP solution. • Complies with Project Change Control Procedures as defined in Section 6 put in place to escalate issues, risks and change requests. • Responds to Project Management regarding progress and issues.		

• Additionally, the District may assign backup Subject Matter experts and department representatives as required and decided by the District project manager.

> d. Amount of onsite time including which team member and for which part of the project

Option 1 and 2:

LSI onsite staffing for both Option 1 and 2, while it will not be 100% onsite throughout the course of the entire project, it will vary depending on details finalized throughout the project planning and negotiation processes. Please see staffing plans for work effort hours projected for all project roles for each phase.

Total Cost

> e. Total cost to the District for each option and any additional anticipated costs for travel

Total Cost for both options includes travel.

Cost for Option 1 – Full Staffing

LSI Response: $530,172.00

Cost for Option 2 – Minimal Staffing

LSI Response: $340,243.20

Sample Project Plan, Timeline, Task List

LSI Response: Please see Appendix B: MS Office SAP Activate Onboarding Project Plan Template for Sample Project Plan, Task List and Task Assignments

Project Timeline for Option 1 and 2 is the same. **Project Go Live date is set at Dec 1 with 1 month of support post go-live.**

Seattle Public Schools: Recruiting and Onboarding									
Phases	Apr-18	May-18	Jun-18	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18	Dec-18
Prepare	▓								
Explore		▓	▓	▓					
Realize					▓	▓			
Cutover							▓		
Deploy								▓	
Support								★	▓

Sample Statement of Work

LSI Response: Please see Appendix C for a sample table of contents for one of our sample SOWs.

Sample Status Report

LSI Response:

	Office of the SSS <<PROJECT NAME>>	

WEEKLY STATUS REPORT

Contractor	XX	Project Title	XX
Contract No.	XX	Change Order Date	XX
Contract Date	XX	Change Order No.	XX

1. Key Status Indicators:

Description	No	Yes	Explanation
Has scope changed?			
Will target dates slip?			
Are there resource problems?			
Any other issues?			

2. Major Activities Completed For Reporting Week (Key Accomplishments):

Activity	Comment(s)

3. Major Activities Planned For Reporting Week and Not Completed:

Activity	Comment(s)

Appendix A: Exceptions to Sample Contract

LSI Response: At this time we have no exceptions.

Appendix B: SAP Activate Onboarding Project Plan Template

SAMPLE Project Plan

ID	% Complete	Text10	Text12	Task Name	Resource Names
1	0%	Milestone	Notes	**Activate Onboarding Implementation**	
2	0%			**PREPARE**	
3	**0%**			**Sales to Delivery Handover**	
4	0%			Review Implementation Profile	PM
5	0%			Review SOW	PM
6	0%			Review Schedule A Pricer	PM
7	**0%**			**Internal Project Kickoff**	
8	0%			Confirm resourcing assign staffing	
9	0%			Review Implementation Scoping Questionnaire	PM
10	0%			Review PSE/SOW/Schedule A	PM
11	0%			Project Kickoff Deck Updated/Scope Matched to SOW	PM
12	0%			Review Project Preparation Checklist	PM
13	**0%**			**Create Customer Collaboration Space (if required)**	
14	0%			Request Customer SharePoint site or Create Customer External JAM site	PM
15	**0%**			**Request S User Accounts**	
16	0%			Request Customer SharePoint site or Create Customer External JAM site	PM
17	**0%**			**Team Introduction**	
18	0%			Pre-Kick Off Call - Introductions	PM,FC,Customer
19	0%			Pre-Kick Off Call - SOW Review	
20	0%			Introduce Collaboration Space/Welcome Materials	PM
21	0%			Provide Module Readiness Checklist	
22	0%			Provide Instruction to Complete Project Team Orientation	
23	0%			Provide & Discuss RACI Matrix	
24	0%			Confirm Onsite Kick-Off Date & Agenda	PM
25	**0%**			**Project Plan**	
26	0%			Draft preliminary Project Plan based on SOW scope and resource booking in ByD	PM
27	**0%**			**Kick-Off Meeting**	
28	0%			Prepare deck for kickoff call/schedule kickoff mtg	PM
29	0%			Meeting Purpose	PM
30	0%			Introductions	PM
31	0%			About SAP	PM
32	0%			Project Scope	PM
33	0%			Business Goals / Drivers	Prod Ops
34	0%			Team Structure	Customer
35	0%			SAP ACTIVATE Methodology	PM
36	0%			Project Timeline	PM
37	0%			Risk Register	PM
38	0%			Rules for the Road to Success	PM
39	**0%**			**Kickoff**	
40	0%			Technical Kickoff	Team

ID	% Complete	Text10	Text12	Task Name	Resource Names
41	0%			Integration Kickoff	
42	**0%**			**Onboarding Pre-Kick-off**	
43	**0%**			**Design and Kickoff Preparation**	
44	0%			Request instance access approval email from client	SAP Consultant
45	0%			Request provisioning & SFTP access	SAP Consultant
46	0%			Request ONB instance to be created	SAP Consultant
47	0%			Review completed Readiness checklist	Customer
48	**0%**			**ONB Systems & Requirements Preparation**	**SAP Design**
49	0%			Connect ONB and BizX instances	SAP Consultant
50	0%			Review/confirm scope	SAP Consultant
51	0%			Determine basic design, Complete best practice configuration	SAP Consultant
52	0%			Create test email account	SAP Consultant
53	**0%**			**Prepare for workshop**	
54	0%			Confirm workshop dates	SAP Consultant,Customer
55	0%			Prepare agenda & demo	Customer
56	0%			Preparation Quality Gate	
57	**0%**			**EXPLORE**	
58	**0%**			**Configuration Definition and Best Practice Review**	**Team**
59	**0%**			**Configuration Workshops**	
60	**0%**			**Onsite/Virtual Requirements Gathering/System Design Workshop**	**PM/PC/Client**
61	0%			Onsite/Virtual Agenda Customized to SOW/Client	PM
62	0%			Onsite or Virtual Logistics Complete	PM/Client
63	**0%**			**Onsite Workshop Conducted 2 full days, Virtual Workshop two 3 hour m**	**PM/PC/Client**
64	0%			Travel to Client's site	**PM/PC,Client Core Design Team**
65	**0%**			**Inititial business requirements collected/ONB System design**	
66	0%			Future State Process flows (High-Level) - drafted	PC/Client
67	0%			High-level systems integrations (current and future state) diagramme	PC/Client
68	0%			Panel/UI Mockups (10 client custom panels) - drafted	PC/Client
69	**0%**			**Config Workbook - initial review and partial completion at onsite**	
70	0%			Work Queue - initial requirements	PC/Client
71	0%			Security Groups - initial requirements	PC/Client
72	0%			Corp Structure - initial requirements	PC/Client
73	0%			Country Codes	PC/Client
74	0%			Custom & Standard Notifications - initial requirements	PC/Client
75	0%			Picklists - initial requirements	PC/Client

ID	% Complete	Text10	Text12	Task Name	Resource Names
76	0%			Security Described - initial requirements	PC/Client
77	0%			User Defined fields - initial requirements	PC/Client
78	0%			eWage Module - overview with instructions for client to complete	PC/Client
79	0%			DocCenter Access - initial requirements	PC/Client
80	0%			Travel back home	
81	**0%**			**Post Workshop**	
82	**0%**			**Onboarding Process Design**	
83	0%			Review of Onboarding Panel Mock-ups (Kick off examples)	
84	**0%**			**System Requirements**	
85	0%			Complete Future State Onboarding Process Flow	
86	0%			Populate Onboarding Configuration Workbook	
87	**0%**			**SPRINT #1 Sign off for configuration initiation**	
88	0%			Deliver future state process flow, and configuration workbook	
89	0%			Update and Sign-off Onboarding Panel Mock-ups future state Onboarding	
90	0%			Ensure Configuration Workbook is signed-off before processing	
91	0%			Explore Quality Gate	
92	**0%**			**REALIZE**	
93	**0%**			**SYSTEM CONFIGURATION**	
94	0%			DocCenter + Federal / State / Standard Hiring Forms / Doc Center / eVerify	
95	**0%**			**Client Specific Configuration (Provisioning & Client Instance) - Component Config v**	
96	**0%**			**Workflows (2)**	
97	0%			Set up WF #1 structure	OfPC
98	0%			Initial Test Rec to OB data flow/systems connection - WF#1	OfPC
99	0%			Set up WF #2 structure	OfPC
100	0%			Initial Test Rec to OB data flow/systems connection - WF#2	OfPC
101	0%			Forms	
102	0%			UI Panels	
103	0%			Notifications	
104	0%			Security Groups	
105	0%			**eWage configuration (if applicable to this SOW, otherwise delete)**	PC
106	**0%**			**Refine Configuration**	
107	0%			*Add client configurations to SF-Cofigured system (if applicable)*	OfPC

ID	% Complete	Text10	Text12	Task Name	Resource Names
108	0%			*Test add-ons (add if applicable)*	*OfPC*
109	0%			**Client Demos (optional/if time/can be done when 90% of config completed)**	
110	0%			**Client Demo #1**	
111	0%			System Demo of Workflow 1 & Client Input	PC/Client
112	0%			configure integrations for Demo 2	
113	0%			Refine & make client requested changes	PC
114	0%			**Client Demo #2**	
115	0%			System Demo of Workflow 2 & Client Input	PM/PC/OfPC/Client
116	0%			Refine & make additional changes	OfPC
117	0%	***M***		*Client Signoff on Configuration for Move to UAT*	PM/PC/OfPC/Client
118	0%			Realize Quality Gate	PM,Customer
119	0%			**VERIFY**	
120	0%			**PREPARATION FOR UAT**	
121	0%			**Test Case Scenarios**	
122	0%			Develop Test Case Scenarios (Client)	Client
123	0%			Review readiness of client test cases	PC
124	0%			Prep for internal run through (optional/if time)	PC/OfPC
125	0%			**Client Preparation for UAT**	
126	0%			User Orientation & Overview	PC/Client
127	0%			**UAT (USER ACCEPTANCE TESTING)**	
128	0%			**Client Testing UAT**	
129	0%			UAT kickoff	PC/Client
130	0%			Train Client on Configured System/Demo	PC/Client
131	0%			**Client UAT**	
132	0%			**UAT - Cycle 1 (core testers)**	**Client/PC/OfPC**
133	0%			Client tests & logs issues	Client
134	0%			SF reviews issues/fixes/client confirms fixes	OfPC/PC
135	0%			**UAT - Cycle 2 (often international and/or end user testers)**	**Client/PC/OfPC**
136	0%			Client tests & logs issues	Client
137	0%			SF reviews issues/fixes/client confirms fixes	OfPC/PC
138	0%			SF internal review and lockdown of list of changes	OfPC/PC,PM,Client
139	0%	***M***		*Client UAT Sign-off to Move to PROD (Go-Live)*	PM/Client
140	0%			Verify Quality Gate	
141	0%			**DEPLOY**	
142	0%			Generate MOU & Initiate eVerify account	eVerify Admin/Client
143	0%			**Planning for Go-Live**	
144	0%			Develop cutover plan	OfPC/PM/PC/Client
145	0%			Review cutover plan with Client	
146	0%			**Client Preparation for Go-Live**	
147	0%			Admin Training (recorded)	Client
148	0%			**Transition to Support**	
149	0%			Introduce Client to Support Contact	PM/Client/Support
150	0%			Client overview of Support Ticket system	PM/Client/Support
151	0%			**System Cutover to PROD**	

ID	% Complete	Text10	Text12	Task Name	Resource Names
152	**0%**			**Client's Non-Technical Preparation**	
153	0%			Client Provides End User Training (in QA)	Client
154	0%			Issue Internal Communications re Go-live	Client
155	**0%**			**Pre-Launch Configuration**	
156	0%			Turn on Provisioning Settings for PROD site	PC
157	0%			Update JRDM (job req template) for Recruiting PROD Site (permissions for Onboa	PC
158	0%			Update RBP-role based permissioning in BizX Prod (permissions for Onboarding)	PC
159	0%			Clear all test activities, switch QA mode off	OfPC
160	**0%**			**Technical Move**	
161	0%			Create production site/move configuration to Production	PC
162	0%			2-Day Internal testing in Production - technical, processes, end to end, document	PC
163	0%			Client systems cutover (as needed)	Client/Client Vendors
164	0%	***M***		*Sign-off on production readiness for Go-Live*	PM/PC/OfPC/Client
165	0%	***M***		*System is Live*	
166	**0%**			**Utilization of Live System**	
167	0%			Provide credentials to client	
168	0%			Production pilot hires- full run through (recommended)	Client
169	0%			Client releases ONB system to organization	Client
170	0%			Deploy Quality Gate	PM,Customer
171	**0%**			**HYPERCARE (2 weeks)**	
172	0%			Mtg 1: Post Go-Live check-in mtg (Change to Mon after cutover	PM/PC/OfPC/Client/Support
173	0%			Mtg 2: Post Go-Live check-in mtg (+2 days)	PM/PC/OfPC/Client/Support
174	0%			Mtg 3: Post Go-Live check-in mtg	PM/PC/OfPC/Client/Support
175	0%			Mtg 4: Post Go-Live check-in mtg	PM/PC/OfPC/Client/Support
176	**0%**			**Begin logging Support issues with Support instead of on Project SharePoint Site**	
177	0%			Review Project Closeout Checklist	PM
178	0%			Internal Lessons Learned meeting is led by the Practice Manager with SSM, PM, FC,	Team
179	0%			Team members complete Lessons Learned survey	Team
180	0%			Ensure that all project documentation has been posted to the Customer SharePoint	PM
181	0%			Each SuccessFactors team member should submit internal ticket to remove their ow	FC
182	0%			Project Manager Completes the Project Closeout Form	PM
183	0%			Go-Live Announcement submitted at the SAP Customer References Platform	PM
184	0%			PS Operations Post Go-Live Survey	Prod Ops
185	**0%**			**PROJECT CLOSEOUT**	PM,PC,OfPC

Appendix C: Sample SOW TOC

*NOTE – the below SOW Table of Contents is taken from an actual Customer. LSI will work with the SPS to detail all services to be performed, deliverables and milestone payment schedule.

City of <CUSTOMER>

SAMPLE Statement of Work Table of Contents

SAP Software Consulting Services

File Name: Attachment A (SOW LSI 06_19_2018)

Version: 1.0

Release Date: 06_19_2018

Table of Contents

Appendix D: Resumes

ASWIN RAJESWARAN

Senior SAP SuccessFactors Consultant-Onboarding/Recruiting Specialist

Profile Summary

- Senior SAP SuccessFactors Consultant with overall 10 years of IT program / project management and implementation experience in HR and Benefits domain.
- SAP Certified consultant in SuccessFactors Recruiting Management, Employee Central and Onboarding
- Experienced in Full End to End Implementation for multiple countries (USA, CAN, MEX)
- Experienced in integration of SuccessFactors BIZX and SAP HCM for PA and OM
- Experienced in Configuring Job Requisition Template, Candidate Profile Template and Candidate Application Template
- Experienced in Configuring Interview Central – Setting up Interview Competencies, Interviewer Data, Completing Interview Assessment and reviewing Interview Assessment results
- Worked on Interview Scheduling, Job analyzer and Employee Referral
- Configured Offer Approvals, Offer Letters and Career Portal
- Set up Recruiting Home Page Tiles, Hire and Onboard
- Job Profile Builder – Configure Job profile templates, contents : Competencies, Skills, Job duties and responsibilities, Families and roles
- Configured Work Queue, security groups, corporate structures, custom and standard notifications
- Configured Doc Center Federal/ State/Standard Hiring Forms/ Everify
- Set up forms, UI Panels and eWage configuration
- SAP Cloud Platform Integration / Dell Boomi Tool Configuration of the interface integrations between Successfactors and other third party
- Lead the Client Business team and drive different iterations of the project
- Experienced in migrating data from SAP HCM/legacy system to Successfactors
- Experience in SAP Successfactors Employee Central, Learning Management, PMGM, EC Reporting and Integration Center(Service Center)
- Worked on Integration of Employee Central with Employee Central Payroll, Compensation, PMGM, and LMS
- Worked in Integration with Workforce, BenefitFocus, Active Directory, Access Control and other 3rd party Vendors
- Worked in all phases of project from business prerequisites gathering, business process examination, applied outline, blueprinting, design, testing, and generation support.
- Experienced in gathering Customer Business requirements and blueprinting, also recording the business process in Success Factors derived workbook configuration sheet.

- Responded rapidly to end-user questions and concerns. Helped them understand the SAP and Success Factors landscape and migration challenges.
- Entities/databases Involvement in ASAP technique from blue printing (necessity gathering, process what's more, whole investigation), acknowledgment (setup, model, information loads, unit test, incorporation testing, documentation), last readiness (stress/relapse testing, end client preparing) and go-live backing.
- Configuring Basic organization settings in Provisioning, Creating Administrators
- Familiar in Configuration of Performance Rating Scales, goals, route map setup, Core competencies, Role specific competencies, Calibration & Email notification setup, Launching shapes, Employee Profile, XML and Data models
- Instance fundamental settings – Passwords, Home Page, Welcome Menu, Company information, Employee documents.
- Configured Administrator tools and Admin Privileges, Setting up organization Logos.
- Managing Data User Records with Employee Data File, Permissions, Password Policies, Email Notifications, Change motor setup, Text Customization in Instance.
- Setting up and scheduling of import and export jobs to and from Success Factors and customer's ERP systems.
- Worked on Picklist records administration, Role Based Permission, Reporting, Rating Scale Dashboards, Create Interactive Dashboards, Reporting Admin.
- Managing Report Permissions, List view reports, Spotlight view reports, Spread sheet reports, Classic reports, and Adhoc reports.
- Capable of working efficiently under pressure, parallel activity, manage multiple project with bottlenecks, milestone schedule.
- Exceptionally Strong in Configuration, taking after the Best Practice in building the SAP Success Factors Language Configurations Settings change and setting as per required activation
- Assigning and escalation of cases to appropriate departments as necessary. Training of new colleagues and knowledge sharing.
- Certified Scrum Master
- Trained in SAP Successfactors other modules (Performance Management, Integration, Learning, Onboarding and Succession Planning).
- Have performed multiple roles including SAP Consultant, Scrum Master, Technical Lead and onsite coordinator.

Skill Set

- ERP: SAP Successfactors (Employee Central, Performance Management, Learning Management, Onboarding)
- Development Tools: Visual Studio 2008, 2010, 2012, 2013
- Functional Modules: Retail and HR

- RDBMS: DB2, SQL, ORACLE, INFORMIX Database
- Languages: C#/VB ASP.Net, MQ, UNIX, PERL, 4GL
- O/S: MS DOS, Microsoft Windows 2000s/XP and UNIX
- System Development Life Cycle (SDLC), Agile
- Configuration Management (Team forge, Anthilpro, Sonar, SVN, GIT)
- Business Analyst: MS Visio, use case, BRD, BRL, traceability matrix, prototypes and workflow

ENGAGEMENTS

1. Cardone Industries – Success Factors Recruiting and Onboarding (June 2017 – Till Date)

Role: Successfactors Lead Consultant – Recruiting & Onboarding
Responsibilities:
Responsible for Gathering, Configuration, Integration, Testing the implementation of the Success Factors Recruiting Management and Onboarding

- ✓ Conduct all workshops, gather business requirements
- ✓ Multi Country Implementation for US and Canada
- ✓ Conduct separate workshops of US and Canada
- ✓ Configure Company Settings, deep links, new rating scale and Setup Data Models (Corporate and Country-Specific) and Pick lists
- ✓ Configured Job Requisition Template, Candidate Profile Template and Candidate Application Template
- ✓ Configured Interview Central – Setting up Interview Competencies, Interviewer Data, Completing Interview Assessment and reviewing Interview Assessment results
- ✓ Configured Interview Scheduling, Job analyzer and Employee Referral
- ✓ Configured Offer Approvals, Offer Letters and Career Portal
- ✓ Set up Recruiting Home Page Tiles, Hire and Onboard
- ✓ Defining Permissions for Role Requisition – Template Role Permissions, Object Level Permissions and target population
- ✓ Job Profile Builder – Configure Job profile templates, contents : Competencies, Skills, Job duties and responsibilities, Families and roles
- ✓ Connect Onboarding and BIZX instance
- ✓ Configured Work Queue, security groups, corporate structures, custom and standard notifications
- ✓ Configured Doc Center Federal/ State/Standard Hiring Forms/ Everify
- ✓ Set up forms, UI Panels and eWage configuration
- ✓ Integrate Recruitment, Onboarding and Employee Central

- ✓ Configure/Setup foundation objects, generic objects, person objects, and employment objects
- ✓ Configure Business Rules and Rule Triggers for Job Requisitions and Job Offers
- ✓ Configured Associations between Foundation and Generic objects
- ✓ Integrate Recruiting with other Successfactors modules – Onboarding and Employee Central
- ✓ Set up Position Management and Job Requisition through Positions
- ✓ One Time data migration from legacy system to Successfactors system.
- ✓ Configured global address template and countries specific address fields
- ✓ Reporting – Recruiting STEM Reports
- ✓ Conduct Test Planning and Test Script Preparation and Test Script execution
- ✓ Assisted Data Migration and Post Load validation

Support Activities:

- ✓ Created BPPs, Training documents for HR Processes, training documents
- ✓ Defect analysis, resolution and Hyper care support
- ✓ Support SAP SF Implementation Enhancements on the SAP Modules
- ✓ Support SF module features upgrade and release to make the new features available in the Production instance

2. Tridonex (Mexico) – Success Factors Employee Central (Jan 2017 – Aug 2017)

Role: Successfactors Lead Consultant
Responsibilities:
Responsible for Gathering, Configuration, Integration, Testing the implementation of the Success Factors Employee Central

- ✓ Conduct all workshops, gather business requirements
- ✓ Mexico – Country Specific configurations
- ✓ Employee Master Data migration from the Legacy CGA system to Successfactors Employee Central
- ✓ Configure/Setup Data Models (Corporate and Country-Specific) and Pick lists
- ✓ Configured translations for Spanish and country specific fields
- ✓ Configured custom portlets and custom fields for Mexico requirements
- ✓ Configured IMSS Interfaces for New Hire, Terminations and Salary Modifications
- ✓ Configured Interfaces for Employee Central to Mexico Bank for New Hires and Mexico Bank to Employee central for updating the Bank Account in the payment information
- ✓ Configure/Setup foundation objects, generic objects, person objects, and employment objects
- ✓ Configure Propagation Rules and Business rules for event reasons
- ✓ Setup Approval Workflows in Business rules

- ✓ Configured Pay component, Pay component groups and validations
- ✓ Setup Role Based Permissions (RBP) and Permission Groups
- ✓ Setup employee demographic data imports
- ✓ Point to Point (P2P) Configuration for Employee Central Master data replication to Employee Central Payroll
- ✓ EC Reporting – Ad-Hoc reporting, dashboards and tiles
- ✓ Setup standard and Custom Portlets as part of employee data
- ✓ Migrated to People Profile and added custom portlets for Company Property logs
- ✓ Configured all HR actions, new hire, termination, promotions, Job Changes
- ✓ Enhanced Succession Data Model to include custom fields for Hire/Termination
- ✓ Involved in Customer Organization Restructuring and Job Leveling.
- ✓ Integration with Workforce for Time management, Active Directory for Email ID creation and Access Control for Badge Creation
- ✓ Involved in Employee demographic data requirement for all third-party vendors.
- ✓ SCPI(HCI) and Boomi configuration for Interface Integrations.

- ✓ Conduct Test Planning and Test Script Preparation and Test Script execution
- ✓ Assisted in Payroll Configuration and Testing
- ✓ Assisted Data Migration and Post Load validation
- ✓ System set up and Configuration migration using instance sync
- ✓ Created BPPs, Training documents for HR Processes, training documents
- ✓ Defect analysis, resolution and Hyper care support

3. Wal-Mart – SAP Successfactors Consultant (Sep 2015 – Jan 2017)

Role: Successfactors RCM and ONB Consultant (Recruiting & Onboarding)
Responsibilities:

- ✓ Conduct all workshops, gather business requirements
- ✓ Multi Country Implementation for US and China
- ✓ Conduct separate workshops of US and China
- ✓ Integrate Recruiting Management with Kenexa – Third Party Applicant Tracking System
- ✓ Configure Company Settings, deep links, new rating scale and Setup Data Models (Corporate and Country-Specific) and Pick lists
- ✓ Configured Job Requisition Template, Candidate Profile Template and Candidate Application Template
- ✓ Configured Interview Central – Setting up Interview Competencies, Interviewer Data, Completing Interview Assessment and reviewing Interview Assessment results
- ✓ Configured Interview Scheduling, Job analyzer and Employee Referral
- ✓ Configured Offer Approvals, Offer Letters and Career Portal
- ✓ Set up Recruiting Home Page Tiles, Hire and Onboard

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303 Wyman Street, Suite 300 Waltham, MA 02451

978.261.6100

- ✓ Defining Permissions for Role Requisition – Template Role Permissions, Object Level Permissions and target population
- ✓ Job Profile Builder – Configure Job profile templates, contents : Competencies, Skills, Job duties and responsibilities, Families and roles
- ✓ Connect Onboarding and BIZX instance
- ✓ Configured Work Queue, security groups, corporate structures, custom and standard notifications
- ✓ Configured Doc Center Federal/ State/Standard Hiring Forms/ Everify
- ✓ Set up forms, UI Panels and eWage configuration
- ✓ Integrate Recruitment, Onboarding and Employee Central
- ✓ Configure/Setup foundation objects, generic objects, person objects, and employment objects
- ✓ Configure Business Rules and Rule Triggers for Job Requisitions and Job Offers
- ✓ Configured Associations between Foundation and Generic objects
- ✓ Integrate Recruiting with other Successfactors modules – Onboarding and Employee Central
- ✓ Set up Position Management and Job Requisition through Positions
- ✓ One Time data migration from legacy system to Successfactors system.
- ✓ Configured global address template and countries specific address fields
- ✓ Reporting – Recruiting STEM Reports

> **4. Lyondellbasell Chemicals – Success Factors Onboarding and Recruitment (Jan 2015 – Aug 2015)**

Role: **Successfactors Consultant RCM and ONB**
Responsibilities:
- ✓ Conduct all workshops, gather business requirements
- ✓ Configure Company Settings, deep links, new rating scale and Setup Data Models (Corporate and Country-Specific) and Pick lists
- ✓ Configured Job Requisition Template, Candidate Profile Template and Candidate Application Template
- ✓ Configured Interview Central – Setting up Interview Competencies, Interviewer Data, Completing Interview Assessment and reviewing Interview Assessment results
- ✓ Configured Interview Scheduling, Job analyzer and Employee Referral
- ✓ Configured Offer Approvals, Offer Letters and Career Portal
- ✓ Set up Recruiting Home Page Tiles, Hire and Onboard
- ✓ Defining Permissions for Role Requisition – Template Role Permissions, Object Level Permissions and target population
- ✓ Job Profile Builder – Configure Job profile templates, contents : Competencies, Skills, Job duties and responsibilities, Families and roles
- ✓ Connect Onboarding and BIZX instance
- ✓ Configured Work Queue, security groups, corporate structures, custom and standard notifications

- ✓ Configured Doc Center Federal/ State/Standard Hiring Forms/ Everify
- ✓ Set up forms, UI Panels and eWage configuration
- ✓ Integrate Recruitment, Onboarding and Employee Central
- ✓ Configure/Setup foundation objects, generic objects, person objects, and employment objects
- ✓ Configure Business Rules and Rule Triggers for Job Requisitions and Job Offers
- ✓ Configured Associations between Foundation and Generic objects
- ✓ Integrate Recruiting with other Successfactors modules – Onboarding and Employee Central
- ✓ Set up Position Management and Job Requisition through Positions
- ✓ One Time data migration from legacy system to Successfactors system.
- ✓ Configured global address template and countries specific address fields
- ✓ Reporting – Recruiting STEM Reports

5. Northfolk Southern – Success Factors Employee Central (Oct 2013 – Dec 2014)

Role: **Success Factors Employee Central Consultant**

Responsibilities:

Responsible for Gathering, Configuration, Integration, Testing the implementation of the Success Factors Employee Central

- ✓ Participate in workshops, gather business requirements
- ✓ Configure/Setup Data Models (Corporate and Country-Specific) and Pick lists
- ✓ Configure/Setup foundation objects, generic objects, person objects, and employment objects
- ✓ Configure Propagation Rules and event-reason derivation rules
- ✓ Setup Approval Workflows
- ✓ Setup Role Based Permissions (RBP) and Permission Groups
- ✓ Setup employee demographic data imports
- ✓ EC Reporting – Ad-Hoc reporting, ORD tool
- ✓ Setup the portlets for Talent scorecard, Talent profile, Performance History, Global Employment and Public profile.
- ✓ Configured the new hire, termination, address changes and Time Off process.
- ✓ Supported the implementation of Success Factors Employee Central and HRIS systems.
- ✓ Enhanced Succession Data Model to include custom fields for Hire/Termination
- ✓ Configured global address template and countries specific address fields
- ✓ Responsible for integration using standard Boomi IFlows for Employee Master Data and Organizational Management Data and validating the data in SAP
- ✓ EC Reporting – Ad-Hoc reporting, ORD tool
- ✓ Defect analysis, resolution and Hyper care support

✓ Conduct Test Planning and Test Script Preparation and Test Script execution
✓ Assisted Data Migration and Post Load validation
✓ System set up and Configuration migration using instance sync
✓ Created BPPs, Training documents for HR Processes, training documents
✓ Configured Pay component, Pay component groups and validations
✓ Configured Associations between Foundation and Generic objects

---

6. Walmart – Compensation, Centralized Hiring and Benefits Application 2014 Development (Jan 2009 – Sep 2013)

Role: **Scrum Master and Technical Lead**
Responsibilities:

✓ Playing Scrum Master for the current portfolio level initiative changes for HR system. Leading 7 scrum teams with total size of 52 resources.
✓ Executed the Scrum team in a different framework like XP, Kanban, Scrum based on the requirements from the customers.
✓ Enact change and continuous improvement increasing the productivity of Scrum teams by 16% and the quality of deliverables by 22%
✓ Trained and educated the Scrum team and implemented CI tools till UI testing which saved 20% of effort as we have frequent releases to end users.
✓ Complete understanding of existing hiring process
✓ Analyzing the entire flow of hiring process starting from the third-party vendor, store, database and learning management system.
✓ Analyzing the Electronic Time Clock application and proposing new changes for the same.
✓ Reviewing business requirements and understanding the changes to create functional and technical specifications.
✓ Writing documentation for users and operation teams to use the benefit application
✓ Database design to accommodate all the coverage and dependent details of the associates enrolled
✓ Creating package in Teamforge for Configuration Management.
✓ QA and UAT environment set up.
✓ Generating Sonar report and fine-tuned the application to get almost 92% compliance
✓ Create CRQ to publish the application
✓ Consistently meet deadlines

Software/languages: C# ASP.Net, Shell Script, RM Jobs, VB.Net, Microsoft Visual Studio 2010, 2013, DB2 database
Agile Framework: SAFe, Scrum, XP, Kanban, TDD
Tools: LeanKit, JIRA, HPQC, Clarity, Team Forge, Source Scan.
Operating System: Windows, .Net Framework 4.0, Unix, Linux

7. Pepsico– Global Learning Management System (Sep 2008 – Dec 2009)

Role: **Technology Analyst, Senior Software Engineer**
Responsibilities:

- ✓ Responsibility in this project involves Creation of Requirement, Design docs, providing design solutions, and performing independent unit testing.
- ✓ Responsibilities also include Development, preparation of Defect Analysis, Unit Test & Release Manual documents, client interacting, bug-fix request, and implementation support.
- ✓ Connect with third party to fetch the details on web services that needs to be consumed from the application
- ✓ Database design to accommodate all the training modules and associate Job Code Details
- ✓ Creating package in Team forge for Configuration Management.
- ✓ QA and UAT environment set up.
- ✓ Generating Sonar report and fine-tuned the application to get almost 96% compliance
- ✓ Create CRQ to publish the application
- ✓ Consistently meet deadlines in AGILE methodology

Software/languages: **C#.Net, Microsoft Visual Studio 2008, DB2 database, Oracle database, Web Services**
Operating System: **Windows, .Net Framework 3.5**

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PAVAN ABRAHAM, PMP

Senior SAP SuccessFactors Consultant

EXPERIENCE

SAP SuccessFactors Certified professional services consultant extensive experience in SAP SuccessFactors HCM Architecture, Functional, implementation and system administration experience with SAP SuccessFactors BizX Talent Management (PMGM, LMS, Succession, CDP, Employee Central (EC) Recruiting & Onboarding, JAM Basic & JAM Enterprise), SAP Benefits Administration (BN), Talent Management – Career and Succession Planning, Performance Management, Employee Central, ESS/MSS, Organization Management (OM), Personnel Administration (PA), and Enterprise Compensation Management sub-modules. Experienced in training, configuration, implementation, testing of business application process and enhancement of functionality in SAP HR and mySAP HR module. SAP HCM Team Lead experience in project management and implementation of large, complex, integrated, global business applications. Strong experience with ASAP methodology and PMI standards and was involved in a wide range of implementation stages of projects.

Lead and conduct Business Process Workshops sessions to accomplish project definition, requirement gathering and research. Extensive knowledge of HR best practices, labor laws and OD best practices. Global experience in HR Transformation includes executive interactions/communication. Experienced in writing functional specifications for RICEF objects and worked with globally disperse technical teams in an offshore model. Expansive thinker with outstanding record of achievement, implementing new business concepts, and delivering innovative business solutions and problem solving analysis to improve process, systems, and methodologies.

ENGAGEMENTS

Duration: Sept 2016 to Present

Cardone Industries

SAP SuccessFactors Architect/Lead Consultant (PMGM, LMS, Employee Central, Employee Central Payroll)

SAP SuccessFactors implementation program for USA, Canada and Mexico. We are implementing PMGM, Continuous Performance Management, Calibration, Succession Planning & Development, Career Development Planning, and Learning (LMS)

- Solution Design & Architecture – Responsible for the solution architecture and design for the Talent Management modules. Developed a globally scalable solution in accordance with the dynamic business strategy and processes
- Responsible for Leading the Performance & Goals Management (PMGM), Learning (LMS) Employee Central and Employee Central Payroll module implementations

- Configuration – Responsible of PMGM, designed and configured six form templates. This includes three Performance forms, one Performance Improvement plan (PIP) form, one Goal plan and one competency only form. Completed end-to-end configuration of CPM, CDP, calibration and LMS
- Data – Responsible for data gathering by conducting Data workshop. Upload performance history, learning data, iContent data files
- Integration –Integration of LMS with third party Content providers (Degreed.com, Skillssoft, Corpedia and Harvard).
- Testing – Develop a testing strategy for the implementation program. Developed test inventory for all modules
- Communication & Change Management- Support the corporate communication team to develop and execute a robust Communication & Change management Strategy

ABT

SAP SuccessFactors Consultant

- Support SAP SF implementation enhancement of Performance and Goals Management
- Conversion of Performance and Goals forms from V11 to V12
- Developed Performance Improvement forms
- Implemented Career Development Plan and Continuous Performance Management modules
- Post production support of Recruitment Management and Recruitment Marketing modules
- Post production support of Onboarding module
- Data conversion for a recent acquisition and merger

Duration: Sept 2015 to August 2016

Republic Services

Lead SAP SuccessFactors Consultant

SAP SuccessFactors optimization of PMGM, LMS, Role Based-Permissions (moving from legacy security design to RBP) and Implementation of Calibration modules

- Solution Design & Architecture – Responsible for optimization of the solution architecture and design. Optimized the existing SAP SuccessFactors PMGM, LMS solution in accordance with the dynamic business strategy and processes
- Configuration – configuration of both PMGM, LMS and Calibration. Upgraded and redesigned the PMGM forms from V11 to V12
- Data – Responsible for data gathering by conducting Data workshop. Upload learning data. Data conversion from PeopleSoft HCM

- Integration – Enhanced Integration of LMS with third party Content providers (VuBiz, Corpedia and Harvard). Integration of iContent with LMS, and Employee Central for user data
- Testing – Develop testing strategy. Responsible for leading the LMS testing

Duration: Sept 2015 to Present

CAPREIT, Toronto, Canada

Lead SAP SuccessFactors Consultant – PMGM, LMS, and Employee Central

SAP SuccessFactors implementation of PMGM, LMS and Employee Central modules

- Solution Design & Architecture – Responsible for solution architecture and solution design. Designed a globally scalable SAP SuccessFactors PMGM, LMS solution in accordance with the business processes. Conduct iteration workshops to gather requirements
- Configuration – Responsible for configuration of both PMGM, LMS and integration with Employee Central system and JAM
- JAM Enterprise Edition – Designed and configured JAM portal, includes LMS integration as well other social networking tools i.e., LinkedIn, Sharepoint
- Data – Responsible for data gathering by conducting Data workshop. Upload learning data. Data conversion from SAP HCM/HR to Employee Central
- Integration – Integration of LMS with third party Content providers (VuBiz, Corpedia and Harvard). Integration of iContent with LMS, and Employee Central for user data
- Testing – Develop testing strategy. Responsible for leading the LMS testing

Duration: Sept 2015 to Dec 2015

SRAM Corporation, Chicago, IL, USA

Lead SAP SuccessFactors Consultant – PMGM, LMS, and Employee Central

SAP SuccessFactors implementation of PMGM, and LMS

- Solution Design & Architecture – Responsible for solution architecture and solution design. Designed a globally scalable SAP SuccessFactors PMGM, and LMS solution in accordance with the business processes. Conduct iteration workshops to gather requirements
- Configuration – Responsible for configuration of both PMGM, LMS and integration with Employee Central system and JAM
- PMGM – Migration of all forms to V12 from V11. The customer wanted to upgrade all forms for performance, and goals management to the latest release of V12 forms. This involved re-design of the previously designed V11 to V12
- JAM Basic Edition – Designed and configured JAM portal, includes LMS integration as well other social networking tools i.e., LinkedIn
- JAM Enterprise upgrade: Upgrade from JAM Basic edition to JAM enterprise edition post go-live
- Data – Responsible for data gathering by conducting Data workshop. Upload learning data. Data conversion from SAP HCM/HR to Employee Central

- Integration – Integration of LMS with third party Content providers (Skillsoft, Corpedia and Harvard). Integration of iContent with LMS, and Employee Central for user data
- Testing – Develop testing strategy. Responsible for leading the LMS testing

The Regional Municipality of Halton, Canada

Duration: Oct 2015 to Jan 2016

SAP SuccessFactors LMS Consultant

SAP SuccessFactors Learning Management Solution (LMS) implementation

- Solution Design – Designed a globally scalable SAP SuccessFactors LMS solution in accordance with the business processes. Conduct iteration workshops to gather requirements
- Configuration – Responsible for configuration of both LMS and BizX systems
- Data – Responsible for data gathering by conducting Data workshop. Upload learning data
- Integration – Integration of third party Content providers (VuBiz, Corpedia and Harvard). Integration of iContent with LMS, and BizX with SAP HCM for user data, JAM integration for LMS
- Testing – Develop testing strategy. Responsible for leading the LMS testing
- Training – Responsible developing a training strategy and plan

CBRE, TX, USA

Duration: Oct 2015 to Jan 2016

SAP SuccessFactors Architect & LMS Consultant

SAP SuccessFactors Learning Management Solution (LMS) implementation for EU and APAC countries

- Solution Architecture and Design – Designed a globally scalable SAP SuccessFactors LMS solution for several lines of business in accordance with the business processes for EU Countries (France, Germany, U.K, Spain, Portugal) and APAC Countries (China, Singapore, Vietnam, Malaysia and Thialand)
- Testing – Develop global testing strategy. Responsible for leading the LMS testing
- Learning Data – Responsible for loading all learning data. This included Learning History, Content, and build objects data. Integration with EC and PeopleSoft HRIS

CHEVRON PHILLIPS CHEMICALS TX, USA

Duration: Sept 2014 to Oct 2015

SAP SuccessFactors HCM Architect – Consultant & Project Manager

Employment Type: Full-time permanent

SAP SuccessFactors BizX Talent Management – Performance Management Goals Management, SF Recruiting Management, Learning Management Solution (LMS), Recruiting & Onboarding, JAM implementation and support

PROJECT 1: Implementation of Performance Management Goals Management (PMGM), Succession, CDP for North America, Saudi Arabia, Singapore, China and Turkey

- PMGM (Performance Management and Goal Management) – Project Manager, Lead Consultant and Subject Matter expert for the Global implementation of PMGM, Succession, and CDP

- Project Management Responsibilities included managing the project end-to-end. Included building a project plan and executing according to the milestones and deliverables defined in the project plan. Manage to deliver the project on time, within budget and most of all as per the scope and business requirements. Managed budgets, preparing presentations for Executive reviews, Identify, Manage and communicate project risks to the Project Review Board

  Requirements gathering and analysis, conducted 'kick-off' meetings for client teams

- Subject Matter Expert Responsibilities: As a SME for the client I was responsible for ensuring that the solution is as per the client's business requirements which were adhering to the best practices. Conducted an 'as-is' business process analysis for the Talent Management process across the organization. Re-engineered the existing processes to define a 'global Talent management Process

- Solution Design – Designed a globally scalable SAP Successfactors PMGM, LMS, Succession and CDP solution for several lines of business in accordance with the business processes for USA, Canada, Brazil and Mexico

- Configuration – Responsible for configuration, includes updating the configuration and the Data Model XML according to the requirements. Responsible for getting configuration sign-off after each iteration. We had three iteration cycles for configuration

- SAP Data Integration – Defined data integration requirements between SAP and SuccessFactors. Responsible for developing interface program, wrote functional specification for 'employee profile', 'background information'

- SAP SuccessFactors System Administration – System administration of Performance and Goal Management, LMS, Succession, Employee profile, CDP, Competency Management, Set-up users, Role-based permissions, monitoring the 'upgrade center' for latest release information and application of releases

- Testing and End-User training – Developed testing strategy for testing PMGM, LMS, Succession and CDP. Responsible for end-to-end integration testing of all SAP Successfactors modules in scope. Responsible for 'train the trainer', developed training materials and job-aid for all modules

Project 2: PMGM/Succession and CDP implementation for Europe

- SAP SuccessFactors Language pack implementation – Implemented SuccessFactors language packs for Europe (Netherlands, Belgium and France)

- Configuration and XML file updates in Dutch, and French

- Responsible for translation of all forms, route maps, rating scales, competency libraries etc. to Dutch and French languages

- Support: Recruiting and Onboarding

ROC Americas

SAP SuccessFactors Lead Consultant & SF Project Manager

Employment Type: Full-time permanent

Client- Comcast, PA

SAP SuccessFactors Consultant & SF Project Manager

SAP SuccessFactors BizX Talent Management – Recruitment Management, PMGM, Employee Central (EC),SAP-SuccessFactors Integration

- Report Optimization for SuccessFactors Talent Acquisition modules (Recruitment Management and PMGM). Work with HR business teams to analyze the issues with reports from SuccessFactors modules. This includes standard reports, as well as ad-hoc reports
- Requirements gathering for creating and optimization of existing reports

Client- Bridgestone Tires North and South America

SAP SuccessFactors Lead Consultant

SAP SuccessFactors BizX Talent Management – PMGM, LMS, Succession, CDP, SAP-SuccessFactors Integration

- PMGM (Performance Management Goal Management and LMS) – Global implementation for LATAM, USA, and Canada. Requirements gathering and analysis, conducted 'kick-off' meetings for client teams
- Solution Design – Designed a globally scalable SAP Successfactors PMGM, LMS, Succession and CDP solution for several lines of business in accordance with the business processes for USA, Canada, Brazil and Mexico
- Configuration – Responsible for configuration, includes updating the configuration and the Data Model XML according to the requirements. Responsible for getting configuration sign-off after each iteration. We had three iteration cycles for configuration
- SAP Data Integration – Defined data integration requirements between SAP and SuccessFactors. Responsible for developing interface program, wrote functional specification for 'employee profile', 'background information'
- SAP SuccessFactors System Administration – System administration of Performance and Goal Management, LMS, Succession, Employee profile, CDP, Competency Management, Set-up users, Role-based permissions, monitoring the 'upgrade center' for latest release information and application of releases
- SAP SuccessFactors Language pack implementation – Implemented SuccessFactors language packs for Spanish and Brazilian Portuguese. Included configuration and XML file updates in Spanish and Brazilian Portuguese.
- JAM Basic edition implementation.
- Testing and End-User training – Developed testing strategy for testing PMGM, LMS, Succession and CDP. Responsible for end-to-end integration testing of all SAP Successfactors modules in scope. Responsible for 'train the trainer', developed training materials and job-aid for all modules

Lyondellbasell Chemicals, Houston

Duration: July 2012 to Feb 2013

IT Business Solutions Lead / SAP SuccessFactors Project Manager/Consultant

Employment Type: Full-time permanent

SAP HCM, SAP SuccessFactors BizX Talent Management(Recruitment Management ,Recruiting Marketing modules, LMS)

- Requirements gathering and analysis: Designed globally scalable SAP Talent Management solutions using SAP On-Demand SuccessFactors BizX.
- Documented requirements, prepared business case for executive approval; developed business requirement documents.
- Customer signoff of scope and requirements. Facilitated budget approval process.
- Executive-level communications.
- Steering Committee co-facilitation.
- Identified, resolved or escalated issues and risks.
- Coordinated testing with project manager.
- Accountable for customer-level communications, customer relationship and satisfaction, ensuring end-product meets customer needs and project delivery with project manager.

  Project Manager for SAP Successfactors Global Recruiting Project
- Managed project budget and ensured the aggressive timeline was met, managed the project to the project plan milestones and deliverable.
- Responsible for system design, blueprinting, system configuration, and production support planning for SuccessFactors BizX Talent Modules.
- Monitored and managed the implementation partner from SAP America.
- Executive level communication to inform team re. the progress of the implementation as well as risks.
- Developed global change management & communication plan and testing strategy.
- Responsible for data migration strategy and plan for data between SAP HCM and SuccessFactor as well as from Taleo.
- Completed SuccessFactor Administrator training.

Abbott Labs, Chicago

Duration: March 2012 to June 2012

Senior SAP HCM Consultant

GIS Talent Management (SAP – Taleo integration)

- Led the SAP HCM – Taleo Recruiting System integration project. Responsible for analysis of SAP HCM & Taleo Integration points between SAP & Taleo.
- Responsible for project management, incl. updating the project, integrating project plan with the overall integrated program level project plan.

- Planned the workload for onsite and offsite team; managed the project budget; identifying risks and putting a risk mitigation plan.
- Designed a program to integrate Taleo hires into SAP HCM, generated employee master data record in SAP for the Taleo external & internal hires to minimize repetitive data entry and maintain data integrity.
- Created a new program to send the Unique Person Identifier details of future employee's in pre-hire and rehire (pre-hire) status from SAP HR to Taleo (on-boarding) system.
- Configured new actions & action reasons for Taleo hire.
- Created a new program to send all open (vacant) position-requisition details to Taleo system from SAP.
- Configured new OM object NB for requisition, configured new relation B072 for Position & Requisition.
- Developed a testing strategy. Including the test scenarios, test plan and test scripts.

  MSS Sharepoint Position Management:

- Responsible for designing new user interface.
- Managed a team of developers to:
  - Design the BAPI's to integrate with TIBCO web service and SAP to create, copy & edit the request.
  - Design the BAPI to display the Manager organizational chart with Vacancy information in Sharepoint portal.
  - Design the BAPI to create new position, requisition and edit the existing position.
  - Design the new BAPI to display the PA, PSA, Job, Job family, Cost center and General attributes in the Sharepoint portal.

NorthgateArinso, USA/S.A/Asia-Pac

Duration: May 2010 to June 2012

Sr. Global SAP HCM Solution Lead

Employment Type: Full-time permanent

Client- AMP, Australia

Duration: August 2011 to March 2012

Business Transformation Lead / SAP Talent Mgt. Lead

SAP ECC 6.0 Enhancement Pack 4.0/5.0, SAP Talent Management, eWS

Talent Management 2.07/2.08

  AMP FFF Talent Management Project:

- Overall Lead for SAP HCM Talent Management for both Release-3 and 5; responsible for managing 'day-to-day' implementation activities.
- Lead Consultant for SAP Performance Management module. Responsible for requirement gathering, analysis and solution design based on client's business requirements. Conducted multiple 'see it' sessions to gather requirements.

- Developed solution design document based on AMP/AMP CI business requirements.
- Developed custom SAP Performance Management appraisal templates.
- Daily interaction with the product development team based in Belgium, and the build team in Philippines and Malaysia for tracking availability of product functionality.
- Identified product functionality 'gaps' in euHReka Performance Management, Recruiting & Learning Management. Documented and discussed with Product team.
- Responsible for identifying data migration requirements for SAP Performance Management, euHReka Performance Management and recruiting solutions. Defined the data migration plan with the client's legacy data team.
- Developed a 'configuration plan' with milestones for the offshore build team.
- Developed functional specifications for RICEF objects in SAP HCM Performance Management and e-Recruting, developing integration requirements between SAP HCM Performance Management and euHReka Performance Management solution.
- Developed testing strategy for SAP Performance Management & SAP e-Recruting.
- Responsible for euHReka 'conference room pilot' (CRP's) sessions Performance Management, Succession Planning, Recruiting & Learning Management. Provided feedback to product development and global process teams for product and process improvement
- Track project milestones for Performance Management.

Client- Gerdau S.A, Brasil

Duration: May 2010 to July 2011

Lead SAP HCM Consultant (Talent Management), OM/PA

SAP ECC 6.0 Enhancement Pack 4, SAP Portal 7.01, SAP TVN Nakisa 3.0

- Responsible for designing, configuring, and implementing the SAP Career & Succession planning and Performance Management solution.
- Configured 9-Block/Calibration grid on a 9 point scale, Talent Profile, Talent Review Meeting side by side comparison of talents functionality.
- Enabled ESS-MSS functionality for TRM, Talent Profile, Calibration Grid etc. worked with the Portal consultant/s to make changes on iViews.
- Designed and wrote functional specifications for custom reports. Wrote functional specifications for complex interfaces and other RICEF objects with third party tools being used by Gerdau and SAP; incl. 360 Degree Feedback, Kiembaum, Russel Reynolds, and language proficiency tools.
- Data Migration Lead: Responsibility for legacy talent management data, load performance data for six countries, all employees. Develop LSMW/BDC programs.
- Integration of SAP C&S with SAP TVN 3.0 (Nakisa), configure TREX search engine.
- Developed the testing strategy, incl. development of Test Cases and Test Scripts.
- Maintained project documentation, managed version control SAP Solution Manager.
- Updated Personnel Actions. Add info types to global and local info groups. Created dynamic actions for Local Country Codes.

ACS, Inc

Duration: March 2006 to March 2010

SAP HCM Lead Consultant/Manager

Employment Type: Full-time permanent

Client -Premier Global, Inc. KS, USA

Duration: Jan 2010 to March 2010

SAP HCM Consultant

ECC 6.0, EP 7.0

- Delivered the project within budget, to scope and on time. Managed the project using the ACS Project Methodology, combined ASAP – PMI. Responsible for understanding the overall business solution, functional problem domain, developing functional design specifications for the functional modules.

- Designed and developed the 'Global Template' for Organizational Management and Personnel Administration. Analyzed and designed new business processes. Work with the business architect to assess current capabilities and identified high-level requirements. Assisted in translating requirements into test conditions and expected results for product, performance, and user acceptance testing.

- Facilitated quality reviews and toll-gate reviews for the project.

- Developed production readiness plan and was responsible for go-live of system.

- Organization Management and Personnel Administration. Re-designed organization structure to accommodate global template/ implementation 'as-is' organizational structures, consolidated to one 'to-be' fully scalable structure. Responsible for end-to-end designing of Personnel Organization, incl. the personnel structure, enterprise and payroll structure.

- Designed all RICEFW objects wrote functional specifications. Responsible for coordinating development of the RICEFW objects with the off-shore HR ABAP development team.

- Configured personnel action and dynamic actions. Developed custom info types, modify info groups.

Client- GoodYear Tire

Duration: Nov 2008 to Dec 2009

SAP HCM Team Lead

ECC 6.0, EP 7.0

- Delivered the project within budget, to scope and on time. Managed the project using the ACS Project Methodology. This is a combination of ASAP and PMI methodology.

- Responsible for understanding the overall business solution, functional problem domain, gathering business requirements, developing functional design specifications for the functional modules.

- Designed and developed the 'Global Template' for Organizational Management and Personnel Administration .Analyze and design new business processes. Work with the business architect and other planners to assess current capabilities and identify high-level requirements.

- Assist in translating requirements into test conditions and expected results for product, performance, and user acceptance testing.

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- Facilitates quality reviews and toll-gate reviews for the project.
- Developed production readiness plan and be responsible for the go-live of system within the scheduled timeframe and budget from an application perspective. Includes 'cut-over' plan.
- Organization Management and Personnel Administration. Re-designed the organization structure to accommodate 'global template/implementation' 'as-is' organizational structures. Consolidated them into one 'to-be' fully scalable organizational structure.
- Responsible for coordinating development of the RICEFW objects with the off-shore HR ABAP development team.
- Developed custom info types, modify info groups, etc.

Client- Basic Energy Services

Duration: August 2007 to Nov 2008

SAP HCM Team Lead

ECC 6.0, EP 7.0

Team Lead

- Delivered the project within budget, to scope and on time. Managed the project using the ACS Project Methodology, combined ASAP – PMI.
- Managed a four-member on-site and three-member off-site team.
- Prepared the project plan for the HCM module. Developed WBS, describing work packages for each   sub-module. Tracked project schedule and timelines.
- Responsible for resource management plan. Managed on-boarding and off-boarding all resources, including identifying resource need, interviewing and managing resource to tasks.

Benefits Administration:

- Responsible for designing and configuring the SAP Benefits Administration module. Led the blue-printing, realization, testing, and development of RICEFW objects effort.
- Configured Health, Insurance, Savings, Stocks Purchase Plans and Miscellaneous plans. Savings plan included 401K and deferred compensation plans.
- Responsible for benefits-Payroll integration. As a part of the Savings plan, configured Health Saving   Account plans. Gathered requirements for the Health Saving Account plans.
- Configured HSA plans with contribution limits for both individual and family plans. Updated and set constants for HSA plans, integrated them with payroll wage types.
- Developed in-bound and out-bound data interfaces for all providers/TPA' as per the specifications provided by them.
- Converted legacy data for go-live.
- Made configuration changes for 'open enrollment' for benefit plan year 2009.

Organization Management and Personnel Administration

- Designed the organization structure to accommodate two distinct 'as-is' organizational structures. Consolidated them into one 'to-be' fully scalable organizational structure.
- Responsible for end-to-end designing of Personnel Organization. Designed all RICEFW objects.

- Responsible for coordinating development of the RICEFW objects with the off-shore HR ABAP development team.
- Developed 'cut-over' plan including data conversion strategy.
- Developed and managed an extensive testing strategy focused on Payroll administration.

  <u>Payroll Administration and Time Management</u>

- Responsible for implementing SAP Payroll Administration and Time Management for 10,000 employees.
- Payroll Administration: Re-designed the 'payroll structure'. Managed timely 'go-live' for payroll.
- FI/CO integration. SAP HCM integration of time & payroll processing with SAP FI/CO data (all labor time and activities for Logistics) from Cross-Application Time Sheet (CATS).
- Successful Year-End processing of W-2's.

  <u>SAP BO/BI</u>

- Designed and built enterprise formatted reports for HR reporting, created interactive dashboard visualizations using Crystal Reports and Xcelsius 2008.

Client- California Portland Cement Company

Duration: March 2006 to July 2007

SAP HCM Team Lead

ECC 6.0

<u>Team Lead</u>:

- Delivered the project within budget, to scope and on time.
- Took the role of team lead when the project was behind schedule, over budget, and full of scope creep. Managed a five member team. Prepared the project plan for the HCM module.
- Developed WBS, describing work packages for each sub-module, tracking project schedule and timelines. Conducted weekly status review meeting with the project sponsors and client project team members to appraise them of the timelines
- Responsible for resource management plan, on-boarding and off-boarding all resources, identifying resource need, interviewing and managing resource to tasks.

  <u>Benefits Administration Lead Consultant</u>:

- Took complete ownership of Benefits Administration sub-module. Led blue-printing, realization, testing, and development of RICEFW objects effort.
- Configured complex benefit plans which included two separate companies located in Canada and the USA. Designed and developed retiree plans, pension plans and 401K plans.
- Designed structure to accommodate two distinct 'as-is' organizational structures. Consolidated them into one 'to-be' fully scalable organizational structure.
- Designed all personnel actions including dynamic actions.
- Designed all RICEFW objects. Responsible for coordinating development of the RICEFW objects with the off-shore HR ABAP development team
- Took complete ownership of legacy master data conversion and load. Developed customized templates for mapping legacy data to SAP format.
- Organizational Management, Personnel Administration and Payroll: took charge of the OM/PA modules in the middle of the project.
- Managed timely 'go-live' for payroll. Took payroll to 'go-live' in two months.

Client: Consol Energy

Duration: Oct 2005 to March 2006

Sr. SAP HR Consultant (OM, PA, BN, ESS/MSS)

ECC 5.0, SAP R/3 4.6C, EPP 6.0

- Responsible for 'as-is' and 'to-be' analysis. Analyzed the existing configuration including the basic OM and PA modules.
- Identified opportunities for improvement, areas of risk and recommendations for new and/or enhanced functionality in the SAP HR system.
- Developed new personnel actions to accommodate new and enhanced business processes, and streamlined existing personnel.
- Reviewed standard SAP reports incl. HR Master Data and Compliance reports. Developed new custom compliance and head-count reports for the HR department. Helped users and super users to develop Ad-hoc reports.
- Reviewed all 150 in/out-bound interfaces for PY, Benefits and time. Recommended solutions for issues re. in-bound interfaces from third party agency.
- Enterprise Compensation Management. Developed a high-level blueprint document for client with   as-is and to-be state regarding the Enterprise Compensation Management. Implemented/configured   Compensation Administration, Budgeting and Long-term Incentive (LTI) sub-modules. Configured   Stock Option plans and the vesting rules/schedule, exercise window rules/exercise windows. Defined   Life Events, created LTI interfaces and reports.

Client- Baylor College of Medicine

Duration: July 2003 to Oct 2005

SAP Consultant (ESS, BN, OM, PA)

Employment Type: Full-time permanent

ECC 5.0, SAP R/3 4.7, EPP 6.0

- Implementation/configuration of HCM/HR. Configured ESS (Employee Self Service) for Benefits in record time of 2.5 months.
- Responsible for solving configuration issues with Benefits module to configure and implement ESS.   Re-configured Personnel Structure and Organizational Structure to accommodate business processes.   Developed test plans and test scripts for ESS, OM, PA and Benefits modules.

SAP and TECHNICAL SKILLS

- **Certified SAP SuccessFactors Consultant (LMS)**
- **Certified SAP SuccessFactors Consultant (PMGM)**
- **Certified SAP SuccessFactors Consultant (Employee Central)**
- SAP SuccessFactors Academy
    - Mastery - Successfactors
    - Successfactors Performance Management and Goal Management

- SuccessFactors Learning Management Systems (LMS)
- SuccessFactors Employee Central (Sales Demo) Configuration training
- SAP Academy Enterprise Compensation Management
- SAP Academy Payroll Management and US Payroll Administration
- SAP Academy Manager Self-Service and Employee Self-Service
- SAP TVN 2.0 (Talent Visualization), SAP Talent Visualization by Nakisa
- Certified Project Management Professional (PMP), Project Mgt. Institute (PMI)

EDUCATION
- Masters in Applied Psychology
- Bachelor's degree in Psychology

DOUGLAS J. SIETSEMA, PH.D.

Consultant Profile

Organizational effectiveness, change management, and talent management specialist experienced in applying organizational development, adult learning, and human resources management principles to improve individual and organizational performance. Effective in internal executive roles and as an external consulting partner. Experienced and comfortable with international or multi-national assignments.

Skills and Abilities

Application Software / Products: SAP Financials, Human Resources, and Payroll; Oracle Financials and Human Resources; PeopleSoft Financials and Human Resources; Siebel CRM, Niku/Clarity Portfolio Management System; Interwoven MediaBin and TeamSite, MEDITECH, Salesforce.com

General Tools: Microsoft Office products including Word, Excel, PowerPoint, Project, Access, and Visio; Adobe PhotoShop, Camtasia
Organizational Change Management (10+ years), Organizational Design (10+ years), Organizational Development (10+ years)

Experience

LSI Consulting, *Organizational Change Management Lead; Public Sector County Government*
Dates: July 2016 to Present

- Provide guidance on standard SAP Organizational Change Management processes and Best Practices
- Develop the Change Management Strategy and Plan for execution by Customer Change Management Lead
- Assist with the implementation of the change management strategy, including communication and change management
- Coordinate with the Functional Team Leads to ensure change management processes fit the organization
- Help identify areas that provide opportunities for business process improvements and then recommends the best practice
- Comply with Project Change Control Procedures put in place to escalate issues, risks, and change requests
- Provide administration and support for creating Project templates, communications and presentations

- Responsible for developing a comprehensive end user training strategy including required course catalog.
- Consult with Customer's training manager to develop the training plan.

Douglass Group, *Organizational Effectiveness Consultant*

Dates: 2003 to Present

Organizational effectiveness consultant in several organizations providing services for external and internal clients in the U.S., Canada, Mexico, Europe, the Middle East, Asia, and Australia Douglass Group, General Manager (independent consultant), 2003-present

Allergan, Inc, *Global Director, IS Change Management*

Dates: 2012 to 2013

Responsible for supporting organizational change management for Information Services projects in all markets, filling several strategic roles:

- Implementation of an Allergan IS Change Management Center of Excellence to enable change management competencies among all IS employees
- Integration of change management work elements and project management checkpoints into the Allergan systems development life cycle and project review governance cycle
- Direct support and supervision of contracted support for change management components of critical Allergan IS projects
- Organizational effectiveness consulting and facilitation for the CIO and IS Management Team to support changes needed to satisfy evolving corporate objectives

Right Management, *Regional Vice President, Talent Management*

Dates: 2009 to 2012

Executive practice leader of a team of over 20 talent management consultants and project managers for western U.S. and Canada markets, providing services in human resources and workforce strategy tied to business strategy, talent assessment (individual and organizational), leader development, executive coaching, organizational effectiveness, employee engagement, organizational change management, and related workforce solutions for the full employment life cycle (strategic sourcing through termination)

- Shared (with sales organization) annual talent management services revenue goal of $6.7 million
- Solely responsible for talent management services gross margin goal of 48%
- Shared (across Leadership Team) goal for operating unit profit of 30+%
- Increased Talent Management revenue by 23% in first year in role (2010 final over 2009 final)
- Aligned and managed proposal scoping and pricing, budgeting and tracking, consultant skills and experience tracking, career development, performance management, knowledge management processes, and the full life cycle of strategic talent acquisition, development, and deployment

PricewaterhouseCoopers Advisory Services LLC - Los Angeles, CA, *Director*

Dates: 2004 to 2007

Delivered consulting services in the areas of:

- Organizational communications for key stakeholders and impacted employees, providing broader and clearer awareness of project purposes, outcomes, requirements, and participation expectations
- Executive alignment, executive coaching, and process facilitation, resulting in agreed project direction and awareness of executives' expectations for the project and mutual interdependencies
- Change readiness assessment and remediation, equipping managers to understand potential barriers to achieving project objectives and to take proactive actions leading to successful outcomes
- Instructional development and delivery, providing employees with role-relevant skills and knowledge to allow them to fulfill performance expectations successfully and efficiently
- Organizational and human resources strategy and design, helping executives translate the company's purpose into effective organizational structure, roles, responsibilities, staffing levels, and process coordination mechanisms, and to implement them effectively
- Project team development, retention planning, and capability transfer management, enabling organizations to support the best performance of project team members, to reduce long-term dependence on consultants or contractors, and to reduce levels of team member attrition
- Skills and competency assessment, resulting in greater precision in definition of skills required for roles, clearer requirements for skills development, and increased recruitment success
- Organizational culture assessment and development, enabling managers to anticipate, and plan actions to mitigate, cultural factors impeding job and organizational performance
- Project and program office management, enabling improved efficiency of project performance, achievement of project budget and performance objectives, and coordination of resources and results across projects to achieve optimal organizational productivity

Deloitte Consulting - Los Angeles, CA, *Director*

Dates: 1998 to 2003

Delivered consulting services in the areas of:

- Organizational communications for key stakeholders and impacted employees, providing broader and clearer awareness of project purposes, outcomes, requirements, and participation expectations
- Executive alignment, executive coaching, and process facilitation, resulting in agreed project direction and awareness of executives' expectations for the project and mutual interdependencies
- Change readiness assessment and remediation, equipping managers to understand potential barriers to achieving project objectives and to take proactive actions leading to successful outcomes

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- Project and program office management, enabling improved efficiency of project performance, achievement of project budget and performance objectives, and coordination of resources and results across projects to achieve optimal organizational productivity

Ernst & Young - Los Angeles, CA, *Senior Manager*
Dates: 1993 to 1997

Delivered consulting services in the areas of:

- Organizational communications for key stakeholders and impacted employees, providing broader and clearer awareness of project purposes, outcomes, requirements, and participation expectations
- Executive alignment, executive coaching, and process facilitation, resulting in agreed project direction and awareness of executives' expectations for the project and mutual interdependencies
- Change readiness assessment and remediation, equipping managers to understand potential barriers to achieving project objectives and to take proactive actions leading to successful outcomes
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Accenture - Los Angeles, CA, *Manager*
Dates: 1989 to 1993

Delivered consulting services in the areas of:

- Organizational communications for key stakeholders and impacted employees, providing broader and clearer awareness of project purposes, outcomes, requirements, and participation expectations
- Executive alignment, executive coaching, and process facilitation, resulting in agreed project direction and awareness of executives' expectations for the project and mutual interdependencies
- Change readiness assessment and remediation, equipping managers to understand potential barriers to achieving project objectives and to take proactive actions leading to successful outcomes
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Computer Sciences Corporation, *Corporate Senior Consultant, Human Resources Development*
Dates: 1985 to 1989

Lead corporate-level resource for culture and management development programs across the corporation, including international business units

EDUCATION

M.B.A. in Organizational Development
UCLA Graduate School of Management - Los Angeles, CA

Ph.D. in Educational Psychology
UCLA Graduate School of Education - Los Angeles, CA

M.A. in Educational Psychology
UCLA Graduate School of Education - Los Angeles, CA

BA in Psychology
Westmont College - Santa Barbara, CA

Deep Springs College - Deep Springs, CA

KIRAN MEHENDALE

Business Intelligence Architect M.S, MBA

SAP HANA Migration Architect/Project Manager

Hosted Solutions and Application Managed Services

Consultant Profile

Experience in successful HANA Migrations. Managed various SAP BW and SAP R/3 migrations to SAP HANA database, involved in optimizations and custom code management.

Experience in hosted solutions and application managed services.

Business Intelligence architect with 12+ years of experience in Data Warehousing and implementing SAP BW, SAP HANA and SAP Business Objects systems.

Expertise in SAP Business Intelligence, SAP HANA, SAP Business Objects, Enterprise Portal, and Budgeting tools.

Skills and Abilities

- SAP HANA migrations (SAP BW and SAP R/3)
- Hosted Solutions
- Application Managed Services
- Data Modeling Architecture and implementations,
- Full Life cycle Implementations,
- Business GAP Analysis,
- Reporting tools (Business Objects suite)

Experience

LSI Consulting

SAP Suite on HANA Migration Architect/Project Manager

Dates: December 2016 – present

Responsibilities:

Successfully managed Suite on HANA migration to latest EHP8 support stack.

- Managed Suite on HANA migration for SAP ECC system.
- Managed standing a new 7.2 Solution Manager Instance integrating with SOH migration.
- Led the teams (technical, functional) through all phases of project from kick off, DMO execution, pre-post integration testing and production go live.

- The effort included preparing the R/3 system for migration involving various steps of cleaning up the system, managing table and table spaces. The end goal is to have a lean and clean system ready for migration.

- Coordinated multiple uptime pre-processing steps to document the scenarios and identify the issues.

- Execution of successful DMO process migrating to HANA.

- Evaluated the errors and issues and documentation. Some of the errors included manual corrections to shadow system or manual intervention in the table structures.

- Planned custom code management and optimization process to have a system adhering to HANA standards.

University of Cincinnati

SAP BW HANA Migration Architect/Project Manager, SAP ECC Suite on HANA migration

Dates: January 2016 – December 2016

Responsibilities:

Successfully managed SAP BW migration for UC from BW 7.4 to SAP BW 7.5 SP1 on HANA (first client in North America to go live).

- Coordinated and led the teams (technical, functional, client and consultants) through all phases of project from kick off, pre-processing, DMO execution, post configurations, pre-post integration testing and production go live.

- The effort included preparing the BW system for migration involving various steps of cleaning up the system, managing table and table spaces. Key components involve cleaning up old PSA tables, DTP log files, statistics tables. The end goal is to have a lean and clean system ready for migration.

- Execution of successful DMO process migrating to HANA.

- Evaluated the errors and issues and documentation. Some of the errors included manual corrections at a query level or fixing the design of Cubes and DSO.

- Planned custom code management and optimization process to have a system adhering to HANA standards. Worked on routines in Transformation to deliver correct results after migrations.

- Strategy and roadmap for Business Object reporting and delivery of a prototype models including 3 executive dashboards for higher management.

- Suite on HANA migration prototypes and strategy session for best utilization of HANA platform.

- Strategic planning and design document for Classic HANA migration option instead of DMO

- Designed roadmap for consolidating system using MCOD and MCOS for efficient data management and administration

University of Nebraska

SAP BW HANA Migration Architect, Optimization strategy after migration

Dates: October 2016 – February 2017

Responsibilities:

Successfully migration of SAP BW system from BW 7.4 to SAP BW 7.5 SP5 on HANA, edition on HANA

- The effort included preparing the BW system for migration involving various steps of cleaning up the system, managing table and table spaces. Key components involve cleaning up old PSA tables, DTP log files, statistics tables. The end goal is to have a lean and clean system ready for migration.
- Execution of successful DMO process migrating to HANA.
- Evaluated the errors and issues and documentation. Some of the errors included manual corrections at a query level or fixing the design of Cubes and DSO.
- Planned custom code management and optimization process to have a system adhering to HANA standards. Worked on routines in Transformation to deliver correct results after migrations.
- Strategy and roadmap for Business Object reporting and Fiori style Launchpad for reporting interface
- Suite on HANA migration strategy session for best utilization of HANA platform.

San Diego Metropolitan Transit System

SAP BW HANA Migration Architect, Modeling on HANA objects

Dates: July 2016 – December 2016

Responsibilities:

Successfully managed SAP BW migration and delivered new data models using HANA technology

- The effort included preparing the BW system for migration involving various steps of cleaning up the system, managing table and table spaces. Key components involve cleaning up old PSA tables, DTP log files, statistics tables. The end goal is to have a lean and clean system ready for migration.
- Execution of successful DMO process migrating to HANA.
- Evaluated the errors and issues and documentation. Some of the errors included manual corrections at a query level or fixing the design of Cubes and DSO.

- Coordinated BW security and BOBJ security teams to create a design document for Business Object reporting.
- Managed team of developers (with some hands on work) creating data models rationalizing 3rd party data in BW on HANA and data models using latest HANA LSA++ architecture.

Duke University

SAP BW HANA Architect, Basketball Analytics UI5 application

Dates: January 2016 – December 2016

Responsibilities:

Successfully implemented public facing Basketball analytics UI5 application using HANA platform (Database, and development platform). First ever client to use UI5 analytics in North America.

- SAP HANA architect and project manager leading effort on modeling HANA artifacts
- Led the team on UI5 design for the public facing interface.
- Duke Solution lives in LSI hosted and managed infrastructure.
- Managed all the efforts for hosting and AMS
- HANA database consumed data from year 1904, over 100 years of data loads.
- SAP recognized the effort last week during the Duke Basketball game for an innovative design and use of HANA platform.
- Technical lead involved making decision on odata services, gateways, security and administration. Anonymous login to the system
- Additional visualization content coming soon like, player comparison, computational journalism, shot chart and infographics.

New York Knicks, Charlotte Hornets, Brooklyn Nets

Dates: May 2015 – September 2015

Responsibilities:

NBA league teams are starting to explore into analytics and consume big data to make business decisions. The SAP HANA platform is used to analyze large volume of complex data to gain business insight into player drafting and business. Kiran acts as HANA Studio architect for all of the LSI Sport clients:

- SAP HANA Architect on basketball projects, teams included NY Knicks, Charlotte Hornets, and Brooklyn Nets.
- Led the teams through all phases of project from kick off, requirement gathering, realization, Testing and production, go live.
- Designed acquisition of data from NBA feed and other sources such as RealGM, SportsVU, and ESPN.

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- Executed Data Extraction Transfer Loading (ETL) using SAP Data Services 4.0 to import csv/excel files into SAP HANA tables.
- Well verse with SAP HANA Administration, Performance Optimization and Modeling using different types of views, SQL scripts.
- Created HANA modeling scenarios and activities such as adding a system, creating schemas and content models, attributes and measures, hierarchies
- Designed and implemented SAP HANA data modeling using Attribute View, Analytic View, and Calculation View.
- Created complex information model to formulate all the player game data and player bio, contract data into one view. The design of the view provided end user with season level summary and game play by play breakdown. Analytical view delivered the desired results
- Created calculation view with aggregation for per game and per 36 minute statistics
- Created Analytical view delivering revenue information from arena seat sales from Archtics (Ticketmaster) data source
- Designed calculation view to track website traffic and merged it with CRM data for the sales team.
- SAP HANA Data provisioning using SAP Landscape Transformation and SAP Data Services, DXC, Flat File Uploader, SAP HANA Architecture.
- Created Users, Roles, Analytical Privileges, Packages, Schemas as part of HANA Security and Development
- Involved in SAP HANA Security including User Management, Roles, and Privileges
- Good analytical skills at troubleshooting data related issues; source related or complex design related
- Created Universe for HANA views using Information Design Tool for reporting
- Reporting, Accessing Analytical and Calculation views using SAP Business Objects tools like Lumira, Web Intelligence and OLAP for office
- Strong knowledge on data flows & workflows using BODS.

Houston Independent School District

Dates: September 2014 – March 2015, January 2016 to July 2016

Responsibilities:

- SAP BW Technical lead on HISD's re-implementation project.
- HISD project was a redesign of account string project on ECC side which triggered re-implementation efforts on BW side.
- Worked with PMO on putting together a project plan detailing source system changes (ECC and SRM) and BW data model re-designs.
- Worked on brain storming sessions to come up with optimal design to retain the current data models and design new data models for new account strings.

- Designed staging layer for merging and blending old SAP data and new data coming from re-implementation project for historical YoY reporting.
- Evaluated and proposed the design to change master data values to new keys for characteristics, adding complexity to merging design included compounding characteristics and attributes.
- Worked with SME's on would be dashboards used and drill down reporting to incorporate in the BOBJ prototype project.
- Designed multiple BOBJ reports and templates including designing dashboards using new SAP Design Studio
- Worked on multiple SAP modules New G/L, BCS, Grants Management, SRM, Plant maintenance, Travel and Procard.
- Provided guidance on do's and don'ts when integrating SAP BW and BOBJ for reporting requirements.

State of Mississippi, Business Intelligence Consultant

Dates: April 2014 – July 2014

Responsibilities:

- Business Intelligence consultant working on small projects and enhancements to deliver the required data models and reports for the July go-live.
- Worked on multiple SAP modules like Contracts Management, SRM, New FI-GL, Asset Management, Bidding, Procurement, Invoices.
- Worked with SAP functional consultants gathering requirements and documenting functional specs for new requirements and change requests.
- Created new Web Intelligence and Analysis OLAP reports working with BOE team.
- Worked on complex Bex Queries and Webi reports involving row-by-row restrictions and various key figure formulas.
- Provided guidance on do's and don'ts when integrating SAP BW and BOBJ for reporting requirements.
- Worked on fixing defects and issues logged in HPQC by the client's testing team.
- Coordinated cut-over plan to production with other team members and validated all the data models, data loads and reports developed for go-live.

Northern Kentucky University, Business intelligence Consultant

Dates: January 2014 – July 2014

Responsibilities:

- Managed team of third party consultants and employees for the prototype dashboard project.

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- Worked on implementation strategy for client's upcoming Business Objects implementation.
- Technical lead for design of landscape, installing BOBJ servers and technical roadmap of the implementation.
- Worked with executive committee on dashboards designs using Balsamiq mockup tool.
- Worked with development team putting together project plan and mapped out the development road map from SQL server data source to BW development and connecting front end BOBJ tools.
- Worked with Basis team on installing BOBJ dev and QA servers, splitting APS servers and activating the requisite services.
- Managing production Support for prior BW implementations, Bex report design fixes and enhancements.

Common Wealth of Kentucky, Lead BI Architect

Dates: March 2011 – March 2014

Responsibilities:

- Managed dual role of on-site manager and BI-BOBJ (Business Objects) Lead architect for HCM reporting project for KHRIS (Kentucky Human Resources Information Systems).
- On-site manager role included being the touch point on client site for all the technical and project level decision making and consulting the team on BW and BOBJ best practices.
- Managed two offshore development teams (UK and South Africa), responsible for daily status updates with the teams, assigning tasks and validating the work.
- Overviewed BW implementation from validating the data model based on blue print, realization, UAT and go-live.
- Upgraded BOBJ landscape from XI3.1 version to BOBJ 4.0 SP6 version.
- Actively participated with the Business Object reporting implementation from designing Universes to writing Webi reports. Applied SAP BOBJ best practices for configuring the BOBJ system.
- Hands-on work on creating and validating security roles in BW backend and Business Objects CMC level.
- Worked on Promotion Management strategy to transport BOBJ object across landscapes.
- Worked with SAP Global support to resolve Client tools and Integration kit version related issues while implementing Business Objects.
- Assisted basis and portal team in integrating ECC Portal to BW portal and launching BOBJ Inofview from BI Portal using SSO and SSL across the domains.
- Presented the BI Reporting solutions (BW+BOBJ) to the steering committee and executive directors at the client.
- Conducted Webi Business objects training sessions for the client.
- Designed Xelsisus dashboards for the client which was a part of prototype.

- BW data model included generic datasources in R/3, loading and staging data to DSO and Infocubes and using Infosets and multiproviders for reporting layer.
- Worked on FSCD billing and payment data model, delivering Open Items, cleared items and aging reports through Webi.
- Worked with multiple departments to centralize BOBJ implementation.
- Migrated all the BOBJ content (webi report, universes, connections, groups) from old landscape to the new enterprise landscape.
- Conducted training session for business users on Business Objects tools (web intelligence and OLAP)

Central Michigan University, Business Intelligence Consultant

Dates: June 2012 – September 2012

Responsibilities:

- This engagement included responsibilities of over viewing client's current SAP BW implementation and consulting on known issues and future developments to come.
- Worked with developers on re-doing some of the data models based on SAP best practices.
- Managed Student financial aid reporting project from development to UAT.
- Worked with business users and project management team on putting together a project plan for upcoming Finance implementation.

Northern Kentucky University, Lead BI Architect

Dates: January 2006 – March 2011

Responsibilities:

- Implemented BI solutions at the SAP **ASUG Impact Award Winner** customer. This was a ramp up project for implementing SAP BI 7.0, Enterprise Portal 7.0 and SAP R/3 ECC 6.0
- Managed a team of eight to provide BI solutions for the client. Involved various departments to participate in the implementation and incorporated their processes and measures.
- Approached the project from a high level perspective to see the bigger picture of the organization and their requirements, planned for the details by talking to individual teams.
- Conducted focus groups and town hall meetings to gather requirements and feedback from end users.
- Worked with the PMO to keep the project on track and report any issues/risks to management team.
- Designed a high level conceptual data model and technical layout for each module and implemented the data model.

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- Created a proof of concept for Budgeting front end (BI-IP) using one layout and further finalized the scope and implemented in detail using planning functions, layouts and templates.
- Analyzed the latest features delivered with 7.0 version like transformation rules, Data transfer process (DTP), Datastore object, Business Integrated Planning, New Reporting tools.
- Revamped the current report requesting process and changed it to a service ticketing client to better track the requests.
- Designed Data models based on EDW architecture, extracted raw data to the EDW layer, massaged data in transformations and staged in different Infocubes.
- Designed Infocubes and Data store objects depending on the granularity of the data required for the enterprise data warehouse. Extensively used Multiproviders and Infosets for cross functional reporting.
- Worked with the basis team in getting the BI and Portal environments up and installing the required components and integrating the systems.
- Assisted Basis team in reviewing the release documentation and in applying necessary Support Packages stacks to meet the Upgrade requirements.
- Communicated with SAP Germany for enhancements to resolve issues in BI 7.0.
- Worked on configuring Enterprise Portal 7.0 with BI backend system. Installed the BI installer template, Planning Modeler, Budgeting Interface for BIIP.
- Implemented the Budgeting solution using the latest BIIP tool from SAP. Tasks involved creating the BIIP templates through WAD and designing layouts for the users to enter their budget information.
- Coordinated with Portal team the execution of the user interface by creating iviews and respective authorization roles for delivering web based report for various functional areas.
- Designed complex and structured reports for state government and official reporting. Used exception and conditional reporting for vendor management and suppliers analysis.
- Developed Analysis Process Designer (APD) model to create snapshot reporting for official purposes.
- Used Open hub destination to feed data to 3rd party systems; used XML to broadcast data, created function module to run BI queries which feeds to R/3 programs to reduce load on transactional system.
- Trained end users on Bex reporting tools and divided the training classes in three categories, end users, power users and SME users.

Industry: Oil Industry, Houston, TX, Sr. Business Warehouse Consultant

Dates: June 2004 – November 2005

Responsibilities:

- Designed and involved in complete Data Modeling, Identified type of Datasources, ETL processes, Data Targets, and Reporting Objects.

- FI-CO, MM, and SD: Designed and developed Infocubes for custom Infosources to meet customer requirement. Generated datasources for custom requirements and worked with the standard Business Content delivered by SAP.
- Built and activated Basic, Remote Infocubes and ODS Objects for data modeling and staging of data.
- Identified the extractors on the R/3 OLTP systems and defined the Transfer structures on the source and target systems. Enhanced the extract structure where necessary.
- Created various transfer rules with and without PSA update option.
- Modified Update rules, Transfer rules, Update routines, and Transfer routines as per client requirements.
- Extracted source data from several disparate data sources including mainframe and legacy data systems, transformed data and loaded data into data targets using ETL tool.
- Worked with the standard Business Content and loaded master data and transaction data. Setting up extraction process using LIS, LO Cockpit Extractor, V3 updates.
- Mapping Source System and configuring the BW system with the R/3 and non SAP systems. Identify Sources of Data, Volume of Data, preservation and/or shredding of data.
- Mapping BW Business Content Datasources with To-Be Reports.
- Extensive use of Analyzer, BEx Browser, and Query designer.
- Created new queries with variables, calculated key figures and restricted key figures. Used exceptions and conditions for reporting.
- Generated web reports through report template in WAD (Web Application Designer).
- Involved in end user training and creating user documentation for respective functional areas.
- Involvement in BI security by creating roles based on multiple authorization objects and testing cross functionality of those roles.
- Created user exit based queries to identify the user authorization by running the user system name through the code and data providers.
- Installed BI administration cockpit and the BI statistics cubes to monitor the query runtime and different stages (OLAP, front end, Database etc.) of the process.

Industry, Manufacturing Company, Bayton, TX, SAP BW Consultant

Dates: July 2003 – April 2004

Responsibilities:

- Activated Business Content for standard Infocubes, Infosources & Info Objects for the HR, MM and SD modules.
- Integrated CRM with other application areas including BW, and SAP R/3.
- Customized Datasources and Infosources for data extraction and loading data from OLTP systems into SAP BW system.
- Extensively worked in LO-Cockpit extraction 2LIS_02_SCL, 2LIS_11_VAITM, 2LIS_13_VDHDR and others using V3 update.
- Created ODS objects for data staging in BW.
- Incorporated transfer rules and customized update rules using ABAP/4.

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- Worked on extended star schema for data modeling and delta update mechanisms for uploading the data to BW from R/3 in specific intervals.
- Generic data extractors to extract and transform the data to suit the Business Warehouse model.
- Installed and activated BW Statistics cubes, worked extensively on custom built hierarchies and training related issues.
- Worked on the SEM- BW team, creating and defining measures for the Balance Scorecard and Management Cockpit for Performance Measurement for the organization.
- Designed and Mapped BW queries to respective roles, SEM Balanced Scorecards and adopted the SEM/Business Planning and Simulation.
- Maintenance of BW/SEM-BPS transactional cubes for Financial Statement planning and reporting.
- Extended Standard Business Contents based on client requirements using User Exit and Function Module.
- Customized Sales and Delivery Infocubes according to the user requirements to accommodate the reporting requirements.
- Scheduled data loads into BW from R/3. Data load scheduling involved initial data loads and delta data loads. Monitoring the LO Extraction Cockpit and the Delta Queue Maintenance.
- Extensively used BEx Analyzer / BEx Query Designer to create and run reports, defining queries, customization of the query data display layout, filters, attaching of charts, Reporting agent, RRI, Personalization, Restricted & calculated key figures for filtering and formula requirement of query.
- Created web templates and published queries using WAD (Web Application designer).
- Archiving data from Infocubes and ODS objects.
- Training end users and knowledge transfer to client.

General Information

Education

- Master's in Business Administration, Northern Kentucky University.
- Master's of Engineering. University of Houston, Texas
- Bachelor's of Engineering. University of Mumbai, India.

Appendix F: SAP SuccessFactors Recruitment Candidate Configuration Workbook

SAMPLE

SAP SuccessFactors ♡

Recruitment Management
Candidate Configuration Workbook

<Customer Name>

SAMPLE

Execution is the difference ™

Global Headquarters
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Phone: (650) 645-2000(650) 645-2000
Fax: (650)645-2099(650) 645-2099

Project Methodology

Working with Your SuccessFactors Consultant

Together with your Professional Services Consultant you will explore and discuss each of the decision points described throughout the workbook. You will record your decisions in this configuration workbook.

Your SuccessFactors Professional Services Consultant is ready to guide you through the completion of this workbook. You should feel free to ask questions and discuss possibilities. We don't expect that you will complete the workbook on your own or without our guidance. While you own the maintenance of the document so that you can record your business decisions in your own words, we will work on completing the document together.

Once you have identified and recorded the configuration options that meet your needs we will ask you to sign-off on this configuration workbook. Your signature indicates that you have completed the process of describing how you would like to see SuccessFactors configured by your Professional Services Consultant. Upon receipt of the signed workbook, your Professional Services Consultant can then configure SuccessFactors to match your requests.

The SuccessFactors Empower methodology calls for three cycles, or iterations, where you can complete the workbook to describe your configuration requests and business decisions.

You will use the workbook to record the configuration you have requested. Note that the signoff for configuration "received" happens after the three iterations of making requests and before testing and the final signoff of

Explain the options available in the Configuration Workbook

Provide feedback and suggestions on the best ways to utilize SuccessFactors to accomplish the customer's business objectives

Configure the SuccessFactors system to match the customer requests documented in the Configuration Workbook after sign-off

[CUSTOMER] Responsibilities

Own the Configuration Workbook document

Complete the Configuration Workbook with guidance and explanation from the Consultant, filling in the pale yellow sections

Sign the workbook before the Consultant makes any configuration changes

Keys to using the Configuration Workbook

• Configuration Item Discussion – Wording following each section heading describing the configuration item and possible choices.

• Customer Input/Decision: . Individual choices are colored with a pale yellow background.

• General Requirements: Area where you may record other comments, requests, or choices relating to configuration

• Business Drivers: Area where you may record business decisions and logic about the configuration element

• Iteration Configuration Modifications: During iterations 2 and 3, this is an area where you may record modifications or clarifications to previous decisions

General Notes

SuccessFactors agreed that. Your Professional Services Consultant will help you understand what is available to you and what is not.

• This Configuration Workbook does not contain every possible configuration option. If it did, it would be 50 times bigger than it is! Your Professional Services Consultant will help you explore the unique and less frequently used features of SuccessFactors if they are a fit for your organization.

The following links will be used to access various parts of the application

TEST (Preview)	
Company ID	
SF Application	https://hcm12preview.sapsf.eu
Candidate Portal (default)	https://career12preview.sapsf.eu/career?company=<CompanyId>
Agency Portal (URL is dependent on server that instance is on):	https://agency12preview.sapsf.eu/xi/ui/agency/pages/home.xhtml
RMK Stage Site (if applicable)	

PRODUCTION	
Company ID	
SF Application	https://performancemanager5.successfactors.eu
Candidate Portal (default)	https://career012.successfactors.eu/career?company=<CompanyId>
Agency Portal (URL is dependent on server that instance is on):	https://agency012.successfactors.eu/xi/ui/agency/pages/home.xhtml
RMP Production Site (if applicable)	
RMK Recruiting Dashboard URL (if applicable)	

Username (test users):	aaaa, bbbb, etc.
Password:	[ZZZZ]

Standard Field Name	Descriptor	Usage	Type of Field
address	Address	Used to capture candidate address. Can include additional custom field to capture "address line 2".	Text
cellPhone	Phone	Appears in the Candidate Profile business card.	Text
contactEmail	Email	All email sent from the system to the candidate is sent to this email address.	Text
country	Country	Required	Picklist
coverLetter	Cover Letter	Will appear as attachment field.	Rich Text
firstName	First Name	Appears in the Candidate Profile business card.	Text
homePhone	Home Phone	Appears in the Candidate Profile search results as the default phone number.	Text
lastName	Last Name	Appears in the Candidate Profile business card.	Text
middleName	MiddleName	Appears in the Candidate Profile business card.	Text
resume	Resume	Will appear as attachment field.	Rich Text
state	State	Used to capture candidate state of residence.	Text or Picklist
zip	Zip	Used as part of Radial Candidate Search.	Text or Picklist

Field Types

- `text` a single line of alphanumeric text with a 100-character limit (character limit and display are nonconfigurable).
- `textarea` alphanumeric text with a 256-character limit, shown as a 100-character-wide box (character limit and display are non-configurable).
- `date` a date that is manually entered or selected from a calendar. Displays mm/dd/yyyy or dd/mm/yyyy according to user's chosen language pack.
- `percent` a percent value with one decimal place.
- `bool` true or false (shown as a check box); if you make this attribute required because if must always be checked.
- `enum` an enumerated type (shown as a pull-down list) where values are defined in the XML.
- `number` a number value with two decimal places, formatted by locale.
- `currency` a currency value, where currency symbol is determined by the field id "currency."
- `picklist` field options from a picklist defined in admin (shown as a pull down list).
- `derived` a pull-down or "find value" field (depending on length of list) where values are automatically determined from another area of the system
- `instruction` a non-editable field that stretches left-to-right across the screen, used to display messages to users. Cannot be made reportable or writable; if reportability or writability is configured, error messages will result
- `multiattachmentselection` A field that can have multiple documents uploaded and attached. Acts as a mini library where all documents uploaded are stored for later reuse. This means that there is an additional check box next to all uploaded files and that checkbox must be selected to attach the document to the record.
- `richText` alphanumeric lines with no character limit
- `hyperlink` field that stores a URL and text to show instead of the URL

Iteration 2 Change	Iteration 3 Change	SF Field Name	Field Label	Standard or Custom	Field Type
		firstName	First Name	Standard	text
		middleName	Middle Name	Standard	text
		lastName	Last Name	Standard	text
		contactEmail	Email	Standard	text
		cellPhone	Phone	Standard	text
		More Information			
		homePhone	Home Phone	Standard	text
		address	Address line 1	Standard	text
		city	City	Standard	text
		state	State/Province	Standard	text
		zip	Postal Code	Standard	text
		country	Country	Standard	picklist
		cust_contactme	XXXX may contact me regarding other positions:	Custom	picklist
		Background Sections: : If a section is "currently used" then it is currently part of the Employee Profile, and it therefore must match what currently exists. Changes are acceptable but it would ap			
		insideWorkExperience	**Company Work Experience**	N/A	**background element**
		startDate	Start Date	N/A	date
		endDate	End Date	N/A	date
		title	Title	N/A	text
		department	Department	N/A	text
		outsideWorkExperience	**Previous Employment**	N/A	**background element**
		startDate	Start Date	N/A	date
		endDate	End Date	N/A	date
		company	Company Name	N/A	text
		startTitle	Title	N/A	text
		education	**Education**	N/A	**background element**
		startDate	Start Date	N/A	date
		endDate	End Date	N/A	date
		school	College/University	N/A	text
		degree	Degree	N/A	picklist
		languages	**Lan**	N/A	**background element**
		language	guage	N/A	picklist
		speakingProf	eaking Proficiency	N/A	picklist
		readingProf	Proficiency	N/A	picklist
		writingProf	Writing ency	N/A	picklist

Picklist Name	Req'd Y/N	Sync with Emp Profile Y/N	Country Specific	Candidate Help Text	Audience (Internal Only, External Only, Both)	Dynamic Group (permission to edit)	Notes
	Y	Y					
	N	Y					
	Y	Y					
	Y	Y					
	Y						
	Y						
	Y	Y					
	Y	Y					
	Y	Y					
	Y	Y					
country	Y	Y					
yesNo	Y						

apply to the employee profile too.

language							
fluency							
fluency							
fluency							

SAMPLE

		Candidate Profile Header Text		Notes
		Introductory Text		**Notes**
		Dear candidate, Thank you for your interest in our company. In this section you have the possibility to add more details about your profile. Please be aware that if you have applied to a specific opening the information you provide here is available to the reviewers of your application. If you do not find any specific open position now or if you would also be interested in other positions you can fill in (or complete) your profile and save it thus making it available to our recruiters who may contact you in case there is a match to a vacancy with your profile and preferences. Please note that by filling/completing your Profile below you hereby agree that your data is available to the recruiters worldwide. Your Recruiting Team		

Iteration 2 Changes *Iteration 3 Changes*

SAMPLE

Career Site Settings

Iteration 2 Changes	Iteration 3 Changes			

Data Privacy Consent Statements

Feature	Enable (Y/N)	Statement Text
Internal Data Privacy Consent		
External Data Privacy Consent		

Candidate Visibility Feature

This feature allows candidates to determine who their data should be visible to. This is commonly required by countries in the European Union.

If this feature is turned on, then candidates can choose if their data should only be visible to those recruiters that are part of specific job being applied to, only recruiters in the country of the candidate's residence, or to recruiters globally. This feature is either turned on or off for all candidates. It can be turned on for external candidates or internal candidates, or both.

If this switch is enabled, it disables the ability to forward candidates to other users if the candidate selected either of the first two options, to prevent candidate data being exposed to unauthorized users.

Note that enabling this switch necessitates that all products users must have an assigned appropriate country code.

Feature	Enable (Y/N)	Notes
Candidate Visibility for External Candidates		
Candidate Visibility for Internal Candidates		

Create/Update Candidate Profile using LinkedIn profile information

This is the ability to create/update candidate profile information using LinkedIn profile information which helps reduce drop off rate.

Feature	Enable	Notes
Apply with LinkedIn - External Site		
Apply with LinkedIn - Internal Site		

Data Privacy Statement

You must accept the terms of the agreement to create an account. Please scroll down to read and accept the data privacy agreement.

I understand that my data will be visible to all Company recruiters and HR personnel. I agree that my data may be shared, at the Company's discretion, with hiring managers considering me for potential future positions.

[I Disagree] [I Agree]

* Make My Profile Visible to:
  ○ Only recruiters managing jobs I apply to
  ○ Any company recruiter in my country of residence
  ○ Any company recruiter worldwide

Profile Creation (Apply) Process

1. Candidate can apply using LinkedIn from the Action list of a job requisition (a) or directly from a job requisition page (b)
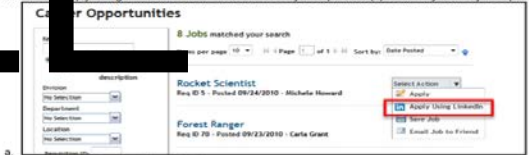
2. When a candidate uses 'Apply with LinkedIn', they are taken to a page where they will be asked to "Grant SuccessFactors..."
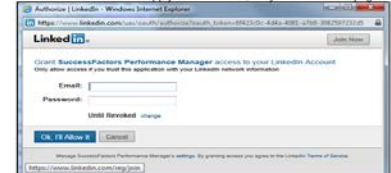
3. Once permission is granted, the candidate will receive a Security Code

4. Candidate will then enter security code in the 'Enter LinkedIn Security Code' box

Standard vs. Custom: There are fields used within the Recruiting Product that are reserved as "standard" fields. Using standard fields is ideal because the product is set-up to use these fields for reporting and other various aspects of standardization. If a standard field is not applicable for usage, then a "custom" field can be utilized. There are some restrictions on the number of custom fields that can be used, such as for tokens (used to populate offer letters, emails, etc.) and as reportable fields. For this reason, a standard field can be repurposed prior to utilizing a custom field. Your Professional Services Consultant will determine whether standard or custom fields are applicable. **Below is a summary of standard fields.**

Auto populate Fields: Any fields that are first completed on the Candidate Profile and are shared with the Candidate Application then, those fields are auto-populated directly to the application

Field Types: Each field must be specified with a type (i.e. text). **Below is a summary of field types.**

Standard Field Name	Descriptor	Usage	Type of Field
comments	comments	Enables and permissions the application comments feature	Text
contactEmail	Email	All email sent from the system to the candidate is sent to this email address. Typically shared with the Candidate Profile.	Text
country	Country	Required	Picklist
coverLetter	Cover Letter	Will appear as attachment field. Typically shared with the Candidate Profile	Rich Text
dateOfBirth	Date of Birth	Typically used for third party integrations.	Text
disabilityStatus	Disability	Client defined values.	Picklist
ethnicity	Ethnicity	Client defined values.	Picklist
firstName	First Name	Appears in the Contact Info line at the top of the	Text
gender	Gender	Values support: No Selection, Male, and Female.	Derived
homePhone	Home Phone	Appears in the Candidate Profile search results as the default phone number.	Text
lastName	Last Name	Appears in the Contact Info line at the top of the application. Typically shared with the Candidate Profile.	Text
middleName	MiddleName	Appears in the Contact Info line at the top of the application. Typically shared with the Candidate Profile.	Text
questionResponse	Screening Details	Displays the applicant's answers to prescreening questions	Text

race	Race	Client defined values.	Picklist
resume	Resume	Will appear as attachment field. Typically shared with the Candidate Profile.	Rich Text
statusId	Status	Populates the candidate pipeline/workflow.	Picklist
veteranStatus	Veteran	Client defined values.	Picklist

Field Types

- *text:* a single line of alphanumeric text with a 100-character limit (character limit and display are nonconfigurable)

- *textarea:* multiple lines of alphanumeric text with a 256-character limit, displayed as a 100-character-wide box (character limit and display are non-configurable)

- *richText:* alphanumeric lines where there is effectively no character limit

- *instruction:* a non-editable field that stretches left-to-right across the screen used to display messages to users. Cannot be made reportable or writable; if reportable or writability is configured error messages will result

- *date:* a date manually entered by user or selected from calendar pull-down. Displays mmddyyyy or ddmmyyyy according to user's chosen language pack

- *number:* a number value

- *percent:* a percent value with one decimal

- *bool:* true or false (shown as a checkbox) — do not make required because if required, always needs to be checked

- *enum:* an enumerated type (shown as a pull-down list) where values are defined in the XML

- *multiattachment:* Indicates a field that can have multiple documents uploaded and attached to it.

- *multiattachmentselection:* A field that can have multiple documents uploaded and attached. Acts as a mini library where all documents uploaded are stored for later re-use without requiring they be uploaded again. Select the additional checkbox next to all uploaded files and to attach the document to the record. Most candidates will not be familiar with this field behavior so this field should not be used in a candidate-facing configuration. Documents uploaded to multiattachmentselection fields on the candidate profile will be automatically available in a field with the same field id on the application; the applicant can delete the attachment if desired.

Iteration 2 Change	Iteration 3 Change	SF Field Name	Field Label	Standard or Custom	Field Type	Picklist Name	Candidates (Internal Only, External Only, Both)	Country Specific	Req'd Y/N	If Custom, Reportable Y/N	Collect only at certain candidate status? If so, which?	Candidate Help Text	Recruiter Help Text
		RECRUITER FIELDS											
		statusId	Status	Standard	picklist	N/A			Y				
		comments	Comments	Standard	text				N	N/A			
		jobsApplied	Other Applications	Standard	text				N	N/A			
		questionResponse	Question Responses	Standard	text				Y				
		CANDIDATE FIELDS											
		custInstrPersInfo	**Personal Information**	Custom	instruction		Both						
		firstName	First Name	Standard	text		Both		Y	N/A			
		middleName	Middle Name	Standard	text		Both			N/A			
		lastName	Last Name	Standard	text		Both		Y	N/A			
		contactEmail	Email	Standard	text		Both		Y	N/A			
		cellPhone	Mobile Phone	Standard	text		Both			N/A			
		homePhone	Home Phone	Standard	text		Both		Y	N/A			
		address	Address line 1	Standard	text		Both		Y	N/A			
		city	City	Standard	text		Both		Y	N/A			
		state	County/State	Standard	picklist		Both			N/A			
		zip	Zip/Post Code	Standard	text		Both		Y	N/A			
		country	Country	Standard	picklist		Both						
		custInstrEmpInfo	**Employment Information**	Custom	instruction		Both						
		referralSource	How did you hear about this position?	Standard	text		External		Y	N/A			
		resume	Resume / CV	Standard	attachment		Both		Y	N/A			
		coverLetter	Cover Letter	Standard	rich text		Both						
		custInstrDiversity	**Diversity Information**	Custom	instruction		External	US					
		gender	Gender	Standard	gender		External	US		N/A			
		ethnicity	Ethnicity	Standard	picklist	ethnicity	External	US		N/A			

		Button Permissions											
		Button Name	**Label**										
		Save	Save										
		Forward	Forward										
		Cancel	Cancel										
		Edit_Candidate_Snapshot	Edit Candidate Snapshot										

Iteration 2 Ch	Iteration 3 Ch	Status Name	Recruiter Label	Candidate Label	Candidate Next Step Text	Req'd (Y/N)	Visible to Referrer (Y/N)	Referrer Label	Referrer Next Step Text	Comment if Skipped (Y/N)	Enable only for external candidates (Y/N)
											System
		Forwarded	Forwarded		We are currently reviewing all applications.						
		Invited To Apply	Invited To Apply		We are currently reviewing all applications.						
		Default	New		We are currently reviewing all applications.						
		Automatically Disqualified	Automatically Disqualified								
		Requisition Closed	Requisition Closed								
		Hired on Other Requisition	Hired on Other Requisition								
											Withdra
		Application Withdrawn by Candidate									
		Deleted on Demand by Candidate									
		Deleted on Demand by Admin									
		Declined DPCS									
											In Proc
		Review	Review		We are currently reviewing all applications.						
		1st interview	1st interview		We are currently reviewing all applications.						
		2nd interview	2nd interview		We are currently reviewing all applications.						
		Offer	Offer		We are currently reviewing all applications.						
		Ready to Hire	Ready to Hire		We are currently reviewing all applications.						
		Hired	Hired		We are currently reviewing all applications.						
											Disqualific
		Reject - No Email	Reject - No Email								
		reject-email	Reject-email								

Iteration 2 Change	Iteration 3 Change	Feature	Status in which to display	O	G	R	T	S	W	Q
		Interviewers Portlet		Selectable	Selectable	Selectable	Selectable	Selectable	Selectable	Selectable
		Offer Approval		Selectable	Selectable	Selectable	Selectable	Selectable	Selectable	Selectable
		Offer Letter		Selectable	Selectable	Selectable	Selectable	Selectable	Selectable	Selectable
		Initiate Onboarding		Selectable	Selectable	Selectable	Selectable	Selectable	Selectable	Selectable
		Background Check		Selectable	Selectable	Selectable	Selectable	Selectable	Selectable	Selectable
		Late-Stage Application		Selectable	Selectable	Selectable	Selectable	Selectable	Selectable	Selectable
		Historical Results - Background Check Integration		Selectable	Selectable	Selectable	Selectable	Selectable	Selectable	Selectable
		Historical Results - Assessment Integration		Selectable	Selectable	Selectable	Selectable	Selectable	Selectable	Selectable
		Historical Results - Pre-Screening Questions & Answers		Selectable	Selectable	Selectable	Selectable	Selectable	Selectable	Selectable

Iteration 2 Change	Iteration 3 Change	Additional permissions		O	G	R	T	S	W	Q

Iteration 2 Change	Iteration 3 Change	Status Name	Status Group Name
		System Statuses	
		Forwarded	
		Forwarded	
		Forwarded	
		Forwarded	
		Forwarded	
		Invited To Apply	
		Invited To Apply	
		Invited To Apply	
		Invited To Apply	
		Invited To Apply	
		Default	
		Default	
		Default	
		Default	
		Default	
		Automatically Disqualified	
		Automatically Disqualified	
		Automatically Disqualified	
		Automatically Disqualified	
		Automatically Disqualified	
		Requisition Closed	
		Requisition Closed	
		Requisition Closed	
		Requisition Closed	
		Requisition Closed	
		Hired on Other Requisition	
		Hired on Other Requisition	
		Hired on Other Requisition	
		Hired on Other Requisition	
		Hired on Other Requisition	
		Withdrawn Statuses	

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		Application Withdrawn by Candidate	
		Application Withdrawn by Candidate	
		Application Withdrawn by Candidate	
		Application Withdrawn by Candidate	
		Application Withdrawn by Candidate	
		Deleted on Demand by Candidate	
		Deleted on Demand by Candidate	
		Deleted on Demand by Candidate	
		Deleted on Demand by Candidate	
		Deleted on Demand by Candidate	
		Deleted on Demand by Admin	
		Deleted on Demand by Admin	
		Deleted on Demand by Admin	
		Deleted on Demand by Admin	
		Deleted on Demand by Admin	
		Declined DPCS	
		Declined DPCS	
		Declined DPCS	
		Declined DPCS	
		Declined DPCS	
		In Process Statuses	
		Review	
		Review	
		Review	
		Review	
		Review	
		1st interview	
		1st interview	
		1st interview	
		1st interview	
		1st interview	
		2nd interview	

SAMPLE

		2nd interview	
		2nd interview	
		2nd interview	
		2nd interview	
		Offer	
		Offer	
		Offer	
		Offer	
		Offer	
		Ready to Hire	
		Ready to Hire	
		Ready to Hire	
		Ready to Hire	
		Ready to Hire	
		Hired	
		Hired	
		Hired	
		Hired	
		Hired	
	Disqualification Statuses		
		reject - no email	
		reject - no email	
		reject - no email	
		reject - no email	
		reject - no email	
		reject-email	
		reject-email	
		reject-email	
		reject-email	
		reject-email	
	Onboarding statuses		
		Onboarding	
		Onboarding	
		Onboarding	
		Onboarding	
		Onboarding	

SAMPLE

Iteration 2 Change	Iteration 3 Change	Template Name:										
		SF internal field	Field Label	Source (Application, Requisition or Offer)	Field Type	Picklist Name	Mobile Y/N	Req'd Y/N	Permission (read comment above)	Custom Token Y/N	Help Text	Notes
		firstName	First Name	Application	text		Y	Y				
		lastName	Last Name	Application	text		Y	Y				
		contactEmail	Email	Application	text		N	Y				
		cellPhone	Phone	Application	text		N	Y				
		country	Country	Application	picklist	country	Y	Y				
		state	State/Province	Application	picklist	state	Y	Y				
		city	City	Application	text		Y	Y				
		id	Requisition ID	Requisition	text		Y	Y				
		title	Position Title	Requisition	text		Y	Y				
		division	Division	Requisition	enum		Y	Y				
		department	Department	Requisition	enum		Y	Y				
		location	Work Location	Requisition	enum		Y	Y				
		costCenterId	Cost Center	Requisition	text		Y	Y				
		hiringReason	Hiring Reason	Requisition	picklist	hiringReason	Y	Y				
		recruiterName	Recruiting/Staffing	Requisition	operator		Y	Y				
		customShift	Shift	Requisition	text		Y	Y				
		currency	Currency	Requisition	enum		Y	Y				
		customString1	Salary	Offer	text		Y	Y				
		customString2	Bonus Target	Offer									
		customLong1	Vacation Days	Offer	number							
		customString3	Relocation Costs	Offer	text							
		resume	Candidate Quick View	Application	N/A							

Iteration 2 Change	Iteration 3 Change	Pre Defined Approval path (Yes/No)	Reorder Approvals (Yes/No)	User	User	User

Offer Letter Templates

Offer letters can be generated in the system and emailed or printed. The templates are managed in Admin Tools > Recruiting > Manage Offer Letter Templates

		Template Name	Country	Email Subject	Email Body
		Standard Exempt	*US*	*Your Job Offer*	*[[LOGO]]* *[[TODAY]]* *[[CANDIDATE_FULL_NAME]]* *[[CANDIDATE_PROFILE_ADDRESS]]* *[[CANDIDATE_PROFILE_STATE]] [[CANDIDATE_PROFILE_COUNTRY]] [[CANDIDATE_ZIP]]* *Dear [[CANDIDATE_FIRST_NAME]],* *I am pleased to confirm the offer you received from [[HIRING_MANAGER_NAME]] for the position of [[JOBREQ_TITLE]], located in [[JOBREQ_LOCATION]].* *Your starting salary for this position will be $[[CUSTOM TOKEN]] per month, payable on a [[SALARY_RATE_TYPE]] basis.* *Additionally, you will receive a signing bonus in the amount of $[[CUSTOM TOKEN]], subject to all applicable taxes, upon start of employment.* *Your total compensation program will be comprised of the following features:* *COMPENSATION: Your starting salary for this position will be $[[CUSTOM TOKEN]] payable on a [[CUSTOM TOKEN]] basis, every {Payroll Day}. In addition, you will earn a shift differential of ${X.XX} per hour. OR Payroll is issued on the 15th and the last day of the month.* *BENEFITS: A full range of benefits including health, life and disability insurance coverage will be effective on your start date with the company.* *401(k) RETIREMENT: A savings and investment retirement plan which is a 401(k) program into which you can contribute up to 20% of your base ... and receive a Company match 100% of ... first ... of contributions ... 50% on the next 3% of your contributions.* *VACATION: Our vacation program lets you accrue vacation days on an "earn-as-you-go" basis. For each full month of service, you will earn ... month of your annual vacation allowance (up ... 0 days ...* *We hope that you will decide on ... career with us and we look forward to your reply and would ask for a written response to this offer by [[OFFER_EXPIRATION_DATE]] ... you have any questions that I can help answer, please do not hesitate to contact me.* *Sincerely,* *[[RECRUITER_NAME]]* *[[USER_TITLE]]* *Offer accepted: _____ Date: _____*

Offer Letter Supported Tokens	
Field Label	**Token**
Ad Code	[[AD_CODE]]
Agency Id	[[AGENCY_ID]]
Agency Name	[[AGENCY_NAME]]
Agency Ownership Status	[[AGENCY_OWNERSHIP_STATUS]]
Agency Portal URL	[[AGENCY_PORTAL_URL]]
Agency Posting URL	[[AGENCY_POSTING_URL]]
Agency User	[[AGENCY_USER]]
Application ID	[[APPLICATION_ID]]
Application Page URL	[[APPLICATION_PAGE_URL]]
Bonus Payout Frequency	[[BONUS_PAYOUT_FREQ]]
Brand	[[BRAND]]
Candidate Address	[[CANDIDATE_ADDRESS]]
Candidate City	[[CANDIDATE_CITY]]
Candidate Country	[[CANDIDATE_COUNTRY]]
Candidate Email	[[CANDIDATE_EMAIL]]
Candidate Fax Number	[[CANDIDATE_FAXNUMBER]]
Candidate First Name	[[CANDIDATE_FIRST_NAME]]
Candidate Full Name	[[CANDIDATE_FULL_NAME]]
Candidate Home Phone	[[CANDIDATE_HOMEPHONE]]
Candidate ID	[[CANDIDATE_ID]]
Candidate Last Name	[[CANDIDATE_LAST_NAME]]
Candidate Offer URL	[[CANDIDATE_OFFER_URL]]
Address	[[CANDIDATE_PROFILE_ADDRESS]]
Cell Phone	[[CANDIDATE_PROFILE_CELL_PHONE]]
City	[[CANDIDATE_PROFILE_CITY]]
Email Address	[[CANDIDATE_PROFILE_CONTACT_EMAIL]]
Candidate Country	[[CANDIDATE_PROFILE_COUNTRY]]
Candidate Current Company	[[CANDIDATE_PROFILE_CURRENT_COMPANY]]
Candidate Current Title	[[CANDIDATE_PROFILE_CURRENT_TITLE]]
Date Of Availability	[[CANDIDATE_PROFILE_DATE_OF_AVAIL]]
Date Of Birth	[[CANDIDATE_PROFILE_DATE_OF_BIRTH]]
Disability Status	[[CANDIDATE_PROFILE_DISABILITY_STATUS]]
Ethnicity	[[CANDIDATE_PROFILE_ETHNICITY]]
Fax Number	[[CANDIDATE_PROFILE_FAX_NUMBER]]
First Name	[[CANDIDATE_PROFILE_FIRST_NAME]]
Gender	[[CANDIDATE_PROFILE_GENDER]]
Home Phone	[[CANDIDATE_PROFILE_HOME_PHONE]]
Last Name	[[CANDIDATE_PROFILE_LAST_NAME]]
Middle Name	[[CANDIDATE_PROFILE_MIDDLE_NAME]]
Min Annual Salary	[[CANDIDATE_PROFILE_MIN_ANNUAL_SAL]]
Candidate Full Name	[[CANDIDATE_PROFILE_NAME]]
Candidate External Email	[[CANDIDATE_PROFILE_POSTCONV_EXT_CONTACT_EMAIL]]
Preferred Location	[[CANDIDATE_PROFILE_PREFERRED_LOC]]
Primary Email	[[CANDIDATE_PROFILE_PRIMARY_EMAIL]]
Race	[[CANDIDATE_PROFILE_RACE]]
SSN	[[CANDIDATE_PROFILE_SSN]]
State	[[CANDIDATE_PROFILE_STATE]]
Veteran Status	[[CANDIDATE_PROFILE_VETERAN_STATUS]]
Zip	[[CANDIDATE_PROFILE_ZIP]]
Candidate State	[[CANDIDATE_STATE]]
Candidate Zip	[[CANDIDATE_ZIP]]
Career Site Forgot Password URL	[[CAREER_SITE_FORGOT_PASSWORD_URL]]
Career Site URL	[[CAREER_SITE_URL]]
Company Name	[[COMPANY_NAME]]
Coordinator Email	[[COORDINATOR_EMAIL]]
Coordinator Fax	[[COORDINATOR_FAX]]
Primary Coordinator	[[COORDINATOR_NAME]]
Coordinator Phone	[[COORDINATOR_PHONE]]
ERP Amount	[[ERP_AMOUNT]]
Facility	[[FACILITY]]
Hiring Manager Email	[[HIRING_MANAGER_EMAIL]]
Hiring Manager Fax	[[HIRING_MANAGER_FAX]]
Hiring Manager	[[HIRING_MANAGER_NAME]]
Hiring Manager Phone	[[HIRING_MANAGER_PHONE]]
Interview Date	[[INTERVIEW_DATE]]
Interview Result	[[INTERVIEW_RESULT]]
Interview Scheduling Candidate Interview URL	[[INTERVIEW_SCHEDULING_CONFIRM_INTERVIEW_URL]]
Interview Scheduling Interviewer Names	[[INTERVIEW_SCHEDULING_INTERVIEWER_NAMES]]
Interview Scheduling Interview Date	[[INTERVIEW_SCHEDULING_INTERVIEW_DATE]]
Interview Scheduling Interview Length	[[INTERVIEW_SCHEDULING_INTERVIEW_LENGTH]]
Interview Scheduling Interview Location	[[INTERVIEW_SCHEDULING_INTERVIEW_LOCATION]]
Interview Scheduling Interview Title	[[INTERVIEW_SCHEDULING_INTERVIEW_TITLE]]
Interview Scheduling Interview Type	[[INTERVIEW_SCHEDULING_INTERVIEW_TYPE]]
Interview Time	[[INTERVIEW_TIME]]

External Job Description	[[JOBREQ_DESC_EXT]]
External Job Description Footer	[[JOBREQ_DESC_EXT_FOOTER]]
External Job Desc Header	[[JOBREQ_DESC_EXT_HEADER]]
Internal Job Description	[[JOBREQ_DESC_INT]]
Internal Job Desc Footer	[[JOBREQ_DESC_INT_FOOTER]]
Internal Job Desc Header	[[JOBREQ_DESC_INT_HEADER]]
Location	[[JOBREQ_LOCATION]]
Internal Job Title	[[JOBREQ_TITLE]]
Currency	[[JOB_REQ_CURRENCY]]
Job Role	[[JOB_ROLE]]
Job Start Date	[[JOB_STARTDATE]]
Login URL	[[LOGIN_URL]]
Logo	[[LOGO]]
MicroSite Logo	[[MICROSITE_LOGO]]
Offer Expiration Date	[[OFFER_EXPIRATION_DATE]]
Offer Extension Date	[[OFFER_EXTENSON_DATE]]
Options	[[OPTIONS]]
Overdue Interviews	[[OVERDUE_INTERVIEWS]]
Overtime Hourly Rate	[[OVERTIME_RATE]]
Position Number	[[POSITION_NUMBER]]
Recruiter Email	[[RECRUITER_EMAIL]]
Recruiter Fax	[[RECRUITER_FAX]]
Recruiter	[[RECRUITER_NAME]]
Recruiter Phone	[[RECRUITER_PHONE]]
Required Travel	[[REQUIRED_TRAVEL]]
Base Salary	[[SALARY_BASE]]
Salary Frequency	[[SALARY_RATE_TYPE]]
Second Recruiter Email	[[SECOND_RECRUITER_EMAIL]]
Second Recruiter Fax	[[SECOND_RECRUITER_FAX]]
Second Recruiter	[[SECOND_RECRUITER_NAME]]
Second Recruiter Phone	[[SECOND_RECRUITER_PHONE]]
Sender User	[[SENDER]]
Signature	[[SIGNATURE]]
Sourcer Email	[[SOURCER_EMAIL]]
Sourcer Fax	[[SOURCER_FAX]]
Recruiting Manager	[[SOURCER_NAME]]
Sourcer Phone	[[SOURCER_PHONE]]
Stock	[[STOCK]]
Bonus	[[TARGET_BONUS_AMOUNT]]
Target Bonus in Percentage	[[TARGET_BONUS_PERCENT]]
Today	[[TODAY]]
Address	[[USER_ADDR1]]
Address Line 2	[[USER_ADDR2]]
Business Phone	[[USER_BIZ_PHONE]]
Cell Phone	[[USER_CELL_PHONE]]
City	[[USER_CITY]]
Country	[[USER_COUNTRY]]
Customizable Field 1	[[USER_CUSTOM01]]
Customizable Field 2	[[USER_CUSTOM02]]
Customizable Field 3	[[USER_CUSTOM03]]
Customizable Field 4	[[USER_CUSTOM04]]
Customizable Field 5	[[USER_CUSTOM05]]
Customizable Field 6	[[USER_CUSTOM06]]
Customizable Field 7	[[USER_CUSTOM07]]
Customizable Field 8	[[USER_CUSTOM08]]
Customizable Field 9	[[USER_CUSTOM09]]
Customizable Field 10	[[USER_CUSTOM10]]
Customizable Field 11	[[USER_CUSTOM11]]
Customizable Field 12	[[USER_CUSTOM12]]
Customizable Field 13	[[USER_CUSTOM13]]
Customizable Field 14	[[USER_CUSTOM14]]
Customizable Field 15	[[USER_CUSTOM15]]
Email	[[USER_EMAIL]]
Business Fax	[[USER_FAX]]
First Name	[[USER_FIRSTNAME]]
Home Phone	[[USER_HOME_PHONE]]
Last Name	[[USER_LASTNAME]]
Middle Name	[[USER_MI]]
Salutation	[[USER_SALUTATION]]
State	[[USER_STATE]]
Suffix	[[USER_SUFFIX]]
Title	[[USER_TITLE]]
Zip	[[USER_ZIP]]
VP Of Staffing Email	[[VP_OF_STAFFING_EMAIL]]
VP Of Staffing Fax	[[VP_OF_STAFFING_FAX]]
VP Of Staffing	[[VP_OF_STAFFING_NAME]]
VP Of Staffing phone	[[VP_OF_STAFFING_PHONE]]

^picklistId	OptionId	minValue	maxValue	value	status	external_code	parentOptionId	en_US	Fields in RED required
country		1	1	1	ACTIVE			United States	**Customer Community Info on Picklists:**
country		2	2	2	ACTIVE			China	http://community.successfactors.com/index.php?option=com_kb&page=articles&articleid=2389
degree		1	1	1	ACTIVE			High School or equivalent	
degree		2	2	2	ACTIVE			Technical/Vocational	
degree		3	3	3	ACTIVE			Bachelors Degree	
degree		4	4	4	ACTIVE			Masters Degree	
degree		5	5	5	ACTIVE			Doctorate/PhD	
language		-1	-1	-1	ACTIVE			English	
language		-1	-1	-1	ACTIVE			Chinese	
fluency		-1	-1	-1	ACTIVE			Beginner	
fluency		-1	-1	-1	ACTIVE			Intermediate	
fluency		-1	-1	-1	ACTIVE			Advanced	
yesNo		-1	-1	-1	ACTIVE			Yes	
yesNo		-1	-1	-1	ACTIVE			No	
ethnicity		-1	-1	-1	ACTIVE			Hispanic or Latino	
ethnicity		-1	-1	-1	ACTIVE			White (Not Hispanic or Latino)	

SAMPLE

Document Owner			
SAP SuccessFactors			

Document History			
Author	**Date**	**Version**	**Status**
Andrea Langer	9-May-16	1605	Released

Change History		
Version	**Section Reference**	**Change Description**
1605	Introduction	Updated methodology approach
	Links	Updated Log-in screenshot
	Fields Overview - Profile	Updated screenshots
	Candidate Profile	Added column for "Standard or Custom" definition Added "Help Text" column
	Fields Overview - Application	Added following field ids: - comments - questionRespons
	Candidate Application	Added following fields: - comments - jobsApplied Added column for "Standard or Custom" definition
	Candidate Status	Added "Additional permissions" section
	Offer Letter Tokens - Reference	Added following tokens: - [[INTERVIEW_DATE]] - [[INTERVIEW_TIME]] - [[MICROSITE_LOGO]]

Appendix G: SAP SuccessFactors Recruitment Requisition Configuration Workbook

SAMPLE

SAP SuccessFactors

Recruitment Management
Requisition Configuration Workbook

<Customer Name>

SAMPLE

Project Methodology

Working with Your SuccessFactors Consultant

Together with your Professional Services Consultant you will explore and discuss each of the decision points described throughout the workbook. You will record your decisions in this configuration workbook.

Your SuccessFactors Professional Services Consultant is ready to guide you through the completion of this workbook. You should feel free to ask questions and discuss possibilities. We don't expect that you will complete the workbook on your own or without our guidance. While you own the maintenance of the document so that you can record your business decisions in your own words, we will work on completing the document together.

Once you have identified and recorded the configuration options that meet your needs we will ask you to sign off on this configuration workbook. Your signature indicates that you have completed the process describing how you would like to see SuccessFactors configured by your Professional Services Consultant. Upon receipt of the signed workbook, your Professional Services Consultant can then configure SuccessFactors to match your requests.

The SuccessFactors Empower methodology calls for three cycles, or iterations, where you can complete the workbook to describe your configuration requests and business decisions.

You will use the workbook to record the configuration you have requested. Note that the signoff for configuration "received" happens after the three iterations of making requests and before testing and the final signoff of "production readiness".

SuccessFactors Consultant Responsibilities
Explain the options available in the Configuration Workbook
Provide feedback and suggestions on the best ways to utilize SuccessFactors to accomplish the customer's business objectives
Configure the SuccessFactors system to match the customer requests documented in the Configuration Workbook after sign-off

[CUSTOMER] Responsibilities
Own the Configuration Workbook document
Complete the Configuration Workbook with guidance and explanation from the Consultant, filling in the pale yellow sections
Sign the workbook before the Consultant makes any configuration changes

Note: The Configuration Workbook represents what you are requesting to see in the next iteration of the system. The system will not reflect these requests until after your consultant takes the information in the workbook and configures the system to match it.

Keys to using the Configuration Workbook

The workbook contains the following elements:

• Configuration Item Discussion – Wording following each section heading describing the configuration item and possible choices.
• Customer Input/Decision: . Individual choices are colored with a pale yellow background.
• General Requirements: Area where you may record other comments, requests, or choices relating to configuration
• Business Drivers: Area where you may record business decisions and logic about the configuration element
• Iteration Configuration Modifications: During iterations 2 and 3, this is an area where you may record modifications or clarifications to previous decisions

General Notes

• This Configuration Workbook may make reference to products or services which are not part of your SuccessFactors agreement. Your Professional Services Consultant will help you understand what is available to you and what is not.
• This Configuration Workbook does not contain every possible configuration option. If it did, it would be 50 times bigger than it is! Your Professional Services Consultant will help you explore the unique and less frequently used features of SuccessFactors if they are a fit for your organization.

The following links will be used to access various parts of the application

TEST (Preview)	
Company ID	
SF Application	https://hcm12preview.sapsf.eu
Candidate Portal (default)	https://career12preview.sapsf.eu/career?company=<CompanyId>
Agency Portal (URL is dependent on server that instance is on):	https://agency12preview.sapsf.eu/xi/ui/agency/pages/home.xhtml
RMK Stage Site (if applicable)	

PRODUCTION	
Company ID	
SF Application	https://performancemanager5.successfactors.eu
Candidate Portal (default)	https://career012.successfactors.eu/career?company=<CompanyId>
Agency Portal (URL is dependent on server that instance is on):	https://agency012.successfactors.eu/xi/ui/agency/pages/home.xhtml
RMP Production Site (if applicable)	
RMK Recruiting Dashboard URL (if applicable)	

Username (test users):	aaaa, bbbb, etc.
Password:	[ZZZZ]

1 - **Recruiting Operator Roles:** Provided below is an overview of the standard recruiting operator roles. Roles are used to define visibility, permissions., and approval workflows. Most of these operator role access is based on the role relationships established in the operator fields on the requisition.

2 - **Team Recruiting Roles:** Provided below is an overview of the standard team recruiting operator roles. There is a team role per each operator role.

3 - **Relational Roles:** Provided below is an overview of relationship roles. These roles are used to define visibility and access permissions. And to define the approval workflows.

4 - **Recruiting Groups:** Provided below is an overview of recruiting groups, which are used to refine the users who can be selected to fill a given operator role.

1 Recruiting Operator Roles

There is a pre-determined list of operator fields that are supported, and each operator field has a related designator. The following table shows all operator roles and the corresponding designator. <u>These roles may be labeled to match the client requirements.</u>

Designator Code	Role
O	Requisition form originator
R	Recruiter
G	Hiring manager
S	Sourcer
T	Coordinator
W	Second Recruiter
Q	VP of Staffing
V	Requisition Approver - cannot hold a single use but define baseline permissions for user who are an operator or team field. This is used to define the permissions a user receives if they are viewing the record and the system cannot identify another operator association for example, if the requisition is routed to an unrelated user to approve, that approval user would receive V permissions.

2 Team Recruiting

- Team Recruiting allows more than one person to sit in each job requisition role, meaning more users have access and can perform required actions to a job requisition
- Recruiting roles can be applied to a team of users. A team can comprise of multiple individually picked users and/or groups. Team users will have the same level of access as the primary users for a given role, except in certain cases, such as receiving emails/notifications).
- Default settings for primary and team users can be setup by the admin and are applied each time a job requisition is created

3 Relational Roles

In addition to the operator fields, it is possible to set up permissions and routing to users who have a defined relationship to the operator users. The relationships are derived from relationships established in the BizX user data.

Designator Code	Relationship	Example
xM	Operator's Manager	OM
xMM	Operator's Manager's Manager	GMM
xM+	Operator's Manager Chain	GM+
xD	Operator's Direct Report	QD
xDD	Operator's Direct Report's Report	QDD
xH	Operator's HR Contact	GH
xX	Operator's /Matrix Manager	GX
xC	Operator's Custom Relationship	RC

Most operator designators (R) can be appended with a relationship designator (M) to

4 Recruiting Groups

The Recruiting Groups feature enables the ability to limit which users can be selected for a particular role within a job requisition.

This feature can be especially useful to large organizations, or to companies that really need to restrict the users that can be chosen for a role.

Example: Client wants to limit which users could be chosen as a "Recruiter" to 10 people out of the 8000 system users. A Recruiter group is created containing the names of these 10 people. Then when selecting the 'Find User' button for the Recruiter role, only those users defined in the Recruiter group would be available for selection

Iteration 2 Change	Iteration 3 Change	Recruiting Roles					Learn More about this functionality:
		SF Role	SF Role	Customer Label	Team Role (Y/N)	Comments	The following roles are used to permission read and write access to the job requisition fields. They are also used to route the requisition through the approval process. Review the Requisition Fields Tab for additional information on read/write access by role. Review the Route Map Tab for additional information on the way roles are used in Route Maps.
		O	originator	Originator			
		G	hiringManagerName	Hiring Manager			
		R	recruiterName	Recruiter			
		T	coordinatorName				
		S	sourcerName				
		W	secondRecruiterName				
		Q	vpOfStaffingName				
		V	all approvers				
			Derived Roles (RM, GM, etc.)				

Iteration 2 Change	Iteration 3 Change	Recruiting Groups (These are used to limit who you can select from when populating a role)				Learn More about this functionality:
		Group Name	Members	Role tied to	Comments	Example of Recruiting Group (click)

SAMPLE

Standard permission based options for creating a requisition:

1. Copy from existing requisition
2. Create from "Families & Roles" library
3. Create from blank
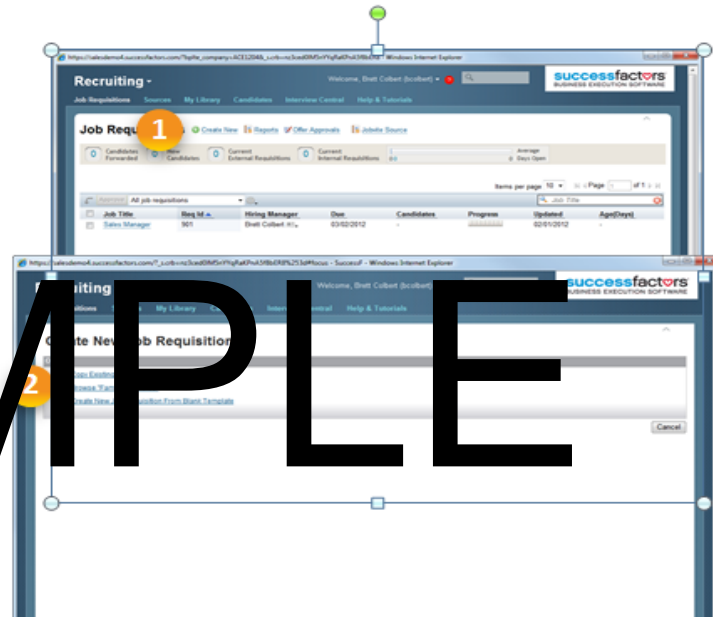
Requisition Template
The Requisition Template holds information that assists in the hiring process and displays the vital position data to managers, staffing personnel, and to a limited extent, to the candidate. You can choose to display the data in various formats and grant reading and writing permission based on the viewer's role in the organization. There are Standard fields that you may utilize and you may also create custom fields.

Requisition Instruction
You can configure instructional text to display for all of your users to view when viewing their list of requisitions:
This is administered in Admin Tools --> Recruiting-->Manage Recruiting Settings

Complete the table in the "**Requisition Fields**" worksheet with the information you would like to display in the requisition form template.
• *Instructional text:* can be used as headers to group fields in to sections or provide instructions on completing the requisition
• *Requisition Field Labels:* field label to be displayed in the req
• *Type of field* : the data type for the field; if picklist, provide values on **Picklist TAB**
• *Required:* fields marked as required will be required to be completed to save or move form to the next step
• *Field Label Consideration:* The standard fields are shared between the requisition templates and any job event templates, so this should be considered when determining field labels, as they are shared across all templates. For example, if events will be configured, instead of calling the job description "Job Description, a better name might be "Description". The same is true if multiple job requisition templates are to be configured.

Sample:

SAMPLE

Standard vs. Custom: There are fields used within the Recruiting Product that are reserved as "standard" fields. Using standard fields is ideal because the product is set-up to use these fields for reporting and other various aspects of standardization. If a standard field is not applicable for usage, then a "custom" field can be utilized. There are some restrictions on the number of custom fields that can be used, such as for tokens (used to populate offer letters, emails, etc.) and as reportable fields. For this reason, a standard field can be repurposed prior to utilizing a custom field. Your Professional Services Consultant will determine whether standard or custom fields are applicable. **Below is a summary of standard fields.**

Filter Fields: These fields can be made searchable on the career sites.

Multi-select Fields: These fields can be used to multi-select values. These fields can be made searchable on the career sites.

Defaulted values: There are certain fields which can contain defaulted values if using Job Code Entity or Job Profile Builder. Your Professional Services Consultant will advise.

Field Types: Each field must be specified with a type (i.e. text). **Below is a summary of field types.**

Standard Field Name	Descriptor	Usage	Type of Field
actualStartDate	Job Actual Start Date	Commonly used to capture the confirmed start date. Commonly used with the standard Offer functionality, and can be either included or not in the requisition.	Date
adCode	Ad Code	Typically used in conjunction with Recruiting Marketing.	Text or Picklist
assessment	Assessment	Enables third-party Assessment Integration.	Derived
bgAccountId	Background Account ID	Used in some third party integrations such as Verifications Inc.	Text or Picklist
bonusPayoutFreq	Bonus Payout Frequency	Commonly used with the standard Offer functionality, and can be either included or not in the requisition.	Enum (built within the requisition)
brand	Brand	Used to define the company brand.	Text or Picklist
candidateHired	Candidate Hired	Produces a status bar next to the numberOpenings field showing the total number of openings and total number remaining.	Date
city	City	Used in some third party integrations such as eQuest. Used in standard recruiting reports.	Text or Picklist
classificationTime	Classification Time	Used in some third party integrations such as eQuest.	Enum
classificationType	Classification Type	Used in some third party integrations such as eQuest.	Enum
commission	Commission	Commonly used with the standard Offer functionality, and can be either included or not in the requisition.	Currency
commissionPack	Commission Package	Commonly used with the standard Offer functionality, and can be either included or not in the requisition.	Text or Picklist
competencies	Competencies	Used to define the competencies that are presented to interviewers on the Interview Assessment form.	Competencies
costCenterId	Background Cost Center ID	Used in some third party integrations such as Verifications Inc.	Text or Picklist
costOfHire	Cost of Hire	No automated cost of hire tracking supported.	Currency
country	Position Location	As with most non-filter fields, this cannot be made searchable by candidates. This may result in needing to define both this country field and a second searchable country field on the Requisition.	Derived (Admin Tools)
currency	Currency	Used for all fields associated with currency, including the Employee Referral program.	Enum (built within the requisition)
custom-date1-5	Job Code Entity Date Fields	Values can be auto populated using Job Code Entity functionality.	Job Code
custom-long1-5	Job Code Entity Integer (no decimal) Fields	Values can be auto populated using Job Code Entity functionality.	Job Code
custom-string1-15	Job Code Entity Text or Picklist Fields	Values can be auto populated using Job Code Entity functionality.	Job Code
dailyOppCost	Operating Costs	Used to define operating costs.	Currency
defaultLanguage	Default Language	Determines the default posting language of the requisition.	Derived
description	Job Code Entity Description Fields	Values can be auto populated using Job Code Entity functionality.	Job Code
division	Division	Values for these fields are automatically assembled based on the values present in the corresponding field on active and inactive users in the BizX user database. Can be made searchable on candidate-facing career sites.	Derived
department	Department	Values for these fields are automatically assembled based on the values present in the corresponding field on active and inactive users in the BizX user database. Can be made searchable on candidate-facing career sites.	Derived
eeoEstablishment	EEO Establishment	Used to define the EEO establishment.	Text or Picklist
eeoGroup	EEO Group	Used to define the EEO group.	Text or Picklist
eeoJobCat	EEO Job Category	Used in standard recruiting reports.	Picklist
erpAmount	Employee Referral	Amount of Employee Referral reward.	Currency
extListingLayout	External Description	Stores the external job description. Can be defaulted if using job profiles.	Rich Text
extTitle	External Position Title	Appears on the external job posting.	Text
facility	Facility	Used to define the facility.	Text or Picklist
filter1-15	Filter Fields	Can be made searchable on candidate-facing career sites.	Picklist
formDueDate	Form Due Date	Used to send requisition approval reminder notifications and cannot be disabled.	Date
function	Function	Used in some third party integrations such as eQuest.	Text w/ quickfind
hiringManagerName recruiterName sourcerName coordinatorName secondRecruiterName vpOfStaffingName	Operator Roles	User lookup fields that provide a view into active BizX user directory. Provides users field level permissions on Requisition and Application. Used in route maps (approval workflow). Supports one user selection per field.	Derived
hiringManagerTeam recruiterTeam sourcerTeam coordinatorTeam secondRecruiterTeam vpOfStaffingTeam	Team Operator Roles	User lookup fields that provide a view into active BizX user directory. Provides users field level permissions on Requisition and Application. Used in route maps (approval workflow). Supports multiple user selection per field.	Derived
id	Requisition ID	System-issued unique numeric identifier for the requisition record.	auto-populated
industry	Industry	Used in some third party integrations such as eQuest.	Enum (Admin Tools)
interviewGuide	Interview Guide	Appears on the interview notification email and in the Interview Central Print and Go Pack.	attachment, multiattachment or multiattachmentselection
intJobDescHeader intJobDescFooter extJobDescHeader extJobDescFooter	Internal/External Header and Footer Fields	Value can be selected from the Header and Footer Templates library. Appears on the Internal and external job posting, respectively. Can be defaulted if using Job Profiles.	richText
intranetPosting corporatePosting agencyPosting	Posting Types	Used for standard internal, external and agency postings.	Bool
intranetPrivatePosting externalPrivatePosting	Private Posting Types	Used for private internal and external postings.	Bool
jobCode	Job Code	Serves as the unique ID that joins Families and Roles data. Can be defaulted if using families/roles or job profiles.	Text
jobGrade	Job Grade	Used to define the job grade.	Text or Picklist
jobLevel	Job Level	Used to define the job level.	Text or Picklist
jobPostLanguage	Posting Language	Enables the recruiting user to post requisitions in multiple languages.	Derived
jobRole	Job Role	Allows user to select a Job Profile.	Job Role
jobStartDate	Job Start Date	Commonly used to capture anticipated start date.	Date
jobType	Job Type	Used to define the job type.	Text or Picklist
location	Location	Values for these fields are automatically assembled based on the values present in the corresponding field on active and inactive users in the BizX user database. Can be made searchable on candidate-facing career sites.	Derived
listingLayout	Internal Description	Stores the internal job description. Can be defaulted if using job profiles.	Rich Text
mfield1-15	Multi-select Fields	Can store multiple values in a single field.	Picklist
nonRecoverableDraw	Non Recoverable Draw	Commonly used with the standard Offer functionality, and can be either included or not in the requisition.	Currency
numberOpenings	Number of Positions	Allows the user to specify the number of openings on a requisition.	Number

Field ID	Display Name	Description	Type
offerExpirationDate	Offer Expiration Date	Commonly used with the standard Offer functionality, and can be either included or not in the requisition. Typically included in the offer letter.	Enum (built within the requisition)
offerExtensionDate	Offer Extension Date	Commonly used with the standard Offer functionality, and can be either included or not in the requisition.	Date
onboardingPackageId	Onboarding Package ID	Used in some third party integrations such as Verifications Inc.	Text or Picklist
<operator>Email <operator>Phone <operator>Fax	Operator Email, Phone, Fax	Each operator field has a correlating derived email field. Auto-populates with the content of the user selected in the operator field. Used to populate the related tokens on the Offer Letter and Recruiting Email templates. Only Email, Phone and Fax data can be autopopulated from the operator's Employee Profile; no other Employee Profile data can be populated on the requisition	Derived
options	Options	Commonly used with the standard Offer functionality, and can be either included or not in the requisition.	Number
optionsPack	Options Package	Commonly used with the standard Offer functionality, and can be either included or not in various locales.	Text or Picklist
originatorName	Originator Name	Automatically captures the value of the user who created the requisition.	Operator
otherBonus	Other Bonus	Commonly used with the standard Offer functionality, and can be either included or not in the requisition.	Text or Picklist
otherCompensation	Other Compensation	Commonly used with the standard Offer functionality, and can be either included or not in the requisition.	Text or Picklist
overtimeRate	Overtime Rate	Commonly used with the standard Offer functionality, and can be either included or not in the requisition.	Currency
packageId	Background Package ID	Used in some third party integrations such as Verifications Inc.	Text or Picklist
positionNumber	Position Number	When a requisition is created from the Succession org chart, Succession Management will populate this field with the appropriate position number.	Text
postalCode	Postal Code	Used in some third party integrations such as eQuest. Used in standard recruiting reports.	Text or Picklist
questions	Questions	Used to define the pre-screen questions presented to a candidate during the apply process.	Questions
recoverableDraw	Recoverable Draw	Commonly used with the standard Offer functionality, and can be either included or not in the requisition.	Currency
relocationCost	Relocation Cost	Commonly used with the standard Offer functionality, and can be either included or not in the requisition.	Currency
relocationPack	Relocation Package	Commonly used with the standard Offer functionality, and can be either included or not in the requisition.	Text or Picklist
requiredTravel	Required Travel	Used to define the travel requirement.	Text or Picklist
salAccepted	Salary Accepted	Commonly used with the standard Offer functionality, and can be either included or not in the requisition.	Currency
salaryBase	Base Salary	Commonly used with the standard Offer functionality, and can be either included or not in the requisition.	Currency
salaryMax	Max Salary	Used to define the target max salary.	Currency
salaryMid	Mid Salary	Used to define the target mid salary.	Currency
salaryMin	Min Salary	Used to define the target min salary.	Currency
salRateType	Salary Rate Type	Used to define the type of salary rate.	Enum (built within the requisition)
signonBonus	Signon Bonus	Commonly used with the standard Offer functionality, and can be either included or not in the requisition.	Currency
stateProvince	State	Used in some third party integrations such as eQuest. Used in standard recruiting reports.	Derived (A...)
status	Status	Used as a way to track current recruiting efforts. Contains any picklist values the client desires to use. Appears in multiple places in the client user interface, such as Job Requisitions tab, reports, and many more.	Picklist
stock	Stock	Commonly used with the standard Offer functionality, and can be either included or not in the requisition.	Number
stockPackage	Stock Package	Commonly used with the standard Offer functionality, and can be either included or not in the requisition.	Text or P...
targetBonusAmount	Target Bonus Amount	Commonly used with the standard Offer functionality, and can be either included or not in the requisition.	Percent
targetBonusPercent	Target Bonus Percent	Commonly used with the standard Offer functionality, and can be either included or not in the requisition.	Percent
title	Internal Position Title	Appears in the product as the clickable link to the requisition record. Appears on the internal job posting. Can be defaulted if using families/roles or job profiles.	Text

Field Types

- text: a single line of alphanumeric text with a 100-character limit (character limit and display are non-configurable.) Each text field can store one value per locale, allowing the user to toggle between languages to enter data in various locales.
- textarea: multiple lines of alphanumeric text with a 256-character limit, displayed as a 100-character wide box (character limit and display are non-configurable.) Each textarea field can store one value per locale, allowing the user to toggle between languages to enter data in various locales.
- date: a date manually entered by user or selected from calendar pull-down. Displays mm/dd/yyyy or dd/mm/yyyy according to user's chosen language pack.
- percent: a percent value with one decimal.
- bool: true or false (shown as a check box), should not be made required because if required, always needs to be checked.
- enum: an enumerated type (shown as a pull-down list) where values are defined in the XML.
- number: a number value.
- currency: a currency value, where currency symbol is determined by the field id "currency".
- picklist: field options come from a picklist defined in admin (shown as a pull-down list).
- derived: a pull-down or "find value" field (depending on length of list) where values are automatically determined from another area of the system.
- instruction: a non-editable field that stretches left-to-right across the screen, used to display messages to users. Cannot be made reportable or writable or an error will result.
- attachment: a field that can have a single document uploaded and attached to it.
- multiattachment: a field that can have multiple documents uploaded and attached to it.
- multiattachmentselection: a field that supports the upload of multiple documents attachments. Acts as a mini library where all documents uploaded are stored for later re-use without requiring they be uploaded again. This means there is an additional check box next to all uploaded files, and that checkbox must be selected in order to actually attach the document to the record.
- richText: alphanumeric lines with about a 32,000 character limit, which includes hidden characters used to define html formatting (character limit and display are non-configurable.) Each richText field can store one value per locale, allowing the user to toggle between languages to enter data in various locales.
- hyperlink: stores a URL and text to display in place of the URL.
- jobCode: field that can have data autopopulated from the Job Classification Foundation Object when a requisition is created via Browse Families and Roles. For more information see the Auto-Populating Data on a New Requisition (Job Code Entry) section of this guide.
- questions: special field type that can only be defined once per requisition template and only on the "questions" field id. Places the pre-screen questions section onto the requisition. For more information see the Requisition Pre-Screen Questions section of this guide.
- competencies: special field type that can only be defined once per requisition template and only on the "competencies" field id. Place the competencies section onto the requisition. For more information see the Interview Central section of this guide.
- operator: special field type that can only be defined on a particular pre-defined list of field ids.
- operatorTeam: special field type that can only be defined on a particular pre-defined list of field ids.

Iteration 2 Change	Iteration 3 Change	SF internal field	Requisition Field Labels	Standard or Custom	Type of Field	Picklist Name (enter values on Picklists Tab)	If Picklist, parent picklist	Required	Mobile Req	Job Description Token	If Custom, Reportable Y/N	Help Text	Notes	Pre-Approved (p / O Originator)
			Template Name:											
		instrInformation	**Requisition Information**	Custom	instruction									
		id	Requisition ID	Standard	text						N/A			Read
		status	Requisition Status	Standard	picklist	status					N/A			Read
		custInstrPosisition	**Job Information**	Custom	instruction									
		title	Job Title (Internal)	Standard	text						N/A			Write
		extTitle	Job Title (External)	Standard	text						N/A			Write
		country	Country	Standard	derived						N/A			Write
		stateProvince	State	Standard	derived						N/A			Write
		division	Division	Standard	derived						N/A			Write
		department	Department	Standard	derived						N/A			Write
		location	Location	Standard	derived						N/A			Write
		costCenterId	Cost Center	Standard	text/picklist						N/A			Write
		numberOpenings	Number of Vacancies	Standard	number						N/A			Write
		candidateHired	Candidates Hired	Standard	number						N/A		Produces status bar next to openings	None
		custaddRep	Additional Hire/Replacement	Custom	picklist	addRep					Yes			Write
		jobCode	Job Code	Standard	text/pic...									Write
		jobLevel	Job Level	Standard	text/pic...	jobL...					N/A			Write
		jobType	Job Type	Standard	text/pic...	job...					N/A			Write
		jobGrade	Job Grade	Standard	text/pic...	jo...ad					N/A			Write
		custInstrCompensation	**Compensation Inf...**	Custom	instruct...									
		currency	Currency	Standard	enum						N/A			Write
		salaryMin	Minimum Annual Base Sal...	Standard	...urrenc...						N/A			Write
		salaryMax	Maximum Annual Base Sala...	Standard	...rrenc...						N/A			Write
		relocationPack	Relocation	Standard	...list	yesNo								Write
		custInstrRoles	**Roles**	Custom	instruction									
		hiringManagerName	Hiring Manager	Standard	operator						N/A			Write
		recruiterName	Recruiter	Standard	operator						N/A			Write
		recruiterTeam	Recruiting Team	Standard	operatorTeam						N/A			Write
		sourcerName	Sourcer	Standard	operator						N/A			Write
		vpOfStaffingName	VP of Staffing	Standard	operator						N/A			Write
		secondRecruiterName	Second Recruiter	Standard	operator						N/A			Write
		coordinatorName	Coordinator	Standard	operator						N/A			Write
		custInstrJobPosting	**Job Posting Information**	Custom	instruction									
		jobPostLanguage	Post Job in Language(s)	Standard	text						N/A			Read
		defaultLanguage	Default Language	Standard	text						N/A			Read
		filter1	Posting Country	Standard	picklist	postingCountry					N/A			Write
		filter2	Job Category	Standard	picklist	postingCategory					N/A			Write
		listingLayout	Internal Description	Standard	richText									Write
		extListingLayout	External Description	Standard	richText									Write
		competencies	Competencies	Standard	competencies									Write
		questions	Questions	Standard	questions									Write
		interviewGuide	Interview Attachments	Standard	multiattachment									Write
		erpAmount	Employee Referral Amount	Standard	currency									Write
			Posting Details (not on Requisition Screen)											
		intranetPosting	Internal Posting	Standard	bool						N/A			Write
		corporatePosting	External Posting	Standard	bool						N/A			Write
		agencyPosting	Agency Posting	Standard	bool						N/A			Write
		intranetPrivatePosting	Internal Private Posting	Standard	bool						N/A			Write

^picklistId	OptionId	minValue	maxValue	value	status	external_code	parentOptionId	en_US	Fields in RED required
status		1	1	1	ACTIVE			Pending Approval	**Customer Community Info on Picklists:**
status		2	2	2	ACTIVE			Open	http://community.successfactors.com/index.php?option=com_kb&page=articles&articleid=2389
status		3	3	88888.0	ACTIVE			On Hold	
status		4	4	99999.0	ACTIVE			Cancelled	
status		5	5	99999.0	ACTIVE			Filled	
addRep		-1	-1	-1	ACTIVE			Additional Hire	
addRep		-1	-1	-1	ACTIVE			Replacement	
postingCountry		-1	-1	-1	ACTIVE			United States	
postingCountry		-1	-1	-1	ACTIVE			China	
postingCategory		-1	-1	-1	ACTIVE			Administrative	
postingCategory		-1	-1	-1	ACTIVE			Finance	
postingCategory		-1	-1	-1	ACTIVE			Human Resources	
postingCategory		-1	-1	-1	ACTIVE			Information Technology	

SAMPLE

		Requisition Route Map (Approval Workflow)
Iteration 2 Changes	Iteration 3 Changes	
		Requisition Form Template Name (e.g. Requisition Sales):	
		Route Map Name (e.g. Requisition Sales Map):	

	Workflow Step	Text
	Step Type	Modify
	Name	Create Requisition
	Name after completion	Requisition sent to manager
	Mouseover	Requisition created
	Type (Role)	O (originator)
	Entry and/or Exit Users	O (originator)
	Exit Button	Send to Manager
	Exit Page Text (next to Exit button)	This requisition will be sent to the hiring manager for approval

	Workflow Step	Text
	Step Type	Modify
	Name	Hiring Manager Approval
	Name after completion	Requisition Approved
	Mouseover	
	Type (Role)	G (Hiring Manager)
	Entry and/or Exit Users	Hiring Manager
	Exit Button	Send to Recruiter
	Exit Page Text (next to Exit button)	This requisition will be sent to the Recruiter

	Workflow Step	Text
	Step Type	Modify
	Name	Recruiter Review
	Name after completion	Recruiter Review
	Mouseover	
	Type (Role)	R (Recruiter)
	Entry and/or Exit Users	R (Recruiter)
	Exit Button	Job Approved
	Exit Page Text (next to Exit button)	By clicking 'Job Approved' this role will be able to sourced.

Learn More about this functionality:

Example of Routemap
Admin -->Form Template Administration-->Routing Maps

Roles on the routemap

Step Name

Exit Button Text

mouseover text

Exit button text
Step Exit Text

			Interview Rating Scale		

		Scale Name	Sample		
		Value	Label	Description	A rating scale is a tool used during the interview assessment process to quantify a interviewer's perspective on performance.
		1	Unsatisfactory	Unsatisfactory	
		2	Below Expectations	Below Expectations	
		3	Meets Expectations	Meets Expectations	Admin Tools --> Company Settings --> Rating Scales
		4	Exceeds Expectations	Exceeds Expectations	
		5	Outstanding	Outstanding	

(Left vertical headers: Iteration 2 Changes, Iteration 3 Changes)

		Scale Name	Client	
		Value	Label	Description
		1		
		2		
		3		
		4		
		5		

Sample

SAMPLE

Recruiting

Job Requisitions   Events   Sources   My Library   Candidates   Interview Central   Help   Tutorials

Welcome, Lorna Iokamoto (lokamoto)

successfactors
BUSINESS EXECUTION SOFTWARE

Interview Assessment: Senior Engineer (SE)

Save   Cancel

	Adam Anderson	Billie Jean Womack	Hannah Summers	Kathy Smith
Communication				
Integrity/Ethics				
Listening Skills				
Problem Solving/Analysis				
Product Knowledge				
Sense of Urgency				
Teamwork				
Summary	3.71	3.00	4.14	4.29

Interview Rating Scale – hover displays "Label"

Interview notes   Interview notes   Interview notes   Interview notes

Overall Rating

Stack Ranker

Summary

1 Kathy Smith 4.29
2 Hannah Summers 4.14
3 Adam Anderson 3.71
4 Billie Jean Womack 3.00

		Career Sites/Microsites					
Iteration 2 Changes	Iteration 3 Changes	Site Name	Welcome Message	Signed In Homepage: Overall Description	Signed In Homepage: Job Search Description	Signed In Homepage: Manage Jobs Description	Signed In Homepage: My Profile Description
		External		Welcome to the Career Opportunities site, {0}! We have several tools to help you find your next new job.	Take a look at our current job openings. You can search, filter, and sort jobs to find the right one for you.	You can track and manage the jobs you've found. Use our organizational tools to save jobs to review later, see the status of jobs you applied to, and create job alerts so you'll be notified when relevant jobs are posted.	Create a personal profile that saves your background experience and business information so recruiters can easily find you when new jobs come up. The more details you add, the more likely the job will match your interests. Also, your profile is automatically attached to any job you apply to.
		Internal		N/A	N/A	N/A	N/A

Learn More about this functionality:

Microsites
In addition to the Candidate Portal, you may configure additional m[...]se are manag[...]
in Admin Tools. They allow for targeted bra[...]ng of candi[...]e sit[...] to specific j[...]fairs, [...]eb
portals, etc.

Admin Tools -->Recruiting-->Manage Recruiting Sites

SAMPLE

Iteration 2 Changes	Iteration 3 Changes	Career Site Config			
		EXTERNAL CANDIDATE SITE SEARCH FILTERS			
		Job Search Filtering Fields	**Display in Search Results? (Y/N)**	**Label**	**Picklist Id**
		Key Words	Yes		N/A
		Requisition Number	Yes		N/A
		Department	No		N/A
		Division	No		N/A
		Location	No		N/A
		Posted within the last N days	Yes		N/A
		filter1	Yes	Country	postingCountry
		filter2	Yes	Job Category	postingCategory
		filter3			
		filter4			
		filter5			
		filter6			
		filter7			
		filter8			
		filter9			
		filter10			
		filter11			
		filter12			
		filter13			
		filter14			
		filter15			
		INTERNAL CANDIDATE SITE SERACH FILTERS			

	Job Search Filtering Fields	Display in Search Results? (Y/N)	Label	Picklist Id
	Role to Display	**No**	**Role:**	
	Key Words	Yes		*N/A*
	Requisition Number	Yes		*N/A*
	Department	Yes		*N/A*
	Division	Yes		*N/A*
	Location	Yes		*N/A*
	Posted within the last N days	Yes		*N/A*
	filter1	Yes	Country	postingCountry
	filter2	Yes	Job Category	postingCategory
	filter3			
	filter4			
	filter5			
	filter6			
	filter7			
	filter8			
	filter9			
	filter10			
	filter11			
	filter12			
	filter13			
	filter14			
	filter15			

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CONCEPTUAL CANDIDATE SEARCH FEATURE

"Conceptual Search" is a way to search information that broadens the search results by including concepts that are similar bas proximities.   At this time, it is only available to customers on the DC4/AZ server, and in US English only

| | **Enable Conceptual Search?** | | Yes/No | |

		Minimum Days to Post An attribute can be set, so that a position must be posted for a specific length of days, and then the system will not allow a us the posting until those days have passed.	
	Minimum Days to Post?	[X] days	
		Minimum Internal Days to Post This attribute can be set, so that the requisition must be posted for a specific number of days internally before external p	
	Minimum Days to Post Internal?	[X] days	

SAMPLE

Parent Picklist Id
N/A
N/A
N/A
N/A
N/A
N/A

SAMPLE

Parent Picklist Id
N/A
N/A
N/A
N/A
N/A
N/A

ed on like concepts and

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Candidate Search

| Keyword and Item Search | Conceptual Search |

Candidate is external or internal ⇕

and **candidate's resume matches** :

Use Conceptual Cand

candidate to:

1. A Job Requ
2. Another ca

and candidate's resume matches :

- (•) A job requisition   581
- ( ) Another candidate's resume
- ( ) A block of text

Add: Keyword

2.   Another ca
3.   A block of t

Candidate Search

Keyword and Item Search | Conceptual Search

Candidate is [external or internal ⌄]

and candidate's resume matches :

- ( ) A job requisition
- (•) Another candidate's resume   Judy M. Hoffman
- ( ) A block of text

Add: Keyword

Candidate Search

Keyword and Item Search

Candidate is [external or i

and candidate's resume m

-) A job requisition
-) Another candidate's r
- (•) A block of text

  Whether it be a res
  large block of text h

Add: Keyword

er to manually remove

osting is allowed.

Question Library

Questions can be created in multiple ways. A Question Library can be uploaded as a comma-separated version (.csv) file or as an XML file (.xml). Question
Admin Tools page. A question can also be created when creating a new requisition. Uploading a .csv file is the fastest way to get many questions into the

Sample CSV layout:

Question Type	Question Category	Parent Competency ID		Question Description
QUESTION_MULTI_CHOICE	Basic Screening		Are you authorized to work in the US?	

SAMPLE

s can also be entered through the system.

Rating Scale	Answer Options	Expected Right Answer	Expected Correct Answer	GUID	Locale in which this copy of the question is translated	Parent Response
	Yes,No	0				

Configuration Workbook Sign-Off

The intent of this sign-off is to close the requirements gathering phase.

The <CUSTOMER> team has reviewed this configuration workbook and agreed to the following:

The configuration workbook accurately reflects <CUSTOMER>'s requirements as they relate to <MODULE> and the associated processes
The SuccessFactors proposed solution addresses these requirements as they are understood by the project team
By moving forward with these requirements, <CUSTOMER> understands that any requests for future edits and changes could impact the project start date

Throughout a project, new information may surface that may necessitate a change in business requirements or a change in the technical environment. These changes may result in a change in project scope and therefore estimated level of effort, project timeline or solution features. Change Orders may result in adjustments to this estimate and an increase in the estimated costs.

be initiated by either a <CUSTOMER> or SuccessFactors team member. Due to the complexity of some change orders, SuccessFactors may bill <CUSTOMER> for the time required to scope and estimate the requested change. SuccessFactors will inform <CUSTOMER> of the estimate if a charge will apply.

Iteration 1

Signed <CUSTOMER>:   Date:

_____   _____

Iteration 2

Signed <CUSTOMER>:   Date:

_____   _____

Iteration 3

Signed <CUSTOMER>:   Date:

_____   _____

Document Owner
SAP SuccessFactors

Document History			
Author	**Date**	**Version**	**Status**
Andrea Langer	9-May-16	1605	Released

Change History		
Version	**Section Reference**	**Change Description**
1602	Introduction	Updated methodology approach
	Links	Updated Log-in screenshot
	Fields Overview - Requisition	Added following standard fields: - \<operator>Email, \<operator>Phone, \<operator>Fax - formDueDate
	Requisition Fields	Updated permissions Replaced field type (operatorTeam) Added missing picklist IDs Added candidateHired field Updated Button Permissions

Appendix H: SAP SuccessFactors Recruitment Other Configuration Workbook

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SAP SuccessFactors

Recruitment Management
Other Configuration Workbook

<Customer Name>

SAMPLE

Project Methodology

Working with Your SuccessFactors Consultant

Together with your Professional Services Consultant you will explore and discuss each of the decision points described throughout the workbook. You will record your decisions in this configuration workbook.

Your SuccessFactors Professional Services Consultant is ready to guide you through the completion of this workbook. You should feel free to ask questions and discuss possibilities. We don't expect that you will complete the workbook on your own or without our guidance. As you own the main substance of the document, so that you can record your business decisions in your own words, we will plan on completing the document together.

Once you have identified and recorded the configuration options that meet your needs we will ask you to sign-off on this configuration workbook. Your signature indicates that you have completed the process of describing how you would like your SuccessFactors configured by your Professional Services Consultant. Upon receipt of the signed workbook, your Professional Services Consultant can then configure SuccessFactors to match your requests.

The SuccessFactors Empower methodology calls for three cycles, or iterations, where you can complete the workbook to describe your configuration choices and business decisions.

You will use the workbook to record the configuration you have requested. Note that the signoff for configuration "received" happens after the three iterations of making requests and before testing and the final signoff of "production readiness".

SuccessFactors Consultant Responsibilities
Explain the options available in the Configuration Workbook
Provide feedback and suggestions on the best ways to utilize SuccessFactors to accomplish the customer's business objectives
Configure the SuccessFactors system to match the customer requests documented in the Configuration Workbook after sign-off

[CUSTOMER] Responsibilities
Own the Configuration Workbook document
Complete the Configuration Workbook with guidance and explanation from the Consultant, filling in the pale yellow sections
Sign the workbook before the Consultant makes any configuration changes

Note: The Configuration Workbook represents what you are requesting to see in the next iteration of the system. The system will not reflect these requests until after your consultant takes the information in the workbook and configures the system to match it.

Keys to using the Configuration Workbook

The workbook contains the following elements:

• Configuration Item Discussion – Wording following each section heading describing the configuration item and possible choices.
• Customer Input/Decision: . Individual choices are colored with a pale yellow background.
• General Requirements: Area where you may record other comments, requests, or choices relating to configuration
• Business Drivers: Area where you may record business decisions and logic about the configuration element
• Iteration Configuration Modifications: During iterations 2 and 3, this is an area where you may record modifications or clarifications to previous decisions

General Notes

• This Configuration Workbook may make reference to products or services which are not part of your SuccessFactors agreement. Your Professional Services Consultant will help you understand what is available to you and what is not.
• This Configuration Workbook does not contain every possible configuration option. If it did, it would be 50 times bigger than it is! Your Professional Services Consultant will help you explore the unique and less frequently used features of SuccessFactors if they are a fit for your organization.

Agency Access

The Agency Access Portal is a separate portal for 3rd party recruiters/agencies to view jobs posted for agencies and forward their candidates to these jobs. Jobs can be posted to specific agencies on the job posting page. The agency logins are managed in Admin. Each agency and agency user must be set up in Ac... in green are required)

Do you want to set up agencies to use the Agency Portal?	Yes / No										

	Agency Name	Agency ID	Address	Phone	Email	Duration (days ownership of new candidates)	Reset Ownership clock with new submission?	Candidate Self-Ownership	Resume Submission	User Name	User Email	Agreement Text

Admin > Managing Recruiting > Setup Agency Access:

Logging into ...gency P...

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Agency ID:

Login ID:

Password:

This is comprised of the company ID of the instance and the Agency ID that was entered when the agency was created. These must be entered in separated by a colon, as follows: <Company ID>:<Agency ID>

This is the email address of the agency user

This was entered when the agency user account was created

Email Communications Overview

1. **System Automated Emails** – generated by the system and are automatically sent based on events the employee/manager performs. Many are shared between modules.

2. **Recruiting email triggers** – specific to the recruiting product and are triggered and automatically sent based on circumstances in the system

3. **Ad-Hoc Emails -** client specific recruiting email templates

   a. Can be triggered based on candidate workflow status

   b. Can be triggered based on specific recruiting "triggers"

   c. Can be triggered manually by the recruiting user (such as when distributing and offer letter).

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System Automated Email Notifications

The recruiting module is designed to automate the notifications of certain The text of these notifications is configurable to your specific needs. A brief description and the default text for each notification are outlined below. To edit the text of a notification, access the E-Mail Notification Templates Settings link in Admin Tools > Company Settings > E-Mail Notification Templates Settings.

Note: Tokens may be specific and/or not applicable for use in the email body or subject line. Must test specific business case use.

		Notification	Description	Enable Yes/No	Default Text	Client Text	Can use for recruiting only (if using other modules)?
Iteration 2 Changes	Iteration 3 Changes						
		Document Creation Notification	Document creation notification will be sent to a user when a form instance is created on his/her behalf.		**SUBJECT:** [[DOC_TITLE]] Creation Notice **BODY:** Please be advised that the document [[DOC_TITLE]] has been created for you by [[SENDER]] and is now available in your PerformanceManager Inbox folder. You can access this document at the following URL: [[DOC_ACCESS_URL]]	**SUBJECT:** **BODY:**	Yes
		Document Routing Notification	Document routing notification will be sent to a user when a form instance is available in his/her Inbox.		**SUBJECT:** [[DOC_TITLE]] Routing Notice **BODY:** Please be advised that the document [[DOC_TITLE]] is now available in your PerformanceManager Inbox folder for your [[DOC_ACTION]]. This document was last with [[SENDER]] and [[IS_WAS_DUE_ON]]. Comments from [[SENDER]] are: [[DOC_COMMENT]] You can access this document at the following URL: [[DOC_ACCESS_URL]]	**SUBJECT:** **BODY:**	Yes
		Document Completed Notification	Document completed notification will be sent when the document is completed.		**SUBJECT:** [[DOC_TITLE]] Completed Notice **BODY:**	**SUBJECT:** **BODY:**	Yes
		Document Due Notification	Document due notification will be sent to a user when the documents in his/her Inbox is approaching the due day.		**SUBJECT:** [[DOC_TITLE]] Due in [[NO_OF_DAYS]] days **BODY:** Please be advised that the document [[DOC_TITLE]] [[IS_WAS... You can access this document at the following URL: [[DOC_ACCESS_URL]]	**SUBJECT:** **BODY:**	No
		Document Late Notification	Document late notification will be sent to a user when the documents in his/her Inbox is already late for completion.		**SUBJECT:** [[DOC_TITLE]] is late [[NO_OF_DAYS]] days **BODY:** Please be advised that the document [[DOC_TITLE]] [[IS_WAS_DUE_ON]]. You can access this document at the following URL: [[DOC_ACCESS_URL]]	**SUBJECT:** **BODY:**	
		Employee Referral Program Candidate added to General pool notification	Emailed to candidate when he/she is added to candidate database via Employee Referral Program.		**SUBJECT: You have been added to candidate database** **BODY:** Hello [[RECRUITING_CANDIDATE_FULLNAME]]. This is an automated email to notify you that you have been submitted to our Candidate database via the Employee Referral Program by [[RECRUITING_ERP_REFERREE_NAME]]. Here is your username: [[RECRUITING_CANDIDATE_USERNAME]] Please click the link below to reset your password and search for jobs. [[RECRUITING_ERP_GENERAL_POOL_URL]]	**SUBJECT:** **BODY:**	Yes
		Employee Referral Program Candidate referred to a job requisition (new candidate)	Emailed to candidate when he/she is referred to a job requisition		**SUBJECT: You have been referred to a job requisition** **BODY:** Hello [[RECRUITING_CANDIDATE_FULLNAME]]. This is an automated email to notify you that you have been submitted to the [[RECRUITING_JOB_EXTERNAL_TITLE]] job via the Employee Referral Program by [[RECRUITING_ERP_REFERREE_NAME]]. Here is your username: [[RECRUITING_CANDIDATE_USERNAME]] Please click the link below to be taken to the job. [[RECRUITING_ERP_JOBREFERRAL_URL]]	**SUBJECT:** **BODY:**	Yes
		Employee Referral Program Candidate referred to a job requisition (existing candidate)	Emailed to candidate when he/she is referred to a job requisition.		**SUBJECT: You have been referred to a job requisition** **BODY:** Hello [[RECRUITING_CANDIDATE_FULLNAME]]. This is an automated email to notify you that you have been submitted to the [[RECRUITING_JOB_EXTERNAL_TITLE]] job via the Employee Referral Program by [[RECRUITING_ERP_REFERREE_NAME]]. Here is your username: [[RECRUITING_CANDIDATE_USERNAME]] Please click the link below to be taken to the job. [[RECRUITING_ERP_JOBREFERRAL_URL]]	**SUBJECT:** **BODY:**	Yes

Notification	Description		Default	Custom	
New Recruiting Operator Notification (used with "Requisition Reassign" feature)	New Recruiting Operator Notification will be sent to selected recruiting operators when a job requisition is reassigned or goes to approved state.		**SUBJECT: New Job Requisition for Your Review** **BODY:** Please be advised that requisition number [[JOB_REQ_ID]] for a(n) [[JOB_REQ_NAME]] is now available in the Recruiting Inbox for your review. To find the form, log into your SuccessFactors account and select Recruiting.	**SUBJECT:** **BODY:**	Yes
Recruiting Interviewer Notification	This message is sent to employees to notify them of a recruiting candidate interview assignment	Yes	**SUBJECT: Interview: [[RECRUITING_APPLICANT_NAME]] for [[RECRUITING_JOB_TITLE]] on [[RECRUITING_INTERVIEW_DATE]]** **BODY:** Dear [[RECRUITING_INTERVIEWER_NAME]], You have been selected to interview: [[RECRUITING_APPLICANT_NAME]] for [[RECRUITING_JOB_TITLE]] on [[RECRUITING_INTERVIEW_DATE]] The interview team is: [[INTERVIEWER_INTERVIEW_TEAM_TABLE]] Job Description: [[JOBREQ_DESC_INT]] You will be assessing [[CANDIDATE_FIRST_NAME]] on the following competencies: [[COMPETENCIES_TABLE]]	**SUBJECT:** **BODY:**	Yes
Recruiting Event Interviewer Notification	This message is sent to employees to notify them of a recruiting event group interview assignment.	Yes	**SUBJECT: Recruiting event interview assignment** **BODY:** Hello [[RECRUITING_INTERVIEWER_NAME]], You have been scheduled as an interviewer for the recruiting event [[EVENT_NAME]], on [[RECRUITING_INTERVIEW_DATE]]. To prepare for the event, or to enter your assessments of the candidates, log in to the SuccessFactors system and follow the link from your To-Do list: [[LOGIN_URL]]	**SUBJECT:** **BODY:**	Yes
Recruiting Manual Candidate Notification	This message is sent to candidates who are created manually to notify them about account details.		**SUBJECT: You have been entered into the recruiting candidate database.** **BODY:** Hello [[RECRUITING_CANDIDATE_FULLNAME]], This is an automated email to notify you that you have been entered into our candidate database by [[RECRUITING_OPERATOR_N...]] You may have submitted your resume to an employee or recruiter at a company event, or it may have been submitted by an external recruiter for consideration for a particular... Your login in... [[RECRUITING_C...URL]] Username: [[RECRUITING_CANDIDATE_US...ME]] Pass... [[RECRUITING_CANDIDATE_PASS...RD]] Please... at your earliest convenience and ch... your pe... from this rando... ...ated val... Please c... from [[...ATOR_N...]] at [[RECRUITING...RL]] if you ...ny questions.	**SUBJECT:** **BODY:**	Yes
Recruiting Imminent Candidate Purge Notification	Emailed to candidates that there profile is about to be purged on PURGE_DATE due to inactivity.		**SUBJECT: Your Profile is about to be purged.** **BODY:** Hello [[RECRUITING_CANDIDATE_FULLNAME]], This is an automated email to notify you that your profile will be purged from our recruiting candidate database on [[PURGE_DATE]] due to inactivity, In keeping with local rules and regulations, if you wish to keep your profile active, to maintain access to your job applications and to be considered for future positions. log in to your account prior to [[PURGE_DATE]] by following the link below. Your login information for: [[RECRUITING_CANDIDATE_SITE_URL]]	**SUBJECT:** **BODY:**	Yes
Recruiting Agency	Emailed to agencies when a new requisition is posted.		**SUBJECT:** New Job Posting from [[COMPANY_NAME]]: [[JOB_TITLE]] **BODY:** There is a new job posted for your agency, [[AGENCY_NAME]], from [[COMPANY_NAME]] [[JOB_TITLE]]. Click [[AGENCY_POSTING_URL]] to view this job posting. You are receiving this email because you have turned on email notifications for new job postings. To modify this, go to Options under [[AGENCY_PORTEL_URL]].	**SUBJECT:** **BODY:**	Yes
Share Candidate Search	Email to selected persons with whom you want to share candidate search		**SUBJECT:** Sharing Candidate Search **BODY:** I've sent the candidate search [[RECRUITING_CANDIDATE_SEARCH_NAME]] to you. It will appear in your saved searches list when you search for candidates, and you can run it, edit it or delete it without effecting my search. [[SENDER_USER_NAME]]	**SUBJECT:** **BODY:**	Yes

Recruiting Email Triggers

Triggered based on circumstances in the system that send an email automatically. Similar to the system email notification templates, but are specific to recruiting

Tied to Email Templates and can include CC and BCC
To edit the set up of a trigger, Admin > Recruiting > Recruiting Email Triggers.

Note: Tokens may be specific and/or not applicable for use in the email body or subject line. Must test specific business case use.

Iteration 2 Changes	Iteration 3 Changes	Category	Trigger Name	Trigger Point	Enable (Yes/No)	Email Template Name (add template on AdHoc Emails tab)	Recipients: (Role on Requisition/Employee Name and/or Email Address)	CC	BCC
		Agency	Applicant Submitted to New Req by Agency	When an agency successfully forwards an applicant to a requisition					
		Agency	New Agency User Alert	A new agency user is created by the Admin					
		Agency	Agency User Re-Activated	When an agency user state is changed from inactive to active, send this email template					
		Application	Application Updated by Recruiting Operator	A non-candidate user has edited and changed data on the application					
		Application	Job Requisition Deleted (Candidate)	Notification to Candidate when a job requisition is deleted					
		Candidate	Application Updated By Candidate	The candidate has edited and changed data on the application after (not including) the initial apply					
		Candidate	Candidate Merge Notification	Emailed to a candidate whose multiple accounts are merged					
		Candidate	Candidate Merge Notification - Master	Emailed to a candidate whose multiple accounts are merged					
		Candidate	Career Site Password Reset for external candidates	This ___ to candidates when ___ reset their pass___					
		Candidate	Job Alert Expired Notification	___ message is sen___ en a Job Aler___ ___ ___ ified for a long period of time					
		Candidate	Job Alert Invalidated Notification	This mess___ when the filte___ specified in a Job A___ ___ no lon___					
		Candidate	Job Alert Notification	___ message is sent ___ ording ___ ___ s___le defined ___ Job Al___					
		Candidate	Invite Candidate to Apply	This ___ to a for___ed candidate once they've been invited to apply for a Job					
		Career	Email Job to Friend	A candidate uses the Email Job to Friend feature in the career site		[Can include Header, Email and Footer Templates]:			
		Career	Welcome / Thanks for Creating Account	The external candidate has successfully created an active user account					
		Interview	Interview Assessments Outstanding	[Indicate days]: If an interview assessment form has been incomplete for [X] days following the interview date, send email every [X] days. If no interview date is specified, this email does not trigger. Send a maximum of [X] reminder emails.					
		Interview	Upcoming Interview Notification	Notification to interviewers about upcoming interviews					
		Interview	Candidate Self-Schedules Interview	Sent to candidates who have been invited to interview, contains login and interview time information.					
		Interview	Interview Confirmation to Candidate	Sent to a candidate when they have confirmed an interview					
		Interview	Interview Confirmation to Organizers	Sent to the organizers when a candidate confirms an interview					
		Interview	Interview Confirmation to Interviewers	Sent to the interviewers when a candidate confirms an interview					

SAMPLE

		Type	Notification	Description				
		Interview	Interview Delete Notification	Notification to all participants when an Interview is deleted by an assigned user				
		Interview	Interviewer Availability Notification	Email request for interviewers to add availability for a certain time				
		Interview	Interview Cancellation to Organizers	Sent to the organizers when a candidate declines an interview				
		Interview	Booked Interview Cancellation to Interviewers	Sent to the interviewers when a candidate cancels a booked interview				
		Interview	Booked Interview Cancellation to Candidate	Sent to candidate to confirm they have canceled their interview				
		Interview	Booked Interview Cancellation to Organizers	Sent to the organizers when a candidate cancels a booked interview				
		Interview	Booked Interview Reschedule Email to Candidate	Email sent to candidate to confirm they have rescheduled their interview				
		Interview	Candidate Interview Response Reminder	Email sent to candidates in the status of "Not Booked" who have been sent an invitation to interview but have not responded yet				
		Interview	Booked Candidate Interview Update	Sent to booked candidates if details of the interview are changed, for example, location or attachments				
		Interview	Cancel Interview Notification	Sent to all participants when an interview is cancelled by interviewers due to unavail...				
		Offer	Offer Approved by All Approvers	An offer has been approved by all approvers and has no further approvals pending				
		Offer	Offer Received An Approval	An offer has been approved by an approver who is not the last approver, and has been passed to the next approver in queue				
		Offer	Offer Initiated (Sent For Approval)	An offer has been sent to the first approver in queue				
		Offer	Online Offer Accepted by Candidate	Email will be sent when candidate chooses "Accept Offer" or "Accept & eSign"				
		Offer	Online Offer Declined by Candidate	Email will be sent when candidate chooses "Decline Offer"				
		Offer	Online Offer Cancelled by Sender Candidate Notification	Candidates can be notified when online offers are cancelled				
		Offer	Online Offer Cancelled by Sender	Recruiting users can be notified when online offers are cancelled				
		Requisition	Requisition Posting Expiration Upcoming	[Indicate days]: A job requisition has one or more postings within [X] days of expiration				
		Requisition	Home Page Tile Stalled Requisition Nudge	A user clicks the "nudge" feature on the Home Page Tile on the V12 homepage	Yes			
		Requisition	Requisition Re-opened	The job requisition has changed from a closed state to an approved state				
		Requisition	Requisition Closed	The job requisition has changed from an approved state to a closed state				
		Requisition	Requisition Changed	The job requisition data has been updated				
		Requisition	Requisition Posted	The job requisition has postings (internal, external, internal private, external private, agency/agencies, eQuest) that has been newly initiated by an operator.				
		Requisition	Job Requisition Deleted (Internal user)	Notification to Internal user when a job requisition is deleted				
		Requisition	Approved job requisition restored	Notification to be sent out on restoring an approved job requisition				
		Requisition	Import Job Role Tag Notification Success	Emailed the successful status of Job Role Tag import	Yes			
		Requisition	Import Job Role Tag Notification Failure	Emailed the failure status of Job Role Tag import.	Yes			

Ad Hoc Email Templates

In addition to the system automated notifications, additional recruiting email templates can be developed. These can be used for emails sent to the candidate or tied to changes in candidate status that can be automatically sent to the candidate or the roles involved when the status changes. To edit the text of a notification, access the Manage Recruiting Email Templates link in Admin Tools > Recruiting > Manage Recruiting Email Templates.

Note: Tokens may be specific and/or not applicable for use in the email body or subject line. Must test specific business case use.

Template Name	Email Subject	Body of Email	Notes
Standard Templates			
Invite Candidate to Apply	You have been invited to apply to [[RECRUITING_JOB_TITLE]]	[[RECRUITING_APPLICANT_NAME]], you have been offered a chance to apply for the job: [[RECRUITING_JOB_TITLE]] posted on [[INVITE_JOB_POSTING_DATE]]. Please click on the URL below to apply! [[INVITE_LINK]]	**Used if "Invite to Apply" email trigger is enabled**
Candidate Merge Notification	Your candidate profiles have been merged	[[RECRUITING_CANDIDATE_FULLNAME]], You have been identified as having multiple accounts in our system. Your accounts have been merged and your username is: [[RECRUITING_CANDIDATE_USERNAME]]. We encourage you to visit our website and update your profile information to ensure it is current. Thank you, [[SENDER]]	**Used if "Candidate Merge Notification" email trigger is enabled**
Candidate Merge Notification	Your candidate profiles have been merged	[[RECRUITING_CANDIDATE_FULLNAME]], You have been identified as having multiple accounts in our system. Your accounts have been merged and your username is: [[RECRUITING_CANDIDATE_USERNAME]]. We encourage you to visit our website and update your profile information to ensure it is current. Thank you, [[SENDER]]	**Used if "Candidate Merge Notification" email trigger is enabled**
Candidate Merge Notification - Master	Your candidate profiles have been merged	[[RECRUITING_CANDIDATE_FULLNAME]], You have been identified as having multiple accounts in our system. Your accounts have been merged and your username is [[RECRUITING_MASTER_CANDIDATE_USERNAME]]. We encourage you to visit our website and update your profile information to ensure it is current. Thank you, [[SENDER]]	**Used if "Candidate Merge Notification" email trigger is enabled**
Career Site E-Mail Notification	Account created	Hello [[CAREERSITE_USER_NAME]], Your account has been created, you can login and you have activated your account by accessing the url below. Please click this link to activate your account:	**Used if "Welcome / Thanks for Creating Account" email trigger is enabled**
Career Site Password Reset for external candidates	Password Reset	Hello [[CAREERSITE_USER_NAME]], Please click on the URL below to change your password. [[LOGIN_URL]]	**Used if "Career Site Password Reset for external candidates" email trigger is enabled**
Job Alert Expired Notification	Job Alert Expired Notification: [[JOB_ALERT_NAME]]	Your [[JOB_ALERT_NAME]] Job Alert expired. It has been inactivated because it has been unmodified for a long period of time. Please log in to the career site to active it manually.	**Used if "Job Alert Expired Notification" email trigger is enabled**
Job Alert Invalidated Notification	Job Alert Invalidated Notification: [[JOB_ALERT_NAME]]	Your [[JOB_ALERT_NAME]] Job Alert is no longer valid because some of the filters are no longer visible. [[ERRORS]] You can log in to the career site and modify the Job Alert and re-activate it.	**Used if "Job Alert Invalidates Notification" email trigger is enabled**
Job Alert Notification	Job Alert Notification: [[JOB_ALERT_NAME]]	There are [[TOTAL_JOBS]] jobs ([[NEW_JOBS]]) matching your criteria for [[JOB_ALERT_NAME]] Here are the most recent jobs: [[JOB_LIST]] You are receiving this email because you registered on our Web site for [[JOB_ALERTS_LINK]]. If you prefer not to receive emails like this in the future, please click on this link: [[JOB_ALERTS_UNSUBSCRIBE]]	**Used if "Job Alert Notification" email trigger is enabled**
Client Specific Templates			

			All Notifications (Yes/No)		
Token	Field Name	Token Description		Specific Notifications	Notification Path

Recruiting Email Supported Tokens

Token	Field Name	Token Description	All Notifications (Yes/No)	Specific Notifications	Notification Path
[[CANDIDATE_FIRST_NAME]]	firstName	**Candidate First Name**	No		
[[CANDIDATE_LAST_NAME]]	lastName	**Candidate Last Name**	No		
[[CANDIDATE_FULL_NAME]]	candidateName	**Candidate Full Name**	No		
[[CANDIDATE_EMAIL]]	contactEmail	**Candidate Email**	No		
[[JOB_REQ_ID]]	id	**Job Requisition Number**	No		
[[JOB_REQ_TITLE]]	title and extTitle	**Job Title**	No		
[[JOB_REQ_LOCATION]]	location	**Location (of Job Requisition location)**	No		
[[HIRING_MGR_FULL_NAME]]	hiringManagerName	**Hiring Manager Full Name (G Role/Hiring Manager Name on the Requisition)**	No		
[[RECRUITER_FULL_NAME]]	recruiterName	**Recruiter Full Name (R Role/Recruiter Name on the Requisition)**	No		
[[SOURCER_FULL_NAME]]	sourcerName	**Sourcer Full Name (S Role/Sourcer Name on the Requisition)**	No		
[[TODAY]]		**Today's date (e.g. January 31, 2009)**	No		
[[LOGO]]		**Company's Logo**	No		
[[ORIGINATOR_FULL_NAME]]	originatorName	**Originator Full Name (O Role/Originator on the Requisition)**	No		
[[SECOND_RECRUITER_FULL_NAME]]	secondRecruiterName	**Second Recruiter Full Name (W Role/Second Recruiter Name on the Requisition)**	No		
[[VP_STAFFING_FULL_NAME]]	vpOfStaffing	**VP Of Staffing Full Name (Q (Q Role/VP of Staffing Name on the Requisition)**	No		
[[COMPANY_NAME]]		**Company Name**	No		
[[SENDER]]		**Sender User**	No		
[[SIGNATURE]]		**Company Signature**	No		
[[CAREER_SITE_URL]]		**Career Site URL**			
[[CAREER_SITE_FORGOT_PASSWORD_URL]]		**Career Site Forgot Password URL**	No		
[[LOGIN_URL]]		**Login URL**	No		
[[APPLICATION_ID]]		**Application ID**			
[[CANDIDATE_ID]]		**Candidate ID**	No		
[[APPLICATION_PAGE_URL]]		**Application Page URL**	No		
[[CANDIDATE_OFFER_URL]]		**Candidate Offer URL (used in place of Offer eSignature)**	No		
[[APPLICATION_ASSESSMENT_PACKAGE_TITLE]]		**Assessment Package Title**		Assessment Integration Notifications	
[[APPLICATION_ASSESSMENT_PROVIDER_URL]]		**Assessment Provider URL**	No	Assessment Integration Notifications	
[[AGENCY_POSTING_URL]]		**Agency Posting URL**	No	Agency Account Notifications	
[[AGENCY_PORTAL_URL]]		**Agency Portal URL**	No	Agency Account Notifications	
[[AGENCY_NAME]]		**Agency Name**	No	Agency Account Notifications	
[[AGENCY_ID]]		**Agency Id**	No	Agency Account Notifications	
[[AGENCY_USER]]		**Agency User**	No	Agency Account Notifications	
[[AGENCY_OWNERSHIP_STATUS]]		**Agency Ownership Status**	No	Agency Account Notifications	
[[INTERVIEW_SCHEDULING_INTERVIEW_TITLE]]		**Interview Scheduling Interview Title**	No	Interview Scheduling Notifications	Admin Tools > Recruiting > Recruiting Email Triggers
[[INTERVIEW_SCHEDULING_CONFIRM_INTERVIEW_URL]]		**Interview Scheduling Candidate Interview URL**	No	Interview Scheduling Notifications	Admin Tools > Recruiting > Recruiting Email Triggers
[[INTERVIEW_SCHEDULING_INTERVIEW_TYPE]]		**Interview Scheduling Interview Type**	No	Interview Scheduling Notifications	Admin Tools > Recruiting > Recruiting Email Triggers
[[INTERVIEW_SCHEDULING_INTERVIEW_LOCATION]]		**Interview Scheduling Interview Location**	No	Interview Scheduling Notifications	Admin Tools > Recruiting > Recruiting Email Triggers
[[INTERVIEW_SCHEDULING_INTERVIEW_LENGTH]]		**Interview Scheduling Interview Length**	No	Interview Scheduling Notifications	Admin Tools > Recruiting > Recruiting Email Triggers
[[INTERVIEW_SCHEDULING_INTERVIEW_DATE]]		**Interview Scheduling Interview Date**	No	Interview Scheduling Notifications	Admin Tools > Recruiting > Recruiting Email Triggers
[[INTERVIEW_SCHEDULING_INTERVIEWER_NAMES]]		**Interview Scheduling Interviewer Names**	No	Interview Scheduling Notifications	Admin Tools > Recruiting > Recruiting Email Triggers
[[ATTACHMENT_RESUME]]		**Application Resume**	No	The purpose of this token is that is allows the end user, when forwarding candidates, to select whether or not they wish to include the resume and cover letter as a zip file in the forward candidate email notification	
[[ATTACHMENT_COVER_LETTER]]		**Application Cover Letter**	No	The purpose of this token is that is allows the end user, when forwarding candidates, to select whether or not they wish to include the resume and cover letter as a zip file in the forward candidate email notification	
[[AGENCY_PWD_RESET_URL]]		**Agency Password Reset**	No	New Agency User Alert Agency User Re-Activated	Admin Tools > Recruiting > Recruiting Email Triggers
[[AGENCY_USER_ID]]		**Agency User ID**	No	New Agency User Alert Agency User Re-Activated	Admin Tools > Recruiting > Recruiting Email Triggers
[[RECRUITING_CANDIDATE_USERNAME]]		**Candidate User Name**	No	Candidate Merge Notification Candidate Merge Notification - Master	Admin Tools > Recruiting > Recruiting Email Triggers
[[RECRUITING_NONMASTER_CANDIDATE_USERNAME]]		**Candidate Previous User Name (if merged)**	No	Candidate Merge Notification Candidate Merge Notification - Master	Admin Tools > Recruiting > Recruiting Email Triggers
[[RECRUITING_MASTER_CANDIDATE_USERNAME]]		**Candidate Primary User Name (if merged)**	No	Candidate Merge Notification Candidate Merge Notification - Master	Admin Tools > Recruiting > Recruiting Email Triggers

Token	Name	Required	Notification	Location
[[CAREERSITE_USER_NAME]]	Candidate Career Site User Name	No	Career Site Password Reset for External Candidates	Admin Tools > Recruiting > Recruiting Email Triggers
[[LOGIN_URL]]	Career Site Login	No	Career Site Password Reset for External Candidates	Admin Tools > Recruiting > Recruiting Email Triggers
[[JOB_ALERT_NAME]]	Job Alert Name	No	Job Alert Notification Job Alert Expired Notification Job Alert Invalidated Notification	Admin Tools > Recruiting > Recruiting Email Triggers
[[TOTAL_JOBS]]	Job Alert Total Jobs	No	Job Alert Notification	Admin Tools > Recruiting > Recruiting Email Triggers
[[NEW_JOBS]]	Job Alert New Jobs	No	Job Alert Notification	Admin Tools > Recruiting > Recruiting Email Triggers
[[JOB_LIST]]	Job Alert List	No	Job Alert Notification	Admin Tools > Recruiting > Recruiting Email Triggers
[[JOB_ALERTS_LINK]]	Job Alert Hyperlink	No	Job Alert Notification	Admin Tools > Recruiting > Recruiting Email Triggers
[[JOB_ALERTS_UNSUBSCRIBE]]	Job Alert Unsubscribe	No	Job Alert Notification	Admin Tools > Recruiting > Recruiting Email Triggers
[[RECRUITING_APPLICANT_NAME]]	Candidate Name (Invite to apply)	No	Invite Candidate to Apply	Admin Tools > Recruiting > Recruiting Email Triggers
[[RECRUITING_JOB_TITLE]]	Job Title (Invite to apply)	No	Invite Candidate to Apply	Admin Tools > Recruiting > Recruiting Email Triggers
[[INVITE_REFERRER]]	Referral Link	No	Invite Candidate to Apply	Admin Tools > Recruiting > Recruiting Email Triggers
[[INVITE_JOB_POSTING_DATE]]	Job Posting Date	No	Invite Candidate to Apply	Admin Tools > Recruiting > Recruiting Email Triggers
[[INVITE_LINK]]	Invite to Apply Link	No	Invite Candidate to Apply	Admin Tools > Recruiting > Recruiting Email Triggers
[[INTERVIEWER_FULL_NAME]]	Interview Name	No	Upcoming Interview Notification	Admin Tools > Recruiting > Recruiting Email Triggers
[[INTERVIEW_DATE]]	Interview Date	No	Upcoming Interview Notification	Admin Tools > Recruiting > Recruiting Email Triggers
[[INTERVIEW_TEAM_TABLE]]	Interview Team Members Names	No	Upcoming Interview Notification	Admin Tools > Recruiting > Recruiting Email Triggers
[[COMPETENCIES_TABLE]]	Interview Competencies	No	Upcoming Interview Notification	Admin Tools > Recruiting > Recruiting Email Triggers
[[JOBREQ_DESC_INT]]	Job Description	No	Upcoming Interview Notification	Admin Tools > Recruiting > Recruiting Email Triggers
[[PREVIOUS_APPROVER]]	Previous Offer Approver	No	Offer Approved by All Approvers Offer Received An Approval	Admin Tools > Recruiting > Recruiting Email Triggers
[[CURRENT_APPROVER]]	Current Offer Approver	No	Offer Initiated (Sent for Approval) Offer Received An Approval	Admin Tools > Recruiting > Recruiting Email Triggers
[[NEXT_APPROVER]]	Next Offer Approver	No	Offer Initiated (Sent for Approval) Offer Received An Approval	Admin Tools > Recruiting > Recruiting Email Triggers
[[OFFER_EXTENDED_DATE]]	Date of Offer	No	Online Offer Accepted by Candidate Online Offer Declined by Candidate	Admin Tools > Recruiting > Recruiting Email Triggers
[[OFFER_RESPONSE]]	Offer Response	No	Online Offer Accepted by Candidate Online Offer Declined by Candidate	Admin Tools > Recruiting > Recruiting Email Triggers
[[OFFER_RESPONSE_DATE]]	Offer Response Date	No	Online Offer Accepted by Candidate Online Offer Declined by Candidate	Admin Tools > Recruiting > Recruiting Email Triggers
[[OFFER_DECLINE_COMMENT]]	Offer Decline Comment	No	Online Offer Declined by Candidate	Admin Tools > Recruiting > Recruiting Email Triggers
[[BEGIN_REPEAT]] and [[END_REPEAT]] (mandatory)	Posting Begin and End	No	Requisition Posted	Admin Tools > Recruiting > Recruiting Email Triggers
[[DOC_COMMENT]]	Document Comment	No	The user will be able to enter comments during the step change (i.e. approval) that are included in the email notification sent to the next step owner, and will be included in the requisition audit trail.	Admin Tools > Company Settings > E-mail Notification Templates Settings
[[DOC_TITLE]]	Document Title	No	Document Routing Notification	Admin Tools > Company Settings > E-mail Notification Templates Settings
[[RECRUITING_CANDIDATE_FULLNAME]]			ERP Candidate added to general pool ERP Candidate referred to a requisition (new candidate) ERP Candidate referred to a requisition (existing candidate)	Admin Tools > Company Settings > E-mail Notification Templates Settings
[[RECRUITING_ERP_REFERREE_NAME]]		No	ERP Candidate added to General pool ERP Candidate referred to a requisition (new candidate) ERP Candidate referred to a requisition (existing candidate)	Admin Tools > Company Settings > E-mail Notification Templates Settings
[[RECRUITING_CANDIDATE_USERNAME]]		No	ERP Candidate added to General pool ERP Candidate referred to a requisition (new candidate) ERP Candidate referred to a requisition (existing candidate)	Admin Tools > Company Settings > E-mail Notification Templates Settings
[[RECRUITING_ERP_GENERAL_POOL_URL]]		No	ERP Candidate added to General pool ERP Candidate referred to a requisition (existing candidate)	Admin Tools > Company Settings > E-mail Notification Templates Settings
[[RECRUITING_JOB_EXTERNAL_TITLE]]		No	ERP Candidate referred to a requisition (new candidate) ERP Candidate referred to a requisition (existing candidate)	Admin Tools > Company Settings > E-mail Notification Templates Settings
[[RECRUITING_INTERVIEWER_NAME]]		No	Recruiting Interviewer Notification Recruiting Event Interviewer Notification	Admin Tools > Company Settings > E-mail Notification Templates Settings
[[INTERVIEWER_FIRST_NAME]]			Recruiting Interviewer Notification	Admin Tools > Company Settings > E-mail Notification Templates Settings
[[INTERVIEWER_LAST_NAME]]		No	Recruiting Interviewer Notification	Admin Tools > Company Settings > E-mail Notification Templates Settings
[[RECRUITING_APPLICANT_NAME]]		No	Recruiting Interviewer Notification	Admin Tools > Company Settings > E-mail Notification Templates Settings
[[RECRUITING_INTERVIEW_DATE]]		No	Recruiting Interviewer Notification Recruiting Event Interviewer Notification	Admin Tools > Company Settings > E-mail Notification Templates Settings
[[RECRUITING_INTERVIEW_NOTE]]		No	Recruiting Interviewer Notification	Admin Tools > Company Settings > E-mail Notification Templates Settings
[[INTERVIEWER_INTERVIEW_TEAM_TABLE]]		No	Recruiting Interviewer Notification	Admin Tools > Company Settings > E-mail Notification Templates Settings
[[COMPETENCIES_TABLE]]		No	Recruiting Interviewer Notification	Admin Tools > Company Settings > E-mail Notification Templates Settings
[[EVENT_NAME]]		No	Recruiting Event Interviewer Notification	Admin Tools > Company Settings > E-mail Notification Templates Settings
[[RECRUITING_OPERATOR_NAME]]		No	Recruiting Manual Candidate Creation Notification	Admin Tools > Company Settings > E-mail Notification Templates Settings
[[RECRUITING_OPERATOR_EMAIL]]		No	Recruiting Manual Candidate Creation Notification	Admin Tools > Company Settings > E-mail Notification Templates Settings
[[RECRUITING_CANDIDATE_SITE_URL]]		No	Recruiting Manual Candidate Creation Notification Recruiting Imminent Candidate Purge Notification	Admin Tools > Company Settings > E-mail Notification Templates Settings
[[RECRUITING_CANDIDATE_FULLNAME]]		No	Recruiting Manual Candidate Creation Notification Recruiting Imminent Candidate Purge Notification	Admin Tools > Company Settings > E-mail Notification Templates Settings
[[RECRUITING_CANDIDATE_USERNAME]]		No	Recruiting Manual Candidate Creation Notification	Admin Tools > Company Settings > E-mail Notification Templates Settings
[[RECRUITING_CANDIDATE_PASSWORD]]		No	Recruiting Manual Candidate Creation Notification	Admin Tools > Company Settings > E-mail Notification Templates Settings
[[PURGE_DATE]]		No	Recruiting Imminent Candidate Purge Notification	Admin Tools > Company Settings > E-mail Notification Templates Settings
[[RECRUITING_CANDIDATE_SEARCH_NAME]]		No	Share Candidate Search	Admin Tools > Company Settings > E-mail Notification Templates Settings
[[SENDER_USER_NAME]]		No	Share Candidate Search	Admin Tools > Company Settings > E-mail Notification Templates Settings

Iteration 2 Changes	Iteration 3 Changes	Data Purging Settings Different countries have different data retention requirements for candidate data. In SuccessFactors you can specify in number days of inactivity when candidate profile data should be deleted and when candidate application data should be anonymized.		
		Country	Candidate Profile Number of Days of Inactivity	Candidate Application Number of Days of Inactivity

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Recruiting Settings

Recruiting Settings can be managed in Admin. There you can define global settings for the recruiting application. To change the recruiting settings, access the Manage Recruiting Settings link in Admin > Manage Recruiting > Manage Recruiting Settings

Settings Name	Value	Enable
Company Contact Information - Enter global company contact details which could be provided to external job postings		
Street Address		
City		
Country		
State/Province		
Postal Code		
Phone		
Fax		
Candidate Response Email		
Return Email Address Information - Specify the return email address information that will be displayed to candidates and agency users on email correspondence		
Make return email address editable in 'Email Candidate'		Yes/No
Return address for system-generated e-mails to candidates		
Display Name		
Delay Emails to Disqualified Candidates (in hours)		Yes/No
Don't send emails older than (in days)		
Candidate Profile Settings		
Set background elements to highlight current value (based on start/end date)		Yes/No
Resume Parsing		Yes/No
Applicant Profile Settings		
Hide skipped statuses in application audit trail		Yes/No
Enable forwarding with application data intact		Yes/No
Time to Hire		Yes/No
Time to Hire Start Date - (Identify the most appropriate Start Date selection, per the menu)		
Time to Hire End Date - (Identify the most appropriate End Date selection, per the menu)		
Exclude time spent in hold statuses		Yes/No
Exclude time spent in deleted statuses		Yes/No
Automatically disposition non-selected in-progress applicants on closed requisitions to status 'Requisition Closed'		Yes/No
Automatically disposition in-progress applicants on closed requisitions to status 'Hired On Other Requisition'		Yes/No
When number of remaining openings becomes less than one. Automatically close requisitions with status		"Closed"
Hide standard job application Social Security number from Ad Hoc Reports		Yes/No
Hide standard job application Date of Birth from Ad Hoc Reports		Yes/No
Allow users to optionally provide comments on application status change		Yes/No
Enable Comment Visibility on the Jobs Applied Portlet		Yes/No
Candidate Search Settings		
Warn users of delay when searching by candidate activity using a custom date range greater than [X] days		[X] days
External to Internal Candidate Profile Conversion Settings -discuss with SuccessFactors if interested in utilizing		
Job Requisition		
Use originator's preferred language as the default language of a new job requisition		Yes/No
Allow forwarding of candidates to unposted jobs		Yes/No
Enable private postings of jobs		Yes/No
Show job description to Applicants even after the job posting is taken down		Yes/No
Disable "Add Role" on Forward to Requisition dialogue		Yes/No
Allow users to view pre-approved requisitions without regard to route map status		Yes/No
Disable Department, Division, and Location filter options on Job Requisition list		Yes/No
Do not allow users to select inactive Divisions, Departments and Locations in the career site job search or when editing requisitions		Yes/No
Use Job Profiles in Requisitions		Yes/No
On the v12 Home page, alert hiring managers if their requisitions haven't been advanced for [x] days		[X] days
Time to Fill		Yes/No
Time to Fill Start Date - (Identify the most appropriate Start Date selection, per the menu)		
Time to Fill End Date - (Identify the most appropriate End Date selection, per the menu)		
Exclude time spent in hold statuses		Yes/No
Exclude time spent in deleted statuses		Yes/No
Age of Requisition		Yes/No
Age of Requisition Start Date - (Identify the most appropriate Start Date selection, per the menu)		
Exclude time spent in hold statuses		Yes/No
Exclude time spent in deleted statuses		Yes/No
Allow reopen of closed requisitions even if number of remaining openings is less than 1		Yes/No
Job Requisition Template Default Status	Template Name(s)	Yes/No
Default Status for Pre-Approved jobs		"Pending Approval"
Default Status for Approved jobs		"Open"
Interview Central		
Enable document attachments for interview notes		Yes/No
Grant Interviewers the access level of [Role]		[Role]
Enable Interview Scheduling		Yes/No
Set virtual interview locations (appropriate list of virtual locations to use for interviews)		Yes/No (need values)
Set face-to-face interview locations (appropriate list of face-to-face locations to use for interviews)		Yes/No (need values)
Candidate Summary		
Display Interview Result and Overdue Interviews in candidate summary page		Yes/No
Offer Approval		
Enable Job Code Entry fields to be editable		Yes/No
Do not pull updated job application and job requisition field data on the offer approval when an offer approval is edited or a new version is created		Yes/No
Offer Letter		
Set date format to be displayed in Offer Letters		**Default** e.g. 06/23/2014 **Long** e.g. June 23, 2014 **Full** e.g. Monday, June 23, 2014
Allow candidate to accept offers online		Yes/No
Enable electronic signature for offer letters	Requires client DocuSign contract	Yes/No
Allow candidate to email job requisition operator		Yes/No
Select an operator who will receive emails from candidate		(from all applicable roles)
Instructions		
Instructions above job requisitions list (Text can be formatted in Rich Text Editor or HTML input)		
Deletion of Attachments: When a candidate's profile is deleted due to privacy choices or an old candidate is purged from the system:		
Delete any documents that are attached to the candidate's profile		Yes/No
Delete any documents that are attached to the application		Yes/No
Delete any documents that are attached to the offer letter		Yes/No
Delete any documents that are attached to the offer approval		Yes/No
Delete any documents that are attached to the correspondence email		Yes/No
Deletion of Correspondence: When a candidate's profile is deleted due to privacy choices or an old candidate is purged from the system:		
Delete all the email and print correspondence available for candidate		Yes/No
Delete all the offer letters available for candidate		Yes/No
Anonymize all the request/response info of background check available for candidate		Yes/No
Anonymize all the request/response info of onboarding available for candidate		Yes/No
Assessment Integration:		
Reinitiate Candidate Assessment Settings		
Enable reinitiating assessment if no acknowledgment is received for any request in last [X] hour(s)		
Field Validation		
Enable field level validation on standard Phone Number fields (cellPhone & homePhone) on Candidate Profile & Application		Yes/No
Enable field level validation on standard Social Security Number field on Application		Yes/No
Short Message Service (SMS)		
Enable SMS messaging	Requires client SAP mobile contract	
Career Site		
Enable Apply with LinkedIn for External Career Site (requires "Complete Profile before Application" and "Enhanced Job Search UI")		Yes/No
Enable Apply with LinkedIn for Internal Career Site (requires "Complete Profile before Application" and "Enhanced Job Search UI")		Yes/No
Disable CAPTCHA on the External Career Site for Email Job to Friend		Yes/No
Disable CAPTCHA on the External Career Site for Account Creation		Yes/No
"Application Submit Page" - Internal Career Site		
Please select "Default Message" to display "Your Application has been sent. Thank you!" in candidate's language. To create a different message, please select "Custom Message", and define the message for all active languages.		default/custom
If custom, please provide text (Text can be formatted in Rich Text Editor or HTML input)		
"Application Submit Page" - External Career Site		
Please select "Default Message" to display "Your Application has been sent. Thank you!" in candidate's language. To create a different message, please select "Custom Message", and define the message for all active languages.		default/custom
If custom, please provide text (Text can be formatted in Rich Text Editor or HTML input)		

Social Networking Integration via Twitter

SuccessFactors currently offers an integration with Twitter. If this is enabled, jobs that are posted on the external career site and/or eQuest will automatically post jobs on twitter. The Twitter (tweet) job posting will follow this text format (only in English):

"(Company_Name) is hiring a (Job_Req_Title) - (TinyURL to career site posting)"

When a User clicks the Twitter (tweet) link, the URL will take her/him to the specific job posting page on the default external career site.

Requirement: An existing Twitter account. Only one Twitter account is supported.

The Twitter account username/password are configured in Admin > Manage Twitter Integration Settings.

Iteration 2 Changes	Iteration 3 Changes			
		Do you want to enable the Twitter integration?	**Yes/No**	
		Twitter Account Username	**Twitter Account Password**	**Comments**

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Recruiting Management to Employee Central (RM to EC) Integration

The Recruiting to Employee Central Integration (RCM to EC) provides a seamless experience of transitioning an External Candidate record into a new Employee account, with the issuance of an Employee ID. For customers using both RCM 2.0 and EC 2.0, they have the ability to hire an external candidate and automatically sync them into their Employee Central database.

The data from Recruiting Management will need to be mapped directly to the equivalent fields in Employee Central. The RM to EC Data Mapping tab will capture this field mapping.

Have you purchased EC? If yes, are you live?	Yes/No	
Will you utilize the RM to EC Integration?	Yes/No	

Candidate Status to trigger the sending to EC (Hireable Status)	Candidate Status for Hired candidate to be placed into by EC upon completion of New Hire process (Hired Status)	Comments
Ready to Hire		

(Left margin vertical labels: Iteration 2 Changes, Iteration 3 Changes)

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RM to EC Integration - Data Mapping

This table is to capture the data elements that will be mapped from RM to EC with the EC fields in pink and the RM fields in blue. A good place to start is to list out the fields in EC that are required as part of the hiring process and then any other data that is captured in RM that you would like to populate into EC. Then you can map the RM fields to this list of EC fields. For any gaps (fields that are required in EC but not captured in RM), you will need to determine if this data will be entered manually during the hiring process or if additional fields need to be configured in RM to capture this data.

		EC Target Field	ECField Name	Required in EC (Y/N)	EC Field Type	RM SF Field ID	RM Field Name	RM Field Type	Manual/Mapped	Where Mapped From:	Notes:
		employmentInfo.start-date	Hire Date	Yes	date	jobStartDate	Start Date	date	Mapped	offerletter	
		personalInfo.last-name	Last Name	Yes	text	lastName	LastName	text	Mapped	application	
		personalInfo.middle-name	Middle Name	Yes	text	middleName	middleName	text	Mapped	application	
		personalInfo.first-name	First Name	Yes	text	firstName	First Name	text	Mapped	application	
		emailInfo.email-address.P	Email	yes	text	contactEmail				application	
		phoneInfo.phone-number.H	Home phone			homePhone				application	
		phoneInfo.phone-number.C	Mobile phone			cellPhone				application	
		homeAddress.address1.home	address			address				application	
		homeAddress.city.home	city			city				application	
		homeAddress.state.home	County/State			State				application	
		homeAddress.zip-code.home	Postal code			zip				application	
		homeAddress.country.home	Country			country				application	
		jobInfo.job-title	Job title			title				jobrequisition	
		employmentInfo.custom-string2	gender			referralSource				application	

(Left side rotated column headers: Iteration 2 Changes, Iteration 3 Changes)

supported fields

personalInfo
personInfo (for date_of_birth)
emailInfo (multiple email can be sent simply by mapping a different key for each entityType)
phoneInfo (multiple phone can be sent by simply mapping a different key for each entityType)
imInfo (multiple im info can be sent by simply mapping a ___ key for each entityTy___)
recurringPayComponents (multiple can be sent by map___ng a differe___ key for each e___ ___e)
nonRecurringPayComponents (multiple can be sent ___ mapping a diff___nt key for ea___ ___en___Type)
addressInfo (support only ONE type "home")
jobInfo
compInfo
employmentInfo

Appendix I: SAP SuccessFactors Onboarding Configuration Workbook

SAMPLE

SAP SuccessFactors

Opportunity Management | Prepare | Explore | Realize | Deploy

Standard Onboarding Configuration

Client name

AccountID:

Kick-off Date:

Project Contacts

Customer Project Manager	
Project Consultant	
Services Sales Engagement Manager	

Execution is the difference ™

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Introduction

Dear CLIENT,

Your configuration workbook is the primary vehicle for the documentation of requirements and design details related to your custom SuccessFactors system. This workbook is your tool to enable your organization to capture the configuration decisions and the drivers for those business decisions, as well as to enable your consultant to configure the SuccessFactors Onboarding system for you. If you would like to change your SuccessFactors configuration in the future, you and your other team members will be able eto understand how the system is configured as well as the logic used in the making of the configuration decisions. During the development phase of the project, this document will be used to guide and constrain the scope of development work and allow the SF development and your consultant to work efficiently and effectively.

Working with Your SuccessFactors Consultant

Together with your Professional Services Consultant you will explore and discuss each of the decision points described throughout the workbook. You will record your decisions in this configuration workbook.

Your SuccessFactors Professional Services Consultant is ready to guide you through the completion of this workbook. You should feel free to ask questions and discuss possibilities. We don't expect that you will complete the workbook on your own or without our guidance. While you own the maintenance of the document so that you can record your business decisions in your own words, we will work on completing the document together.

Once you have identified and recorded the configuration options that meet your needs we will ask you to sign-off on this configuration workbook. Your signature indicates that you have completed the process of describing how you would like to see SuccessFactors configured by your Professional Services Consultant. Upon receipt of the signed workbook, your Professional Services Consultant can then configure SuccessFactors to match your requests.

The SuccessFactors methodology calls for three cycles, or iterations, where you can complete the workbook to describe your configuration requests and business decisions.

You will use the workbook to record the configuration you have requested. Note that the signoff for configuration "received" happens after the three iterations of making requests and before testing and the final signoff of "production readiness".

SuccessFactors Consultant Responsibilities
Explain the options available in the Configuration Workbook
Provide feedback and suggestions on the best ways to utilize SuccessFactors to accomplish the customer's business objectives
Configure the SuccessFactors system to match the customer requests documented in the Configuration Workbook after sign-off

CLIENT Responsibilities
Own the Configuration Workbook document
Complete the Configuration Workbook with guidance and explanation from the Consultant, filling in the the necessary data required
Sign the workbook before the Consultant makes any configuration changes

Note: The Configuration Workbook represents what you are requesting to see in the final product. The system will not have these requests until after your consultant takes the information in the workbook and configures the system to match it.

Keys to Using the Configuration Workbook

The workbook contains the following elements:

• Configuration Item Discussion: Wording following each section heading describing the configuration item and possible choices.
• Customer Input/Decision: Individual choices are colored with a pale yellow background.
• General Requirements: Area where you may record other comments, requests, or choices relating to configuration
• Business Drivers: Area where you may record business decisions and logic about the configuration element

General Notes

• This Configuration Workbook may make reference to products or services which are not part of your SuccessFactors agreement. Your Professional Services Consultant will help you understand what is available to you and what is not.
• This Configuration Workbook does not contain every possible configuration option. If it did, it would be 50 times bigger than it is! Your Professional Services Consultant will help you explore the unique and less frequently used features of SuccessFactors if they are a fit for your organization.   • This Configuration Workbook represents what you are requesting to see in your Onboarding site; this is not an iterative process. Once this document is completed and signed, any changes to the report may affect the timeline and may result in additional costs.

Requirement Documentation

This workbook along with several other documents will be used to gather and document the requirements for configuration.

These document may be used by the client to develop training and test scenarios. They should be maintained and kept up to date through the course of the project and beyond.
Typically these documents are shared by the project team via a Customer SharePoint site or JAM.

Requirement Documents include:
    This configuration workbook
    Leading Practices document
    US or International Presentation

SAMPLE

Standard Onboarding Configuration Questions

Process Flow Questions (Using the Activate Methodology and Leading Practices guide lines the fields highlighted in green will be enabled by default)

General Company Information

Number of Employees:	
Number of Locations:	
Will you be using Onboarding for countries other than the U.S.?	
If yes, please list countries.	
Average Number of new hires per year:	

Localization

Will you be using languages other than English?	
If yes, please list all languages to be used within Onboarding.	
Will various languages be used in all workflows?	

At Home and On-Site Options

Will the New Hire complete his/her paperwork at home or on-site?	
Does the company have remote employees? - US Compliance	

Remote Employees: Defined as a new hire that is not coming to the corporate location to show their I-9 physical documentation to a company representative. Rather, they will take and show their documents to a notary public or a company designee. It is up to the client to designate a company designee, or to allow a notary public. In both situations, the responsibility of the person is to look at the documents and confirm that they are authentic, and to sign Section 2 of the I-9. Different states have different rules on whether or not the notary is required to sign a separate notary form in addition to Section 2. It is the client's responsibility to understand their state's rules regarding this requirement. Finally, the client must designate the location to which the completed, notarized (if appropriate) form(s) are faxed.

I-9 Form- US Compliance

Will you be using the I-9 form?	Yes
Does the exact same business address appear on all your I-9 documents, regardless of whether or not you have multiple locations?	
If "Yes", what is the business name? (Corporate level 1)	
If "Yes", what is the business address? (Corporate level 1)	
If "No", and the name of the business should change based on corporate structure (e.g. division, department or location-corporate levels), please indicate what data defines which business address should be used.	

I-9 3 Business Day- US Compliance

If the I-9 documentation is out of compliance for an employee, would you like to have the ability to track and be notified?	Yes

I-9 Reverification- US Compliance

Will you be using I-9 Reverification?	Yes
NOTE: tracking outstanding Reverifications for hires that were completed in legacy onboarding systems in not in scope for standard implementations. Additional scope and custom integration required if you wish to include those	

E-Verify: Includes up to 5 MOU's (Memorandum of Understanding) - US Compliance

Will you be using E-Verify?	Yes
If you have multiple locations within a state, will you use E-Verify at all locations or only select locations? Please specify.	
Will you have separate MOUs for different entities under your company's corporate umbrella?	
Are you currently using e-Verify to verify employee's eligibility? *Note: You must terminate your existing e-Verify account prior to using Onboarding for e-Verify; a new MOU must be signed. Timing for this will be discussed later in the design process.*	
See "E-Verify" tab to complete the E-Verify questionnaire	

SSN or other country specific identification number

Is a SSN for employees required for payroll purposes?	Yes

State Withholding - US Compliance

Will you be using State Withholding? *Note: SF does not support State Tax Reciprocity.*	Yes
Please List all State Names if not turning on for all states	

W-4 - US Compliance

Would you like to turn on Federal Tax Withholding?	Yes

Standard Forms- Samples attached in PDF

Will you be using the Onboarding standard hiring forms? These include forms such as Direct Deposit, Pay Card, New Employee Summary, EEO, and Emergency Contacts. *Note: These forms are not customizable. You can see samples int he PDF attached.*	

Direct Deposit

Will you be using the Standard Direct Deposit Panels?	Yes
Must all employees use direct deposit?	
Is a "live" check an option in conjunction with direct deposit?	
Will the Standard Direct Deposit panel work for you?	
Will you be activating the ONB to EC integration for Direct Deposit? (Recommended if you have EC) Note, If yes, you must have People Profile 3 enabled in EC.	

PayCard

Will you be using the PayCard Panels?	
Please Provide the PayCard vendor name.	
Would you like to use the standard PayCard form?	

Emergency Contact

Will you be using the standard Emergency Contact Panel?	Yes
Would you like the Emergency Contact information to be populated on the standard form? *Note: if you will be using the Emergency Contact Panels the data will automatically be included on your export file.*	

New Employee EEO/Veteran Information - US Compliance

Will you be using the standard EEO Panel? *Note; The standard Panel and Form are U.S. Government compliant and are not customizable.*	Yes
Would you like to also include options for Disability and Veterans?	Both Disability and Veteran
Would you like to use the standard New Employee Summary Form to populate the EEO employee data? *Note: if you will be using the EEO Panels the data will automatically be included on your export file.*	

SAMPLE

Policies List	
Would you like to allow employees to acknowledge they have read a company policy prior to signing the policy form? If yes, these will be documented in the forms tab.	Yes
DocumentCenter: Unlimited Storage	
Will you be using DocumentCenter?	Yes
If you are not using DocumentCenter, do you have a legacy document management system? *Note: Any integration with a vendor is additional billable custom work.*	
Name of legacy document management system:	
Do you have Recruiting documents that you would like to be presented to a manager or hire on a panel? (This will require an API integration and may be additional billable work)	
If yes, what is the name of the document to attach to the panel?	
Do you have Recruiting documents that should be imported directly to Document Center? (This will require an API integration and may be additional billable work.)	
If yes, what are the names of the documents?	
Note: Permission restrictions will be addressed in the DocCenter Access tab of this workbook	
Fiori Dashboard and Panels	
Would you like to activate the HCM Home Page 3?	
Would you like to activate the Fiori theme ONB dashboard?	
Would you like to activate the Fiori theme ONB panels?	
See "Work Queue and Panel Design" tab for more details	
Asterisk Display on Panels	
Would you like the required fields on a panel appear with a red asterisk? (See print screen)	Yes
New Hire Onboarding Employee Portal	
Will you be using the Employee Portal? *Note: Configuration of New Hire Onboarding Employee Portal is 100% configured by customer.*	Yes
Mobile Onboarding	
Do you have Mobile App deployed for other modules?	
Will you be using Mobile Onboarding?	Yes
International Compliance Forms (Recommended if you have hires in these countries)	Indicate yes/no if you would like to activate the form(s)
Canada- TD1 and Provincial Tax forms	
Australia: Tax file number declaration	
Australia: Superannuation standard choice form	
India: Provident Funds Declaration and Nomination Form	
India: Transfer Claim Form	
UK: Starter Checklist	
UK: P45 – Details of employee leaving work	
eSignature Technology Choice	
DocuSign eSignature is available as the recommended alternative to the existing SAP Click Signature technology. **DocuSign allows the manager and hire to sign on Mobile devices.** (Note without DocuSign Mobile capabilities are not possible.) The feature can be used to capture signatures on forms that require a single signature step. (See print screen)	
Would you like to activate the DocuSign eSignature Feature? If yes, indicate which forms you would like on the Forms tab.	
Ir enabling DocuSign would you like to use "Remote Signing" or "Embedded Signing"? (Remote Signing is recommended as it allows the user to sign on any device.)	
*NOTE: Client must have an account with DocuSign to utilize this feature.	
Goals Integration	
The customer must use the standard New Hire Goal template in GM, the hiring manager can enter the 30, 60, and 90 day goals directly from the Manager New Hire Activity. You must have the SAP SuccessFactors Goals module active and configured.	
Would you like to activate Goals integration from Onboarding to the Goal Management module?	
Crossboarding integration from EC to ONB	
If desired, the Internal hire process (Crossboarding) can be initiated from Employee Central. Based on Intelligent Services the system will automatically trigger a crossboarding event when criteria has been met for an internal transfer. This allows you to process an internal hire without having to go through recruiting.	Requires: EC enabled Rules engine used Intelligent Services enabled A process configured in Onboarding to process an internal hire
Would you like to activate the Crossboarding integration from EC to ONB?	
Internal Hire integration without EC	
Will your Internal Hires import from SAP?	
Will your Internal Hires import from a 3rd party?	
Pre-populate Internal Hire data	
Would you like Internal Hire's data from a previous ONB record to be used in the new Internal Hire record?	
If Yes, All Data or Selected Data?	
If Selected Data provide the data keys on the integrations tab	
Offboarding	
Will you be activating the Offboarding functionality? (must be included in SOW)	
Pre-Day 1 and Temporary ID	
Will you be activating the Pre-Day 1 functionality?	
Would you like the Tempoary ID to equal the Employee Central Employee ID? (EC is required for this feature)	
Permanent Admin User ID for Integrations	
What would you like the SF ONB Admin user name to be? It is used for reports, syncs, API, etc and will remain constant in your system. (Never deleted)	

SAMPLE

Site Links

Your Consultant will provide the URL's - Log in credentials will be sent individually

Test Environments	
Data Center	
Onboarding Company ID	
SF Platform Company ID (BizX)	
SF Application URL	
ONB Application URL	
ONB New Hire Employee Portal	
Test Email	
Production Environments	
Data Center	
Onboarding Company ID	
SF Platform Company ID (BizX)	
SF Application URL	
ONB Application URL	
ONB New Hire Employee Portal	
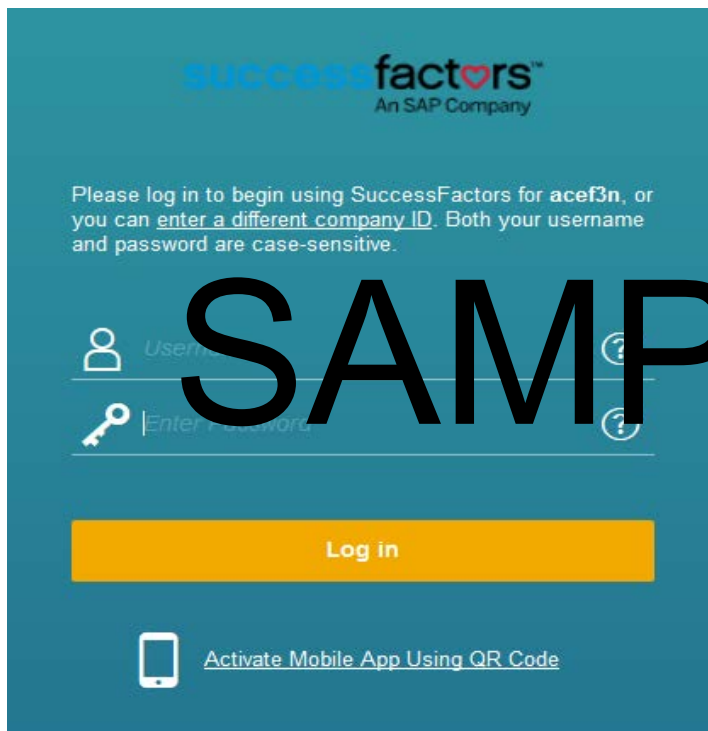
Forms and Policies

Note: Client is responsible for providing accurate business rules for all forms including country specific compliance forms. All forms in white are included with the Activate Methodology and Leading Practices guidelines

FORMS STATUS (Pending or FINAL)	Form #	Form Name	Add the PDF form here or reference where it can be found (i.e. on JAM or other Shared Site)- Provide the exact name if on a shared site	Description	Is this a non-U.S. country specific compliance form?	Process Name (i.e. Onboarding, Offboarding, Crossboarding)	Process Step Name (i.e. PHV, NES, OS)	List any languages other than English that is required for this form (applies to custom forms only. Customer is responsible for all translations).	Business Rules (e.g. All new hires complete same forms, forms are presented based on job code, etc.)
1 (In Scope)	1	Custom Policy							
2 (In Scope)	2	Custom Policy							
3 (In Scope)	3	Custom Policy							
4 (In Scope)	4	Custom Policy							
5 (In Scope)	5	Custom Policy							
6 (In Scope)	6	Custom Policy							
7 (In Scope)	7	Custom Policy							
8 (In Scope)	8	Custom Policy							
9 (In Scope)	9	Custom Policy							
10 (In Scope)	10	Custom Policy							
1 (In Scope)	16	Custom Form							
2 (In Scope)	17	Custom Form							
3 (In Scope)	18	Custom Form							
4 (In Scope)	19	Custom Form							
5 (In Scope)	20	Custom Form							
Standard		I9	NA	US Work Authorization Verification	No			NA	
Standard		Direct Deposit	NA	Direct Deposit Bank Account and Authorization				NA	
Standard		Employee Summary Form	NA	US output summarizing collected data fields	No			NA	
Standard		Pay Card Form	NA	Direct Deposit alternative	No				
Standard		W4	NA	US Federal tax withholding				NA	
Standard		NY Wage Theft Prevention Act	NA	US Compliance notice of wage and overtime rates	No			NA	
Standard		CA Wage Theft Prevention Act	NA	US Compliance notice of wage and overtime rates	No			NA	
Standard		PA Residency	NA	US- PA residency delaration for PA state tax withholding adjustments	No			NA	
Standard	23	District of Columbia	NA	D-4 Employee Withholding Allowance Certificate	No			NA	NA
Standard	24	Georgia	NA	Employee's Withholding Allowance Certificate	No			NA	NA
Standard	25	Hawaii	NA	Employee's Withholding Allowance and Status Certificate	No			NA	NA
Standard	26	Illinois	NA	Employee's Illinois Withholding Allowance Certificate	No			NA	NA
Standard	27	Indiana	NA	Employee's Withholding Exemption and County Status Certificate	No			NA	NA
Standard	28	Iowa	NA	Employee Withholding Allowance Certificate	No			NA	NA
Standard	29	Kansas	NA	Employee Withholding Allowance Certificate	No			NA	NA
Standard	30	Kentucky	NA	Employee's Withholding Exemption Certificate	No			NA	NA
Standard	31	Louisiana	NA	Employee's Withholding Allowance Certificate	No			NA	NA
Standard	32	Maine	NA	Employee's Maine Withholding Allowance Certificate	No			NA	NA
Standard	33	Maryland	NA	Employee's Maryland Withholding Exemption Certificate	No			NA	NA

Standard	34	Massachusetts	NA	Massachusetts Employee's Withholding Exemption Certificate	No			NA	NA
Standard	35	Michigan	NA	Employee's Michigan Withholding Exemption Certificate	No			NA	NA
Standard	36	Mississippi	NA	Mississippi Employee's Withholding Exemption Certificate	No			NA	NA
Standard	37	Missouri	NA	Employee's Withholding Allowance Certificate	No			NA	NA
Standard	38	New Jersey	NA	Employee's Withholding Allowance Certificate	No			NA	NA
Standard	39	New York	NA	Employee's Withholding Allowance Certificate	No			NA	NA
Standard	40	North Carolina	NA	Employee's Withholding Allowance Certificate	No			NA	NA
Standard	41	Ohio	NA	Employee's Withholding Exemption Certificate	No			NA	NA
Standard	42	Puerto Rico	NA	Withholding Exemption Certificate	No			NA	NA
Standard	43	Puerto Rico	NA	Certificado De Exencion Para La Retencion	No			NA	NA
Standard	44	Vermont	NA	Employee's Withholding Allowance Certificate	No			NA	NA
Standard	45	Virginia	NA	Employee's Income Tax Withholding Exemption Certificate	No			NA	NA
Standard	46	West Virginia	NA	Employee's Withholding Exemption Certificate	No			NA	NA
Standard	47	Wisconsin	NA	Employee's Wisconsin Withholding Exemption Certificate/New Hire Reporting					NA
Standard	48	Canada- TD1 and Provincial Tax forms	NA						Country = Canada
Standard	49	Australia: Tax file number declaration	NA						Country = Austrailia
Standard	50	Australia: Superannuation standard choice form	NA		Yes				Country = Austrailia
Standard	51	India: Provident Funds Declaration and Nomination Form	NA		Yes				Country = India
Standard	52	India: Transfer Claim Form	NA		Yes				Country = India
Standard	53	UK: Starter Checklist	NA		Yes				Country = United Kingdom
Standard	54	UK: P45 – Details of employee leaving work	NA		Yes				Country = United Kingdom

Standard Notifications

Standard Notifications include those for both Onboarding and HCM (red)

Notifications will automatically be activated. You can inactivate them using the Adminstrative Functions in the Onboarding site. (Using the Activate Methodology and Leading Practices guide lines the fields highlighted in green are recommended)

Activate?	Name (Unable to modify name of notification)	Process	Type	Subject (can be customized)	Initial Email (can be customized)
No	N0 Manager - New onboarding process start	Onboarding	Assignee Notification	New Onboarding Activity Available: {FirstNameMILastName}	<p>Dear {ManagerFullName},</p><p>Congratulations on your
	N1 Manager - New Hire Activities Wizard	Onboarding	Assignee Notification	Set up Onboarding Activities for {FirstNameMILastName}	<p>Dear {ManagerFullName}</p><p>Please set up the
	Note: It is recommended to enable the N1 but customize the message and remove the wizard setting.				
Yes	N2 New Hire - Onboarding Activities	Onboarding	Employee Notification	Please Review Your Onboarding Activities	<p>Dear {FirstNameMILastName}, < br /> Your manager has
	N3 LMS Assignments (informational only- no LMS integration)	Onboarding	Hiring Managers Notification	LMS setup for New Hire {FirstName} {LastName}	<p>{ManagerFullName},</p><p>Enter the LMS system and setup
Yes	N4 Introduce the Team	Onboarding	Hiring Managers Notification	Introduce your {FirstName} {LastName} to the Team	<p>{ManagerFullName},</p><p>It's time to introduce
Yes	N5 (OB) Welcome Letter	Onboarding	Employee Notification	Welcome Letter	<p><font face="Times New Roman" size="3"><span style="font-
Yes	N5 (OB) Welcome Letter. Remote Employee (US only)	Onboarding	Employee Notification	Welcome Letter	<p><span style="font-family: Arial"><span style="font-size:
	N8 Set Goals (informational only- no GOALS integration)	Onboarding	Hiring Managers Notification	Goal setting for {FirstName} {LastName}	<p>A reminder to set golas for your recent hire {FirstName}
Yes	N10 (OB) Please complete the I-9 form	Onboarding	Assignee Notification	Reminder: Please complete the I-9 form	
	N11 IT Provisioning	Onboarding	Internal Resource Notification	Provisioning Requirements for {FirstName} {LastName}	<p><span style="font-family: Arial;">Provisioning requirements
Yes	Onboarding Manager Meeting Notification	Hiring Manager Activity	HCM	Onboarding Meeting: [[SUBJECT_NAME]]	Hello,
Yes	Onboarding Buddy Notification	Hiring Manager Activity	HCM	You are the Buddy for [[ONB_NEW_HIRE_FIRSTNAME]] [[ONB_NEW_HIRE_LASTNAME]]	Dear [[ONB_PERSON_FIRSTNAME]],
Yes	Onboarding recommended Person Notification	Hiring Manager Activity	HCM	Please help onboard our new hire [[ONB_NEW_HIRE_FIRSTNAME]] [[ONB_NEW_HIRE_LASTNAME]]	Dear [[ONB_PERSON_FIRSTNAME]],
Offboarding					
	IT - Offboarding	Offboarding	Internal Resource Notification	Offboarding	<p>Initial Request: Please remove all network privileges for
	Job Termination	Offboarding	Employee Notification	Job Termination	<p>Dear {FirstName}:</p> <p>Your exit interview is
DocuSign (Used only if DocuSign is enabled)					
	(OB) DocuSign Manager Correct Data	Onboarding	Hiring Managers Notification	Correct Data is required	<p>Dear {ManagerFullName},</p> <p>You recently declined to
	(OB) DocuSign New Employee Correct Data	Onboarding	Employee Notification	Correct Data is required	<p>Dear {FirstName} {LastName},</p> <p>You recently
	DocuSign New Hire Correct Data From ONB	Onboarding	Employee Notification	Information has changed on the form(s)	s="MsoNormal"><span style="font-size: larger;"><span
	DocuSign Reminder Employee	Onboarding	Employee Notification	Employee signature is required	<p><font face="Arial"><span style="font-size: 14.4px;">Dear
	DocuSign Reminder Manager	Onboarding	Hiring Managers Notification	Manager signature is required	<p><font face="Arial"><span style="font-size: 14.4px;">Dear
	DocuSign Reminder Translator	Onboarding	Translator Notification	Translator signature is required	<p><span style="font-size: larger;"><span style="font-family:
	DocuSign Translator Correct Data From ONB	Onboarding	Translator Notification	Information has changed on the form(s)	<p class="MsoNormal"><span style="font-size: larger;"><span
	N1 (OB) DocuSign New Employee Signature	Onboarding	Employee Notification	New Employee Signature Requirement	<p><font face="Times New Roman" size="3"><span style="font-
	N1 (OB) DocuSign New Employee Signature On Outside Signing	Onboarding	Employee Notification	New Employee Signature Requirement	<p><font face="Times New Roman" size="3"><span style="font-
	N2 (OB) DocuSign Manager Signature	Onboarding	Assignee Notification	New Employee Signature Completed	<p><span style="font-size: larger;"><span style="font-family:
	N5 (OB) DocuSign Welcome Letter	Onboarding	Employee Notification	Welcome Letter	<p>Dear {FirstName} {LastName},</p> <p><b>Welcome to our
	N5 (OB) DocuSign Welcome Letter. Remote Employee	Onboarding	Employee Notification	Welcome Letter	<p class="MsoNormal"><span lang="EN-US" style="font-
Payroll					
	Claimed Exempt & Makes More than $800/mo	Onboarding	Internal Resource Notification		<p>New Hire {FirstName} {LastName}</p> <p>Store Number
	More than 10 Deductions	Onboarding	Internal Resource Notification	W4 with more than 10 deductions	<p>New Hire {FirstName} {LastName}</p> <p>Store Number
United States Specific Forms					
Yes	(OB) Employee does not have SSN	Onboarding	Employee Notification	Please bring in your social security card as soon as you receive.	<p> </p> <p><span style="font-size: 11pt; font-family:
Yes	(OB) Employee has applied for a SSN. HR (e-Verify)	Onboarding	Assignee Notification	Employee has applied for a SSN.	<p>Activity Information: Name: {FullName}
Yes	(OB) Employee has applied for SSN. Payroll (e-Verify)	Onboarding	Internal Resource Notification	Employee has applied for SSN.	<p>Activity Information: Name: {FullName}
Yes	(OB) Employee has applied for SSN. Payroll. (no e-Verify)	Onboarding	Internal Resource Notification	Employee has applied for SSN.	<p>Activity Information: Name: {FullName}
Yes	(OB) More than 14 Exemptions for NY IT-2104	Onboarding	Internal Resource Notification	NY IT-2104 for {FirstName} {LastName}	<p>New Hire {FirstName} {LastName}</p><p>Please click <a
E-Verify					
Yes	(E-Verify Incorrect Data) Please complete the I-9 form	E-Verify Correct Data	Assignee Notification	Reminder: Please complete the I-9 form	
Yes	(E-Verify Incorrect Data) Remote Employee 3-Step I-9 Notarized	E-Verify Correct Data	Employee Notification	I-9 Notarized	<div><span style="font-size: small">Dear {FirstName}
Yes	(E-Verify Incorrect Data) Remote Hire: Corp Rep Enters 3-Step I-9 Info – Initial Verification	E-Verify Correct Data	Assignee Notification	Remote Hire: Corp Rep Enters I-9 Info – Initial Verification	<div><span style="font-size: small">Employee: {FirstName}
Yes	(E-Verify Incorrect Data) Welcome Letter	E-Verify Correct Data	Employee Notification	Welcome Letter	<p><font face="Times New Roman" size="3"><span style="font-
Yes	(E-Verify Incorrect Data) Welcome Letter. Remote Employee	E-Verify Correct Data	Employee Notification	Welcome Letter	<p><span style="font-family: Arial"><span style="font-size:
Yes	(E-Verify) [AfterAssigning] A new activity has been reassigned to you	E-Verify	Assignee Notification	A new activity has been reassigned to you	<p>Activity Data: Full Name: {FullName}
Yes	(E-Verify) [BeforeAssigning] Your activity has been reassigned	E-Verify	Assignee Notification	Your activity has been reassigned	<p>Activity Data: Full Name: {FullName}
Yes	E-Verify - DHS No Show	E-Verify	Internal Resource Notification	E-Verify Resolution: DHS No Show for {FirstName} {LastName}	<p>We have received a DHS NO SHOW for the employee listed
Yes	E-Verify - Employment Authorized	E-Verify	Internal Resource Notification	E-Verify Resolution: Employment Authorized for {FirstName} {LastName}	<p>The employment has been AUTHORIZED for the employee
Yes	E-Verify - Final NC - DHS	E-Verify	Internal Resource Notification	E-Verify Resolution: DHS Final Nonconfirmation for {FirstName} {LastName}	<p>We have received a DHS FINAL NONCONFIRMATION for the
Yes	E-Verify - Final NC - SSA	E-Verify	Internal Resource Notification	E-Verify Resolution: SSA Final Nonconfirmation for {FirstName} {LastName}	<p>We have received an SSA Final Nonconfirmation for the
Yes	E-Verify - Not Contest - DHS	E-Verify	Internal Resource Notification	E-Verify Resolution: New Hire has decided Not to Contest DHS Tentative Non	<p>The new hire listed below has decided NOT to CONTEST the
Yes	E-Verify - Not Contest - SSA	E-Verify	Internal Resource Notification	E-Verify Resolution: New Hire has decided Not to Contest SSA Tentative Non	<p>The new hire listed below has decided NOT to CONTEST the
Yes	E-Verify - Upload verification document	E-Verify	Internal Resource Notification	E-Verify: Upload verification document for {FirstName} {LastName}	<p>If an employee presented a Permanent Resident card, Alien
Yes	E-Verify status has been updated	E-Verify	Assignee Notification	E-Verify status has been updated for {FirstName} {LastName}	<p>The status of the E-Verify activity has been updated for the

Yes	Forms for Contest DHS TNC (Employee)	E-Verify	Employee Notification	Forms for Contest DHS Tentative Nonconfirmation	<p>Dear {FirstName} {LastName},</p> <p>You had previously
Yes	Forms for Contest DHS TNC (Employee, Jbl)	E-Verify	Employee Notification	Forms for Contest DHS Tentative Nonconfirmation	<p>Dear {FirstName} {LastName},</p> <p>You had previously
Yes	Forms for Contest DHS TNC (Employee, Jbl, Spanish)	E-Verify	Employee Notification	Forms for Contest DHS Tentative Nonconfirmation	<p>Dear {FirstName} {LastName},</p> <p>You had previously
Yes	Forms for Contest DHS TNC (Employee, Spanish)	E-Verify	Employee Notification	Forms for Contest DHS Tentative Nonconfirmation	<p>Dear {FirstName} {LastName},</p> <p>You had previously
Yes	Forms for Contest Photo DHS TNC (Employee)	E-Verify	Employee Notification	Forms for Contest DHS Tentative Nonconfirmation	<p>Dear {FirstName} {LastName},</p> <p>You had previously
Yes	Forms for Contest Photo DHS TNC (Employee, Jbl)	E-Verify	Employee Notification	Forms for Contest DHS Tentative Nonconfirmation	<p>Dear {FirstName} {LastName},</p> <p>You had previously
Yes	Forms for Contest Photo DHS TNC (Employee, Jbl, Spanish)	E-Verify	Employee Notification	Forms for Contest DHS Tentative Nonconfirmation	<p>Dear {FirstName} {LastName},</p> <p>You had previously
Yes	Forms for Contest Photo DHS TNC (Employee, Spanish)	E-Verify	Employee Notification	Forms for Contest DHS Tentative Nonconfirmation	<p>Dear {FirstName} {LastName},</p> <p>You had previously
Yes	Forms for Contest SSA TNC (Employee, Natz)	E-Verify	Employee Notification	Forms for Contest SSA Tentative Nonconfirmation	<p>Dear {FirstName} {LastName},</p> <p>You had previously
Yes	Forms for Contest SSA TNC (Employee, Natz, Spanish)	E-Verify	Employee Notification	Forms for Contest SSA Tentative Nonconfirmation	<p>Dear {FirstName} {LastName},</p> <p>You had previously
Yes	Forms for Contest SSA TNC (Employee, Not Natz)	E-Verify	Employee Notification	Forms for Contest SSA Tentative Nonconfirmation	<p>Dear {FirstName} {LastName},</p> <p>You had previously
Yes	Forms for Contest SSA TNC (Employee, Not Natz, Spanish)	E-Verify	Employee Notification	Forms for Contest SSA Tentative Nonconfirmation	<p>Dear {FirstName} {LastName},</p> <p>You had previously
I-9					
Yes	(I3 B Days) Do not change StartDate - Payroll	I-9 3 Business-Days	Internal Resource Notification	Form I-9 for {FullName} is out of compliance	<p>Name of Employee: {FirstName} {LastName} Start Date:
Yes	(I3 B Days) Start Date has been changed - Payroll	I-9 3 Business-Days	Internal Resource Notification	Start Date has been changed	<p>Name of Employee: {FirstName} {LastName} Start Date:
Yes	(I3 B Days) Susp - Assignee - The Employment for {FullName} has been suspended	I-9 3 Business-Days	Assignee Notification	The Employment for {FullName} has been suspended	<p>Name of Employee: {FirstName} {LastName} Start Date:
Yes	(I3 B Days) Susp - Payroll - The Employment for {FullName} has been suspended	I-9 3 Business-Days	Internal Resource Notification	The Employment for {FullName} has been suspended	<p>Name of Employee: {FirstName} {LastName} Start Date:
Yes	(I3 B Days) Term - Assignee - Employee has not provided their proof of eligibility to work	I-9 3 Business-Days	Assignee Notification	Employee {FullName} has not provided their proof of eligibility to work	<p>Name of Employee: {FirstName} {LastName} Start Date:
Yes	(I3 B Days) Term - Payroll - Employee has not provided their proof of eligibility to work	I-9 3 Business-Days	Internal Resource Notification	Employee {FullName} has not provided their proof of eligibility to work	<p>Name of Employee: {FirstName} {LastName} Start Date:
Yes	(I-9 3 Business-Days) [AfterAssigning] A new activity has been reassigned to you	I-9 3 Business-Days	Assignee Notification	A new activity has been reassigned to you	<p>Activity Data: Full Name: {FullName}
Yes	(I-9 3 Business-Days) [BeforeAssigning] Your activity has been reassigned	I-9 3 Business-Days	Assignee Notification	Your activity has been reassigned	<p>Activity Data: Full Name: {FullName}
Yes	(I-9 Reverification) [AfterAssigning] A new activity has been reassigned to you	I-9 Reverification	Assignee Notification	A new activity has been reassigned to you	<p>Activity Data: Full Name: {FullName}
Yes	(I-9 Reverification) [BeforeAssigning] Your activity has been reassigned	I-9 Reverification	Assignee Notification	Your activity has been reassigned	<p>Activity Data: Full Name: {FullName}
Yes	(OB) (Reverification Group) I9 Notification	Onboarding	Internal Resource Notification	I9 Notification	<p>The following individual {FullName} has confirmed his/her
Yes	(OB) Do not change StartDate - Payroll	Onboarding	Internal Resource Notification	Form I-9 for {FullName} is out of compliance	<p>Name of Employee: {FirstName} {LastName} Start Date:
Yes	(OB) Start Date has been changed - Payroll	Onboarding	Internal Resource Notification	Start Date has been changed	<p>Name of Employee: {FirstName} {LastName} Start Date:
Yes	(OB) Susp - Assignee - The Employment for {FullName} has been suspended	Onboarding	Assignee Notification	The Employment for {FullName} has been suspended	<p>Name of Employee: {FirstName} {LastName} Start Date:
Yes	(OB) Susp - Payroll - The Employment for {FullName} has been suspended	Onboarding	Internal Resource Notification	The Employment for {FullName} has been suspended	<p>Name of Employee: {FirstName} {LastName} Start Date:
Yes	(OB) Term - Assignee - Employee has not provided their proof of eligibility to work	Onboarding	Assignee Notification	Employee {FullName} has not provided their proof of eligibility to work	<p>Name of Employee: {FirstName} {LastName} Start Date:
Yes	(OB) Term - Payroll - Employee has not provided their proof of eligibility to work	Onboarding	Internal Resource Notification	Employee {FullName} has not provided their proof of eligibility to work	<p>Name of Employee: {FirstName} {LastName} Start Date:
Yes	(OB) Upload a Copy of Notice from USCIS	Onboarding	Assignee Notification	(OB) Upload a Copy of Notice from USCIS	<p>Please upload a copy of notice from USCIS acknowledging the
Yes	(OB) Upload Form I-129	Onboarding	Assignee Notification		se upload Form I-129, Proof of payment for filing Form I-
Yes	(Offboarding) [AfterAssigning] A new activity has been reassigned to you	Offboarding	Assignee Notification	A new activity has been reassigned to you	<p>Activity Data: Full Name: {FullName}
Yes	(Offboarding) [BeforeAssigning] Your activity has been reassigned	Offboarding	Assignee Notification	Your activity has been reassigned	<p>Activity Data: Full Name: {FullName}
Yes	(OnBoarding) [AfterAssigning] A new activity has been reassigned to you	OnBoarding	Assignee Notification	A new activity has been reassigned to you	<p>Activity Data: Full Name: {FullName}
Yes	(OnBoarding) [BeforeAssigning] Your activity has been reassigned	OnBoarding	Assignee Notification	Your activity has been reassigned	<p>Activity Data: Full Name: {FullName}
Yes	I9 Notification	Onboarding	Assignee Notification		<p>The following individual {FullName} has confirmed his/her
Yes	Remind on due date for the I-9	I-9 3 Business-Days	Hiring Managers Notification		
Yes	Remote Employee I-9 Notarized	Onboarding	Employee Notification	I-9 Notarized	<div><span style="font-size: small">Dear {FirstName}
Yes	Remote Hire: Corp Rep Enters I-9 Info	Onboarding	Assignee Notification	Remote Hire: Corp Rep Enters I-9 Info	<div><span style="font-size: small">Employee: {FirstName}
Yes	Remote Hire: Corp Rep Enters I-9 Info – Initial Verification	Onboarding	Assignee Notification	Remote Hire: Corp Rep Enters I-9 Info – Initial Verification	<span style="font-size: small">Employee: {FirstName}
Yes	Remote Hire: DHS Contest/Not Contest Decision	E-Verify	Assignee Notification	E-Verify: Remote Hire referred to DHS	<p>The new employee is contesting his/her employment
Yes	Remote Hire: Final Nonconfirmation DHS	E-Verify	Internal Resource Notification	Remote Hire: DHS Final Nonconfirmation	<p>Employee {FirstName} {LastName} Position:
Yes	Remote Hire: Final Nonconfirmation Photo DHS	E-Verify	Internal Resource Notification	Remote Hire: DHS Final Nonconfirmation	<p>Employee {FirstName} {LastName} Position:
Yes	Remote Hire: Final Nonconfirmation SSA	E-Verify	Internal Resource Notification	Remote Hire: Final Nonconfirmation	<p>Employee {FirstName} {LastName} Position:
Yes	Remote Hire: Need DHS Contest (Employee)	E-Verify	Employee Notification	E-Verify: DHS Tentative Nonconfirmation	<p>Dear {FirstName} {LastName},</p> <p>Our company
Yes	Remote Hire: Need DHS Contest (Manager)	E-Verify	Assignee Notification	E-Verify: Remote Hire has decided {BasP_DHSContest, ifeq=Yes;to Contest;N	<p>The employee received a Tentative Nonconfirmation from
Yes	Remote Hire: Need Photo DHS Contest (Employee)	E-Verify	Employee Notification	E-Verify: DHS Tentative Nonconfirmation	<p>Dear {FirstName} {LastName},</p> <p>Our company
Yes	Remote Hire: Need Photo DHS Contest (Manager)	E-Verify	Assignee Notification	E-Verify: Remote Hire has decided {BasP_PhotoDHSContest, ifeq=Yes;to Cont	<p>The employee received a Tentative Nonconfirmation from
Yes	Remote Hire: Need SSA Contest (Employee)	E-Verify	Employee Notification	E-Verify: SSA Tentative Nonconfirmation	<p>Dear {FirstName} {LastName},</p> <p>Our company
Yes	Remote Hire: Need SSA Contest (Manager)	E-Verify	Assignee Notification	E-Verify: Remote Hire has decided {BasP_cboxContest, ifeq=Yes;to Contest;N	<p>The new employee received a Tentative Nonconfirmation
Yes	Remote Hire: Photo DHS Contest/Not Contest Decision	E-Verify	Assignee Notification	E-Verify: Remote Hire referred to DHS (Photo)	<p>The new employee is contesting his/her employment
Yes	Remote Hire: SSA Contest/Not Contest Decision	E-Verify	Assignee Notification	E-Verify: Remote Hire referred to SSA	<p>The new employee is contesting his/her employment
Yes	Reverification Completed	I-9 Reverification	Internal Resource Notification	Reverification Completed for {FullName}	<p>I-9 Reverification has been completed for {FullName}. The
Yes	Reverification Notice - 180 days	I-9 Reverification	Internal Resource Notification	Reminder: 180 Day I-9 Reverification Notice for {FirstName} {LastName}	
Yes	Reverification Notice - 2 days	I-9 Reverification	Internal Resource Notification	Reminder: 2 Day I-9 Reverification Notice for {FirstName} {LastName}	
Yes	Reverification Notice - 2 days - Employee	I-9 Reverification	Employee Notification	Reminder: 2 Day I-9 Reverification Notice	
Yes	Reverification Notice - 240 days	I-9 Reverification	Internal Resource Notification	Reminder: 240 Day I-9 Reverification Notice for {FirstName} {LastName}	
Yes	Reverification Notice - 30 days	I-9 Reverification	Internal Resource Notification	Reminder: 30 Day I-9 Reverification Notice for {FirstName} {LastName}	
Yes	Reverification Notice - 30 days - Employee	I-9 Reverification	Employee Notification	Reminder: 30 Day I-9 Reverification Notice	
Yes	Reverification Notice - 90 days	I-9 Reverification	Internal Resource Notification	Reminder: 90 Day I-9 Reverification Notice for {FirstName} {LastName}	
Yes	Reverification Notice - 90 days - Employee	I-9 Reverification	Employee Notification	Reminder: 90 Day I-9 Reverification Notice	
Yes	Send Foreign Passport/Temporary I-551 Notification to Corp Rep	I-9 Reverification	Assignee Notification	Due Date To Present Actual Form I-9 Documents	<p>Employee Name: {FullName} Start Date:
Yes	Send Foreign Passport/Temporary I-551 Notification to Employee	I-9 Reverification	Employee Notification	Due Date To Present Actual Form I-9 Documents	<p>Dear {FirstName}, </p><p>You have presented a
Yes	Send Lost, Stolen or Damaged Notification to Corp Rep	I-9 Reverification	Assignee Notification	Due Date To Present Actual Form I-9 Documents	<p>Employee Name: {FullName} Start Date:
Yes	Send Lost, Stolen or Damaged Notification to Employee	I-9 Reverification	Employee Notification	Due Date To Present Actual Form I-9 Documents	<p>Dear {FirstName},</p><p>You have presented the following
Yes	Send Refugee Notification to Corp Rep	I-9 Reverification	Assignee Notification	Due Date To Present Actual Form I-9 Documents	<p>Employee Name: {FullName} Start Date:
Yes	Send Refugee Notification to Employee	I-9 Reverification	Employee Notification	Due Date To Present Actual Form I-9 Documents	<p>Dear {FirstName},</p><p>You have presented a Form I-94/I-
Yes	Send Temporary I-551 Notification to Corp Rep	I-9 Reverification	Assignee Notification	Due Date To Present Actual Form I-9 Documents	<p>Employee Name: {FullName} Start Date:
Yes	Send Temporary I-551 Notification to Employee	I-9 Reverification	Employee Notification	Due Date To Present Actual Form I-9 Documents	<p>Dear {FirstName},</p><p>You have presented a Form I-94/I-
Yes	The due date for the I-9 has passed	I-9 3 Business-Days	Hiring Managers Notification	Reminder: The employee {FirstName} {MiddleName} {LastName} has not bro	
Yes	The I-9 step has been removed from the Work Queue	I-9 3 Business-Days	Hiring Managers Notification	The I-9 step for new hire {FirstName} {MiddleName} {LastName} has been rer	The I-9 step for new hire {FirstName} {MiddleName} {LastName}

Process Flow Design

Determine what you would like to call the steps in the processes and if any client defined processes are required. (Using the Activate Methodology and Leading Practices guide lines the fields highlighted in green will be enabled by default)

Onboarding Standard Process	Activate? Y/N	Change any of the Step Names?	Describe employee population who will be put through this process	Data key that will used to direct upon import to this process	Will this process be intiated manually via Process tab?	Will this process be intiated by RCM?	Will this process be intiated by other ATS?
Post Hire Verification Step	Yes						
New Employee Step	Yes						
Orientation Step	Yes						

Client Defined Onboarding Process	Activate? Y/N	Change any of the Step Names?	Describe employee population who will be put through this process	Data key that will used to direct upon import to this process	Will this process be intiated manually via Process tab?	Will this process be intiated by RCM?	Will this process be intiated by other ATS?
Step 1 (optional)							
Step 2 (employee step required)	Yes						
Step 3 (optional							

OffBoarding	Activate? Y/N	Change any of the Step Names?	Describe employee population who will be put through this process	Defaulted from EC	Will this process be intiated manually via Process tab? (if on for Onboarding will be on for OffBoarding)	Will this process be intiated by EC?	Wll the Mass OffBoarding Feature be used? Csv OR XML?
Intiation Step							
Employee Step							
Exit Interview Step							

*Note: this process is on or off all users with access to the Process Tab will have access

SAMPLE

Review the standard columns in the Work Queue and indicate any changes here. Note: Assigned To, Activity Name, First Name, Last Name, and Due Date cannot be removed.

The theme set in the SuccessFactors Platform will carry over to Onboarding

Work Queue and Panel Design

Below is a sample of the Onboarding Work Queue used by Recruiters, Hiring Managers, and Admins.

Admin Users can create their own panel design, load forms, and map fields. Below is a sample of a custom panel that can be created. See the Customer Admin guide for step by step details

Form Elements
Label - Can be a page title, section, title or instructions. Can also be created using Rich Text format.
Section - a grey box in which to place fields that will be completed by the user. The grey section is used as a separator between labels/instructions and data completed by the user.
Table - Can be generated with multiple columns or rows. Used to place fields together that contain relevant information.
Text Box - Used to gather open text. Can be configured to contain specific amounts of text.
Radio Buttons - Typically used for "Yes/No" questions
Checkboxes - Used when there are "either/or" choices, like red or blue. Also used when there are multiple choices with an option to select more than one. Also used for policy/procedure acknowledgements.
Date - Date Field used with calendar control.
Time - Used to gather a specific time. Sometime used to notate the employees new hire orientation.
Drop Down List - Used when you have a list of items to choose from. Only one choice is allowed. Can also be built with Advanced Conditions allowing one DDL to contain a specific list based on the answer in another DDL, Radio Button, or Check Box.
Combo box - Used as a picklist or DDL that is dynamic allowing the users to type the first three letters of a possible match to display. Great for large lists.
File Upload - Used to upload employee documents, such as Drivers License, Degree, or references. Documents can be stored in the DocumentCenter automatically.
Policy Link - Used to allow an employee to acknowledge that they have read a specific company policy. Standard design is to force the employee to click the link, opening the policy prior to clicking on acknowledgement check box.
User List - Used when you have a list of specific system users. Only one choice is allowed. Often used to determine a specific manager or new hire buddy.

X Process Panel Design

Create additional tabs in the workbook, one per process where X is the name of the process, to describe the User Defined Panels created for the process. Below is an example, please modify this tab to meet your needs

Panel Information	Description/Key	Type of Field	Print Screen of Completed Panel
Panel name	Global National ID		
Purpose	Collect hire's National ID		
Step within the Process	NES		
Logic to present panel	If country does not equal US		
Instruction or Header	National ID Information	Panel Label	
Field Name/Key	NationalIDCountry	SF picklist	
Field Name/Key	NationalIDCardType	SF picklist	
Field Name/Key	NationalID	Text	
Field Name/Key	NationalIDIsPrimary	Radio	

National ID Information

National Id Country _____ *

National ID Card Type
_____ *

National ID # _____ *

Is Primary? ⦿ Yes ◯ No *

SAMPLE

Hiring Manager New Hire Activity

The Onboarding Manager Wizard controls the tile content in SuccessFactors HCM Dashboard for the New Hire. A To Do List item is placed on the Manager SuccessFactors HCM Dashboard upon import of the new hire into Onboarding. NOTE: New Hires entered manually into Onboarding will not be eligible for this activity. The activity will be assigned to the user in the HiringManager data key.

Please answer the questions below to help set up the workflow.

Indicate if you would like the manager to have the following tasks. (Using the Activate Methodology and Leading Practices guide lines the fields highlighted in green will be enabled by default)

Task	Activate? Y/N	Required? Y/N	If yes...	Advanced Conditions for limiting view
Welcome Message from Manager	Yes		Provide default text below	
Assign a Buddy	Yes		Provide default text below	
Useful Contacts	Yes		Provide default text below	
Schedule Meetings				
Useful Links			Provide default links below	
Furnish Equipment				
Complete Checklist			Provide default items below	
Goal Setting			Provide default items below	

Date Rules	Days
How many days in advance of new hire start must this task be completed?	
The system notifies the hiring manager when a workflow is incomplete this many days before the new hire's start date	

Home Page Tour	Yes/No
Activate the Home Page Tour?	Yes
Activate Prepare for Day One?	Yes
Activate Where to Go?	

New Hire's Prepare for Day One Checklist
Checklist Item

Where to Go Instructions

Home Page 3 view
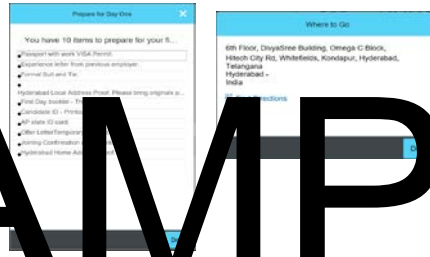
Welcome Message from Manager - This is editable by the manager but you may provide a default text.
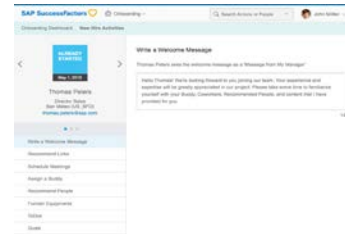
Furnish Equipment: If you indicated that you would like to have your manager request equipment, please indicate the equipment type and workflow.					
Equipment Type	Equipment Options	What Role should receive the request To Do item? (RBP Role, User)	Does this role exist already in RBP?	Do you need workflow in SF Plaform?, if yes describe the workflow	Due Date for Manager to be notified if activity not complete

SAMPLE

Manager's Check List: If you indicated that a Checklist is required, indicate the items you would like to appear on the Check List for all managers

Required?	Checklist Item	Import items from SuccessStore best practice			

As a starting place, you can download content for the checklist, meetings and equipment activities from the Success Store. You can add or change this content as needed. The file name in the Success Store is NH Activity Planning - default configuration.zip. You can also access the Success Store file under Admin
Tools Import and Export Data Onboarding Process Configuration - default content for MDF-based new hire activity planning.

Meetings: If you indicated that you would like a manager to set up meetings for the new hire are there any default meetings you would like to appear?

Meeting Name					

Buddy and Reccommended People Notification text (See tab 5 "Standard Notifications" for the message default)

Notification	Default Text			Automatic or Manual?	
Buddy					
Recommended People					

Default Links

Title of Link	URL		Reason for Recommendation	

Set Default Goals (Note: Standard New Hire Goal template must be used with 30Day, 60Day and 90Day categories)

Goal Title	Goal Description	Required/Not Required

SAMPLE

Onboarding New Employee Portal - Overview

The Onboarding New Employee Portal can be utilized as a landing page for new hires to learn about the company or organization prior to completing the Onboarding step. Information can be added for benefits, company policies, and where to go on your first day of work.

The Employee Portal "shell" is provided to the customer for their own unique customization. Customers can upload their own logo's, create company branding, add documents, add content, and even add links to external content. The Portal comes with 6 navigation links that can be re-branded to meet your organizations culture. Please see the attached users guide for instructions.

Picture	- Maximum size of picture is 910x260pix or smaller. Format must be JPEG, GIF or PNG.
	- Flash video format(FLV).
	- Width and height of video must be less than 640x480 and greater than 320x240.
	-Streaming files must be no more than 50 mb
	- Recommend using video files with size less than 100mb.
	- The length of videos depends on its quality.
	- Videos should not exceed 15 minutes in length.
Video	- No more than 5 videos for the portal.

See Section 13 of the Onboarding Administrators Guide for Employee Portal Configuration:

Click here for the Onboarding Admistrators Guide

For Client Planning Use

Left Menu Nav Page Titles:	Filters Needed

Content

Page	Document Name/Filters Needed

What is the data key that will be used for non-English webparts?	

Security Described

Use this worksheet as an exercise to help create the Onboarding User Group Security tab and is not required to complete. (Using the Activate Methodology and Leading Practices guide lines the fields highlighted in green will be enabled by default)

|	
DESCRIPTION OF SPECIFIC USERS	
There are two types of "named users" that come across in the standard New Hire Import: Hiring Managers and Recruiters. You can have more than two named users in a new hire record. The purpose of the named users is not just informational; they can be used to determine who performs what step.	
Will your **Hiring Managers** be involved in your process in Onboarding?	Yes
If "Yes" please describe: what do your Hiring Managers do?	
Will your **Recruiter**s be involved in your process in Onboarding? (Yes/No)	No
If "Yes" please describe: what do your Recruiters do?	
Will you have other named users in the new hire record? (Yes/No)	
If "yes", what are they, and what role do they play? (list each on a separate line). (example: HR Manager)	
Post Hire Verification Step (Includes eWage and PA Residency)	
Do you want your users to see just their own activities?	Yes
If yes, what level of the Corporate Structure will be used?	
What Roles are responsible for starting the PHV wizard and entering data?	
Do you want any other groups to monitor the PHV step? If yes, list each group? (Please list all)	
New Employee Step (Includes eWage and PA Residency)	
Do you want your users to see just their own activities?	Yes
If yes, what designates the activity as "just their own"?	
Only the New Employee will have Execute rights for the NES in Production. Would you like another user type to be able to execute this step during UAT?	
Do you want anyone to monitor this process or this step?	
If yes, who/which group? (Please list all)	
Orientation Step	
Do you want your users to see just their own activities?	Yes
If yes, what designates the activity as "just their own"?	
Who is responsible for opening the panels in the Orientation Step and entering or confirming the data there?	
Do you want anyone to monitor this process or this step?	
If yes, who/which group? (Please list all)	
3-Business Day I9	
Do you want your users to see just their own activities?	Yes
If yes, what designates the activity as "just their own"?	

Who is responsible for opening the panels in the 3-Business Day I9 Step and entering or confirming the data there?	
Do you want anyone to monitor this process or this step?	
If yes, who/which group? (Please list all)	
E-Verify	
Note: By default the user who is responsible for Executing the Orientation Step will be the executor of the Intial Verfication. You can define who gets assigned follow-up activities and notifications	
Who is responsible for opening the panels in the Secondary or Follow-up E-Verify Activities?	
Do you want anyone else to monitor this process or this step?	
If yes, who/which group? (Please list all)	
I9 Reverification	
Do you want your users to see just their own activities?	No
If yes, what designates the activity as "just their own"?	
Who is responsible for opening the panels in the I9 Reverification Step and entering or confirming the data there?	
Do you want anyone to monitor this process or this step?	Yes
If yes, who/which group? (Please list all)	

SAMPLE

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RFP 02851 Exhibit C General Conditions

Seattle Public Schools is committed to making its online information accessible and usable to all people, regardless of ability or technology. Meeting web accessibility guidelines and standards is an ongoing process that we are consistently working to improve.

While Seattle Public Schools endeavors to only post documents optimized for accessibility, due to the nature and complexity of some documents, an accessible version of the document may not be available. In these limited circumstances, the District will provide equally effective alternate access.

For questions and more information about this document, please contact the following:

Donna Schmidt
HR Director
djschmidt@seattleschools.org

This document is the District's standard Terms & Conditions with minor changes to reflect that the vendor is supplying implementation services and not expressly developing or selling software.

Exhibit C

SERVICES CONTRACT
GENERAL CONDITIONS (SHORT FORM)

ARTICLE 1 - CONTRACTOR'S SERVICES AND RESPONSIBILITIES

1.1   Services. Contractor shall furnish all personnel, equipment and materials for the performance of all services under this Agreement. Such services, together with all drawings, specifications, materials, information, property, and other items provided or to be provided to District under this Agreement, are sometimes collectively referred to herein as the "Services."

1.2   Manner of Performance. Contractor's Services shall be performed with the degree of care and diligence ordinarily exercised under similar circumstances in the applicable disciplines and as expeditiously as is consistent with such standards of professional skill and care and the orderly progress of the Services. At the time of performance, Contractor shall be properly licensed, equipped, organized and financed to perform the Services.

1.3   District's Representatives. District may designate one or more individuals or firms as its representative for administration of this contract. If a representative is assigned by District, it shall not have authority to assign additional Services or to reduce the Services to be performed by the Contractor under this contract.

1.4   Correction of Noncompliances. Contractor shall, at no cost to District, promptly and satisfactorily correct any Services found to be defective or not in compliance with the requirements of this Agreement or the requirements of any governmental authority, law, regulations or ordinances.

1.5   Contractor's Personnel. All personnel employed by Contractor engaged in the Services and Services shall be fully qualified and shall be authorized under applicable federal, state, and local law to perform such Services and Services. Contractor shall, if so requested by District, remove from the performance of the Services any person District reasonably deems incompetent. Failure of District to so object shall not relieve Contractor of responsibility for such person. If any personnel are reassigned or replaced by Contractor upon District's request, Contractor shall replace them with personnel approved by District.

1.6   Contractor Employee Background. Pursuant to RCW 28A.400.330, Contractor shall prohibit from providing Services at a public school where there may be contact with children, any employee of Contractor who has pled guilty to or been convicted of any felony crime involving the physical neglect of a child under Chapter 9A.42 RCW, the physical injury or death of a child under Chapter 9A.32 or 9A.36 RCW (except motor vehicle violations under Chapter 46.61 RCW), sexual exploitation of a child under Chapter 9.68A RCW, sexual offenses under Chapter 9A.44 RCW where a minor is the victim, promoting prostitution of a minor under Chapter 9A.88 RCW, the sale or purchase of a minor child under RCW 9A.64.030, or violation of similar laws of another jurisdiction. Contractor shall furnish records to confirm compliance with this section prior to commencing work. Failure to comply with this section shall be grounds for District to immediately terminate the contract.

1.7   Compliance With Laws
1.7.1   General. Contractor shall comply, and be certain that its Services comply, with all applicable laws, ordinances, regulations, resolutions, licenses of record, permits of record, and other requirements applicable to the Services, in effect at the time of performance of the Services and as interpreted by cognizant authorities. Contractor shall furnish such documents as may be required to effect or evidence such compliance. All laws, ordinances, regulations, and resolutions required to be incorporated in agreements of this character are incorporated in this Agreement by this reference.
1.7.2   Nondiscrimination.
A.   Applicable state laws concerning prevailing wages, hours, workers' compensation and other conditions of employment are called to the attention of bidders for their compliance. Bidder shall include in the bid any filing fees required to comply with applicable labor laws.
B.   During the term of this Agreement, Contractor shall comply with applicable local, state and federal laws prohibiting discrimination with regard to race, creed, color, national origin, sex, sexual orientation, including gender expression or identity marital status, age or the presence of any sensory, mental or physical handicap.
C.   Any contractor who is in violation of these requirements, or an applicable nondiscrimination program shall be barred forthwith from receiving awards of any purchase order from Seattle School District No. 1 or shall be subject to other legal action or contract cancellation unless satisfactory showing is made that discriminatory practices have

Exhibit C

terminated, and that reoccurrence of such acts is unlikely. This includes compliance with Section 503 and 504 of the Vocational Rehabilitation Act of 1973 and Sections 2012 and 2014 of the Vietnam Era Veterans Readjustment Act of 1974.

1.7.3   Warranty of Accessibility. For any external facing software components for which (1) the Contractor is responsible for customizing or (2) the Contractor is responsible for configuring the software purchased by the District and where the software's configuration options would allow the Contractor's employee who is doing the configuration to inadvertently choose formatting options that would render the resulting component out of ADA compliance, the Contractor will ensure that the resulting component is ADA compliant and, at a minimum, conform with all applicable laws, including Section 508 of the Rehabilitation Act of 1973 (29 U.S.C. 794d), as amended, all other regulations promulgated under Title II of the Americans with Disabilities Act, and the accessibility standards of the Web Content Accessibility Guidelines ("WCAG") 2.0 AA.

C.   C

1.7.4   Student User Privacy. Contractor agrees to comply with the Student User Privacy in Education Rights Act ("Super Act" - a Washington State law on student privacy) if the provisions of SUPER Act apply to the school services provided by the Contractor to the District. School service means a website, mobile application, or online service that: (a) Is designed and marketed primarily for use in a K-12 school; (b) is used at the direction of teachers or other employees of a K-12 school; and (c) collects, maintains, or uses student personal information. A "school service" does not include a web site, mobile application, or online service that is designed and marketed for use by individuals or entities generally, even if also marked to a United States K-12 school.

1.7.5   Confidential Student Information. Contractor understands and agrees that any educational records received from the District are considered confidential student information protected by federal law, the Family Educational Rights and Privacy Act ("FERPA"), 20 U.S.C. Section 1232g. Contractor further agrees that student educational records received from the District will not be disclosed to any other person, agency, or entity without the prior written consent of the District unless required to make such a disclosure in connection with the performance of its obligations under this Agreement (provided that the party to whom such information is disclosed is subject to confidentiality restrictions) or under an applicable law or court order. Contractor shall not be permitted to sell such information and must seek permission from District before including such information that is identifiable to the school or district. Contractor agrees that any student information obtained through this Agreement is confidential and cannot be disclosed to a third-party unless disclosure is expressly permitted in this section or required by law. Upon termination or expiration of this Agreement for any reason, contractor shall either return or permanently delete and destroy all confidential student information. Contractor will confirm its destruction or return confidential student information in writing at the request of the District. For the avoidance of doubt, this section does not create any obligations for Contractor with respect to information that is not in Contractor's control. The unauthorized or unlawful disclosure of student records by Contractor is just cause for the District to immediately terminate this Agreement.

ARTICLE 2 - PAYMENTS TO CONTRACTOR

The compensation shall be made no more frequently than monthly and if paid on a lump sum basis shall be in proportion to the Services performed. Each of Contractor's invoices shall set forth in a detailed and clear manner a complete description of the Services covered thereby, on a form substantially similar to that customarily used by District and shall be supported by such receipts, documents, and other information as District may reasonably request. The invoice shall include separate listings of Services for particular schools or programs, if requested by the District. District shall pay each of Contractor's invoices within thirty (30) days after District's receipt, provided that all required documentation is included and accurate.

ARTICLE 3 - REIMBURSABLE EXPENSES
As shown in contract.

ARTICLE 4 - CONTRACTOR'S ACCOUNTING RECORDS

The Contractor's records of performance of Services shall at all times be subject to review by and the approval of District, but the making of (or failure or delay in making) such review or approval shall not relieve Contractor of responsibility for performance of the Services in accordance with this Agreement. Records of Reimbursable Expenses shall be kept in accordance with generally accepted accounting principles.

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Contractor shall promptly furnish District with such information related to the Services as may be requested by District. Until the expiration of three (3) years after final payment of the compensation payable under this Agreement, Contractor shall provide District access to (and District shall have the right to examine, audit and copy) all of Contractor's books, documents, papers and records which are related to the Services or this Agreement.

ARTICLE 5 - DISTRICT OWNERSHIP AND USE OF DOCUMENTS

5.1   <u>District Ownership</u>. All drawings, specifications, materials, information, property and other items obtained or developed in connection with the Services or the cost of which is included in the Reimbursable Expenses (including, but not limited to, documents, designs, drawings, plans, specifications, calculations, maps, sketches, notes, reports, data, estimates, reproductions, renderings, models, mock-ups, completed Services and Services in progress), together with all rights associated with District ownership of such items (such as copyright, patent, trade secret and other proprietary rights), shall become the property of District when so obtained or developed or when such expense is incurred, as the case may be, whether or not delivered to District. Contractor shall deliver such items, together with all materials, information, property and other items furnished by District or the cost of which is included in the Reimbursable Expenses, to District upon request and in any event upon the completion, termination or cancellation of this Agreement. However, Contractor may at its own expense retain copies of any such items for its own records or for use in the furtherance of its professional knowledge.

5.2   <u>License</u>. District shall have a permanent, assignable, nonexclusive, royalty-free license and right to use all concepts, methods, processes, products, writings and other items (whether or not copyrightable or patentable) developed or first reduced to practice in the performance of the Services or otherwise whether by Contractor, any of its subcontractors, or any employee(s) of Contractor in connection with this Agreement. District shall hold Contractor or its subcontractors harmless for District's reuse of documents on a project other than this Project.

5.3   <u>Nondisclosure</u>. Contractor shall not, without the prior written consent of District, disclose to third parties any information obtained in connection with the Services unless: (a) the information is known to Contractor prior to obtaining the same directly or indirectly from District or in connection with the Services; (b) the information is in the public domain at the time of disclosure by Contractor; or (c) the information is obtained by Contractor from a third party who did not obtain the same directly or indirectly from District or in connection with the Services. If so requested by District, Contractor shall obtain from its employees, subcontractors and their respective employees nondisclosure agreements in the form and content satisfactory to District. Submission or distribution to meet official regulatory requirements or for other purposes in connection with the activity for which the Services were rendered is not to be construed as publication in derogation of District's or Contractor's rights.

ARTICLE 6 - RELEASE, INDEMNIFICATION AND HOLD HARMLESS

6.1   <u>Release and Indemnification</u>. Contractor releases and shall indemnify and hold harmless District, its successors and assigns, and the directors, officers, employees and agents of District and their successors and assigns (collectively, the "<u>Indemnitees</u>") from all claims, losses, harm, costs, liabilities, damages and expenses (including, but not limited to, reasonable attorneys' fees) relating to the services arising (whether before or after completion of the Services) out of any act, error or omission of any of the following: Contractor; Contractor's subcontractors or subcontractors; the directors, officers, employees or agents of Contractor or any of its subcontractors or subcontractors; or anyone acting on Contractor's behalf in connection with the Services or this Agreement. However, Contractor shall not be required to so indemnify any of the Indemnitees against liability or damages to the extent caused by or resulting from the negligence of such Indemnitees. The indemnification obligation under this paragraph will be limited to the maximum amount of compensation payable to the contractor under this agreement with the exception of the Contractor's obligation to indemnify and hold harmless District in relation to Section 1.7.3 <u>Warranty of Accessibility</u>. **Contractor further agrees that this waiver has been mutually negotiated by the parties.**

6.2   <u>Workers' Compensation</u>. Contractor expressly waives any immunity or limitations (e.g., on the type or amount of damages, compensation, benefits or liability payable by Contractor) that might otherwise be afforded under any industrial insurance, workers' compensation, disability benefit or similar law, rule, regulation or order of any governmental authority having jurisdiction (including, but not limited to, the Washington Industrial Act, Title 51 of the Revised Code of Washington). By executing this Agreement, Contractor acknowledges that the foregoing waiver has been mutually negotiated by the parties.

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6.3　　Patent; Copyright. Contractor releases and shall defend, indemnify and hold harmless the Indemnitees from all claims, losses, harm, costs, liabilities, damages, expenses (including, but not limited to, reasonable attorneys' fees) and royalties arising (whether before or after completion of the Services) out of or in connection with any claim, action, suit or proceeding based upon infringement of any patent, copyright, trade secret or other proprietary right or upon the wrongful use of any confidential or proprietary concept, method, process, product, writing, information or other item and arising out of or in connection with performance of the Services or the use or intended use of any of the Services. Further, if any of the Services or any use or intended use of the Services constitutes an infringement of any patent, copyright, trade secret or other proprietary right or the wrongful use of any confidential or proprietary concept, method, process, product, writing, information or other item, Contractor shall at its expense either procure for the Indemnitees the right to use the infringing item, replace the infringing item with a substantially equal but noninfringing item or modify the infringing item so that it becomes noninfringing; provided, however, that this paragraph 6.3 does not apply to any claim, action, suit or proceeding based upon infringement which is related to any materials or equipment designated solely by District for use by the District.

ARTICLE 7 – INSURANCE AND BONDS

7.1　　General Provisions.

A.　　Contractor shall, at its sole cost and expense, with respect to Contractor, its subcontractors of any tier, and their employees, officers, representatives and agents, ensure that Contractor and its subcontractors maintain in effect at all times during the performance of the Work coverage or insurance in accordance with the applicable laws relating to workers' compensation and employer's liability insurance (including, but not limited to, the Washington Industrial Insurance Act), regardless of whether such coverage or insurance is mandatory or merely elective under the law. Prior to commencing the Work, Contractor shall furnish to Owner assurance and evidence acceptable to Owner of coverage or insurance with respect to all persons performing the Work in accordance with the applicable laws relating to workers' compensation and employer's liability insurance (including, but not limited to, Certificate(s) of Compliance as issued by the Washington State Department of Labor and Industries).

B.　　Without limiting the generality of paragraph (a) above, Contractor shall purchase and maintain insurance as set forth below for all its employees, officers, representatives and agents engaged in Work on this Project under this Contract. In case any such Work is subcontracted, Contractor shall require the subcontractor to provide the same insurance coverage for all of the latter's employees, officers, representatives and agents engaged in such Work. In case any class of employees engaged in hazardous work under this Contract and the site of the Project is not protected under the above Washington State Industrial Insurance Act, or "stop-gap" insurance, Contractor shall provide and shall cause each subcontractor to provide compensation insurance and employer's liability insurance with a private insurance company.

C.　　Prior to the commencement of performance of the Work, Contractor shall, at its sole cost and expense, secure such liability insurance as will protect Contractor, its employees, officers, representatives and agents, Owner and Owner's Representative, from and against any and all claims and liabilities arising out of bodily or personal injury (including death) or property damage that may result from Contractor's operations or performance of Contractor's obligations under this Contract, whether such performance is by Contractor or any of its Support. All such insurance shall be placed with such insurers and under such forms of policies as may be acceptable to Owner.

7.2　　Contractor's Liability Insurance. Contractor shall, at its own expense, secure and maintain Commercial General Liability Insurance including Products and Completed Operations; Broad Form Property Damage; Stop Gap; Contractual Liability (and Collapse, Explosion and Underground). Without limiting the generality of the foregoing, such insurance shall protect Owner, Owner's Representatives, Construction Manager, Architect/Engineer and Contractor from the following claims which may arise out of, result from or relate to Contractor's operation or performance under the Contract:

A.　　claims under workers' or workmen's compensation, disability benefit and other similar employee benefit act;

B.　　claims for damages because of bodily injury, occupational sickness or disease, or death of its employees;

C.　　claims for damages because of bodily injury, sickness or disease, or death of any person other than its employees;

D.　　claims for damages, insured by usual personal and advertising injury liability coverage which are sustained (1) by any person as a result of an offense directly or indirectly related to the employment of such person by Contractor, or (2) by any other person;

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E.   claims for damages, other than to work itself, because of injury to or destruction of tangible property, including loss of use resulting therefrom (including, but not limited to, the usual Broad Form Property Damage Liability coverage); and
F.   claims for damages because of bodily injury or death of any person or property damage arising out of the ownership, maintenance or use of any motor vehicle.

All required liability policies shall be written on an "occurrence" and not "claims-made" form.
The insurance required by 7.2 shall include contractual liability insurance applicable to Contractor's indemnification obligations under this Agreement.

All required liability policies shall be specifically endorsed as primary insurance, and not contributory to any other insurance or self-insurance available to Owner.

7.3   Limits of Liability. The liability insurance required herein shall be written for not less than that stated in these Contract Documents; or one million dollars ($1,000,000), whichever is greater. Except for workers' compensation, limits shall be project specific and dedicated to work performed under this Contract, unless otherwise agreed to by Owner. The amounts of insurance shall not be less than:

workers' compensation	statutory
employer's liability	$1,000,000 each accident
(stop gap)	$1,000,000 disease-policy limit
	$1,000,000 each employee
commercial general liability	(per occurrence/aggregate)
bodily injury and property damage	$1,000,000/$2,000,000
personal and advertising injury	$1,000,000/$2,000,000
products and completed operations	$1,000,000/$2,000,000
damage to rented premises	$100,000
automobile liability (owned, non-owned, leased or hired)	$1,000,000 per occurrence
umbrella/excess coverage	$2,000,000 per occurrence
professional liability	$1,000,000 each occurrence

Exhibit C

7.4   Coverage Period. Contractor or its Subcontractors shall maintain the foregoing insurance and coverages in full force and effect at all times; (a) until all of Contractor's obligations under this Contract have been fully performed, all of the Work has been fully accepted by Owner and all operations of Contractor and its employees, officers, representatives, agents and subcontractors (including, but not limited to, removal of equipment and other property) on or about the site of the Work have been concluded; and (b) in the case of completed operations and products liability insurance, until the expiration of one (1) year after all of Contractor's obligations under this Contract have been fully performed.

7.5   Certificates of Insurance. Prior to the execution of the Contract (or within such further time as Owner may allow in writing), Contractor shall deliver to Owner Certificates of Insurance in a form acceptable to Owner as evidence that policies providing insurance with such provisions, coverages and limits are in full force and effect. Such Certificates shall state specifically the name of this Project and its address, and shall evidence the Owner and Owner's Representatives, if any, as insureds or additional insureds. These certificates shall contain a provision that coverages afforded by the policies will not be canceled until at least 45 days prior written notice has been given to Owner and additional insureds. Contractor shall also furnish Owner with such additional assurance and evidence of such insurance (such as copies of all insurance policies, certified by an authorized representative of the insurer) as Owner may from time to time request. The certificate shall also evidence that the policies are issued as primary insurance and noncontributory to any insurance or self-insurance applicable to Owner.

7.6   Renewal, Termination, Cancellation, Expiration, and Alteration. In the event of any renewal, termination, cancellation, expiration or alteration in any policy of insurance required under this Contract, Contractor shall deliver to Owner a Certificate of Insurance with respect to any such renewal, termination, cancellation, expiration or alteration, as the case my be prior to inception of any such coverage.

7.7   Additional Insureds; Right of Subrogation. Contractor shall ensure that any policies of insurance that Contractor or any of its subcontractors are required to carry, provide or have provided as insurance against loss of or damage to property or bodily harm that may occur in connection with the Work or this Contract shall name Owner and Owner's Representatives as additional insureds and include a waiver of the insurer's right of subrogation against Owner, the Construction Manager, the Architect/Engineer and Owner's Representative. To the extent permitted by its insurance policies, Contractor hereby waives its rights of subrogation against Owner, the Construction Manager, the Architect/Engineer and Owner's Representative.

7.8   No Limitation. The requirements of this Contract as to insurance and acceptability to Owner of insurers and insurance to be maintained by Contractor and its Support are not intended to and shall not in any manner limit or qualify the liabilities and obligations assumed by Contractor under this Contract.

7.9   Owner's Right to Maintain Insurance. If Contractor or any of its subcontractors fails to maintain the insurance coverage as required by this Part 2, Owner may obtain such insurance coverage as is not being maintained, in form and amount substantially the same as set forth above, and Owner may charge to or otherwise recover from Contractor (e.g., by offset against any amounts due or which may become due Contractor under this Contract), the cost of such insurance.

ARTICLE 8 – CHANGES

8.1   Notice. District may at any time, by written notice thereof to Contractor, make changes in the Services to be performed under this Agreement (including, but not limited to, additions to or deletions from any Services, suspension of performance, and changes in the schedule and location of performance). Contractor shall, within ten (10) days after receipt of notice of any change which Contractor believes to be outside the scope of Services, give District written notice of such belief, otherwise the change shall be deemed to be within the scope of Services.

8.2   Adjustment. If any change under paragraph 8.1 causes an increase or decrease in the cost of or the time required for performance of the Services, an equitable adjustment in the compensation and/or schedule under this

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Agreement shall be made to reflect such increase or decrease and this Agreement shall be modified in writing accordingly. Such equitable adjustment shall constitute full compensation to Contractor for such change.

ARTICLE 9 - TERMINATION OF THIS AGREEMENT
9.1	Termination of Agreement by District for Cause.

9.1.1	If Contractor shall fail to fulfill in a timely and proper manner its obligations under this Agreement, or if Contractor shall violate any of the provisions of this Agreement, or if Contractor becomes insolvent or the subject of any proceeding under bankruptcy, insolvency or receivership law or makes an assignment for the benefit of creditors, District shall thereupon have the right to terminate this Agreement by giving written notice of such termination and specifying the effective date thereof as a certain date at least seven (7) days after the notice, during which period Contractor shall have the right to cure the default.
9.1.2	Whether or not this Agreement is so terminated, Contractor shall be liable to District for any damage or loss resulting from such failure or violation by Contractor described in subparagraph 9.1.1, including, but not limited to, costs in addition to those agreed to herein for prosecuting Services to completion and delay damages paid or incurred by District. The rights and remedies of District provided by this paragraph are cumulative with and in addition to any other rights and remedies provided by law or this Agreement.
9.1.3	District shall be liable to Contractor for Contractor's just and equitable compensation for any satisfactory services completed, but in no event, shall this compensation exceed the percentage of total services satisfactorily completed at the time of termination times the total compensation payable under this Agreement. District may withhold payments to Contractor equal to any claim made in writing by District for the purpose of set-off until such time as the exact amount of damages due District from Contractor is determined. In no event shall District be liable for any consequential or incidental damages, including, but not limited to, loss of profit on other projects or of reputation incurred by Contractor as a result of such termination. If District purports to terminate all or a part of this Agreement for cause, and it is determined that insufficient cause existed, such termination shall be deemed to have been a termination for convenience of District pursuant to paragraph 10.2, and the rights of the parties shall be determined accordingly.

9.2	Termination for Convenience by District. District may, at its option, terminate all or a portion of the services not then performed under this Agreement at any time by so notifying Contractor in writing. In that event, all finished or unfinished documents and other materials as described above shall, at the option of District, become its property upon compensation therefor in accordance with this Agreement, and District shall indemnify and hold harmless Contractor and its agents and employees from any claims arising from District's subsequent use of such documents and other materials, except to the extent Contractor is solely or concurrently negligent. If the Agreement is terminated by District as provided herein, Contractor's compensation for the Services shall be (i) that portion of the compensation for services performed prior to termination, and (ii) proper compensation for Reimbursable Expenses. District shall not be liable for any consequential or incidental damages, including, but not limited to, loss of profits on other projects or of reputation incurred by Contractor as a result of such termination.

ARTICLE 10 – MISCELLANEOUS
10.1	Time. Time is of the essence with regard to performance of this Agreement.

10.2	Subcontracting. Except for any services to be performed by subcontractors specified in the Scope of Work, Contractor shall not (by contract, operation of law or otherwise) delegate or subcontract performance of any Services to any other person or entity without the prior written consent of District.

10.3	Independent Contractor. Contractor shall at all times be an independent contractor and not an agent or representative of District with regard to performance of the Services as authorized by this Agreement. Contractor shall not represent that it is, or hold itself out as, an agent or representative of District.

10.4	Nonwaiver. The failure of either party to insist upon or enforce strict performance by the other party of any of the provisions of this Agreement or to exercise any rights under this Agreement shall not be construed as a waiver or relinquishment to any extent of its rights to assert or rely upon any such provisions or rights in that or any other instance.

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10.5   Assignment. Neither District nor Contractor shall assign, sublet or transfer any interest in this Agreement without the written consent of the other.

10.6   Entire Agreement. This Agreement represents the entire and integrated agreement between District and Contractor and supersedes all prior negotiations, representations or agreements, either written or oral. This Agreement may be amended only by written instrument signed by both District and Contractor.

10.7   Applicable Law; Venue. This Agreement shall be interpreted, construed, and enforced in all respects in accordance with the laws of the State of Washington. Venue in any litigation shall be in King County, Washington.

10.8   Debarment. Contractor, by accepting this contract, warrants that it is not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions (defined as not being eligible to receive federal funds) by any local, state or federal department or agency. Contractor agrees to be bound by the terms of School Board Policy No. 6973, which provides additional requirements applicable to debarment of contracts from receiving future contracts with SPS.

10.9   Cooperation with District Auditor and State Auditor. Contractor agrees to provide reasonable cooperation with any inquiry by either the district or State Auditor relating to the performance of this contract. The District has the right to audit records of the Contractor relating to payment or performance under this contract, for one year after completion of this contract. Failure to cooperate may be cause for debarment from award of future contracts.

RFP 02851_Exhibit E_ SPS Vendor Travel Guidelines

Seattle Public Schools is committed to making its online information accessible and usable to all people, regardless of ability or technology. Meeting web accessibility guidelines and standards is an ongoing process that we are consistently working to improve.

While Seattle Public Schools endeavors to only post documents optimized for accessibility, due to the nature and complexity of some documents, an accessible version of the document may not be available. In these limited circumstances, the District will provide equally effective alternate access.

For questions and more information about this document, please contact the following:

Donna Schmidt
HR Director
djschmidt@seattleschools.org

This Exhibit is the District's standard Travel Guidelines for vendors.

VENDOR TRAVEL GUIDELINES
LSI/ Seattle Schools Software Agreement
Dated:

General Vendor Responsibilities

All vendor travel must be approved by District in writing prior to travel, including:
- Travel dates
- Travel objective
- Names and roles of people travelling

Vendors must minimize travel expenses whenever possible by using the least expensive options that does not result in unreasonably ineffective use of work time.

All insurance for vendors is the responsibility of the vendor's employer. District is not responsible for providing insurance coverage.

Airlines

Vendors should purchase tickets that leverage the discounts of fourteen (14) day advanced ticketing and travel Economy/Coach class unless authorized in writing by the District.

Vendors must book the Lowest Logical Fare (LLF) which is defined as the lowest fare within a 3-hour departure window and may include connections that do not add more than a two (2) hour layover. Exceptions to the LLF must be authorized in advance by the District.

Hotels

Vendors will be reimbursed for mid-range, reasonably priced hotels. Expenses for staying in a private home (e.g., family, friends, or at a vendor's personal residence) in lieu of hotel costs are not reimbursable.

Sunday night hotel expenses are allowed for business that begins on Monday morning. Friday or Saturday night weekend hotel expenses may be reimbursable if airfare savings result in a lower overall cost for the trip by at least $250.00 USD or equivalent currency and the expenses do not exceed the airfare savings (or by prior agreement by the District).

Car Rental

Vendors should rent midsize or smaller vehicles whenever possible. Full size vehicles are allowed only when being shared by 3 or more people. Cars should be shared whenever possible. All cars must be refueled before returning to avoid fuel surcharges. No fuel charges from the rental company may be expensed.

Rail Travel

Rail travel should be used when it is less expensive than air travel, adds no more than one and a half hours to the total travel time, or is timelier than driving.

Frequent Flyer/Frequent Guest Programs

Vendors may retain program awards and benefits. Participation in these programs should not influence flight or lodging selections in any manner that would result in increased costs to District.

Food

Vendors will follow the per diem limits for food listed for the Seattle area on the U.S. Services General Administration site, http://www.gsa.gov/portal/category/100120.

Cancellations

When a trip is cancelled by District after Vendor has incurred expenses, Vendors are responsible for canceling reservations and securing a cancelation number; District will pay no expenses which could have been avoided by prompt cancellation.

Vendor shall not seek reimbursement for incurred travel expenses that are cancelled for reasons of Vendor and are not in response to a change in plans by District.

EXPENSE REIMBURSEMENT (all receipts required)
Reimbursable Expenses

The following items may be reimbursable to Vendors when necessary and reasonable, and incurred while conducting District business. Reimbursable items include but are not limited to:
- Commercial airfare and surface transportation (Economy/Coach Class) including parking fees and tolls
- Actual gratuity tips paid, when reasonable and customary
- Hotel/lodging
- Meals incurred during travel
- Hotel high-speed internet connection

Non-Reimbursable Expenses
Non-reimbursable items include but are not limited to:

- Airline club memberships
- No-show fees for hotels, airfare, or car rentals
- Cancellation fees except those unavoidable due to business requirements
- Class of service upgrades
- Car, train, and air phones
- Barber, hair stylist, manicurist, spa services, shoe shines, and other grooming/personal service expenses
- Lost or stolen personal items
- Personal entertainment including movies and DVD rentals
- Traffic/parking violations
- Family member or other non-business associate's expenses

- Credit card fees including annual or membership fees, late fees, and interest charges
- Insurance premiums
- Clothing purchases
- Entertainment
- Laundry and dry cleaning unless trip exceeds 5 business days
- Membership fees (including frequent flyer/frequent guest programs)
- Trip or flight insurance
- Pet care or kennel costs
- Babysitters or house-sitters