



Driving Innovation, Empowering Transformation.

# SAP SuccessFactors – Content Management by OpenText





Driving Innovation, Empowering Transformations.

**1,500**  
Successful  
Projects

**10,500+**  
TB of Data  
Managed

**22+**  
Years Evolving  
Companies

**\$1,5B**  
Total Customer  
Savings

## Data Management

- SAP Data Archiving
- SAP DaRT
- Data Quality & Governance
- Data Migration
- System Decommissioning
- Data Privacy

## Solution implementation

- S/4HANA Implementation
- SAP Business Data Cloud (BDC)
- SAP BTP Deployment
- SAP OpenText
  - Extended ECM
  - Vendor Invoice Management
  - Doc Presentment
- SAP Spend Management
- SAP Vistex
- SAP Vertex
- AI Implementation
- Cloud Migrations

## Product & Innovations

- Data ASSIST by Auritas  
*(Data Archiving Automation)*
- Data GUARD by Auritas  
*(Legacy Decommissioning)*
- Auritas Intelligent Accrual  
*(Financial Automation)*



## Strategic Partnerships

- SAP Gold Partner
- SAP PartnerEdge, Sell
- CCFlex – Cloud Choice Flex



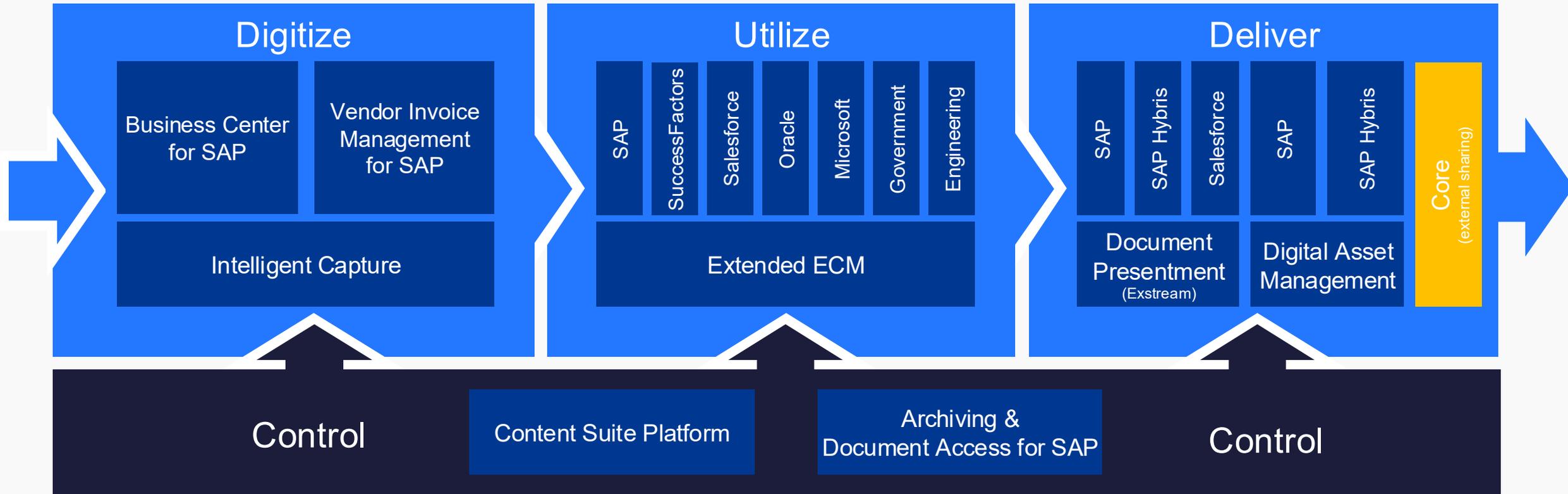
# Agenda

- Breaking down xECM
  - Platform for the Enterprise
  - xECM - Anatomy
- Business Need
  - HR Priorities
  - Content Management Challenges
- xECM for SuccessFactors
- Use Cases
- Key Benefits



Information Flows

# Content Services for the Digital Enterprise



# Extended ECM Platform: What is a Workspace?

A **workspace** represents a meaningful **entity** in an organization, e.g. a **customer**, a **sales opportunity**, a **project**, or even a **community** of people with common interests. A workspace provides insight from the data, the content, the people, and the task perspective.

**Business data** provides context to content and thus makes it relevant, searchable and actionable. Data can be synchronized with a leading business application.

Organize and store your organization's **documents**, and other **content**, that relate to organization's processes.

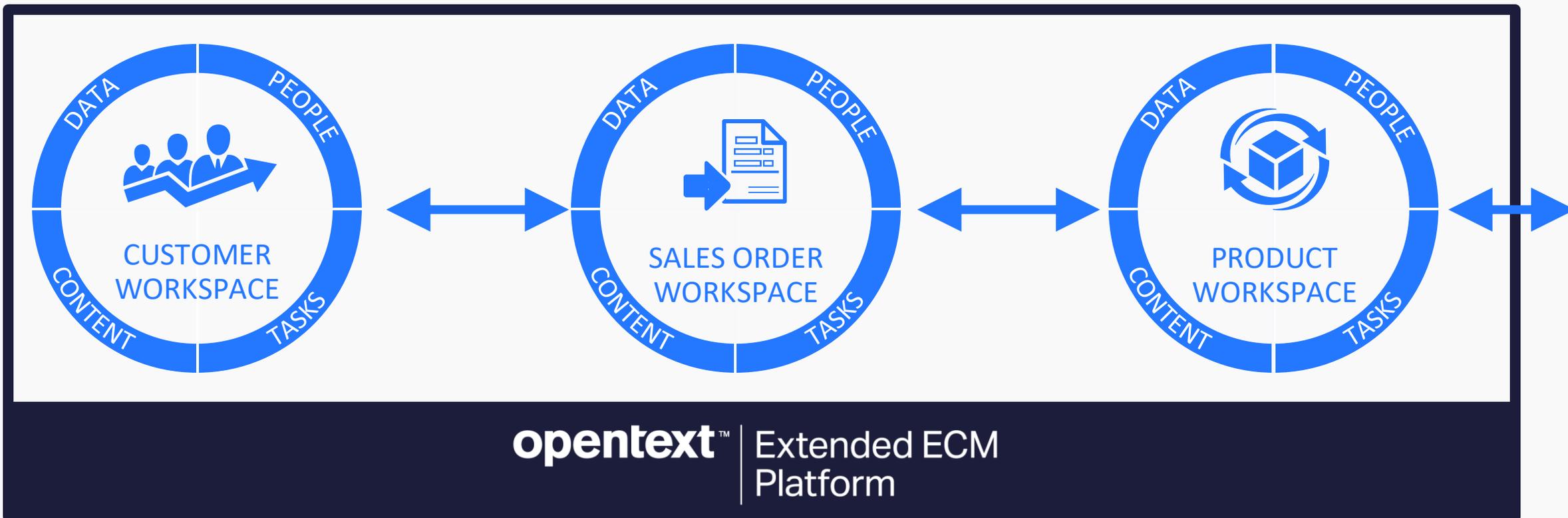


Call it **teams**, **communities** or **groups**, it's about people working together to achieve a common goal. In doing so people can have different **roles** and responsibilities.

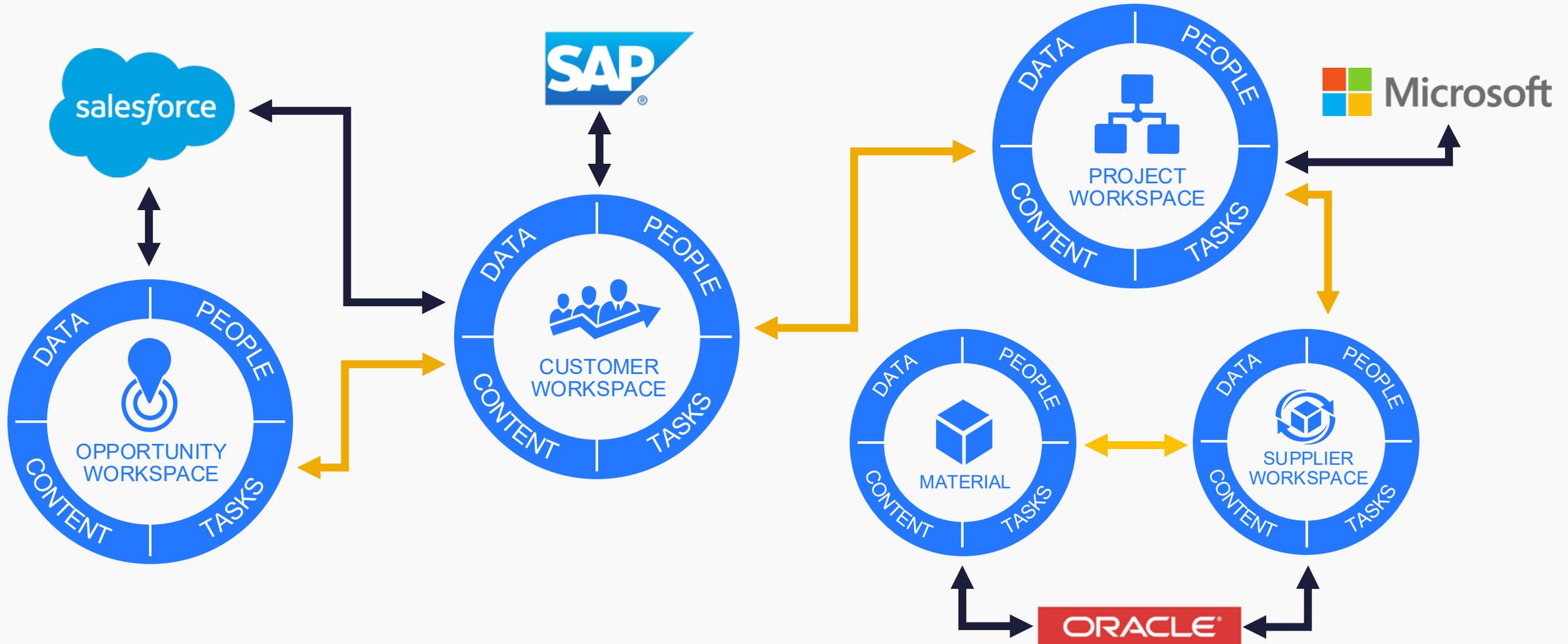
Workspaces are actionable through **tasks**, **follow-ups**, **milestones**, and **phases**. They can be predefined, ad-hoc or synchronized with ERP, CRM or HCM systems.

Extended ECM Platform

# Open, Versatile Content Management Platform

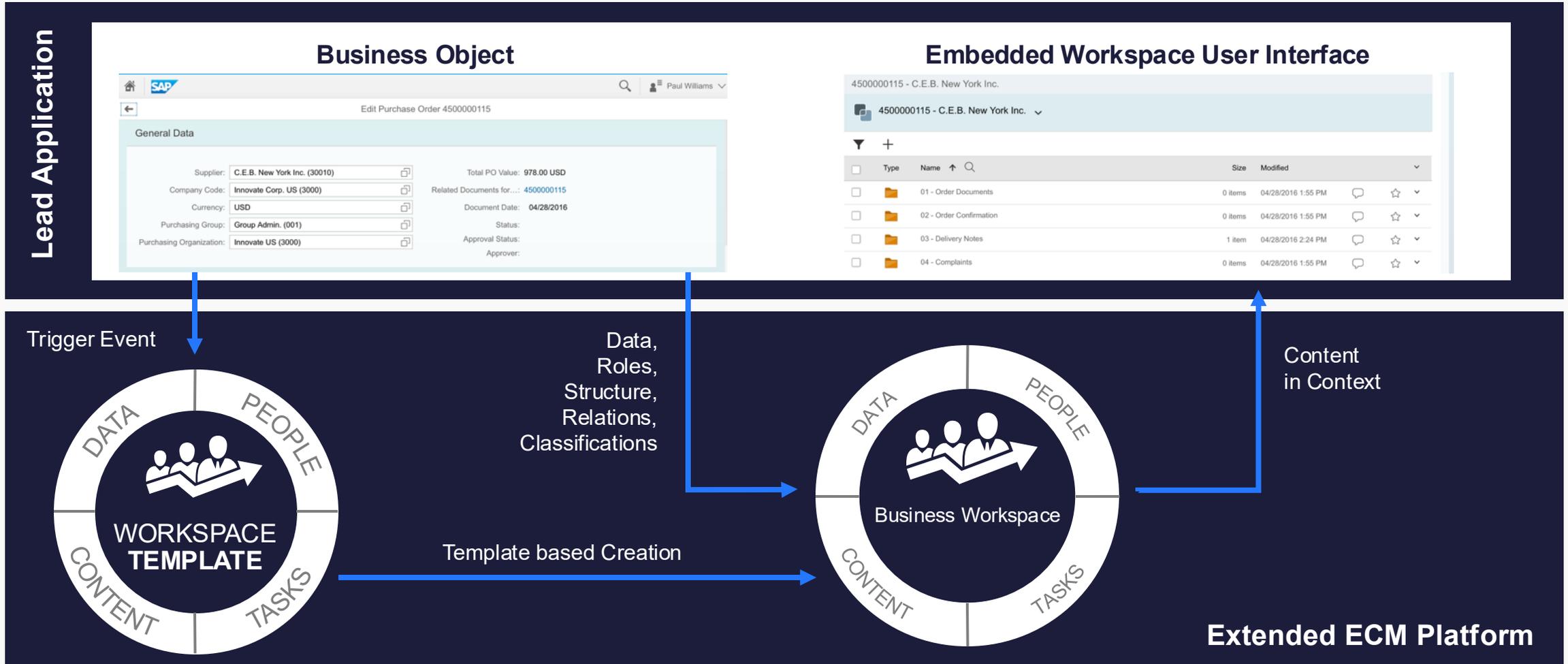


# Extended ECM Platform Network of Business Workspaces



# Extended ECM

## Anatomy of the Integration



# HR Business Challenges & Need



# Customer Priorities for Change

## Priorities

What priorities are top of mind for our customers?

What forces are driving change?

### Efficient, agile & responsive HR services

How can we...

- Support a virtual HR service center?
- Manage my digital employee files?
- Reduce paper consumption?
- Better support the recruitment process?
- Provide increased HR automation?

### First-class employee experience

How can we...

- Prepare for remote or hybrid working?
- Attract and retain talent?
- Improve the employee experience?
- Reduce paper, photocopying, printing and postage?

### Security, privacy & compliance

How can we...

- Support GDPR regulatory requirements?
- Help support vaccination tracking?
- Support subject access requests?
- Meet external legal audit requests?

### Scalability, growth & automation

How can we...

- Keep up with our growing volume of employee records?
- Improve HR service despite “leaner teams” and “leaner budgets”?
- Make hiring faster as vacant positions cost money?

# HR document management challenges don't stay in HR—they impact stakeholders across the organization



## Employees / Managers

- Why is it so hard to access documents quickly?
- Why does onboarding feel so manual and disjointed?
- Can I track missing onboarding documents without HR?



## HR leaders

- Is manual work taking time away from strategic priorities?
- How much time is spent filing, searching, or chasing documents?
- Are onboarding and offboarding still relying on paper or email?



## HR IT

- Is our current system integrated with our HRIS or ERP platforms?
- Are we maintaining secure, access to employee documents?
- Is our document storage scalable, centralized, and compliant?

## HR shared services

- Can we retrieve any employee document quickly and securely?
- How much time is spent chasing down missing documents?
- Is our process fast enough to meet internal SLAs?



## Compliance officer

- How quickly can we respond to security or compliance audits?
- How do we enforce data retention and destruction policies?
- Do we have audit trails and version control for every document?



# How SAP & OpenText can help

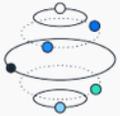


# Digitalize and streamline processes with HR document management solutions from SA



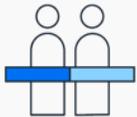
## Drive efficient document lifecycle management

Store, manage, and create employee documents from within your HR platform for improved operational efficiency



## Streamline HR document generation

Improve HR communications with accurate and personalized employee documents



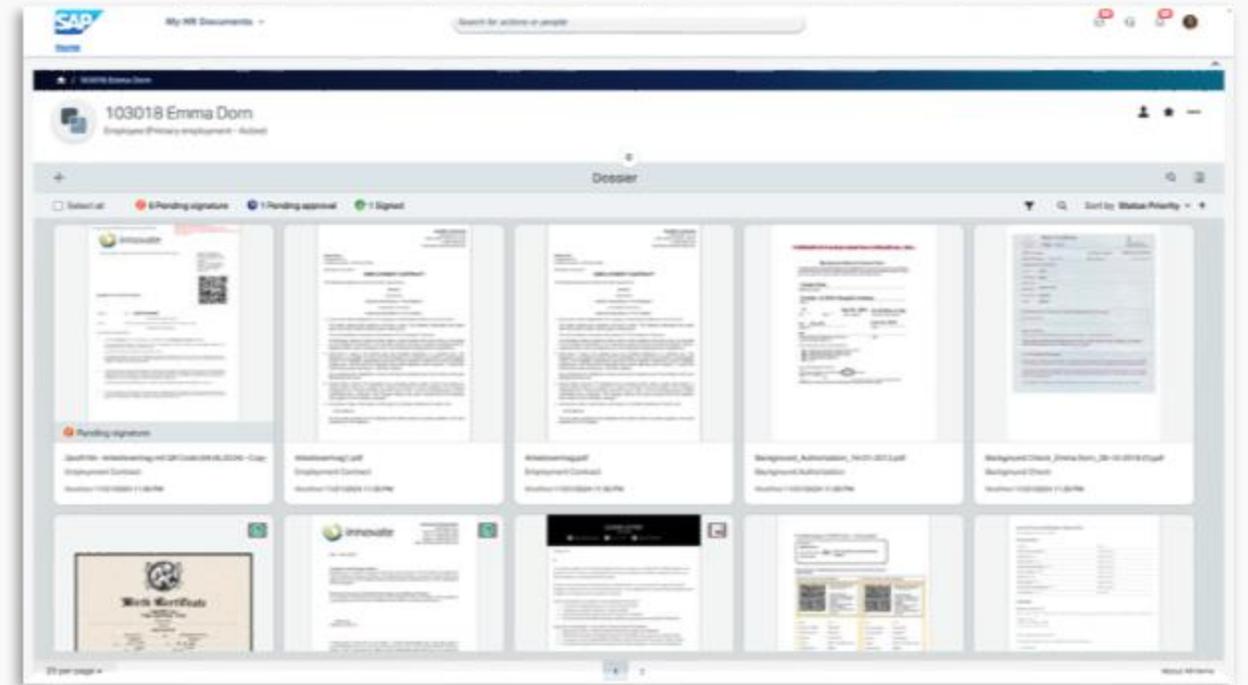
## Personalize people experiences

Boost employee engagement and productivity with personalized experiences for document-related transactions and services



## Enable agile and compliant HR

Meet data privacy requirements while ensuring complete employee files



# How we deliver HR document management

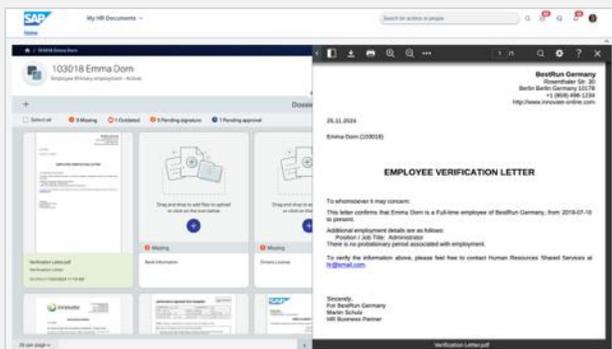
From creation to disposition, a comprehensive enterprise solution



## Document Generation

Create engaging employee communications with:

- Predefined templates with conditional formatting and editable fields
- Employee self-service
- Integrated eSignature
- Bulk document generation
- Event-based document generation\*
- Create document workflows



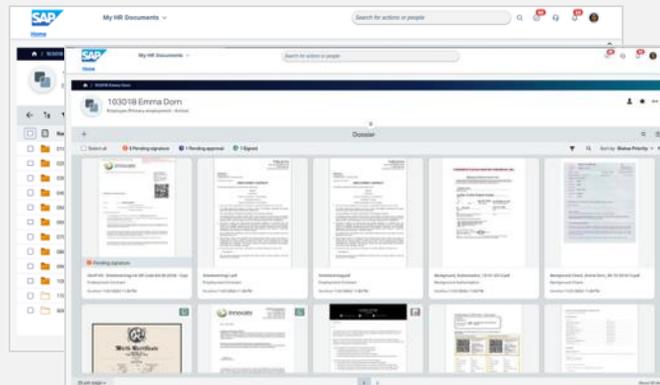
\*Functionality only available with SAP SuccessFactors Extended ECM by OpenText



## Document Management

Increase productivity with:

- Centralized document storage with metadata
- Document version control
- Folder structure and taxonomy
- Full-text search
- Role-based permissions for security and access control
- Upload and approve documents



## Records Management

Enable HR document compliance with:

- Support regulatory requirements such as GDPR
- File completeness check
- Legal holds
- Audit trail
- Document disposition
- Retention policies
- Redaction\*

Enabled	Name	Description	Disposition	Retention Trg.	Created	Modified
<input checked="" type="checkbox"/>	000 + 17 Years		Destroy	Calculated Date	08/05/2024 5:12:17 AM	08/05/2024 5:12:17 AM
<input checked="" type="checkbox"/>	EOL - New		Destroy	Event based	08/05/2024 6:58:29 AM	08/05/2024 6:58:29 AM
<input checked="" type="checkbox"/>	RetentionPolicy		Destroy	Calculated Date	08/05/2024 1:54:13 AM	08/05/2024 1:54:13 AM
<input checked="" type="checkbox"/>	000 + 3 days	000 + 3 days	Destroy	Calculated Date	08/13/2024 11:04:32 PM	08/13/2024 11:04:32 PM
<input checked="" type="checkbox"/>	000 + 2 days	000 + 2 days	Destroy	Calculated Date	08/13/2024 10:40:36 PM	08/13/2024 10:40:36 PM
<input checked="" type="checkbox"/>	Retirement + 2 Day		Destroy	Event based S...	08/21/2023 10:11:38 PM	08/21/2023 10:11:38 PM
<input checked="" type="checkbox"/>	000 + 20 Years	20 Years from Date of Origin	Destroy	Calculated Date	08/18/2021 7:10:20 AM	08/23/2023 9:08:03 PM
<input checked="" type="checkbox"/>	Retirement + 2 Years	2 Years from Retirement	Destroy	Event based S...	03/05/2021 4:29:06 PM	08/23/2023 9:27:48 PM
<input checked="" type="checkbox"/>	000 + 2 Years	2 Years from Date of Origin	Destroy	Calculated Date	03/05/2021 6:15:25 PM	08/23/2023 9:27:11 PM
<input checked="" type="checkbox"/>	000 + 8 Months	8 Months from Date of Origin	Destroy	Calculated Date	03/05/2021 6:14:20 PM	08/23/2023 9:27:11 PM
<input checked="" type="checkbox"/>	11 Months from Date of Origin	11 Months from Date of Origin	Destroy	Calculated Date	03/05/2021 6:13:14 PM	01/30/2024 12:03:54 AM



# Solution Differentiators



# Unique selling points for **SAP SuccessFactors Document Management Core**

## The value of a Solution Extension from SAP

### An SAP solution

- SAP premium qualified solution is tested, validated and approved to meet SAP product standards
- Current and future-state architecture with SAP core products is ensured

### One vendor

- Single contract
- One cloud service level agreement (SLA)
- SAP is the single point of contact during all phases of the technology lifecycle (training, maintenance, support)
- Broader functionality from a single vendor

### Best of breed

- Designed by the content management experts at OpenText
- OpenText is a leader in the [IDC MarketScape: Worldwide Intelligent Content Services 2024 Vendor Assessment](#)

### Compliance and governance

- Robust records management capabilities meets the requirements of many compliance standards and certifications including FEDRamp, U.S. DoD 5015.02-STD v3, SOC compliance, ISO 15489, Australian VERS, and more.

### Predefined integrations

Technical and process integration, including:

- User interface
- Role-based permission sync
- Document integration without duplication
- Workflow integration

### Document generation capabilities

- Interactive content editing
- Template designer
- Bulk letter generation

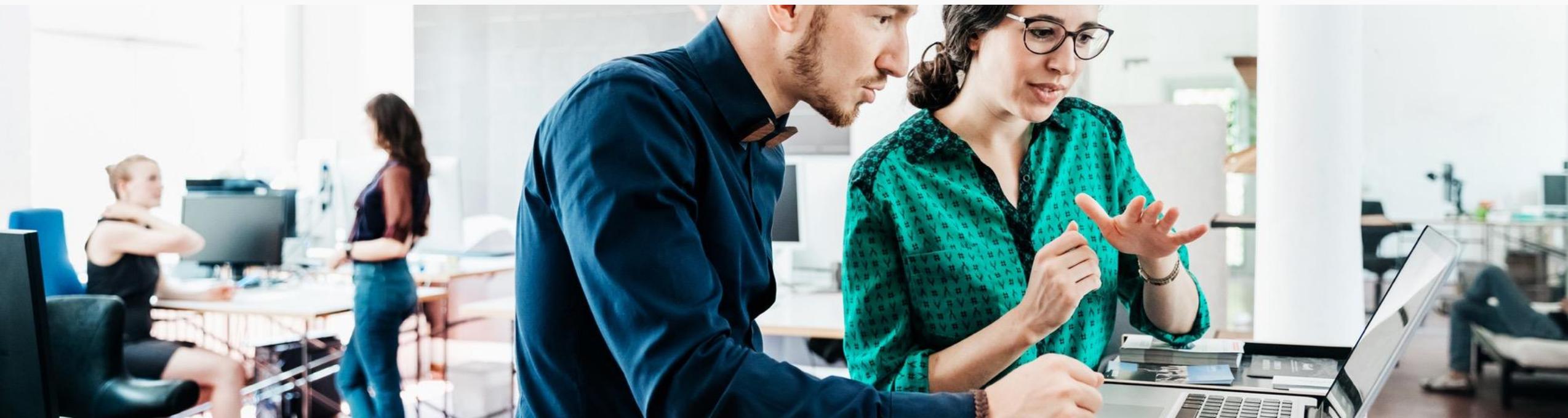
# Side-By-Side Functional Comparison Matrix

(OpenText 25.2 release)

Feature	SAP SuccessFactors Document Management Core	SAP SuccessFactors Extended ECM
<b>Records Management</b>	<ul style="list-style-type: none"> <li>Ability to set retention rules and legal holds</li> <li>Audit trail captures list of events including create, upload, download, version and view</li> <li>View compliance reports</li> </ul>	<ul style="list-style-type: none"> <li>Ability to set retention rules and legal holds</li> <li>Configure compliance reports</li> <li>Audit trail captures comprehensive list of events including automated versions, email and print</li> <li>Configure multi-staged retention schedule</li> <li>Process to delete documents can be fully automated with proactive notifications</li> <li>Certified to global standards</li> <li>Recycle Bin</li> </ul>
<b>Document Generation</b>	<ul style="list-style-type: none"> <li>Ability to create templates</li> <li>Employee self-service to generate documents</li> <li>Permission HR business users to edit document templates</li> <li>Integration with SAP SuccessFactors Signature Management by DocuSign</li> <li>Manual process to generate documents</li> <li>Document output in PDF only</li> <li>Bulk document generation</li> </ul>	<ul style="list-style-type: none"> <li>Ability to create templates</li> <li>Employee self-service to generate documents</li> <li>Permission HR business users to edit document templates</li> <li>Integration with SAP SuccessFactors Signature Management by DocuSign</li> <li>Bulk document generation</li> <li>Automated process to generate documents based on business rules and metadata</li> <li>Document output in PDF, Word, email, or SMS</li> <li>Ability to automate generation of documents based on events in SAP SuccessFactors (via intelligent services)</li> </ul>
<b>Document Management</b>	<ul style="list-style-type: none"> <li>Centralized employee workspace for document management</li> <li>Embedded viewer</li> <li>Annotate, audit &amp; version documents with full-text search and thumbnail view</li> <li>Drag and drop or batch import of existing documents</li> <li>Document completeness check to identify outdated or missing documents</li> <li>Control permission at the document level</li> <li>Route documents for approval via workflow</li> <li>Advanced reporting</li> <li>Employee Self-Service to submit own documents</li> </ul>	<ul style="list-style-type: none"> <li>Centralized employee workspace for document management</li> <li>Embedded viewer</li> <li>Annotate, audit &amp; version documents with full-text search and thumbnail view</li> <li>Drag and drop or batch import of existing documents</li> <li>Document completeness check to identify outdated or missing documents</li> <li>Control permission at the document and folder level</li> <li>Route documents for approval via workflow</li> <li>Advanced reporting, plus ability to create additional custom reports</li> <li>Employee Self-Service to submit own documents</li> <li>Edit documents in MS Office, save as PDF, send notifications and documents via Outlook</li> <li>Document scanning including text search capability</li> <li>Automated Document Numbering</li> </ul>
<b>Integration</b>	<ul style="list-style-type: none"> <li>Out-of-the-box integration with Employee Central, Recruiting and Onboarding for documents via CMIS</li> <li>Integrates with SFSF role-based permissions</li> <li>Bulk workspace creation, hiring event automatically creates new employee workspace</li> <li>Metadata integration – flexibility to define custom attributes per document type</li> <li>UI integration from tile, home menu, and take action link; single sign-on</li> </ul>	<ul style="list-style-type: none"> <li>Out-of-the-box integration with Employee Central, Recruiting and Onboarding for documents via CMIS</li> <li>Integrates with SFSF role-based permissions</li> <li>Bulk workspace creation, hiring event automatically creates new employee workspace</li> <li>Metadata integration – flexibility to define custom attributes per document type</li> <li>UI integration from tile, home menu, and take action link; single sign-on</li> <li>Integration into Microsoft 365</li> <li>Integration with SAP HCM</li> </ul>
<b>Business Administration</b>	<ul style="list-style-type: none"> <li>Transport of business config from test to prod</li> <li>Predefined folder taxonomy and document types and ability to add custom</li> <li>Individualized landing page configuration</li> <li>16 languages</li> <li>Self service usage metrics/consumption</li> <li>Automated instance refresh</li> </ul>	<ul style="list-style-type: none"> <li>Transport of business config from test to prod</li> <li>Predefined folder taxonomy and document types and ability to add custom</li> <li>Individualized landing page configuration</li> <li>24 languages</li> </ul>

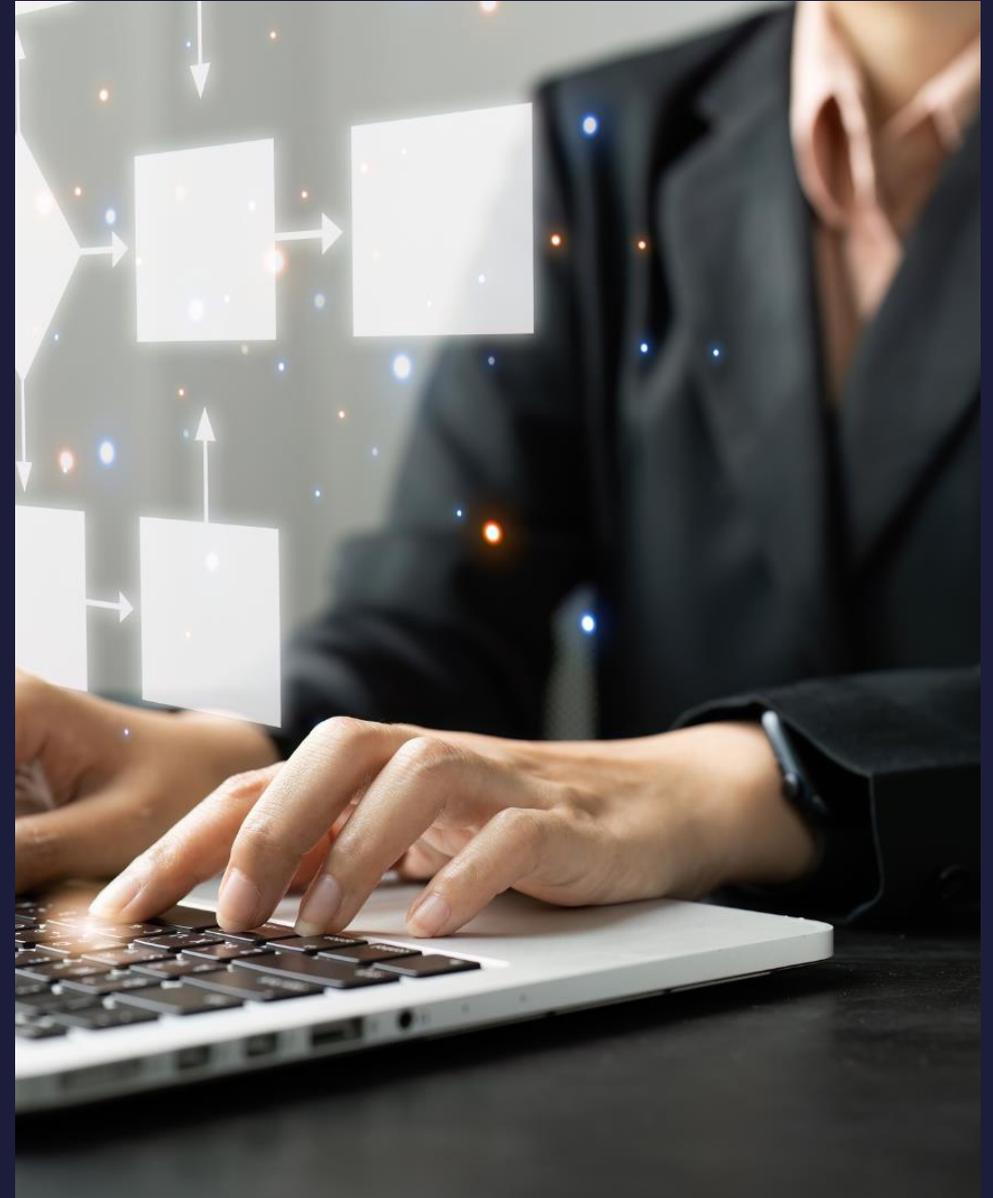


# Use Cases



# Business process use cases

1. Improve the new hire experience
2. Ensure seamless employee transfers
3. Mitigate the risk of employee departures
4. Empower employees with self-service access
5. Streamline the management of mandatory employee certifications
6. Support audit requests with ease
7. Comply with General Data Protection Regulations





# Solution Options & Features



# Enhanced document management capabilities of Document Management Solutions for SAP SuccessFactors (by OpenText)

## Document Management Solutions for SAP SuccessFactors (by OpenText)

- Create centralized employee folders
- Attach/view documents in centralized employee folders
- Flexible folder structure/taxonomy, and ability define document types and assign meta data
- Ability to generate HR audit and completeness check reports (current/expiring/missing)
- Activity log and version control for documents
- Records management including retention rules, disposition based on region rules, configurable workflows, and legal holds/permissions (RBP)
- HR inbox to process new document requests (assign/deny/forward)
- Define permission access to documents in employee folders
- Ability to scan and import documents and attach them to the centralized employee file
- Full-text search on documents regardless of their folder location
- Scan a document and attach to centralized employee file
- Document level access controls via SAP SuccessFactors role-based permissions (RBP)

### SAP SuccessFactors document management service provides basic document storage

- Administrators can manage, view, sort, and filter employment and personal information documents centrally based on selected criteria.
- Admin can upload of company documents and download / bulk download for audit and other purposes based on selected criteria
- Admins can access documents based on RBP defined at the document category level
- Set the retention period for purge of documents and user data
- Candidates, employees and managers have the ability to view and attach documents in the SAP SuccessFactors UI in the context of a business process
- View total storage usage by document category

# Enhanced document generation capabilities offered by Document Management Solutions for SAP SuccessFactors (by OpenText)

## SAP SuccessFactors Document Management Core by OpenText

- Insert pre-composed paragraphs/sections into a document (from a centralized text resource library)
- Interactive content editing
- Interview mode (questions guide template development)
- Generate documents with pending EC workflow\*
- Template designer
- DocuSign integration available when creating communications for recruitment, onboarding and employee during employment
- Trigger document generation based on Intelligent Services event\*
- Automatically save generated document in employee's file
- Bulk letter generation\*
- Admin UI for document template management and document generation (centralized management)

## SAP SuccessFactors Employee Central document generation capabilities

- Create global and country-specific document templates
- SAP SuccessFactors data mapping to fields in document templates
- Create business rules to define data inserted into document template (like conditional text formatting)
- Email / download of documents generated in word and PDF format
- Bulk document generation (up to 500 documents at a time)
- Multi-language support
- Support electronic signatures for documents (DocuSign integration)\*\*
- Generation of documents with ESS and manager proxy on behalf of employee
- Manager / HRBP can initiate a change and this associated workflow can trigger
  - EC document generation
- HRBP's can generate documents for inactive employees
- Limited to use with SAP SuccessFactors Employee Central only
- Leverage role-based permissions for mapping and generation of documents

# The benefits of SAP SuccessFactors Document Management Core



## One Version of the Truth

Centralized repository for all your employee files



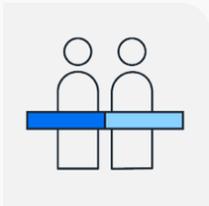
## More Time for Strategic HR

Digitize and optimize document-related workflows



## Compliance with Regional Regulations

Records Management, deletion regulations, audit trails, and completeness check



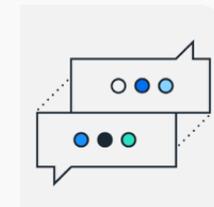
## Employee Productivity

Provide self-service access for employees



## Reduced Security Risk

Role-based permissions for security and access control



## Improved HR Communication

Multi-channel document generation and distribution

# What is an SAP Solution Extension?

SAP Solution Extensions are strategic third-party solutions developed by our most innovative software providers. They offer cross-line of business and cross-industry functionality that address your distinct business needs. SAP supports these solutions as its own, guaranteeing the standards of quality and support SAP clients expect.

- **Predefined Integration:** Technical and process integration delivers faster time to value.
- **Governance and Security:** Solution is tested, validated and approved to meet SAP product standards.
- **Proven Technology:** Both current and future-state architecture with SAP core products is ensured.

## What This Means for You?

- ✓ Broader functionality from a single vendor
- ✓ SAP owns integration of the solution into the roadmap
- ✓ Single contract
- ✓ SAP is the single point of contact during all phases of the technology lifecycle (training, maintenance, support)



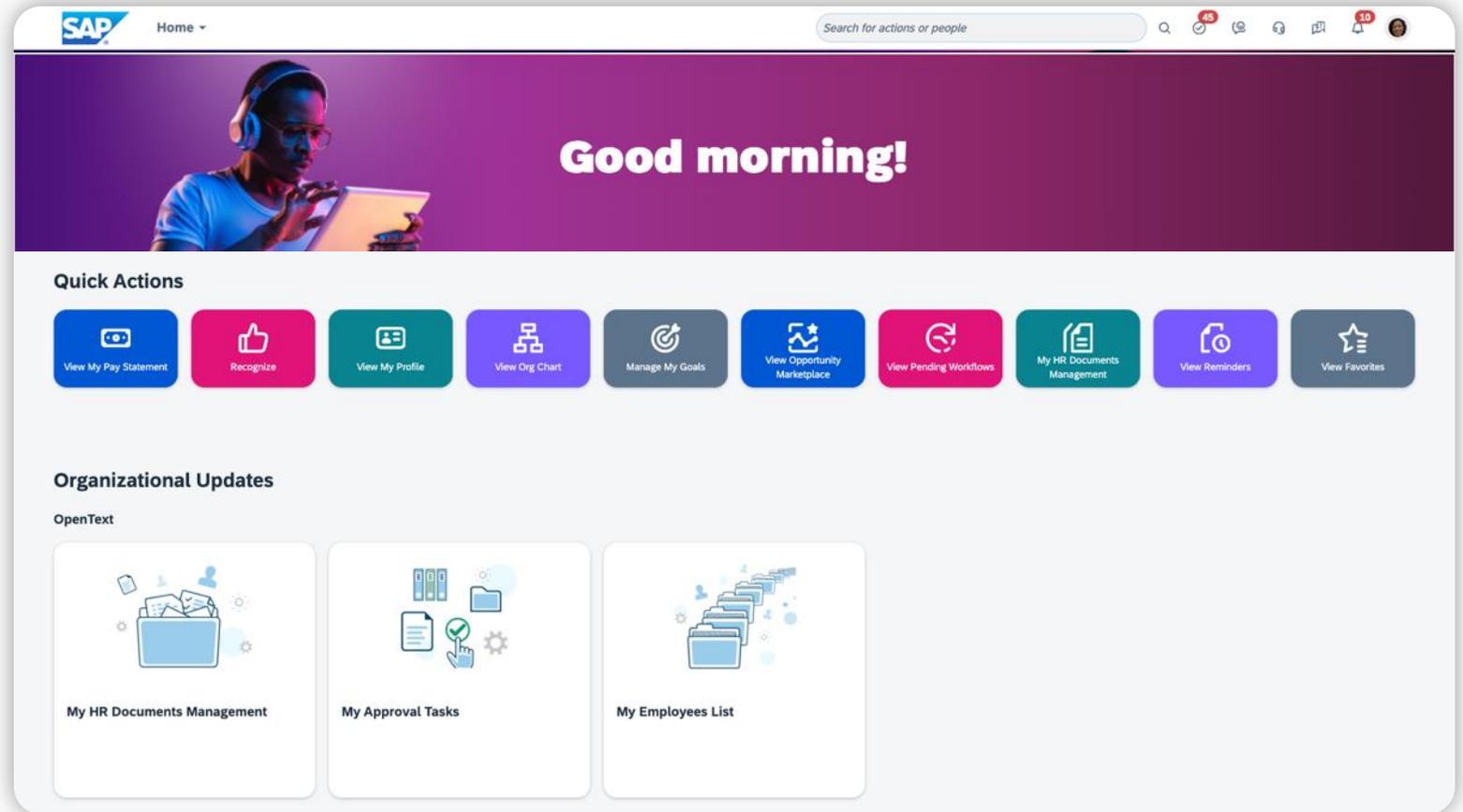
# Solution Overview



# Store, manage and create employee documents from within your HR platform

**Provide a comprehensive platform to manage the entire document lifecycle from creation, to disposition**

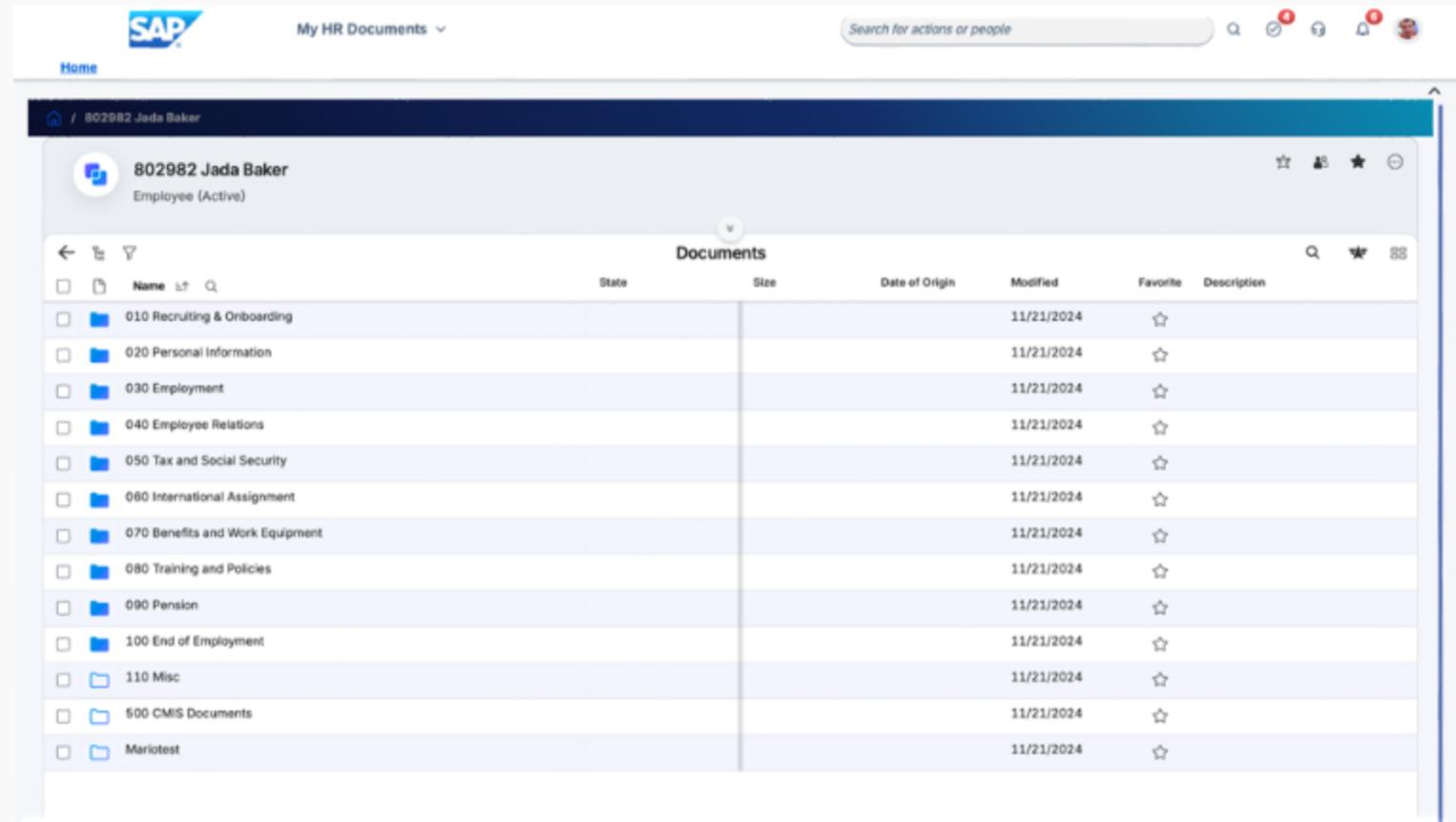
- ✓ Establish a centralized digital repository as the single source of truth for all HR employee documentation
- ✓ Access employee documents directly from the SAP SuccessFactors homepage—fast, secure, and user-friendly
- ✓ Ensure secure access with role-based permissions aligned to your SAP SuccessFactors configuration
- ✓ Seamlessly integrate with core HR modules like Employee Central, Recruiting, and Onboarding for a connected HR experience



# Reduce the administrative burden on HR with the digitalization of document management

## Centralize the storage and management of all employee documents

- ✓ Avoid duplication and manual updates by managing HR documents directly within your existing HR system
- ✓ Quickly find what you need with a unified document workspace offering a complete view of each employee file
- ✓ Automate compliance checks with alerts for missing or outdated documents using file completeness tracking
- ✓ Streamline reviews and approvals with configurable workflows that route documents to the right stakeholders



# Improve HR service delivery with flexible reporting

## Reduce HR response time to document requests with centralized document reporting

- ✓ Create tailored document reports to match your organization's needs—unlock deeper visibility and actionable workforce insights
- ✓ Standardize reporting with consistent metadata and taxonomy for faster, more reliable document analysis
- ✓ Quickly find critical records with cross-employee search functionality—ideal for audits, internal reviews, and compliance checks
- ✓ Easily export documents in bulk by employee or document type to streamline sharing and external reporting

The screenshot displays the SAP Admin Center 'Documents report' interface. On the left is a search sidebar with filters for Document type, Document status, Date of origin, Creation date, Country of work, Employee, and Employee status. The main area features a summary row with seven cards: All documents (13), Declined to sign (0), In workflow (6), Missing (0), Expires soon (0), Outdated (3), and Pending signature (6). Below this is a table titled 'All documents' with columns for Name, Document type, Person ID, Employee, Document status, Country, Date of origin, and Created On. The table lists various documents such as 'Gehaltserhöhung.pdf', 'Arbeitsvertrag.pdf', and 'Offer Letter.pdf' with their respective details.

Name	Document type	Person ID	Employee	Document status	Country	Date of origin	Created On
Gehaltserhöhung.pdf	Salary Increase	103005	Bianca Duffner	Outdated, In workflow	Germany	11/25/2024	11/25/2024
Gehaltserhöhung333.pdf	Salary Increase	103005	Bianca Duffner	Outdated, In workflow	Germany	11/25/2024	11/25/2024
20250425 - Arbeitsvertrag.pdf	Employment Contract	103018	Emma Dorn	Pending Signature	Germany	04/25/2025	04/25/2025
Abmahnung.docx	Law Case Documentation	103018	Emma Dorn	Pending Signature	Germany	08/20/2024	03/17/2025
COVID Pass_GER.pdf	Six Sigma Certification	103018	Emma Dorn	In workflow	Germany	04/15/2025	04/15/2025
Employment Contract.pdf	Employment Contract	103018	Emma Dorn	Pending Signature	Germany	04/28/2025	04/28/2025
Gehaltserhöhung.pdf	Salary Increase	103018	Emma Dorn	In workflow	Germany	04/17/2025	04/17/2025
Payroll Information for 0002_HB.pdf	Bank Information	103046	Hella Buhr	In workflow	Germany	04/27/2025	04/27/2025
Company Policy Agreement.pdf	Company Policy Agreement	103010	Kathrin Denecken	Outdated	Germany	02/01/2019	10/11/2024
Contrat de travail.pdf	Employment Contract	lthekla	Lene Thekla	Pending Signature	Germany	08/14/2024	08/14/2024
Gehaltserhöhungsschreiben.pdf	Merit Increase Letter	103019	Martin Schulz	Pending Signature	Germany	09/13/2024	09/13/2024
Incremento salarial.pdf	Salary Increase	103009	Peter Eckardt	In workflow	Germany	04/16/2025	04/16/2025
Offer Letter.pdf	Offer Letter	103009	Peter Eckardt	Pending Signature	Germany	04/25/2025	04/25/2025

# Easily manage HR compliance obligations with records management

## Reduce risk with streamlined, secure and compliant records management

- ✓ Align with retention policies and legal requirements, including GDPR, through automated rule-based archiving
- ✓ Automatically apply retention schedules based on real-time employee lifecycle events in SAP SuccessFactors
- ✓ Safeguard critical records with legal holds to prevent tampering or deletion during litigation
- ✓ Ensure accountability with a complete, tamper-proof audit trail of all document access and activity

opentext | Core Compliance CE 24.3

Dashboard Retentions Holds Destructions Tasks Audit Records Audit Roles

+ Configure Retentions

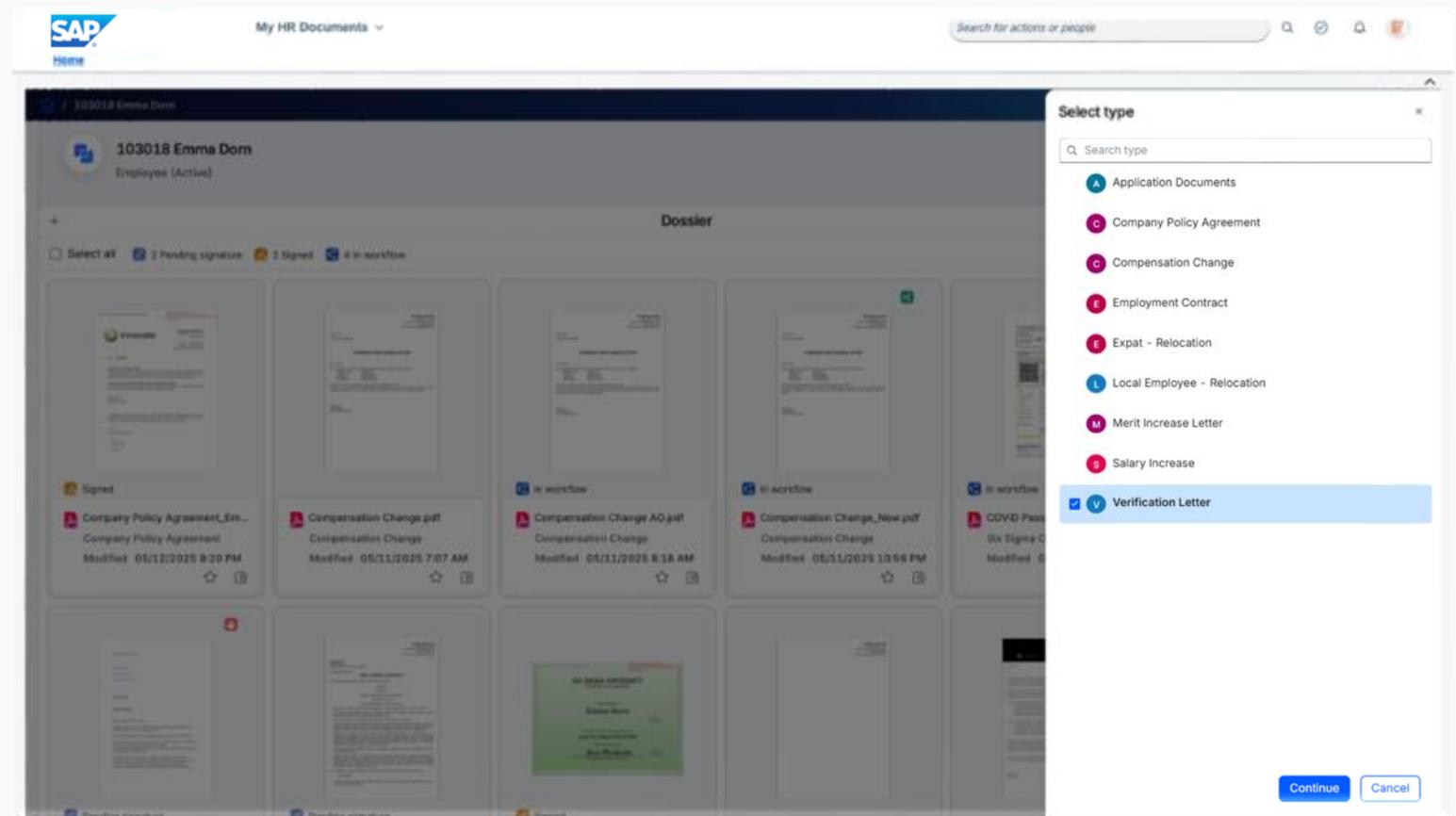
<input type="checkbox"/>	Enabled	Name	Description	Disposition Ac...	Retention Trig...	Created	Modified
<input type="checkbox"/>	✓	DOO+1Y (New)		Destroy	Calculated Date	08/09/2024 5:12:17 AM	08/09/2024 5:12:17 AM
<input type="checkbox"/>	✓	EDE-5Y_New		Destroy	Event based	08/08/2024 6:08:29 AM	08/08/2024 6:08:29 AM
<input type="checkbox"/>	✓	PassportPolicy		Destroy	Calculated Date	08/08/2024 12:54:13 AM	08/08/2024 12:54:13 AM
<input type="checkbox"/>	✓	DOO + 3 days	DOO + 3 days	Destroy	Calculated Date	06/12/2024 11:04:32 PM	06/12/2024 11:04:32 PM
<input type="checkbox"/>	✓	DOO + 2 days	DOO + 2 days	Destroy	Calculated Date	06/12/2024 10:40:36 PM	06/12/2024 10:40:36 PM
<input type="checkbox"/>	✓	Retirement + 1 Day		Destroy	Event based (l...	08/21/2023 10:11:38 PM	08/21/2023 10:11:38 PM
<input type="checkbox"/>	✓	DOO + 20 Years	20 Years from Date of Origin	Destroy	Calculated Date	04/19/2021 7:10:20 AM	08/22/2023 9:28:02 PM
<input type="checkbox"/>	✓	Retirement + 2 Years	2 Years from Retirement	Destroy	Event based (l...	02/08/2021 6:29:06 PM	08/22/2023 9:27:46 PM
<input type="checkbox"/>	✓	DOO + 2 Years	2 Years from Date of Origin	Destroy	Calculated Date	02/08/2021 6:15:25 PM	08/22/2023 9:27:26 PM
<input type="checkbox"/>	✓	DOO + 6 Months	6 Months from Date of Origin	Destroy	Calculated Date	02/08/2021 6:14:20 PM	08/22/2023 9:27:11 PM
<input type="checkbox"/>	✓	11 Months from Date of Origin	11 Months from Date of Origin	Destroy	Calculated Date	02/08/2021 6:13:14 PM	01/30/2024 12:03:54 AM

15 items

# Elevate the employee experience with self-service tools

## Empower your employees with quick and easy access to HR-related transactions and services

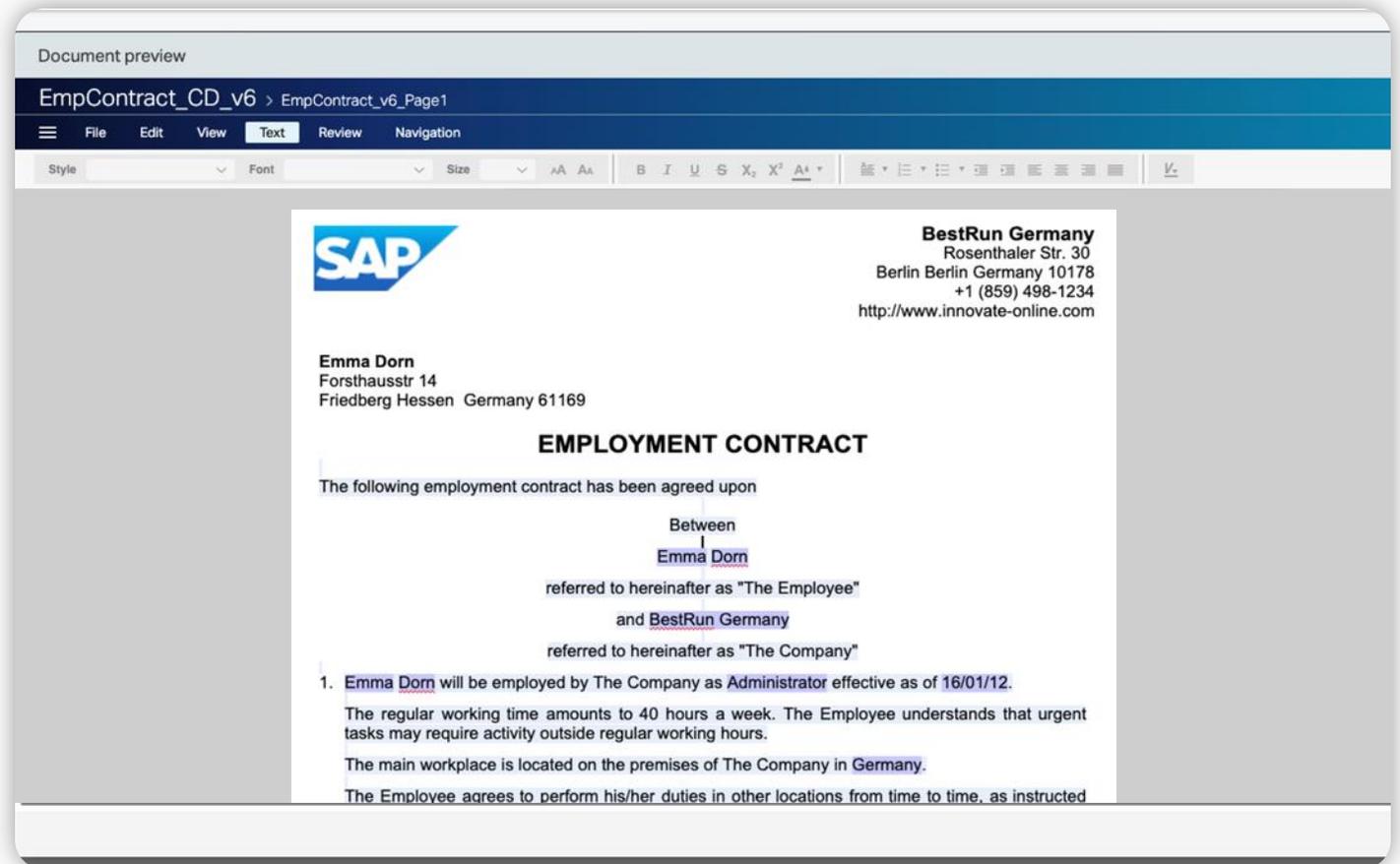
- ✓ Enable secure self-service so employees can easily view and retrieve documents from their own file
- ✓ Keep records up to date by allowing employees to upload or update documents as needed
- ✓ Reduce routine HR requests by letting employees generate common documents like employment verification letters
- ✓ Boost manager efficiency with self-service tools that support team oversight and reduce back-and-forth with HR



# Streamline HR communications with document generation

## Simplify and standardize the creation of employee documents across the organization

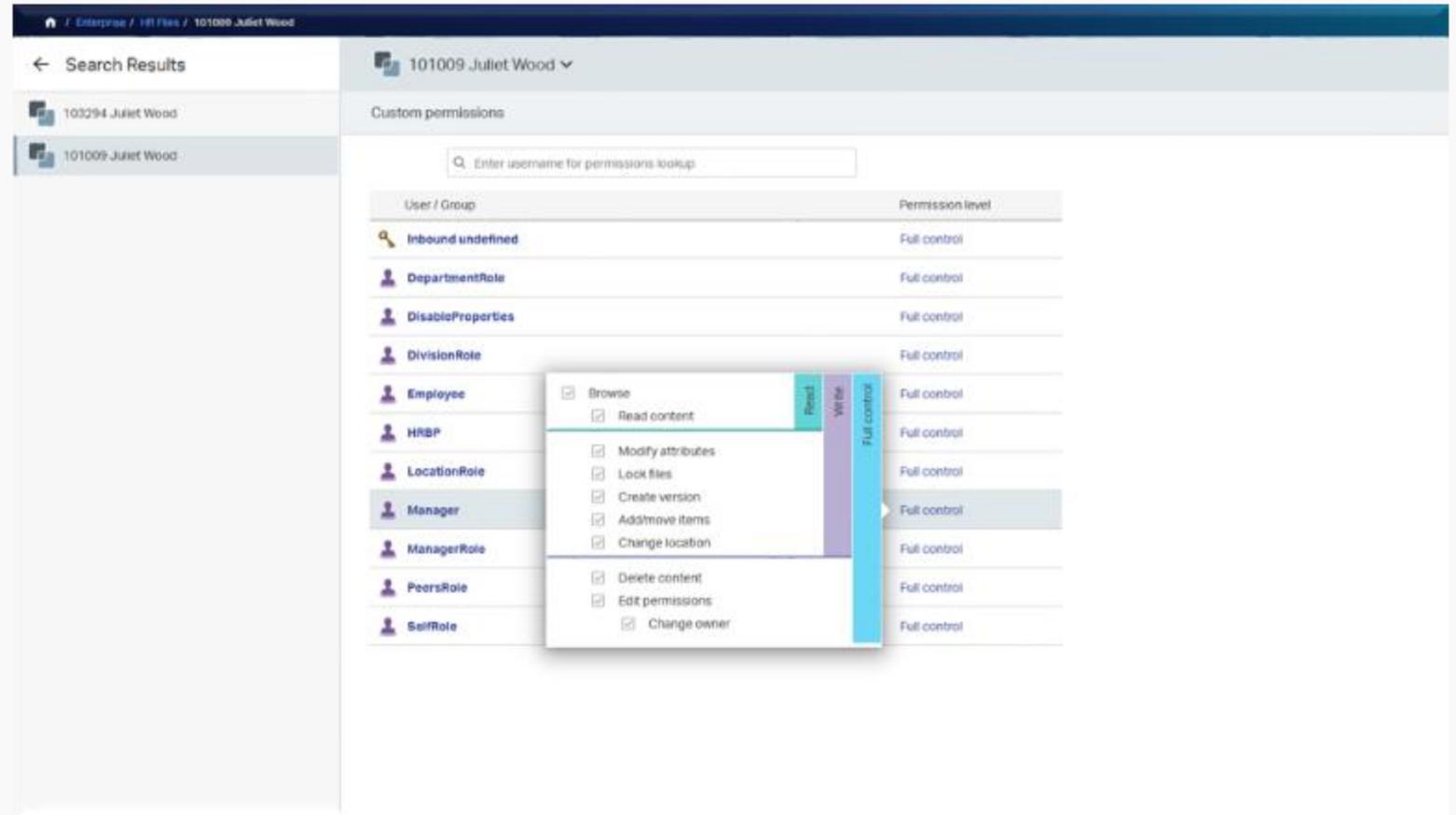
- ✓ Ensure brand and policy alignment by using a centralized library of pre-approved, styled templates
- ✓ Save time with automation—generate documents in bulk or based on employee events (e.g., promotions, exits) with multi-channel delivery\*
- ✓ Accelerate approvals by integrating secure electronic signature workflows
- ✓ Personalize at scale with a dynamic text resource library that adapts documents using conditional formatting



# Simplify the complexity of managing multiple employments

## Easily manage multi-role employees with dedicated folders for each role, even across countries or departments

- ✓ Streamline contract updates and version control to eliminate manual oversight and reduce administrative burden
- ✓ Protect sensitive records by automatically adjusting permissions as employees change roles, managers, or working hours
- ✓ Enhance operational efficiency by centralizing management of contract, contingent, and temporary worker documents
- ✓ Mitigate compliance risk by ensuring accurate, complete records across all employment relationships



Search Results

103294 Juliet Wood

101009 Juliet Wood

101009 Juliet Wood

Custom permissions

Enter username for permissions lookup

User / Group	Permission level
Inbound undefined	Full control
DepartmentRole	Full control
DisableProperties	Full control
DivisionRole	Full control
Employee	Full control
HRBP	Full control
LocationRole	Full control
Manager	Full control
ManagerRole	Full control
PeersRole	Full control
SelfRole	Full control

Context menu for Manager role:

- Browse
- Read content
- Modify attributes
- Lock files
- Create version
- Add/move items
- Change location
- Delete content
- Edit permissions
- Change owner

**Thank you.**

