

Getting started with OpenText Core Content Management for SAP SuccessFactors



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Overview

This document summarizes how customer administrators can get started with OpenText™ Core Content Management for SAP® SuccessFactors, from registering tenants to preparing for implementation.

Note: By now you should have received two auto-generated emails from OpenText (donotreply@opentext.com) for each of your production and non-production tenants. If your organization has not received these emails, please contact your account executive for support.

Prerequisites

Before a customer administrator can use Admin Center to configure the OpenText Cloud Service, an OpenText administrator must create a tenant and a OpenText Core Content Management for SAP SuccessFactors app for a customer.

Tenants

A tenant is an environment where OpenText apps can be accessed by a customer and its users. When a new tenant is created, a Tenant Admin (also known as a customer administrator) is identified. An email is then sent to the Tenant Admin to register an account so that they can access Admin Center, where they can configure the tenant and its apps. Once registered, another email confirms the registration and provides a link to Admin Center.

Apps

The OpenText Core Content Management for SAP SuccessFactors app enables a customer to access the service within a tenant. When a new app is created, an app administrator is identified (typically the same user as the Tenant Admin). The app administrator is automatically added as an app user in Admin Center, where other administrators and users can be added.

What is OpenText Core Content Management for SAP SuccessFactors?

OpenText Core Content Management for SAP SuccessFactors (also known as SAP® SuccessFactors® Document Management Core by OpenText™ when sold by SAP) is a single repository, accessible within the SAP SuccessFactors interface, to simplify and centralize the processing and control of all employee documents, from creation to deletion. This supports the changing needs of an HR administrator to quickly locate, process, and sign off on documents from recruitment to retirement.

Depending on the role they are allocated (for example, employee, manager, or HR business partner), users can access employee workspaces and perform administrative tasks in the Smart UI web interface. The cloud-based solution enhances the employee experience with improved responsiveness and employee self-service (ESS) capabilities accessible within the SAP® SuccessFactors® Employee Central interface. Embedded document generation capabilities generate effective, consistent employee correspondence. Retention management supports compliance requirements throughout the employee lifecycle.



What has been provided by OpenText?

Every customer receives two distinct tenants: one non-production tenant and one production tenant. OpenText provides these tenants to the tenant administrator user provided in the order.

Each tenant contains the following three apps:

- **OpenText Core Content Management for SAP SuccessFactors:** The main app.
- **OpenText™ Core Compliance:** The records management app to create retention policies, define legal holds, etc.
- **OpenText™ Core Communications - Thrust API:** The document generation app, including a web-based template design editor.

OpenText Admin Center is the management console, which allows tenant administrators to manage their tenants (both non-production and productive). OpenText Core Content Management for SAP SuccessFactors can be administered in OpenText Admin Center as an app.

➞ Where do I start?

As tenant administrator, perform the following steps for both environments (nonproduction and production) to complete your registration and invite additional users:

1. Complete the registration for your production and nonproduction tenants

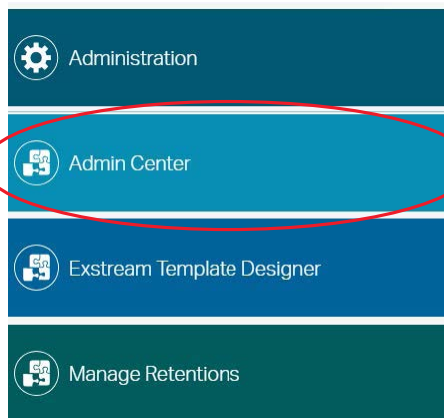
As part of the simple self-service registration process, the tenant administrator receives two system-generated email notifications (OpenText account registration emails) from donotreply@opentext.com: one for the production environment and one for the non-production environment.

Once you receive both welcome emails, as tenant administrator you need to complete registration before you can start configuring your OpenText Core Content Management for SAP SuccessFactors app.

To complete registration for each of your tenants (production and non-production):

- i. Click the **Register Now** button in the system-generated email notification.
- ii. Enter your full name and set a password.
- iii. Click **I accept** to accept the terms and conditions.

You are then directed to the login page.



2. Sign in to your tenants

Once you have completed tenant registration, sign in to your tenant in one of the following ways:

- Enter your email address and password to directly sign in to your tenant.
- Click **Change tenant** and then provide the tenant name if you want to access another tenant for which you have registered.

When you log in, you see the administration page in the OpenText Core Content Management for SAP SuccessFactors app. On the landing page, **click the Admin Center link** in the Administration widget.

3. Plan your implementation

You are ready to start planning your implementation. While an implementation can be completed by a knowledgeable customer, we highly recommend engaging with [OpenText Professional Services](#) or an experienced implementation partner. OpenText offers a [FasTrak package](#), which is a short duration project using a leading practices approach to quickly and easily implement the OpenText Core Content Management for SAP SuccessFactors solution.

How do I give OpenText Professional Services or an implementation partner access to the tenants?

User management is designed for full self-service. You don't need any support from OpenText on this as you can fully manage user access permissions on your own.

Inviting other users as tenant and app administrators

You can add further tenant administrators in **Admin Center** if you want to allow other users to configure tenant settings and manage all of the apps on your tenant. An implementation partner or OpenText Professional Services project team is typically invited as a tenant administrator since this role comes with all required privileges.

When you add a tenant administrator, Admin Center sends an email invitation to that user at the email address you specify. The user's status is set to **Invited** on the **User management > Admins page**. The user must click the link in that email to complete registration. After registering an account, the user receives another email that contains a link to access the solution. The user can then click that link to open the Cloud Platform sign-in page and provide their Cloud Platform credentials to sign in as a tenant administrator. After the user signs in, the user's status changes to **Enabled** on the **Admins page**.

You can then invite other users to become app administrators for each app as required. For more details on application access permissions and the difference between a Tenant Admin and an App Admin, [click here](#).



Important: To access an app within the tenant, a user must be explicitly added as a user or app administrator to this app by the tenant administrator. Therefore, as tenant administrator, you must also add yourself as app administrator for all three apps (OpenText Core Content Management for SAP SuccessFactors, OpenText Core Compliance, and OpenText Core Communications - Thrust API) on both your production and your non-production tenant before you can start configuring them.

4. Next steps

You are now ready to get started with your implementation! Here are some additional resources and next steps to help you on your journey.

- ✓ Visit the [Customer Success Portal](#)—a valuable source of information
- ✓ Enroll in instructor-led business administrator [training](#)
- ✓ **Know your version:** The current release version is displayed in the header next to the product name in the OpenText Core for SAP SuccessFactors app or in the About dropdown
- ✓ Understand how to **open a support ticket** via [SAP for Me](#)
- ✓ Get access to **MySupport** for access to **release notes** and other documentation. (Tip on finding the latest release notes: **use search term #CoreContentManagementforSAPSuccessFactors2x.xDocumentation using the latest version number**)
- ✓ Sign up for [status updates](#)
- ✓ Watch for **in-app notifications** with details of new releases and timely user tips and tricks
- ✓ Use the **in-app help**: click the question mark icon in the upper left corner of the app