

SAP Solution Brief

SAP Solution Extensions | SAP SuccessFactors Document Management by OpenText

Digitalize and Streamline HR for Intelligent Document Management

THE BEST RUN





Transform and centralize document processes

Integrating and simplifying HR document management processes across the extended enterprise improves employee experiences and engagement and enhances transparency. With a sophisticated document management environment, your intelligent enterprise can reduce HR costs, increase internal efficiencies, and foster corporate and regulatory compliance.

To keep a competitive edge in the digital economy, it's imperative to support and enable strong human capital management. But while HR is one of the most document-intensive areas in an organization, the management of employee documents has typically been slow to automate. Manual tasks and paper-driven activities, such as sharing documents and files by e-mail, lead to poor reporting, inadequate auditing, legal exposure, and high administrative costs – as well as process bottlenecks and increased risk.

By capturing and storing employee information, you can centralize files and data so that they are easy to find, update, and share. Controlling access based on roles gives HR, managers, and employees secure access to files while supporting local and global compliance efforts. And automating the creation of documents and content such as letters and contracts speeds processes and increases efficiency.

Transform and centralize document processes



Streamline employee document management and generation

The SAP® SuccessFactors® Document Management application by OpenText unifies HR document management and enables you to build and maintain a complete digital record of all your employees, from hire to retire. SAP SuccessFactors Document Management simplifies and centralizes the processing and control of all employee documents, from creation to deletion, and provides secure storage. The application integrates with other user interfaces for SAP SuccessFactors solutions and with the SAP SuccessFactors Employee Central solution to control permissions.

Sophisticated, interactive document-generation functionality empowers employees and HR alike, speeding processes, saving time and resources, and improving the employee experience. Stakeholders can use approved templates and content to generate and distribute documents including offer letters, policy updates, employment contracts, and compensation statements.

For example, employees can use self-service functionality, along with predefined templates created by HR for frequently requested items such as employment verification letters, to generate documents without having to submit a request to HR.

Streamline employee document management and generation

Support shared services and speed information access

Mitigate risk and foster compliance

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Recruiters can choose from templates created by HR to generate offer letters based on the location and role of the hire. The templates contain preapproved standard content and give users the ability to add optional content such as variable text, videos, and images to customize letters according to contract details. Once generated, documents can be automatically sent to candidates, and copies can be stored in employee folders.

With the application, you can create classification plans and disposition policies. Role-based permissions help ensure that only authorized users can upload and view documents through a self-service portal. You can perform intelligent full-text searches that

combine metadata and word search. Search criteria can include any combination of content, properties, and details about a file and are not limited to the metadata assigned. For example, an HR stakeholder might need to see all the employees who have completed a certain certification course in the last year. Instead of having to navigate tediously through folders and files, you can simply search on the course name and year to find all relevant documents. You also can run completeness checks based on predefined rules to identify missing and out-of-date employee documents and manage employee documents according to country- and region-specific regulations.

Streamline employee document management and generation

Support shared services and speed information access

Mitigate risk and foster compliance



Support shared services and speed information access

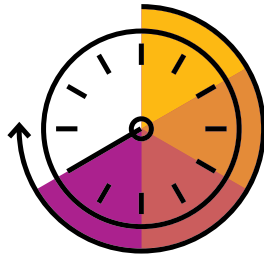
SAP SuccessFactors Document Management supports a shared-services approach to optimize service levels across your HR organization. With the intuitive, user-friendly interface, authorized personnel get fast, secure access to relevant employee information. Employee-workspace functionality lets employees and your HR team share and manage HR-related documents.

Employee documents are often stored in locations throughout the distributed enterprise, creating silos of information and slowing processes. Using powerful search functionality, business users can easily find what they need, when they need it. Detailed classifications and metadata help identify content authors and stakeholders so you can quickly access the relevant content. Expansive search capabilities allow you to find what you need using criteria such as document type, employee identification, metadata, full-text search, and employee attributes.

Streamline employee document management and generation

Support shared services and speed information access

Mitigate risk and foster compliance



Save as much as one in every ten hours of HR-worker time by improving the speed and efficiency of finding employee documents.



Mitigate risk and **foster compliance**

With SAP SuccessFactors Document Management, you can limit compliance risk and improve HR productivity. Depending on your organization, country, or region, the type of documents stored in employee files may vary. The application lets you set rules defining whether a particular document type must be retained in an employee's file and

setting the duration of the validity of the document, all from one central view. These rules are then applied to all the same document types added to employees' files going forward. The application can detect if documents are missing or out of date and notifies HR as well as the employees involved in any such occurrences.

Streamline employee document management and generation

Support shared services and speed information access

Mitigate risk and foster compliance

The application detects if documents are missing or out of date to help **automate compliance**.





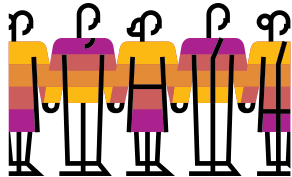
Transform document management and enhance visibility

From monitoring compliance and cutting costs to achieving significant internal efficiencies, SAP SuccessFactors Document Management connects and coordinates HR document processes and enables you to become an intelligent enterprise. You can take advantage of employee-workspace functionality to share and manage employee documents in a centralized place for a comprehensive view of all employee files. HR, authorized stakeholders, and employees can find documents faster and more easily, increasing service levels and speeding response times for shared services.

Sophisticated, self-service document generation speeds processes, empowers employees, and eases the HR workload.

Eliminating paper documents and reducing storage costs and administrative overhead – as well as legal costs such as litigation and damages – accelerate processes and make a positive impact on your HR budget. With the application, you can improve governance and compliance with HR regulations and legal requirements. Centrally managed, role-based access increases data and document security and mitigates risks in sharing documents.

Transform document management and enhance visibility



Manage documents simply and securely, enable compliance, and gain a comprehensive, **centralized view** of employee information.



Summary

Reduce manual processes, increase efficiency and productivity, and transform HR with the SAP® SuccessFactors® Document Management application by OpenText. By digitalizing and integrating processes, you can empower HR to create and manage employee files – enabling you to become an intelligent enterprise. The application supports compliance and information security, while reducing the time and costs associated with document management.

Objectives

- Create a centralized digital record for all employee files
- Provide fast access and a complete view of employee documents
- Minimize compliance and security risk
- Support HR document generation needs

Solution

- Centralized document generation, lifecycle management, and storage
- Fast and intuitive access to all employee information
- Enhanced employee experience with workflows and a dossier view
- Role-based permissions and controls

Benefits

- Immediate access to key documents on demand through the employee workspace
- Integrated HR-document generation
- Increased accuracy, security, and efficiency thanks to reduced manual activities and process automation
- Lower legal and administrative costs

Learn more

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