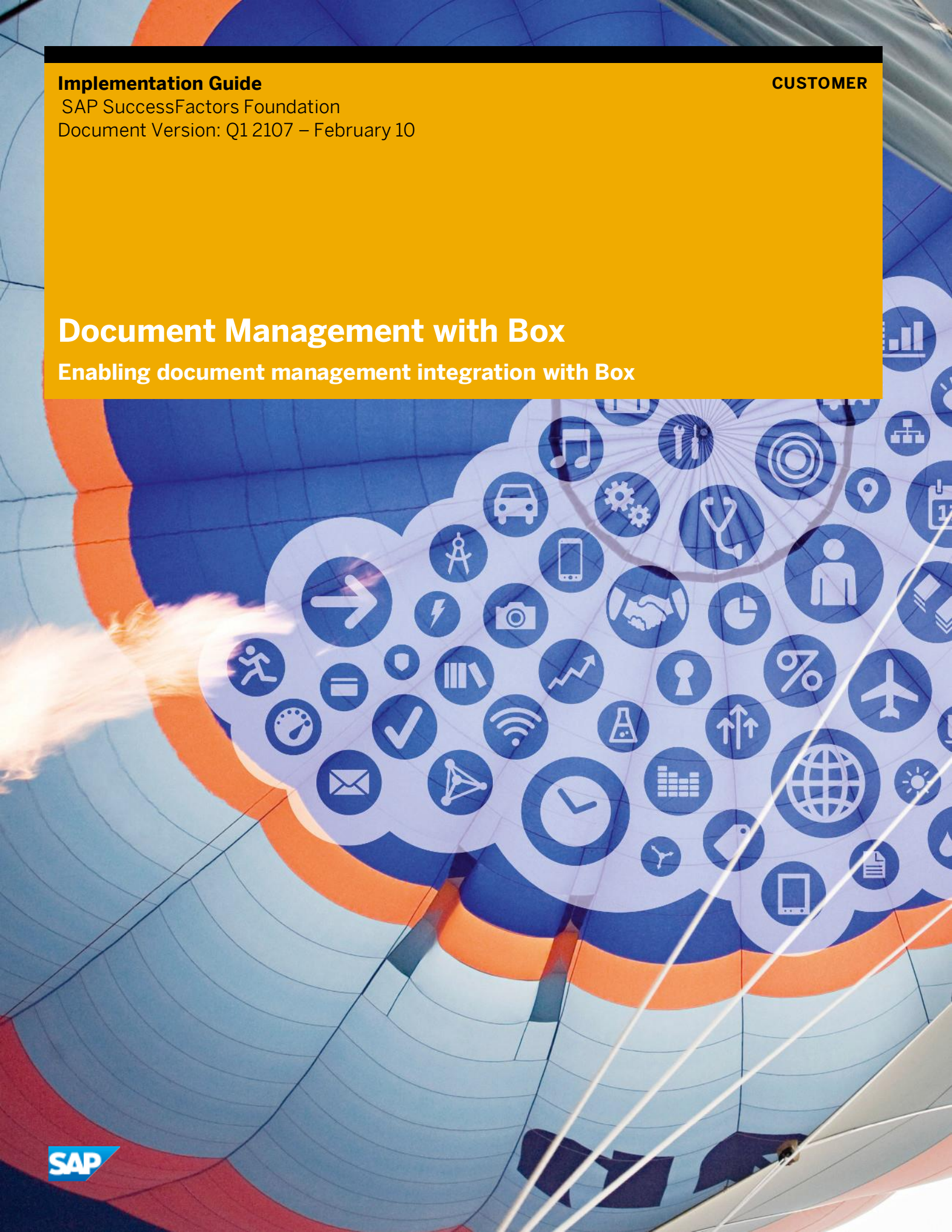
Implementation Guide
SAP SuccessFactors Foundation
Document Version: Q1 2107 – February 10

CUSTOMER

Document Management with Box

Enabling document management integration with Box



Typographic Conventions

Type Style	Description
Example	Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options. Textual cross-references to other documents.
Example	Emphasized words or expressions.
`EXAMPLE`	Technical names of system objects. These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE.
`Example`	Output on the screen. This includes file and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade and database tools.
`Example`	Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.
`<Example>`	Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system.
`EXAMPLE`	Keys on the keyboard, for example, `F2` or `ENTER`.

© 2017 SAP SE or an SAP affiliate company. All rights reserved.

Document History

Version	Date	Change
Q1 2017	February 10	There are no changes to this guide since the last publication.
Q3 2016	Sept 16	First publication

CUSTOMER
© 2017 SAP SE or an SAP affiliate company. All rights reserved.

Table of Contents

1 Introduction 5
1.1 Prerequisites 5

2 Enabling Document Management 6

3 Setting Up Integration with Box 7

4 How SuccessFactors Integrates with Box 10
4.1 Box Admin View 10
4.2 Box Employee File View 10

5 Limitations 12

6 Using Document Management in SuccessFactors 13

© 2017 SAP SE or an SAP affiliate company. All rights reserved.

1 Introduction

Document management helps you better manage your documents in SAP SuccessFactors Employee Central, and SAP SuccessFactors Performance and Goals solutions. Your users can upload, search, and download documents that are relevant to your SAP SuccessFactors solutions.

You can use SAP SuccessFactors' built-in document storage or you can integrate your system with another enterprise cloud storage vendor. Currently, our document management solution integrates with Box only. Integration with other enterprise cloud storage solutions are under evaluation.

1.1 Prerequisites

- Metadata Framework (generic objects) enabled
- Role-based permissions (RBP) enabled
- Vendor account set up

© 2017 SAP SE or an SAP affiliate company. All rights reserved.

2 Enabling Document Management

To enable document management, complete the following steps:

1. In Provisioning, check *Enable Attachment Manager* and *Enable Document Management Service*
2. In role-based permissions, enable the permission for *Configure Document Management*
3. Log out.

Result

Next time you log back in, you can select your vendor on the *Document Storage Vendor Setup* screen.

© 2017 SAP SE or an SAP affiliate company. All rights reserved.

3 Setting Up Integration with Box

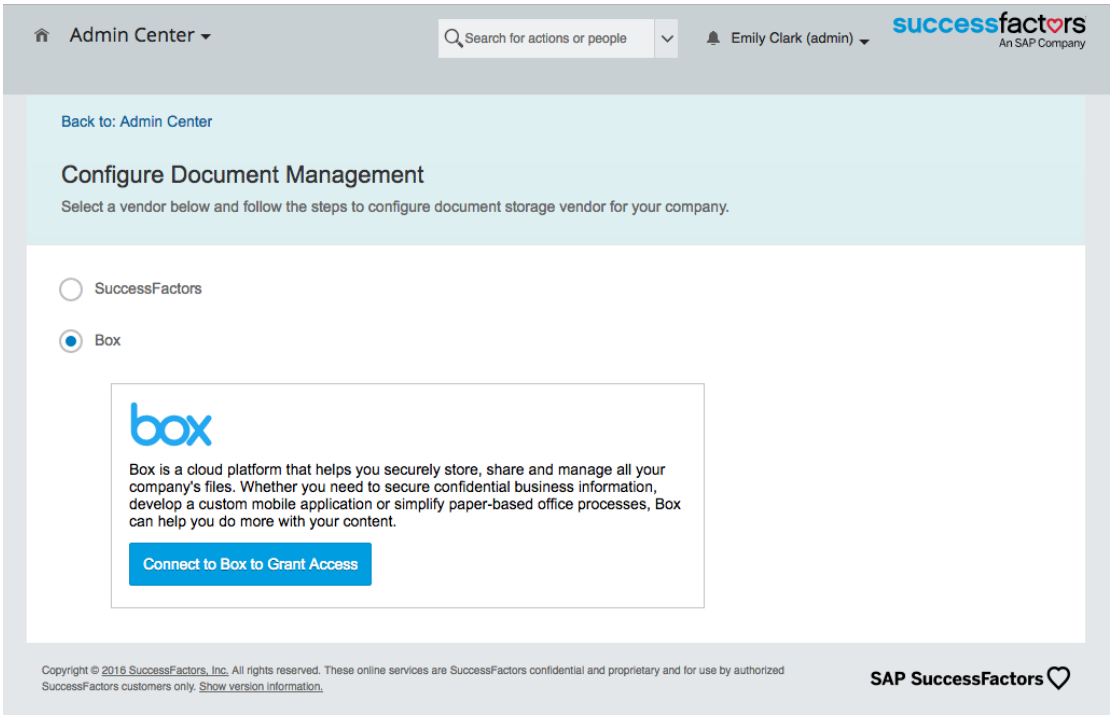
To set up integration with Box, complete the following steps:

1. Navigate to the '*Configure Document Management* page using action search or the *Tools* search in *Admin Center*.
2. Select *Box* radio button
3. Click *Connect to Box to Grant Access*
4. You will be redirected to Box to grant access to SuccessFactors
5. Log in to Box with your enterprise account admin username and password

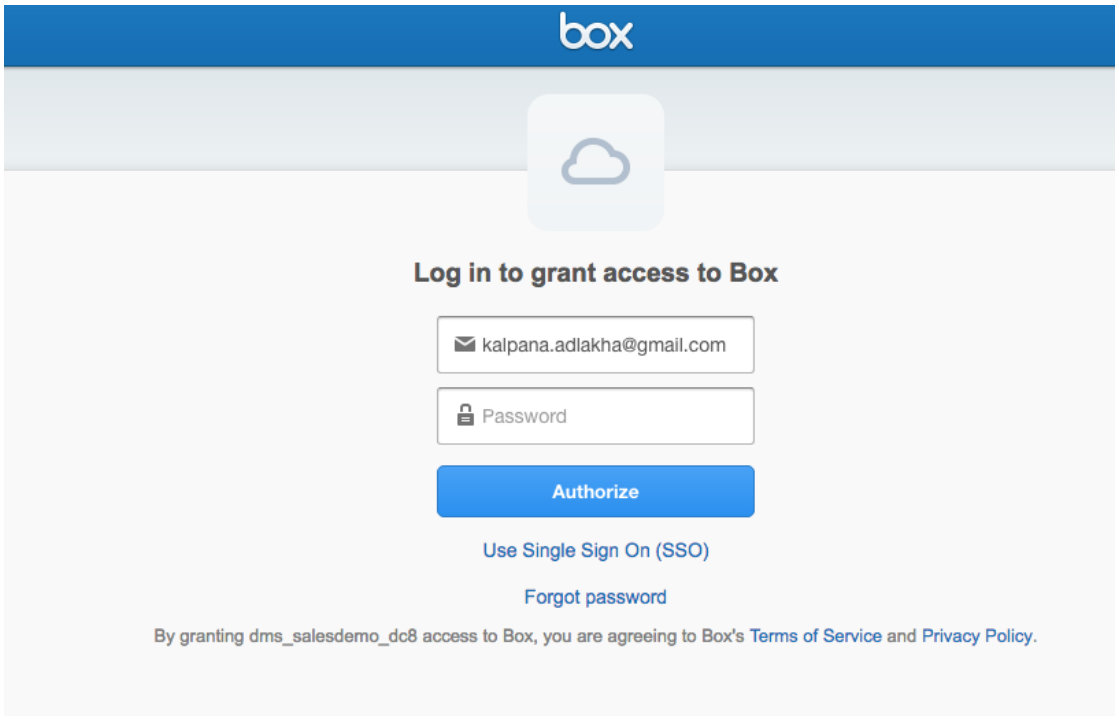
Result

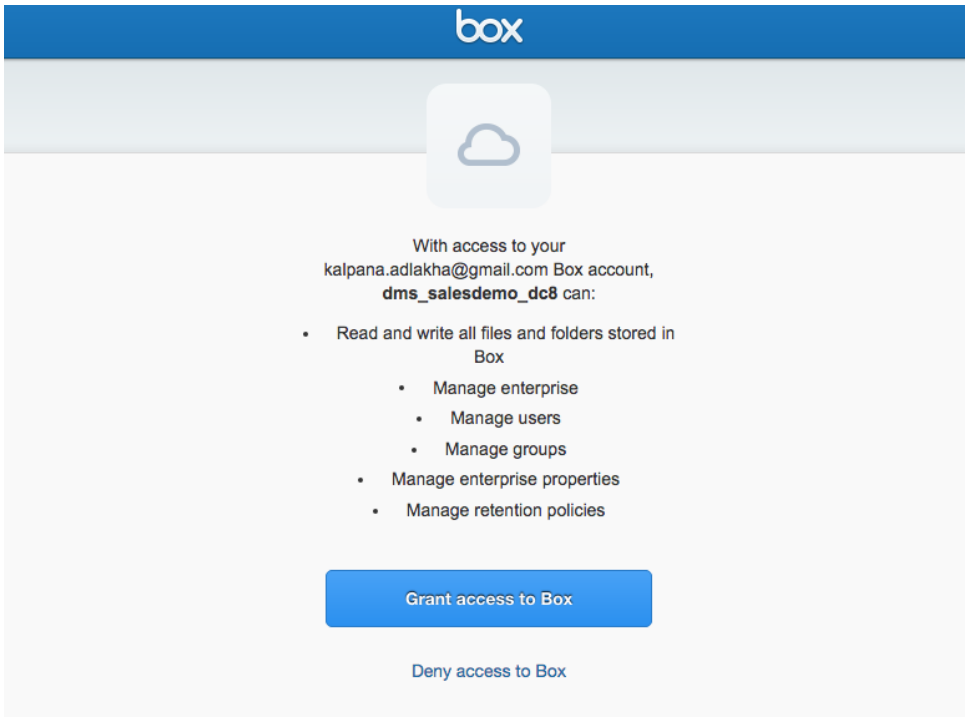
Once done, your SuccessFactors instance will be connected to your Box instance

Screenshots

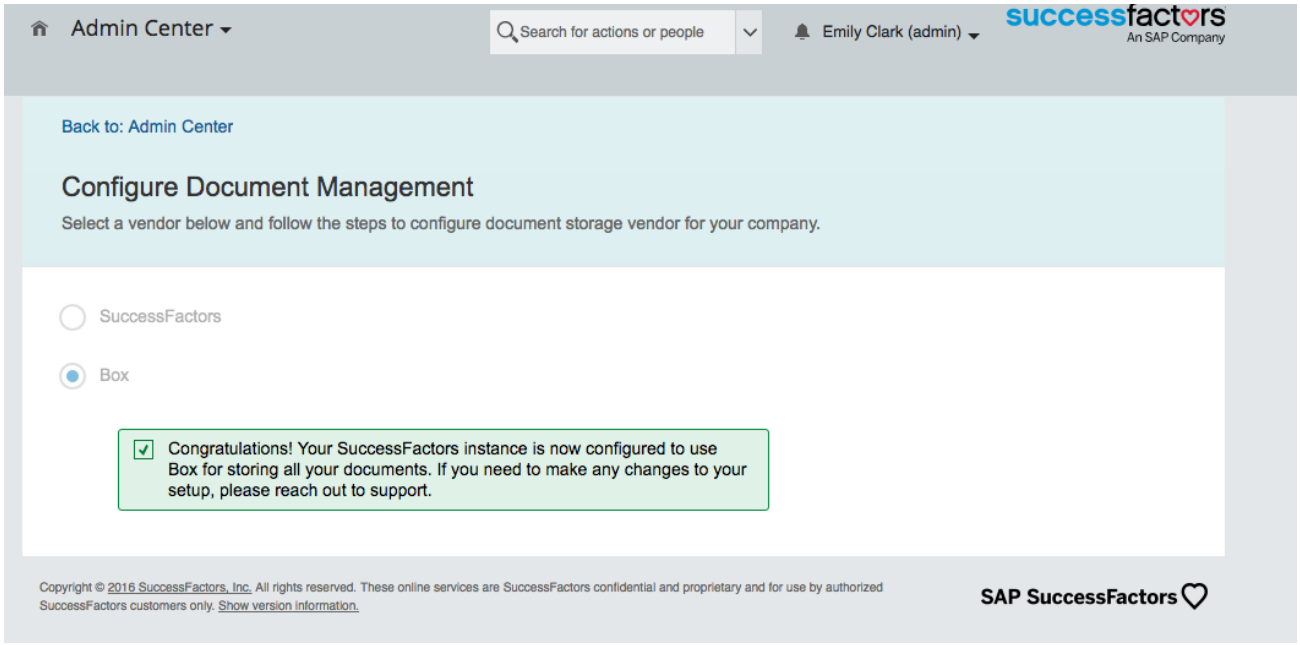


© 2017 SAP SE or an SAP affiliate company. All rights reserved.





CUSTOMER
© 2017 SAP SE or an SAP affiliate company. All rights reserved.

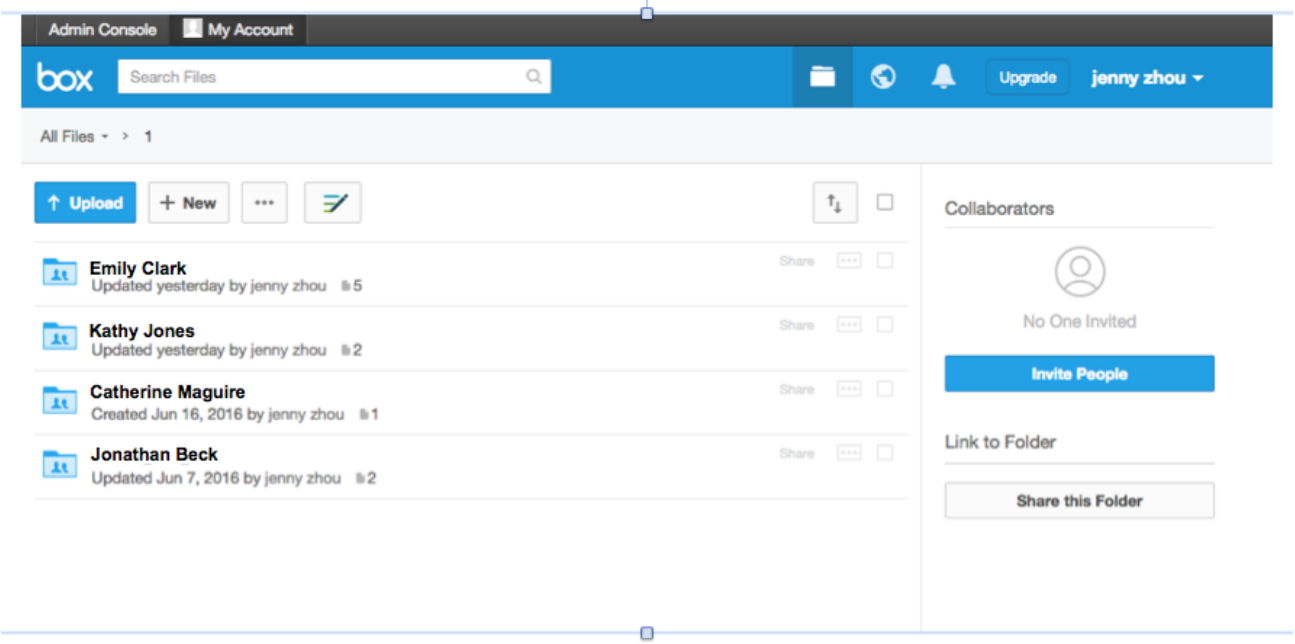


© 2017 SAP SE or an SAP affiliate company. All rights reserved.

4 How SuccessFactors Integrates with Box

4.1 Box Admin View

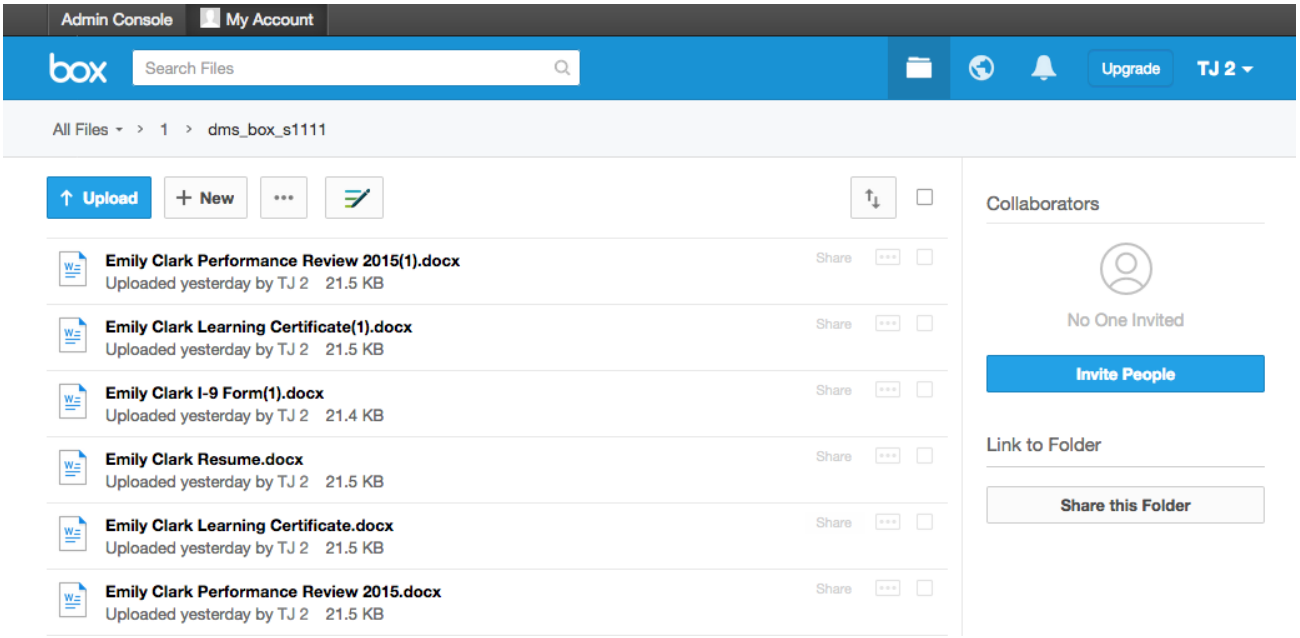
Employee folder will be created in real time in Box when an employee uploads first document in SuccessFactors. The admin will see folders for all employees in their view.



4.2 Box Employee File View

Documents uploaded by employee in SuccessFactors will show up in real time in Box employee file. Files uploaded across modules that support Document management will be added to the employee folder.

© 2017 SAP SE or an SAP affiliate company. All rights reserved.



© 2017 SAP SE or an SAP affiliate company. All rights reserved.

5 Limitations

Vendor Permissions

As of Q3 2016, we do not sync document permissions to the vendor application. That means the permissions you have set up in your vendor application may be different from those set up in SuccessFactors, potentially allowing end-users to perform actions directly within the vendor application that they are NOT allowed to do in SuccessFactors.

Therefore, you should only provide access to the vendor application to authorized admins only.

Document Deletion

Please do not delete documents in the vendor application. Documents related to SuccessFactors should be deleted within the SAP SuccessFactors HCM Suite only.

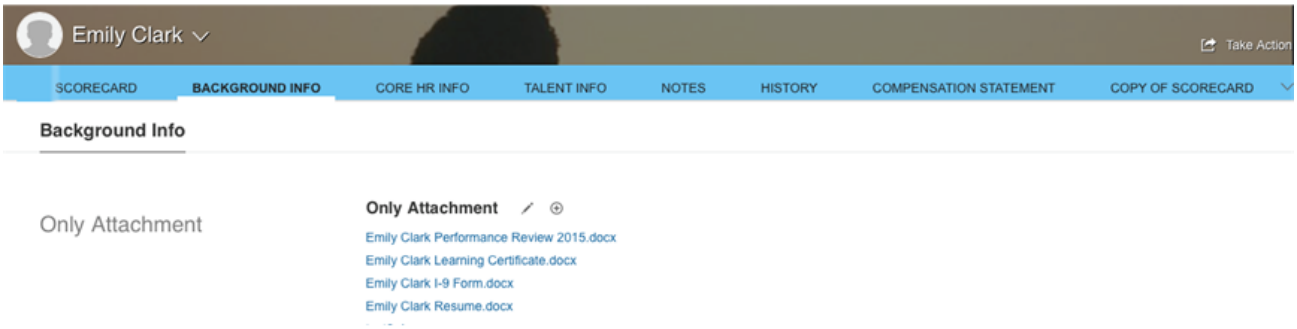
© 2017 SAP SE or an SAP affiliate company. All rights reserved.

6 Using Document Management in SuccessFactors

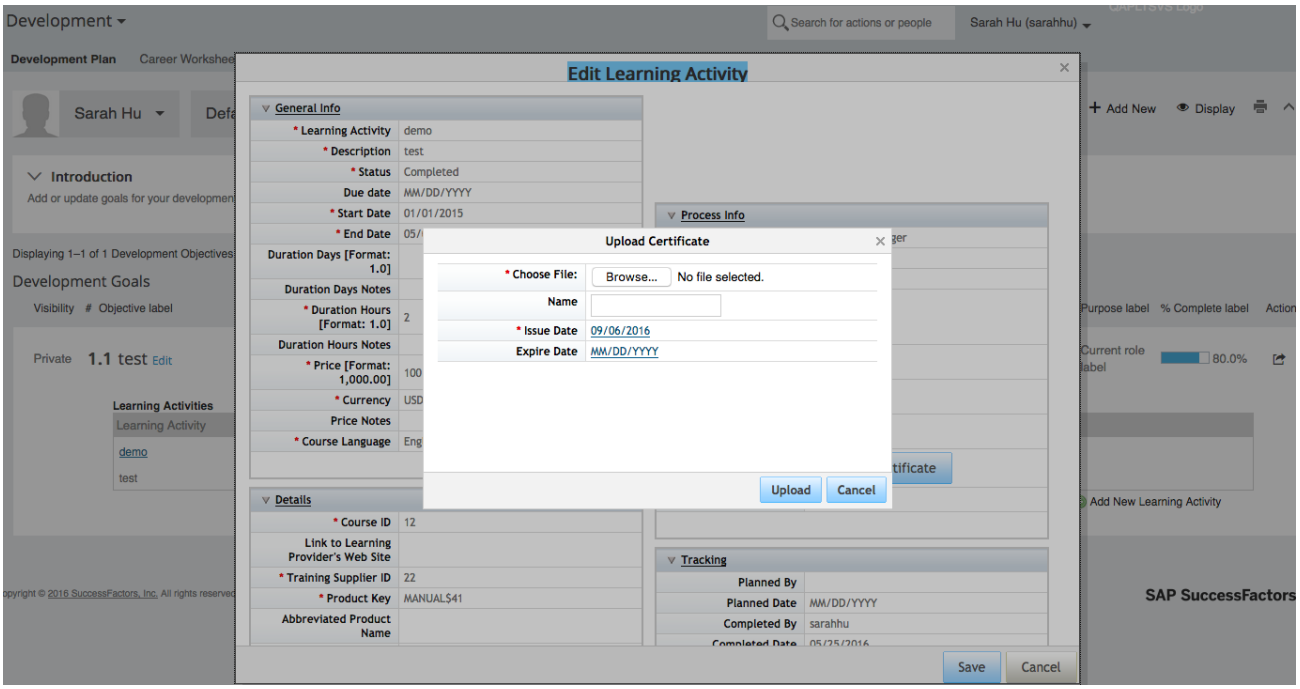
Users can upload documents for many purposes within different solutions in the SAP SuccessFactors HCM Suite. Currently, not all of parts of the suite are integrated with third-party enterprise cloud storage vendors, such as Box.

Some SuccessFactors solutions that integrate with third-party cloud storage vendors, such as Box, are:

Employee Profile

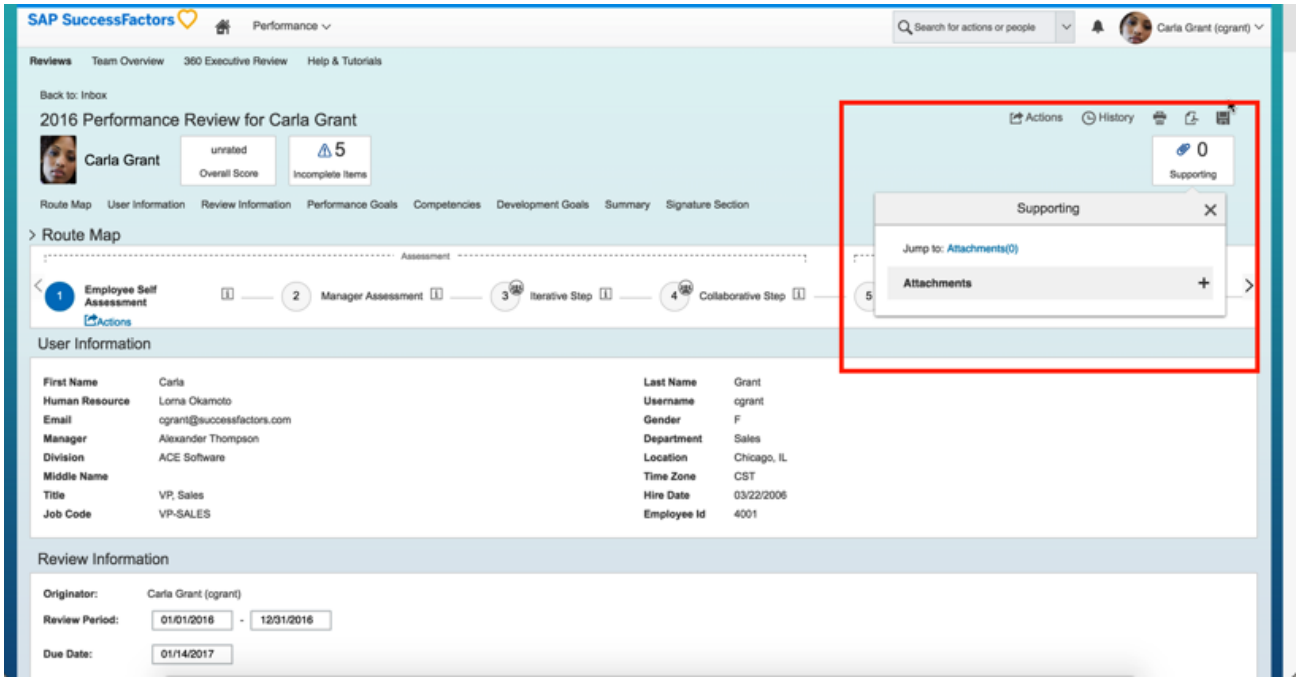


Career Development Planning



© 2017 SAP SE or an SAP affiliate company. All rights reserved.

Performance Reviews



© 2017 SAP SE or an SAP affiliate company. All rights reserved.

www.sap.com/contactsap

© 2017 SAP SE or an SAP affiliate company. All rights reserved.
No part of this publication may be reproduced or transmitted in any form or for any purpose without the express permission of SAP SE or an SAP affiliate company.
The information contained herein may be changed without prior notice. Some software products marketed by SAP SE and its distributors contain proprietary software components of other software vendors. National product specifications may vary.
These materials are provided by SAP SE or an SAP affiliate company for informational purposes only, without representation or warranty of any kind, and SAP or its affiliated companies shall not be liable for errors or omissions with respect to the materials. The only warranties for SAP or SAP affiliate company products and services are those that are set forth in the express warranty statements accompanying such products and services, if any. Nothing herein should be construed as constituting an additional warranty.
SAP and other SAP products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of SAP SE (or an SAP affiliate company) in Germany and other countries. All other product and service names mentioned are the trademarks of their respective companies. Please see www.sap.com/corporate-en/legal/copyright/index.epx for additional trademark information and notices.

Material Number: