Onboarding and Offboarding Workflows in ERP Training Course

Professional Development Training Course Outline

Category	Enterprise Resource Planning (ERP)	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

In today’s fast-paced digital business environment, effective Onboarding & Offboarding Workflows in ERP systems are crucial for maximizing operational efficiency, compliance, and employee satisfaction. Organizations increasingly rely on ERP automation, digital HR transformation, and workflow optimization to streamline employee lifecycle management. Onboarding and Offboarding Workflows in ERP Training Course equips participants with hands-on expertise to implement, configure, and manage end-to-end onboarding and offboarding processes, ensuring data integrity, role-based access management, and seamless integration with core HR and finance modules. Participants will gain insights into process standardization, best practices, and real-world ERP case studies, enabling faster adaptation to evolving business requirements.

This course emphasizes practical knowledge, combining workflow automation techniques, ERP configuration skills, and strategic process improvements. Learners will develop a deep understanding of employee lifecycle management, from recruitment to exit, leveraging cloud-based ERP systems, compliance automation, and digital recordkeeping. Through interactive exercises, participants will master task orchestration, approval workflows, and audit trail management, while learning to mitigate risks and enhance organizational efficiency. By the end of the program, learners will confidently implement robust onboarding and offboarding workflows that drive measurable business impact and promote a culture of operational excellence.

Programme Curriculum

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Course Duration

5 days

Course Objectives

1. Implement end-to-end onboarding workflows in ERP systems.
2. Configure offboarding automation for efficiency and compliance.
3. Optimize employee lifecycle management in digital ERP environments.
4. Enhance role-based access control (RBAC) during onboarding/offboarding.
5. Integrate HR and Finance modules for seamless workflow transitions.
6. Automate task assignments and approvals using ERP tools.
7. Ensure compliance with labor laws and organizational policies.
8. Leverage digital recordkeeping and audit trails for offboarding.
9. Apply workflow analytics to monitor process efficiency.
10. Reduce manual HR administrative tasks through automation.
11. Implement notification and alert systems for key milestones.
12. Customize ERP workflows for diverse organizational needs.
13. Utilize case-based learning to troubleshoot real-world workflow challenges.

Target Audience

1. HR professionals and HRIS administrators
2. ERP consultants and system integrators
3. IT managers responsible for ERP workflows
4. Payroll and finance executives
5. Organizational change managers
6. Talent acquisition and employee experience specialists
7. Compliance and audit officers
8. Project managers implementing ERP solutions

Course Modules

Module 1: Introduction to ERP Onboarding & Offboarding

- Overview of employee lifecycle in ERP
- Key workflows and automation concepts
- Importance of data integrity and compliance
- Common challenges in onboarding/offboarding
- Case study: ERP onboarding implementation in a mid-sized enterprise

Module 2: ERP Workflow Configuration Basics

- Defining workflow steps and roles
- Creating approval hierarchies
- Automating notifications and reminders
- Setting triggers and conditional tasks
- Case study: Automating offboarding in SAP SuccessFactors

Module 3: Employee Onboarding Processes

- Pre-joining documentation and task assignment
- Role-based system access provisioning
- Induction and training workflow integration
- Integration with payroll and HR modules
- Case study: Onboarding automation in Oracle HCM Cloud

Module 4: Employee Offboarding Processes

- Exit interviews and knowledge transfer workflows
- Revoking system access and asset management
- Final payroll and benefits settlement automation
- Legal and compliance checklist automation
- Case study: Offboarding workflow in Microsoft Dynamics 365

Module 5: Role-Based Access & Security Management

- Defining roles and access levels
- Automating access provisioning and revocation
- Ensuring compliance with IT security policies
- Monitoring and reporting access activities
- Case study: Role-based ERP access management

Module 6: Integration with HR & Finance Modules

- Connecting onboarding/offboarding workflows to payroll
- Automating HR document management
- Ensuring data consistency across modules
- Workflow impact on financial reporting
- Case study: End-to-end workflow integration in Workday

Module 7: Workflow Monitoring & Analytics

- Tracking workflow efficiency and bottlenecks
- KPI definitions for onboarding/offboarding
- Generating audit-ready reports
- Continuous process improvement using ERP analytics

- Case study: Workflow optimization in a multinational company

Module 8: Troubleshooting & Best Practices

- Identifying common ERP workflow errors
- Best practices for workflow design and automation
- Change management and user adoption strategies
- Implementing continuous improvement cycles
- Case study: Resolving workflow failures in SAP ERP

Training Methodology

This course employs a participatory and hands-on approach to ensure practical learning, including:

- Interactive lectures and presentations.
- Group discussions and brainstorming sessions.
- Hands-on exercises using real-world datasets.
- Role-playing and scenario-based simulations.
- Analysis of case studies to bridge theory and practice.
- Peer-to-peer learning and networking.
- Expert-led Q&A sessions.
- Continuous feedback and personalized guidance.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call +254769199797

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

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