



SAP SuccessFactors 

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Integrating SAP SuccessFactors with OpenText

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1 Using Document Management

SAP SuccessFactors document management tools enable administrators to manage document attachments centrally for the HCM suite.

People can upload documents attachments on several screens in the SAP SuccessFactors HCM suite, such as the candidate profile or employee profile. Administrators can use document management tools to view and manage these documents centrally.

As an administrator, you can use the [Manage Documents](#) page in Admin Center to perform a variety of tasks. The redesigned layout displays three key sections side by side: [Documents](#), [Document Categories](#), and [Document Storage](#) for easier navigation.

[Documents](#):

Admin Center / Manage Documents

Manage Documents

Documents

Document Categories

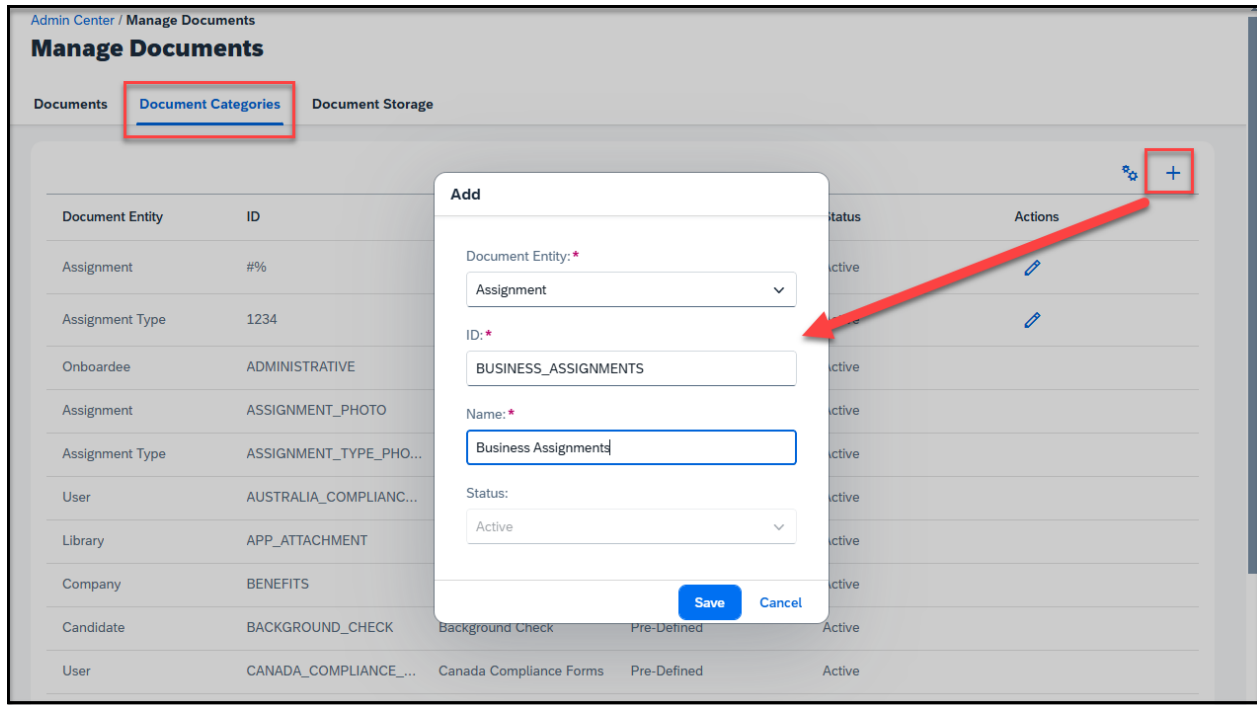
Document Storage

Status: Active; User Type: Internal; Document Type: All;

<input type="checkbox"/>	Document Name (Uploaded)	Attachment ID	Document Size	Document Type	Uploaded By	Document Entity	Document Category
<input type="checkbox"/>	352522 _ 2023 1H 2023 Prev...	2020	509.4 KB	docx	Daniel Cortez	User	Opportunity Marketplace Assignment
<input type="checkbox"/>	oma_img_1732067955597	2019	66.3 KB	jpg	Daniel Cortez	Assignment	Assignment Background
<input type="checkbox"/>	oma_img_1732067955597	2018	66.3 KB	jpg	Daniel Cortez	Assignment	Assignment Background
<input type="checkbox"/>	oma_img_1732067955597	2017	66.3 KB	jpg	Daniel Cortez	Assignment	Assignment Background
<input type="checkbox"/>	oma_img_1730092678343	2016	11.9 KB	jpg	Daniel Cortez	Assignment	Assignment Background
<input type="checkbox"/>	532157.docx	2015	221.8 KB	docx	Daniel Cortez	User	Opportunity Marketplace Assignment
<input type="checkbox"/>	oma_img_1727253279112	2011	66.3 KB	jpg	Daniel Cortez	Assignment Type	Assignment Type Background
<input type="checkbox"/>	Sean_testing.docx	2008	12.9 KB	docx	fairy1 fairy1	User	Opportunity Marketplace

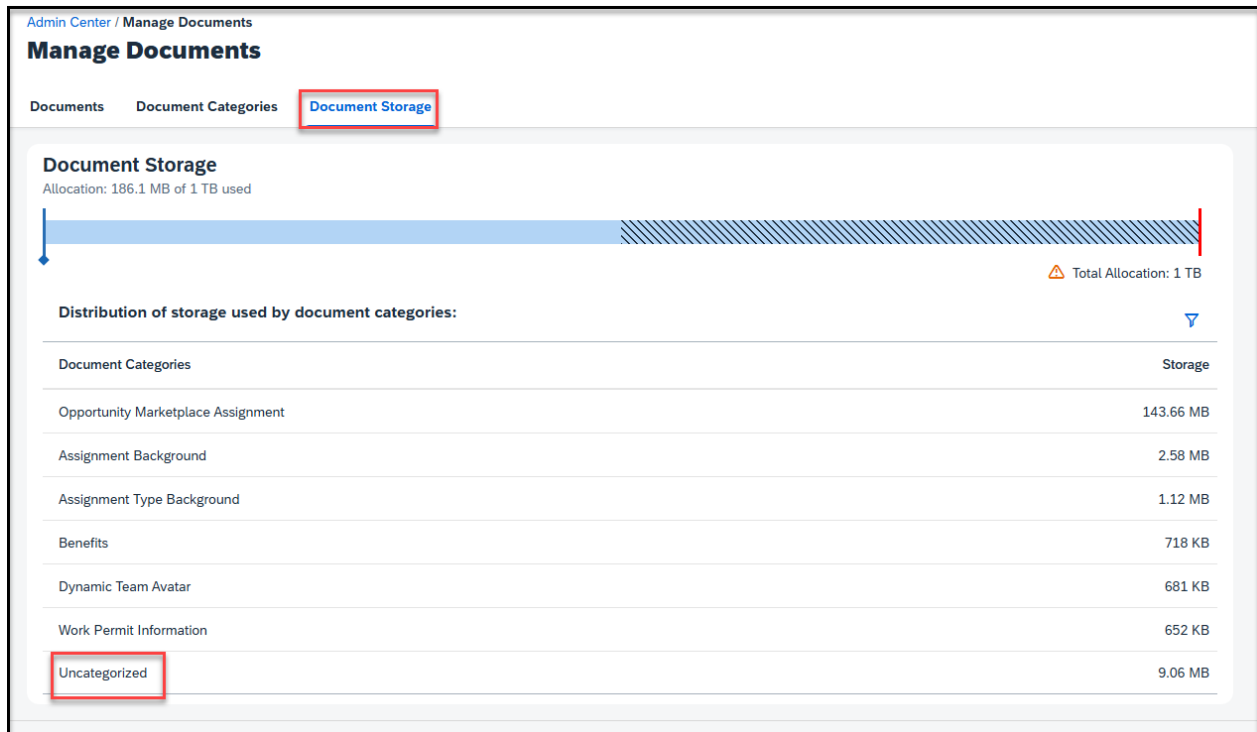
- View, sort and filter all uploaded documents
- Use [Advanced Filters](#), including a new [Undefined](#) radio button for identifying documents without an assigned entity type
- View additional metadata in the results table.
- Download and upload documents, including bulk downloads and download history tracking

Document Categories



- You can now order the document list based on the document entity or category type
- Add and edit categories using an improved, more user-friendly dialog box

Document Storage



- View total storage usage by document category
- Filter storage data by document category and date range

- **Note**

To filter by document category and date range, click the new [Filter icon](#) in the [Document Storage](#) section.

To view the available document categories after performing a filtered search, click the Filter icon again, clear the fields in the [Document Entity](#), [Document Category](#), and [Date Range](#) sections, and click [OK](#). The number of categories displayed depends on the categories shown before applying the filter.

- See a clear breakdown of all categories that contribute to storage usage, along with the [Uncategorized](#) category for documents that do not have an assigned category.

Additional System Configuration Options

You can also use system configuration settings to:

- Configure document attachment settings such as file size limits and notification frequency. Refer to [Configuring Document Attachment Settings](#)
- Integrate your system with OpenText. Refer to [Setting Up Integration with OpenText](#)

2 Enabling Document Management

To enable document management, complete the following steps.

Prerequisites

- Metadata Framework (MDF) enabled.
- You have access to Provisioning.

→ Remember

As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

Procedure





1. In Provisioning, select the relevant settings based on your requirements.
 - Select only [Enable Attachment Manager](#) to enable document management with SAP SuccessFactors.
 - To enable OpenText solutions for SAP SuccessFactors, select [Enable OpenText Integration](#) in addition to the first setting.
For more information, see:
 - [Setting Up Integration with OpenText](#)
 - [SAP SuccessFactors Extended ECM by OpenText \(X2HR\)](#)
 - [SAP SuccessFactors Document Management Core by OpenText](#)

⚠ Caution

Enabling integration with OpenText is a system-wide setting. Once enabled, all newly uploaded documents are stored in OpenText, and this applies to all documents, not just a subset (e.g., specific countries or departments). Additionally, once you begin migrating existing documents into OpenText using Provisioning, this process is final and cannot be reversed.

Disabling the integration will result in loss of access to the migrated documents, as switching back to SAP SuccessFactors native storage is not supported. Ensure that OpenText integration is fully set up and successful before initiating the migration.

2. Save your changes in Provisioning.
3. Grant role-based permissions to the relevant roles.
 - Grant [Manage Document Categories](#) permission to roles who can use the [Manage Document Categories](#) to search for and view categories of documents.


- Grant  [User Permissions](#)  [Employee Data](#)  [View](#)  permission for the following fields:
 - First Name
 - Last Name
 - Status
 - User Name
 - Grant [Configure Document Management](#) permission to roles who can set up integration with OpenText.
 - Grant [Company System and Logo Settings](#) permission to roles who can configure document attachment settings.
4. Save your changes to role-based permissions.

3 Creating Integration with OpenText

3.1 Setting Up Integration with OpenText

Set up the integration with OpenText.

Prerequisites

- You have a license for one of the following products:
 - [SAP SuccessFactors Extended ECM by OpenText \(X2HR\)](#)
 - [SAP SuccessFactors Document Management Core by OpenText](#)
If you have trouble logging in to view the documentation, refer to [How to Request an OpenText Knowledge Center Login](#) 
- Employee Central is required for enabling the integration of either Core or Extended ECM with SAP SuccessFactors.
- [Enable Open Text Integration](#) and [Enable the Attachment Manager](#) must be selected in [Provisioning](#).

→ Remember

As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

- Grant the following permissions to the administrator: [Manage Documents](#) and [Configure Document Management](#).

Procedure

1. In the [Admin Center](#), go to [Configure Documentation Management](#) page.
2. Select [OpentText](#).
3. Select [OpentText](#).
 - **Endpoint:** [<per customer's settings>](#)
 - **System User:** [<per customer's settings>](#)
 - **System Password:** [<per customer's settings>](#)
 - Choose [Get Repository](#): [<per customer's settings>](#).
 - Choose [Connect to OpenText](#).

Results

Test your integration by performing upload, download, and delete tests in your instance.

3.1.1 Migrating Existing Attachments to OpenText in Provisioning

Prerequisites

- You've set up and tested your OpenText integration.
- You've run the the Check Tool migration check called *OpenText prerequisites are met*. Refer to **Performing Checks on Documents Migrated to OpenText** in the **Related Information** section.

⚠ Caution

Once the migration of attachments to OpenText is initiated and the integration is enabled, it cannot be rolled back. Disabling the integration will result in loss of access to the migrated documents, as switching back to SAP SuccessFactors native storage is not supported. Ensure that OpenText integration is fully set up and successful before initiating the migration.

Procedure

1. Log into *Provisioning* and select the instance.

→ Remember

As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

2. Go to *Manage Scheduled Job*.
3. Choose *Create New Job*, and under the *Job Type* drop-down, choose the job called *Document Management Service Migrate Attachments to OpenText Job*.
4. Complete all the mandatory fields:
 - *Job Name*
 - *Job Owner*
 - *Job Type*
 - *Job Parameters*
5. In the *Occurrence* field, select the the *Recurring* and *Daily* radio buttons.

6. In the adjacent time scheduling picker, hold down the **Ctrl** key and select the corresponding run times for the schedule.

→ Tip

For a fast migration of existing documents, the job should run as frequently as possible (every 3rd hour, for a total of 8 runs in a 24 hour period).

Create New Job

Use this page to create a new job. Fields marked with * are required.

Job Definition

* **Job Name:**

* **Job Owner:** [Find User...](#)
The Job Owner will be used to authenticate all submitted jobs. They will also be the default user to receive Email notifications.

* **Job Type:**

Job Parameters: **WARNING: Migration to OpenText is final and cannot be reversed. This job should only be triggered after OpenText integration is completely set up and successful.**
☐ I understand & agree Parallel execution: Failure attempts:

Job Occurrence & Notification

Occurrence: ☐ Once ☒ Recurring ☐ Dependent of

Recurring Pattern
Based on Time Zone: UTC

☒ Daily ☐ Weekly ☐ Monthly ☐ Yearly

Hold the Ctrl key down to select multiple hours.
Example: For 5:30AM and 5:30PM, select "5" and "17" in the hours, and "30" in the minute.

0 (12AM) 1 2 3 4 5 minutes 0

Start Date: Jobs are scheduled based on local time for this server which is currently: Tue Jan 28 20:44:38 UTC 2025
 Time: Hour Minute AM

End Date: Time: Hour Minute AM

Additional Email Recipients:
Enter additional Email addresses, separated by commas, for all the users who want to receive the notifications.

Send an email when job fails: ☒

7. Click [Create Job](#).

→ Remember

The job runs for 2 hours and then pauses for 1 hour before it resumes, even if it is scheduled to run every 2 hours. This is the expected behavior, not a bug.




Related Information

[Performing Checks on Documents Migrated to OpenText \[page 11\]](#)

3.2 Performing Checks on Documents Migrated to OpenText

Use the Document Management migration checks in the Check Tool for SAP SuccessFactors. These checks assist with diagnosing, resolving, and ensuring the successful migration of documents from Document Management to OpenText.

Prerequisites

- You have enabled the Metadata Framework
- You have the following  [Administrator](#)  [Check Tool](#)  permissions:
 - [Access Check Tool](#) authorizes users to access the tool.
 - [Allow Check Tool Quick Fix](#) authorizes users to run quick fixes for the checks that have this feature. A quick fix can be used to immediately correct any issues found by that check.
 - [Allow Configuration Export](#) authorizes users to attach configuration information to a ticket.

Context

The new document migration checks within the Check Tool help administrators identify and resolve issues during the migration of documents from Document Management to OpenText. These checks detect common problems, such as attachments that failed to migrate, validate the status of migrated documents, and verify that OpenText prerequisites are met..

By proactively identifying migration issues and confirming that all necessary conditions are fulfilled, these checks improve the migration process, reduce delays, and ensure a smoother transition to OpenText.

Procedure

1. Go to the  [Admin Center](#)  [Check Tool](#)  [Migration](#)  tab.
2. Under the [Application](#) tab, search for [Document Management Services](#) and click [Go](#).
3. Select the available checks under [Document Management: Document Migration to OpenText](#):

Check Name	Description
OpenText prerequisites are met	Address the issues detected to ensure compatibility with OpenText. Use the Quick Fix to resolve these issues and prepare the documents for a successful migration.

Check Name	Description
Determine the status of documents migrated to OpenText	Identifies the migration status of documents to OpenText, ensuring that all documents have been successfully transferred and highlighting any discrepancies or incomplete migrations.
Identify attachments that failed to migrate to OpenText	Detects attachments that failed migration to OpenText, allowing administrators to identify and resolve issues before the next migration attempt.

4. Choose [Run Checks](#) at the top right of the results table.

The [Results](#) column displays any issues found.

3.2.1 Check Results

After you run checks in the check tool, it returns the results of the checks so that you can resolve the issues found.

The results of a check are displayed in the [Result](#) column. If you run the checks multiple times to see how you're resolving issues, you can select a previous result from the [History](#) dropdown list.

Note

To display the [History](#) dropdown list, select a check. On the details screen that opens on the right side of the page, expand the header. The [History](#) dropdown list is directly below the check title.

Possible Results of Check Tool

Result	Action
No issues found	If the tool can't find issues, you see a green check mark in the Result column.
Issues found	<p>If the tool finds issues, it reports the number of issues and a yellow warning icon or a red alarm icon.</p> <ul style="list-style-type: none"> • The yellow icon indicates a low severity issue. The system proposes a solution. • The red icon indicates a high severity issue. You must take action, which could include creating a support ticket.
Pending migrations	If the tool finds pending migrations that need to be completed by the user, you can see a yellow warning icon or a red alarm icon in the Status column on the Migration tab.
Completed	If the tool finds no issues with migration, or the migration has already been completed, you see a green check mark in the Status column on the Migration tab.

Note

- Select the [Export Results](#) button to download the check results. Ensure you run the check before exporting the check results. If not you can view only the first 100 check results.
- The downloaded check result table can display a maximum number of 10,000 rows.

4 Change History

Learn about changes to the documentation for Integrating with Third-Party Document Storage in recent releases.

2H 2024

Type of Change	Description	More Info
Change	We updated the steps to set up the migration job attachments to OpenText.	Migrating Existing Attachments to OpenText in Provisioning [page 9]
Change	We added a "Caution" note warning about disabling the integration to OpenText.	Enabling Document Management [page 6]
Change	We removed the topic "Additional Links to OpenText Documentation" and moved this information to the "Prerequisite" section of the topic "Setting Up Integration with OpenText"	Setting Up Integration with OpenText [page 8]
Change	We added Employee Central as a prerequisite to setting up the integration between SAP SuccessFactors and OpenText.	Setting Up Integration with OpenText [page 8]

1H 2024

Type of Change	Description	More Info
Change	We removed the following topics: <ul style="list-style-type: none">• Upgrade to X.509 Certificate Authentication with OpenText• Renewing Your X.509 Certificate for OpenText	
Change	We've added a note warning existing customers about re-establishing their connection to OpenText, as this will leave X.509 as their only authentication option going forward.	Setting Up Integration with OpenText [page 8]
New	We've added the topic "Additional Links to OpenText Documentation".	

Type of Change	Description	More Info
Change	We've removed the topic "Using Third-Party Cloud Storage Vendors".	
Change	<ul style="list-style-type: none"> We've updated the path name "Enable Document Management Service" to "Enable Open Text Integration". We removed the steps to authenticate with username/password and now point to integration steps using certificate-based authentication. 	Setting Up Integration with OpenText [page 8]
New	We've added the new topics "Upgrade to X.509 Certificate-Based Authentication with Open Text", and "Renewing Your X.509 Certificate for Open Text."	

2H 2311

Type of Change	Description	More Info
Change	We have moved the Change History to the end of the guide.	Using Document Management [page 3]

2H 2022

Type of Change	Description	More Info
Change	We "removed" the note advising that SAP SuccessFactors Onboarding does not allow for Open Text usage .	

1H 2022

Type of Change	Description	More Info
Change	We added a note advising that SAP SuccessFactors Onboarding does not allow for Open Text usage .	

1H 2020 – Present



Type of Change	Description	More Info
None	We did not update this document.	

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