

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
<i>Example</i>	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 .

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

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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

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.

3 Setting Up Integration with Box

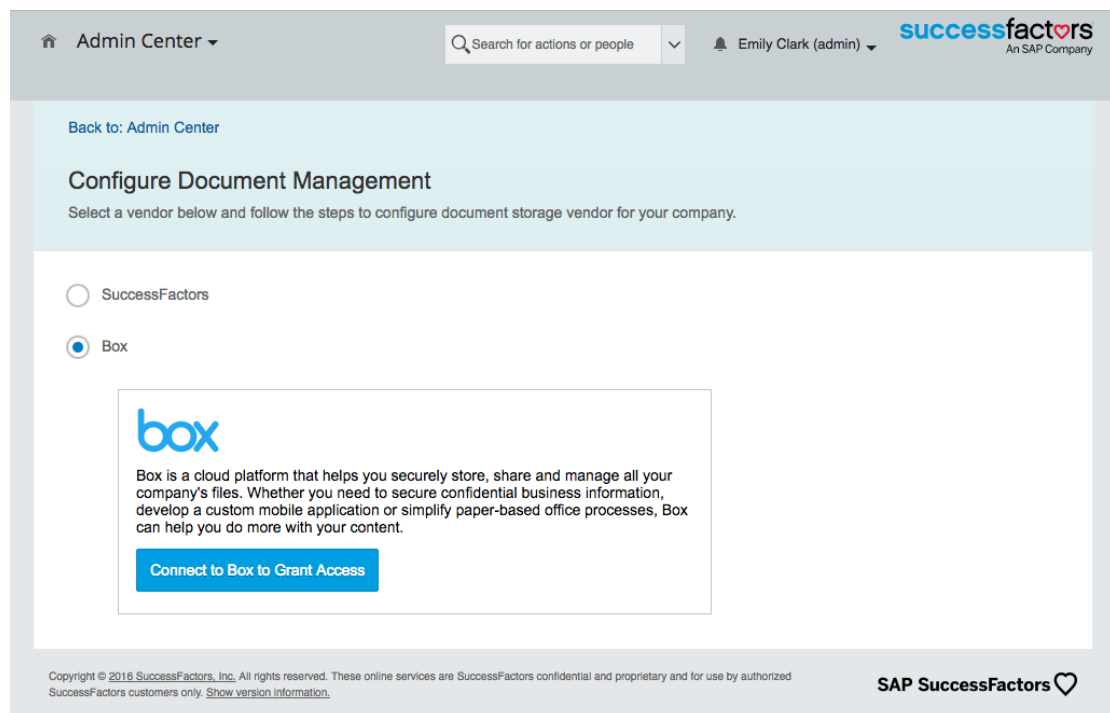
To set up integration with Box, complete the following steps:

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




box



Log in to grant access to Box

 kalpana.adlakha@gmail.com

 Password


Authorize

[Use Single Sign On \(SSO\)](#)

[Forgot password](#)

By granting dms_salesdemo_dc8 access to Box, you are agreeing to Box's [Terms of Service](#) and [Privacy Policy](#).

box



With access to your
kalpana.adlakha@gmail.com Box account,
dms_salesdemo_dc8 can:

- Read and write all files and folders stored in Box
 - Manage enterprise
 - Manage users
 - Manage groups
 - Manage enterprise properties
 - Manage retention policies

Grant access to Box

[Deny access to Box](#)

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Document Management with Box
Setting Up Integration with Box

Admin Center ▾

▾

Emily Clark (admin) ▾

successfactors
An SAP Company

[Back to: Admin Center](#)

Configure Document Management

Select a vendor below and follow the steps to configure document storage vendor for your company.

☐ SuccessFactors

☒ Box

☒

Congratulations! Your SuccessFactors instance is now configured to use Box for storing all your documents. If you need to make any changes to your setup, please reach out to support.

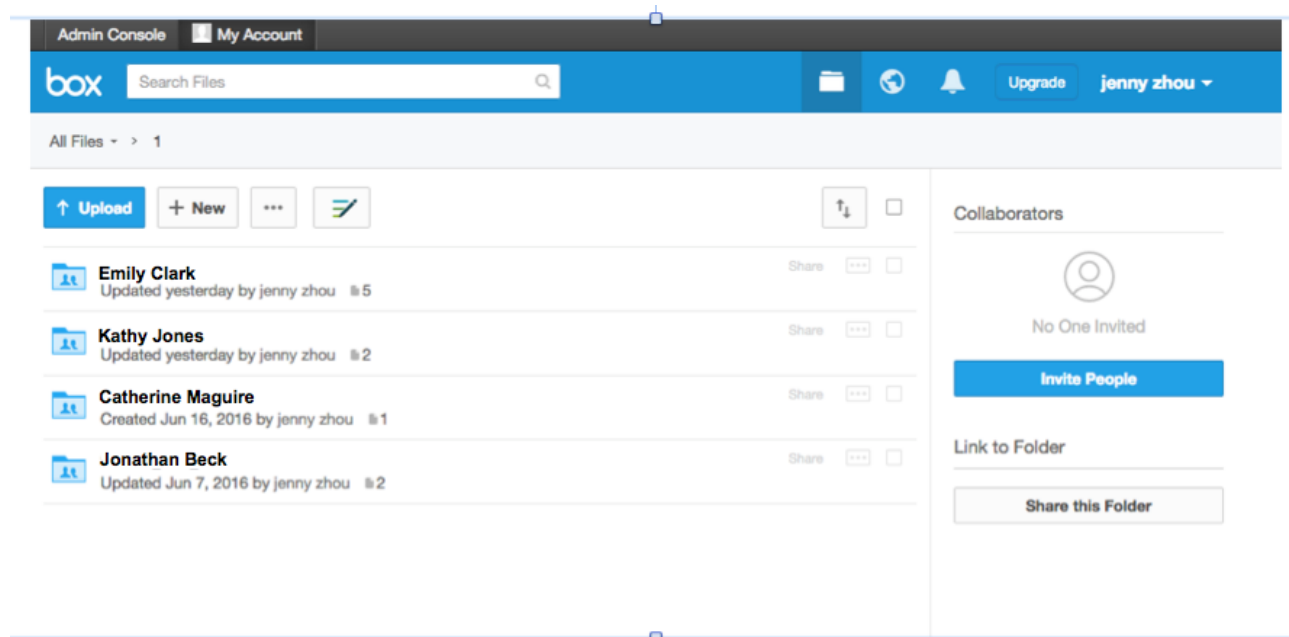
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SAP SuccessFactors

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.

Admin Console
My Account

box

Search Files

Q

📁

🌐

🔔

Upgrade

TJ 2 ▾

All Files ▾ > 1 > dms_box_s1111

↑ Upload







+ New

...

✍

↕

☐

	Emily Clark Performance Review 2015(1).docx Uploaded yesterday by TJ 2 21.5 KB	Share <div>...</div> <div>☐</div>
	Emily Clark Learning Certificate(1).docx Uploaded yesterday by TJ 2 21.5 KB	Share <div>...</div> <div>☐</div>
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	Emily Clark Learning Certificate.docx Uploaded yesterday by TJ 2 21.5 KB	Share <div>...</div> <div>☐</div>
	Emily Clark Performance Review 2015.docx Uploaded yesterday by TJ 2 21.5 KB	Share <div>...</div> <div>☐</div>

Collaborators

👤

No One Invited

Invite People

Link to Folder

Share this Folder

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.

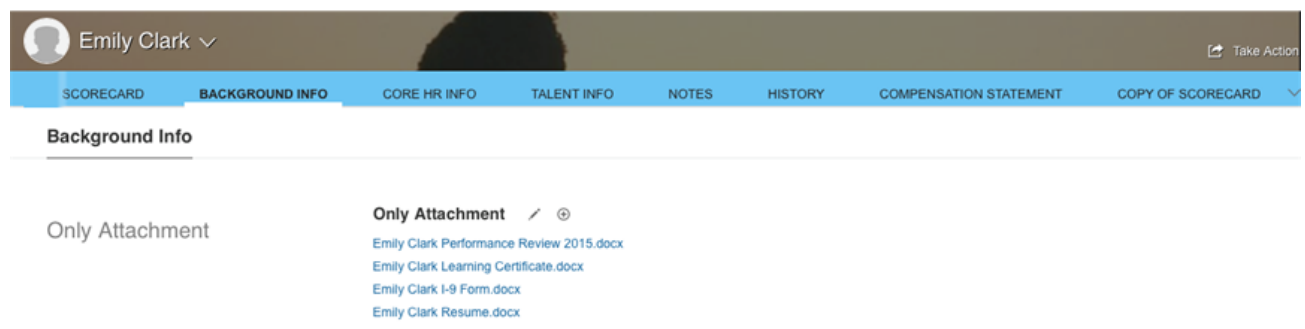
Document Deletion

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

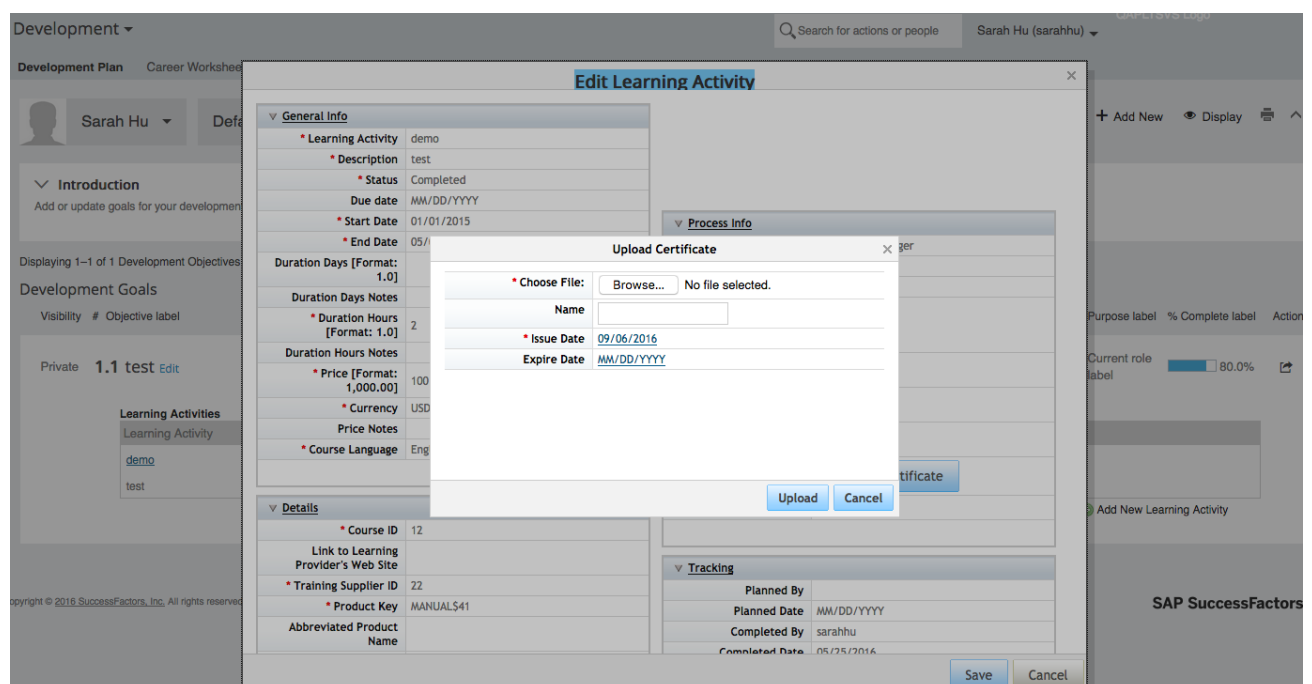
6 Using Document Management in SuccessFactors

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



Performance Reviews

SAP SuccessFactors

Performance

Search for actions or people

Carla Grant (cgrant)

Reviews

Team Overview

360 Executive Review

Help & Tutorials

Back to: Inbox

2016 Performance Review for Carla Grant

Carla Grant

unrated

Overall Score

5

Incomplete Items

Route Map

User Information

Review Information

Performance Goals

Competencies

Development Goals

Summary

Signature Section

Route Map

Assessment

1 Employee Self Assessment

2 Manager Assessment

3 Iterative Step

4 Collaborative Step

5

User Information

First Name: Carla

Human Resource: Loma Okamoto

Email: cgrant@successfactors.com

Manager: Alexander Thompson

Division: ACE Software

Middle Name:

Title: VP, Sales

Job Code: VP-SALES

Last Name: Grant

Username: cgrant

Gender: F

Department: Sales

Location: Chicago, IL

Time Zone: CST

Hire Date: 03/22/2006

Employee Id: 4001

Review Information

Originator: Carla Grant (cgrant)

Review Period: 01/01/2016 - 12/31/2016

Due Date: 01/14/2017

Actions

History

Supporting

0

Supporting

Jump to: Attachments(0)

Attachments

+



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Material Number: