

ONBASE

ONBASE INTEGRATION FOR SAP SUCCESSFACTORS

SUMMARY

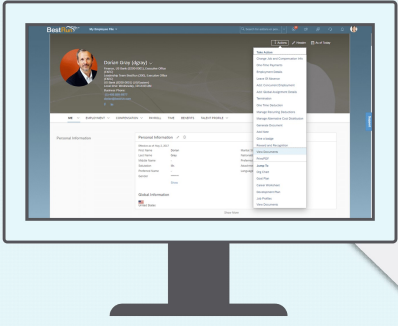
The OnBase Integration for SAP SuccessFactors seamlessly links employee records within SAP SuccessFactors to corresponding documents and content stored within OnBase. A simple click from the employee record launches an intuitive OnBase dashboard to capture, view and execute tasks on employee documents, all from familiar SAP SuccessFactors screens. Missing documents are flagged and can be easily uploaded from the employee record in SAP SuccessFactors, ensuring document compliance related to critical HR processes. Embedding OnBase content management capabilities directly within SAP SuccessFactors removes document silos and provides users with a complete view of the employee file.

BENEFITS

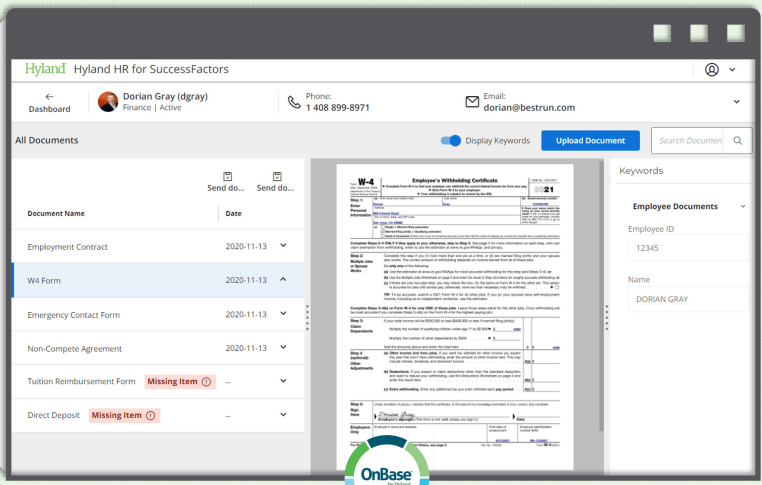
- **Accelerate HR processes** with OnBase content management functionality embedded directly within the SAP SuccessFactors user experience
- **Ensure compliant and secure storage for employee files** with a central repository for employee content accompanied by OnBase retention and governance processes
- **Enhance employee experience and productivity** by providing a complete view of an employee's documents alongside their record, without having to leave SAP SuccessFactors
- **Maximize SAP SuccessFactors business value** by allowing users to effectively perform all HR file management functions directly within the application

DESIGN

EMPLOYEE RECORD
in SAP SuccessFactors



INTUITIVE ONBASE INTERFACE
displaying employee documents



VIEW
 UPLOAD
 EXECUTE TASKS
 FLAG MISSING ITEMS

An intuitive and modern OnBase interface is launched from an employee record in SAP SuccessFactors, providing the ability to view and upload OnBase content, execute Workflow ad-hoc tasks and proactively identify items that are missing from an employee file.

APPLICATIONS

- **Employee File Management** is simplified by pairing the employee data managed in SAP SuccessFactors with the documents that accompany an employee file managed in OnBase. All content associated with an employee can be easily displayed alongside the record in SAP SuccessFactors, providing a complete view of the employee file and enabling HR partners to better support their employees.
- **Employee Life Events** that require supporting documents to be submitted are easily managed from an employee record. Employees simply navigate to their employee record within SAP SuccessFactors and drag-and-drop or click to upload their new documents.
- **Document Compliance** is supported through the missing document feature that allows HR employees to proactively identify missing documents that may be required for compliance purposes. Employees can also check their own document list to ensure compliance with company policies.

KEY FEATURES

- **Access and view employee documents** stored in OnBase alongside corresponding employee records directly from the SAP SuccessFactors interface.
- **Capture new documents** right from the SAP SuccessFactors employee record with a simple drag-and-drop or click to upload; select a document type for automatic indexing into the OnBase repository.
- **Automatic flagging of missing documents** that proactively alerts an HR representative, or the employee themselves, to what is missing from the record for compliance purposes.
- **Dynamic OnBase Workflow interaction** provides the ability to execute ad-hoc tasks, such as initiating a review process or flagging items, directly from employee documents within SAP SuccessFactors.
- **Personalized dashboard** displays employee documents and relevant metadata in a modern and intuitive Hyland application.
- **Seamless SSO experience for login** means end users can access and run the Hyland application simply by signing into SAP SuccessFactors.
- **Bidirectional API-level integration** provides real-time interaction between SAP SuccessFactors and OnBase, tailored to the customer's business process needs.

INTERFACE

The screenshot displays the Hyland HR for SuccessFactors interface. At the top, the Hyland logo and 'Hyland HR for SuccessFactors' are visible on the left, and the user's name 'OBDGRAY' is on the right. Below this, a navigation bar shows the user's profile: Dorian Gray (dgray), Finance | Active, with contact information: Phone: 1 408 899-8971, Email: dorian@bestrun.com, and Department: Leadership Team BestRun (300).

The main content area is divided into two columns. The left column contains 'Personal Information' and 'Role' sections. The right column contains 'Recent Documents' and 'Upload Document' sections.

Personal Information

Country	ZipCode	Nationality
United States	10022	USA
Country Of Birth	Date Of Birth	Last Name
United States	5/7/1976	Gray
First Name	Person Id	
Dorian	dgray	

Role

ZipCode	Country	Supervisor
10022	United States	Aanya Singh (sfadmin)
Start Date	Job Classification	Cost Center
7/16/2021	HR Professional (50029122)	Finance (B200FN01)
Company	BestRun Bank (B200)	

Recent Documents

Document Name	Date
COBRA Documentation - 5/12/2022	5/12/2022
COBRA Documentation - 09/05/2022	5/9/2022

[View All Documents](#)

Upload Document

Drag & drop files to import or browse

Clear

Displayed from an employee record in SAP SuccessFactors, this configurable dashboard allows users to view and upload employee documents.

All Documents

Display Keywords

Upload Document

Search Documents

Document Name	Date	
Employment Contract	2020-11-13	Send do... Send do...
W4 Form	2020-11-13	
Emergency Contact Form	2020-11-13	
Non-Compete Agreement	2020-11-13	
Tuition Reimbursement Form	Missing Item	
Direct Deposit	Missing Item	

W-4 Employee's Withholding Certificate (2021)

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. **Do not file this form with your employer.**

Step 1: Personal Information

Enter your name and address: **Person: Dorian Gray**

Enter your Social Security number: **SSN: 123-45-6789**

Enter your filing status: **Married**

Enter your employer's name and address: **Employer: BestRun**

Step 2: Multiple Jobs or Spouse

Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs.

Do only one of the following:

- (a)** Use the estimator at www.irs.gov/IRAApp for most accurate withholding for this step (and Steps 3-4), or
- (b)** Use the Multiple Jobs Worksheet on page 3 and enter the result in this box (do not check this box).

Step 3: Claim Dependents

(a) Dependents: Multiply the number of qualifying children under age 17 by \$2,000. **0**

(b) Other dependents: Multiply the number of other dependents by \$2,000. **0**

Step 4: Deductions

(a) Other income: Add the amount of other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income. **0**

(b) Extra withholding: Enter any additional tax you want withheld each pay period. **0**

Step 5: Sign Here

Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.

Employee's Signature: **Dorian Gray** Date: **11/13/2020**

Employer's Name and Address: **BestRun** First date of employment: **01/01/2020** Employee Identification Number (EIN): **00-0000000**

Keywords

Employee Documents

Employee ID: 12345

Name: DORIAN GRAY

The list of documents shows a preview, related keywords and flags missing items with a visual notification. In addition, Workflow ad-hoc tasks can be executed to move HR processes forward.

Learn more at Community.Hyland.com