Hyland HR for SAP SuccessFactors Schedule

Hyland will provide Professional Services to Customer to install and configure the Hyland HR for SAP SuccessFactors (HSF) application. Implementation will be focused on administration within Customer SuccessFactors environment to enable rich content services features in the context of SAP SuccessFactors HCM.

Hyland HR for SAP SuccessFactors is an optional offering that requires the following solution:

Hyland Care AP Services for New SAP Customer

Description of Solution

1. Users may launch HSF App from SuccessFactors portal via custom Navigation Link or custom Tile on Employee's Dashboard. Authentication into SuccessFactors portal allows user access to the HSF App without prompting for additional credentials;

2. User's HR employees may perform the following tasks on behalf of other employees within HSF App:

    A. View user details for employee from HSF dashboard;

    B. View employee's document list (via OnBase Custom Query identified in SuFa Configuration App);

    C. View selected documents for employee in viewing pane and its applicable keywords from the context of SuccessFactors screen;

    D. Upload documents into OnBase via drag & drop or browsing out to file location from SuccessFactors screen;

    E. Identify missing documents from document list in SuccessFactors and upload from that screen into OnBase via drag & drop or browsing out to file location:

    F. User must manually enter Primary ID (e.g. Employee ID) and press Enter to trigger population of Auto Fill Keyword Set data.

    G. View and execute applicable tasks for a document; and

    H. Search for specific documents via document name in the Search Document box.

3. User's employees may perform the following tasks on behalf of themselves within HSF App:

    A. View your user details from HSF dashboard;

    B. View document list (via OnBase Custom Query identified in SuFa Configuration App);

    C. View selected documents in viewing pane and its applicable keywords from the context of SuccessFactors screen;

    D. Upload documents into OnBase via drag & drop or browsing out to file location from SuccessFactors screen;

    E. Identify missing documents from document list in SuccessFactors and upload from that screen into OnBase via drag & drop or browsing out to file location:

        i. User must manually enter Primary ID (e.g. Employee ID) and press Enter to trigger population of Auto Fill Keyword Set data.

F. View and execute applicable tasks for a document; and

G. Search for specific documents via document name in the Search Document box.

4. User access of documents in the HSF App is controlled by the OnBase security configuration.

Assumptions for Hyland HR for SAP SuccessFactors Integration

1. All services will be provided remotely;

2. Customer has a functioning non-production environment (e.g., test) in which to develop and test the solution;

3. Scope includes configuration in one (1) test environment and migration to one (1) production environment;

4. The following software is required for HSF:

    A. Hyland Identity Provider (IdP) 3.0.0+ or later;

    B. Hyland API Server 21.1.9.1000 or later; and

    C. Hyland Configuration Service (1.1.0 or later).

5. Customer is licensed for Hyland HR for SuccessFactors;

6. The minimum OnBase version supported for HSF App is OnBase Foundation EP5;

7. Customer must also have an existing production and non-production SuccessFactors organization/environment, along with their unique credentials for SuccessFactors;

8. If using SSO, Customer will have provider setup and established. SSO configuration will be the responsibility of the Customer:

    A. Support is for Azure AD and/or Hyland IdP only.

9. File formats supported in viewer include PDF, Microsoft Word, Text File, Image File (non-supported content will not display);

10. UT support will not exceed a total of eight (8) hours over a two (2) week period;

11. Migration to production will be a one (1) time event;

12. Go-live will be a one (1) time event;

13. Go-live support will not exceed a total of six (6) hours over a one (1) week period;

14. Prior to engagement, Customer will have document types, keywords, AutoFill Keyword Set, and custom query configured;

15. For identifying list of required document types, all document types must reside in one (1) document type group;

16. As Document Access Authorization requirements change, the Document Access Keywords must be updated accordingly in OnBase; and

17. End User access to configured solution will be provided only through HSF application. It is not expected that the users will access solution through Software clients.

Exclusions for Hyland HR for SAP SuccessFactors Integration

1. WorkView triggers;

2. Workflow triggers requiring user interaction;

3. Custom workflow configuration;

4. Custom scripting or custom integration;

5. Creation of custom training documentation;

6. Migration of documents from SuccessFactors and importing into OnBase;

7. Upgrades to OnBase EP5; and

8. Installation and configuration of any third party software.

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