

d.velop

d.velop Content Package for SAP
SuccessFactors: User

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1. d.velop Content Package for SAP SuccessFactors: User

1.1. Basic information on the application

In this application manual, you will learn how to open a personnel file in d.velop documents from SAP SuccessFactors. Users require basic knowledge of the systems SAP SuccessFactors and d.velop documents.

1.1.1. About d.velop Content Package for SAP SuccessFactors

d.velop Content Package for SAP SuccessFactors is used to connect SAP SuccessFactors to a personnel file in d.velop documents. The connection is established via d.velop integration service for SAP Solutions. The following functions are supported:

- Initial creation of the personnel files in d.velop documents for existing employees
- Initial transfer of the documents for existing employees
- Automatic creation of a new personnel file when employees are hired
- Automatic updating of the personnel file in the event of changes (e.g. name change)
- Linking from the employee's profile (Employee Central People Profile) to the personnel file in d.velop documents
- Individual template adjustments for d.velop integration service for SAP Solutions via a content package

Note

Since the personnel file configurations in d.velop documents are highly individual, and because existing personnel files can be integrated, the personnel file in d.velop documents does not form part of d.velop Content Package for SAP SuccessFactors. Optionally, you can integrate a template for personnel files when implementing the application.

1.2. Getting started

d.velop Content Package for SAP SuccessFactors automatically creates personnel files in d.velop documents. In addition, master data changes are automatically transferred to d.velop documents, provided the changes are relevant to the personnel file. Furthermore, specified documents can be automatically transferred from SAP SuccessFactors to the personnel file in d.velop documents and sorted correctly.

Users can utilize the automatically generated links from SAP SuccessFactors to the personnel file in d.velop documents.

Note

You can define individually which links are active for you. It is therefore possible that not all links are configured.

1.2.1. Opening a personnel file from the main menu

You can open your own personnel file in d.velop documents directly from the SAP SuccessFactors main menu.

Navigate to **d.velop personnel file** via the SuccessFactors main menu. Depending on the settings in d.velop documents, you either have to log in to d.velop documents separately or you are logged in automatically.

1.2.2. Opening a personnel file from employee profiles

You can open the respective personnel file in d.velop documents directly from the profiles of employees (People Profiles) in SAP SuccessFactors. The profile is divided into different sections. A separate section **d.velop personnel file** is set up for the personnel file in d.velop documents.

This is how it works

1. Open the profile, for example, via the central search or the organization chart.
2. Navigate to **d.velop personnel file**.
3. Click **personnel file** to open the personnel file in d.velop documents. Depending on the settings in d.velop documents, you either have to log in to d.velop documents separately or you are logged in automatically.

1.2.3. Opening a personnel file from the action menu

You can open the respective personnel file for an employee in d.velop documents directly from the SAP SuccessFactors actions. The action menu is displayed in the details for the employee.

This is how it works

1. Enter the name of an employee in the central search without confirming the name with the **ENTER** key.
2. Place the cursor over the found entry to display the information for the employee.
3. Click **Show actions and links**.
4. Under **Actions** or **Links**, click **d.velop personnel file** to open the personnel file in d.velop documents. Depending on the settings in d.velop documents, you either have to log in to d.velop documents separately or you are logged in automatically.

1.2.4. Displaying the personnel file in d.velop documents

The configurations of the personnel file in d.velop documents are highly individual. The structure of the file is defined with the customer during the implementation project. Therefore, this section only provides general information about the personnel file. Further information on working with d.velop documents can be found, for example, in the [documentation for d.3one and d.velop documents](#).

In the **Properties** perspective, you can also display individual properties from SAP SuccessFactors, such as user IDs.

Based on your installed applications, different context actions are available to you when you display a document. With context actions, you can use the following functions, for example:

- Electronic signature (d.velop sign)
- Delivery of documents (connection to d.velop mailbox)
- Template management
- Working with workflows (d.velop process studio)
- Resubmission

1.3. Frequently asked questions

You can find answers to frequently asked questions in this section.

1.3.1. What do I do if the "personnel file" entry is missing in employee profiles?

It can happen that you may navigate from an employee profile to the personnel file in d.velop documents or d.velop personnel file, but the **personnel file** entry is missing.

In this case, the basic configuration and permission to open the personnel file are correct. An entry in the Metadata Framework (MDF) for the respective employee is missing. Your administrator has to check whether the automatic generation of MDF entries is set up correctly.

1.3.2. What should I do if I cannot switch to the personnel file in d.velop documents or d.velop personnel file?

If you do not have the option to open the personnel file, there may be different reasons for this.

Examples:

- The current user does not have the necessary permissions to display this option.
- The option is not set up. This can occur if customers have opted against it.

Contact your administrator to establish the cause.

1.4. Additional information sources and imprint

If you want to deepen your knowledge of d.velop software, visit the d.velop academy digital learning platform at <https://dvelopacademy.keelearning.de/>.

Our E-learning modules let you develop a more in-depth knowledge and specialist expertise at your own speed. A huge number of E-learning modules are free for you to access without registering beforehand.

Visit our Knowledge Base on the d.velop service portal. In the Knowledge Base, you can find all our latest solutions, answers to frequently asked questions and how-to topics for specific tasks. You can find the Knowledge Base at the following address: <https://kb.d-velop.de/>

Find the central imprint at <https://www.d-velop.com/imprint>.