Special Topic:

EP Document Management solution

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- Role: Senior Director
- SuccessFactors Experience: Since 2012

Christian Holst is an experienced solution architect and expert in SuccessFactors, SAP HCM/ERP, and SAP Cloud Platform.

He has provided End-to-End guidance on HR and topics like technology choice, process advisory, roll-out, and roadmap of solutions.
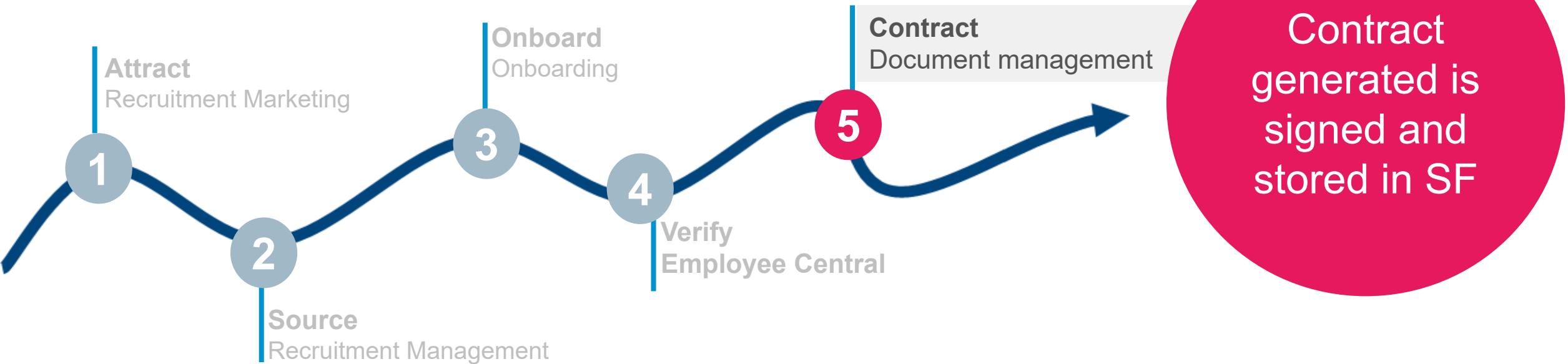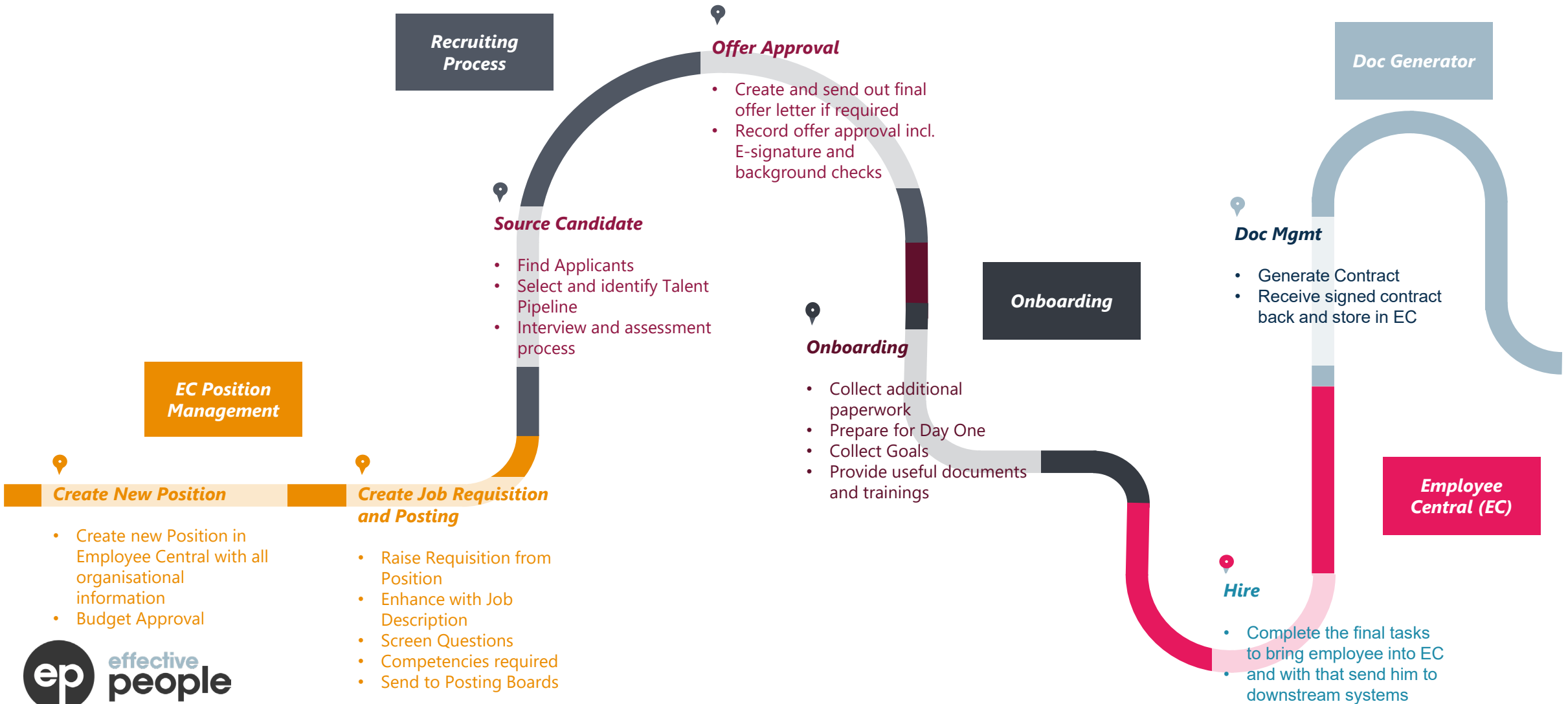
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Agenda

- Document Management Overview
- Demonstration
- Implementation Considerations
- Q&A

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The flow we want to look at today

Attract
Recruitment Marketing

Source
Recruitment Management

Onboard
Onboarding

Verify
Employee Central

Contract
Document management

1

2

3

4

5

Contract generated is signed and stored in SF

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Document Manager

Recruiting Process

Offer Approval

- Create and send out final offer letter if required
- Record offer approval incl. E-signature and background checks

Source Candidate

- Find Applicants
- Select and identify Talent Pipeline
- Interview and assessment process

EC Position Management

Onboarding

Onboarding

- Collect additional paperwork
- Prepare for Day One
- Collect Goals
- Provide useful documents and trainings

Doc Generator

Doc Mgmt

- Generate Contract
- Receive signed contract back and store in EC

Create New Position

- Create new Position in Employee Central with all organisational information
- Budget Approval

Create Job Requisition and Posting

- Raise Requisition from Position
- Enhance with Job Description
- Screen Questions
- Competencies required
- Send to Posting Boards

Employee Central (EC)

Hire

- Complete the final tasks to bring employee into EC and with that send him to downstream systems

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Leading Practice: Contract process

Recruiting Process

Offer Letter
- Not a contract
- Limited to information from Recruiting

Onboarding

Data Collection Process

Onboarding
- Collect additional paperwork
- Additional data collected and verified

Employee Central (EC)

Pending Hires
- Verify Data by HR
- Complete hire

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Huris
- Generate Contract
- Signed contract is stored Employee Central

Employee Central (EC)

Employe Central
- Complete data set in EC including contract with signed status

Onboarding Process

Onboarding
- Prepare for Day One
- Collect Goals
- Manager tasks
- Provide useful documents and trainings

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Leading Practice: Considerations

Pro

- High-quality data available during contract generation
- Contract "correctness" is high – low risk of manual rework on contract
- Contract can be stored right away on employee's profile in employee central
- This ensures that the process between the FastHire Solution and regular process are aligned for Contract Generation

Con

- Risk of any having "No-show employees" integrated down-stream
- Onboarding activities (singing documents) must be completed before contract generation/signature
- Contract will not appear in EC until hire date

....But we can generate documents on any data from SAP SuccessFactors..

Attract
Recruitment Marketing &
Recruiting Management

Hired
Employee Central

Custom Objects
Data stored

1

2

3

4

5

Onboard
Onboarding & Offboarding

Talent
Performance & Goals,
Compensation Management

Documents
generated is
signed and
stored in SF

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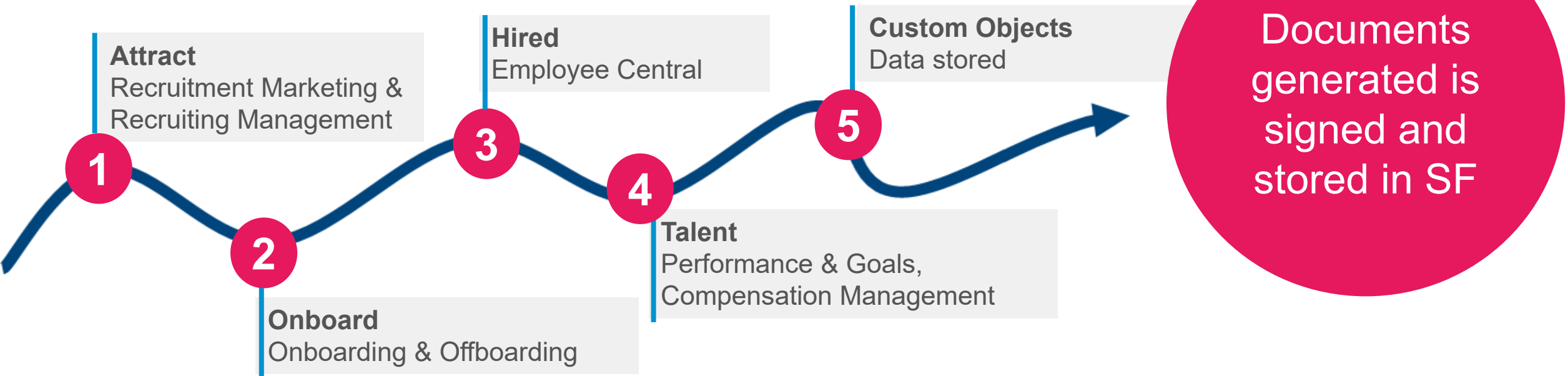
Document Management & Generator

Document Manager
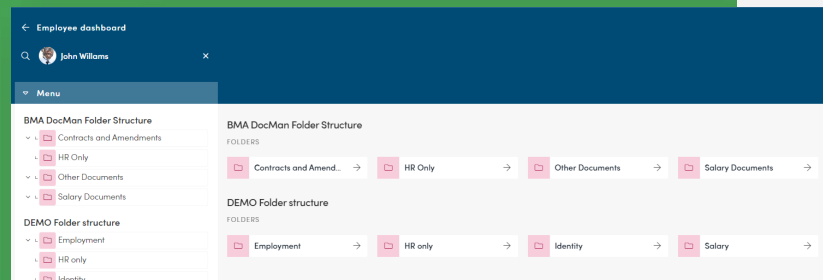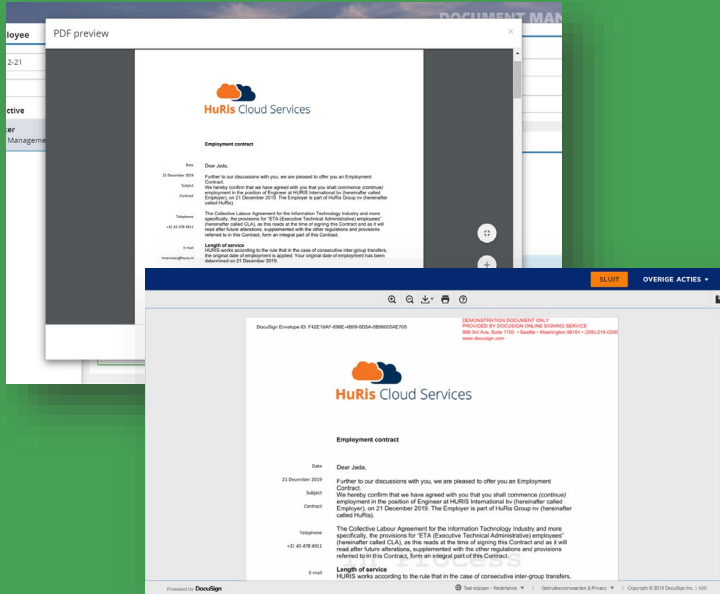
- Support for Digital Signature – Different vendors are supported and more added as requested

- Embedded into SAP SuccessFactors

- No customer data stored locally – only on SAP SuccessFactors

- Integrated into multiple SAP SuccessFactors processes such as Recruiting, Onboarding and Employee Central

Digital Personnel File

- Complete Digital File using SAP SF Role-Based Permission framework
- User friendly and easy to use
- Mass change functionality for upload and deletion of documents
- Flexible retention period
- Document Compliance
- Document Routing
- Extensive search options for documents
- Template-based setup for new requirements

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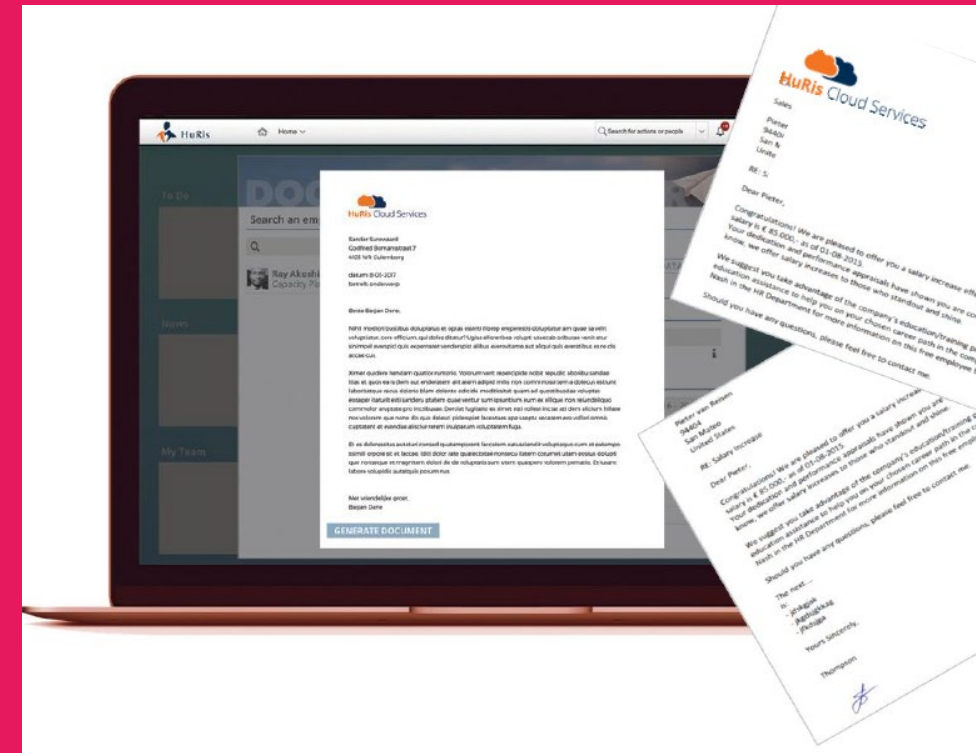
FEATURES & BENEFITS

Fully integrated in SuccessFactors

- User-friendly User Interface
- Automatic generation of documents based on planned events
- Make use of existing authorizations (Role Based Permissions)
- Template based implementation for rapid implementation

Simple template management

- Continue to manage current Word, e-mail or PDF templates in MS Word
- Upload templates in the Document Manager
- Use dynamic fields, images and calculated fields
- Define mandatory and optional fields
- Different templates possible per group

Versatile processing of documents

- Bulk generation of documents
- Flexible E-mail options
- Digital signing through integration vendors
- Automatically save documents in a digital personnel file
- Flexible configuration and monitoring of retention periods
- Extensive document search

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Employee Document Manager

- Modern UI experience with responsive design for mobile usage – complete the hire process on any device

- Single UI for all roles

- Continuous improvements on the UI for further features
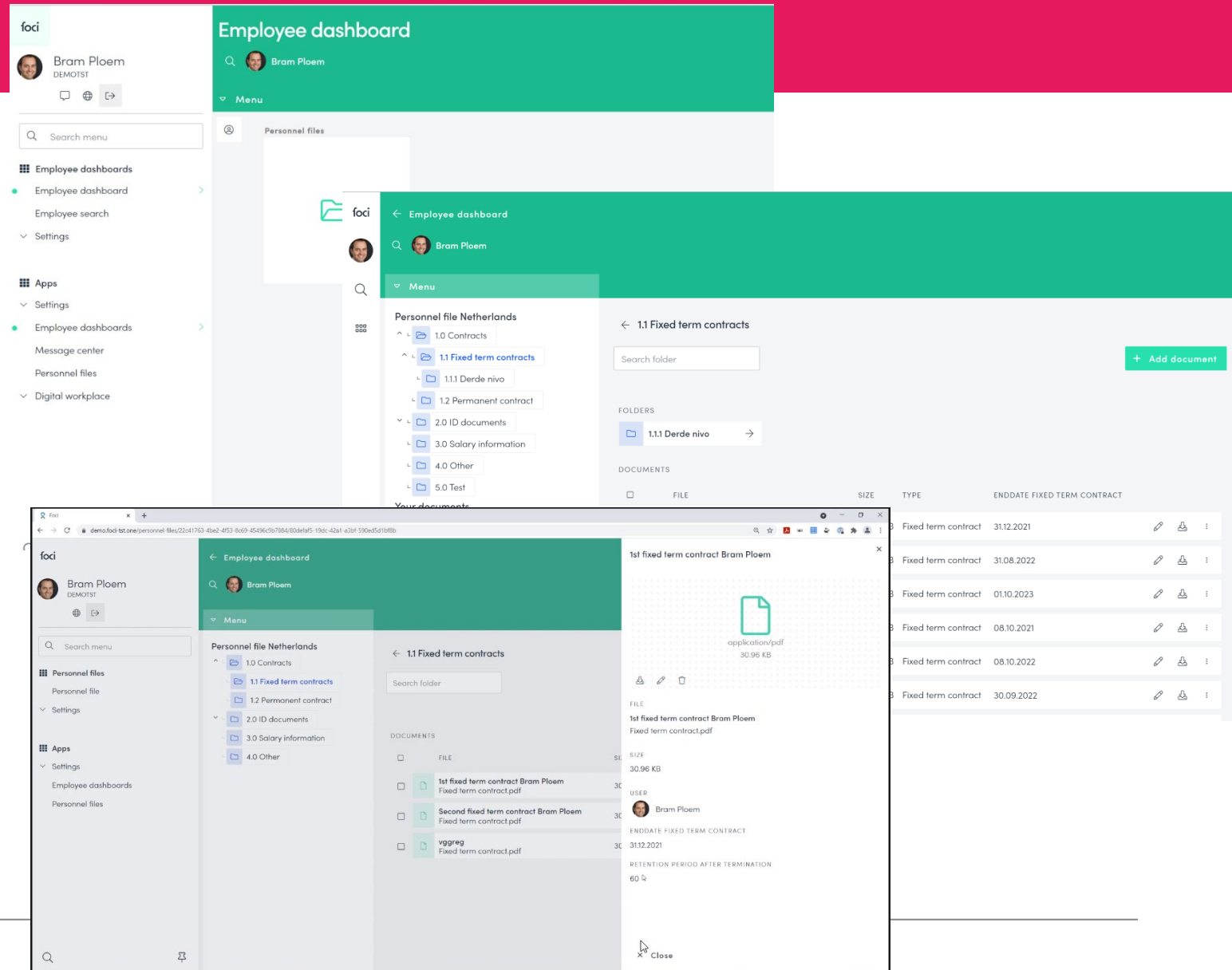
Employee Document Manager – Mobile

- Modern UI experience with responsive design for mobile usage – complete the hire process on any device

- Ability to perform same tasks on mobile as in browser
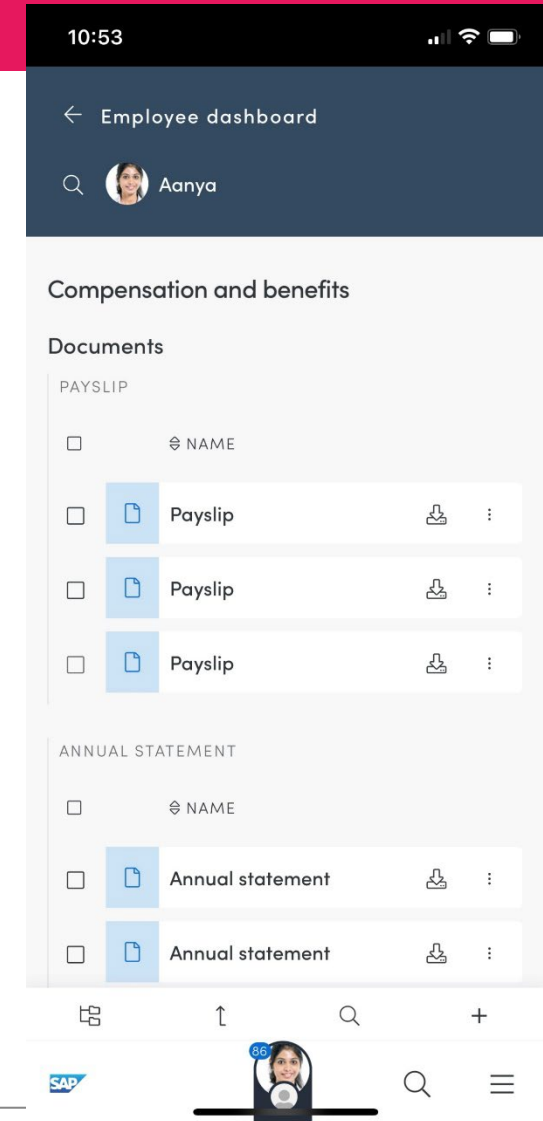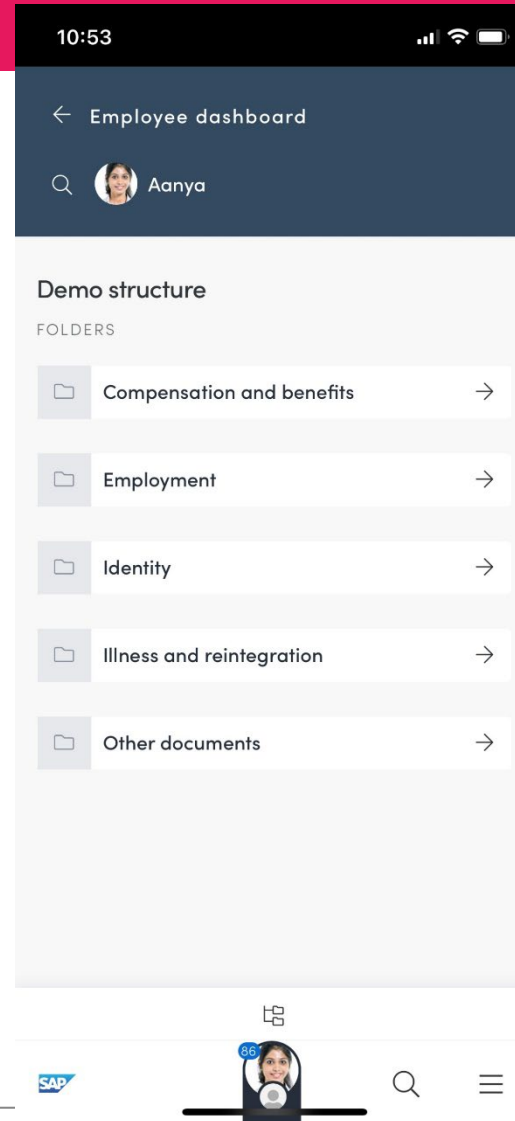
Document Generation

- Web-editor to support:

  - Template creation
  - Adjustments to existing templates
  - Adjustments to live documents
  - Adjustments to generated documents before sending to signature
  - Editor will also be used for system features such as:
    - Emails
    - Notifications
    - News
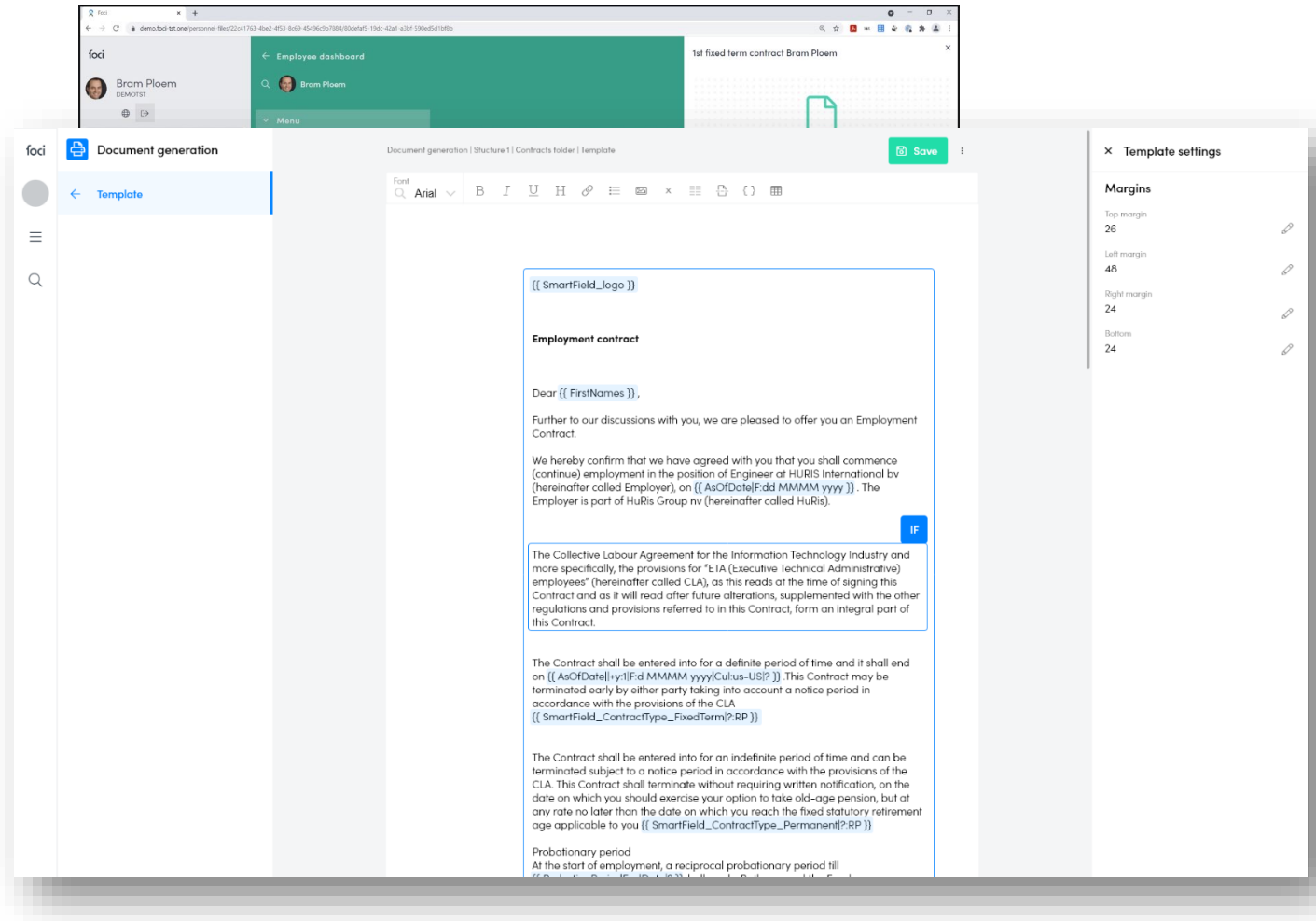
Technical Details

- Document Manager are based on Microsoft Azure cloud platform and integrated with SAP SuccessFactors using the SAP SuccessFactors APIs

- No customer data is stored in Microsoft Azure cloud platform;
  - All documents are stored in SAP SuccessFactors MDF objects (Benefit for compliance, SF instance management, data retention)

- Document Management can support DocuSign, VeriSign, Scrive, Adobe Sign and others (separate license) for employee digital signature and tracking

Note:
Document Management allows creation of documents based on Recruitment and Employee Central data - permanent storage in Digital Personnel File can be done on the Employee Central user record; which means that for Employee Contract Use Case, the document can only be stored after user is created in Employee Central (requires customisation if document is to be created based on SuccessFactors Recruiting Management data and transferred via Onboarding to Employee Central)

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Other key features

- Smartfields
  - Smartfields make it possible to automatically change text fields and images in the Word templates based on data fields from SuccessFactors. For example a different logo for company A or B, a signature (image) based on the manager, or a different text item based on the job classification of the employee.

- Mass Upload / Delete
  - Simplified upload and delete features compared to SAP SuccessFactors standard mass upload of documents (Via MDF framework)

- New features to be part upcoming release:
  - More signing providers; Adobe, VeriSign and others
  - Third-party data sources to be used during generation of documents

- Integrated together with EP FastHire to local services such as Danish CPR for quick population of data in real-time

Timeline

Timeline

Month / Stream	Jan	Feb	Mar	Apr	May	Jun
Project Management	Prepare → Explore →	Realize →	Deploy →	Run & Roll-out →		
Document Management & Generation	Workshop: Requirements →	Config → Review →	Config → Review →	Go-live		
Templates	Gathering Requirements →	Implement & Adjust →	Verify		Gathering Requirements → Implement & Adjust →	
Integrations: Signing Providers		Configuration → Test & Adjust →				