

SAP SuccessFactors

PUBLIC

Document Version: 1H 2605 – 2026-10-15

Implementing Document Management and Attachment Storage

© 2026 SAP SE or an SAP affiliate company. All rights reserved.

SAP

Content

1 Using Document Management. 3
1.1 Review Examples of Document Attachments in the SAP SuccessFactors HCM suite. 5
1.2 Viewing All Documents as an Administrator. 7
1.3 Uploading a Company Document. 8
1.4 Downloading Documents in Bulk. 10
1.5 Exporting Filtered Document Lists. 12
1.6 Viewing Information About Attachment Storage Space. 13
1.7 Document Management on the Home Page. 15
1.8 Predefined Document Categories. 18

2 Enabling Document Management with OpenText. 66
2.1 Control Access to Document Management Categories. 67

3 Configuring Document Attachment Settings. 69

4 Uploading Static Content and Generating a Public Link. 71
4.1 Replacing Existing Static Content at a Public Link. 73

5 Strategies for Purging Attachments. 75

6 Creating a Custom Document Category. 76
6.1 Assigning Document Categories to Attachment Fields in MDF. 77

7 Behavior of Attachments for OpenText-Enabled Tenants During Instance Refresh. 81

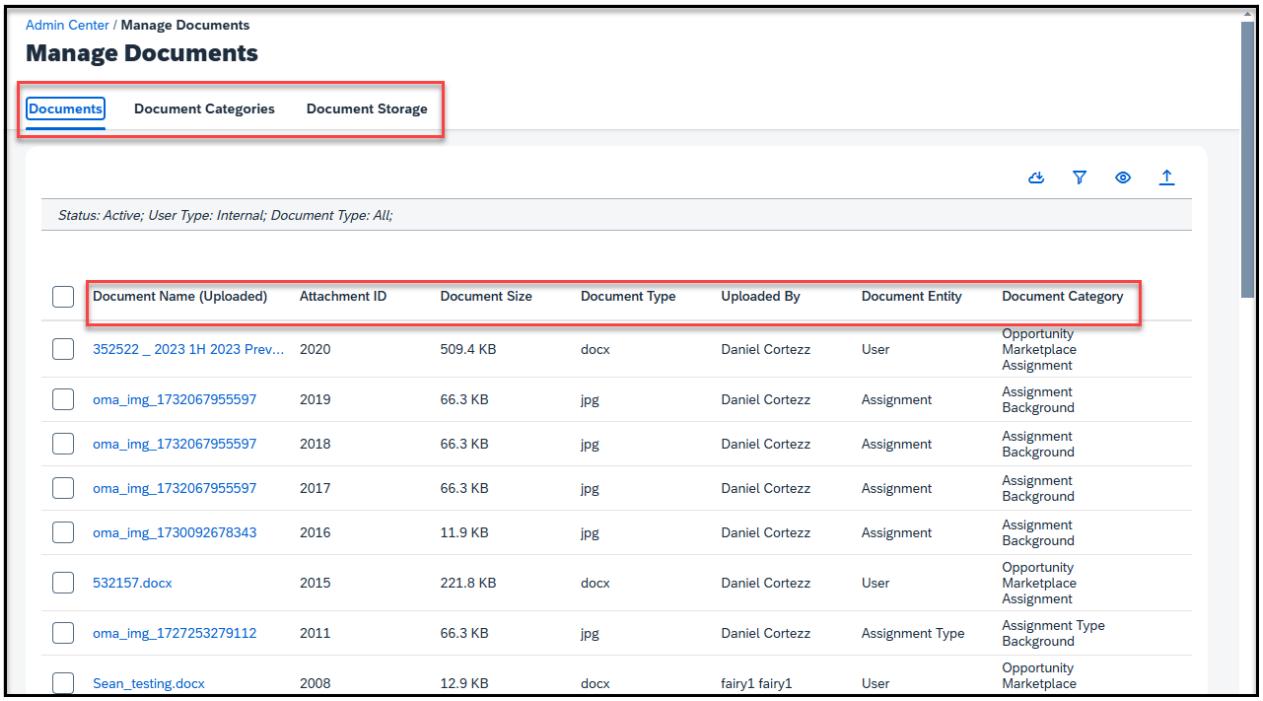
1 Using Document Management

SAP SuccessFactors document management tools enable administrators to manage document attachments centrally for the HCM suite.

People can upload documents attachments on several screens in the SAP SuccessFactors HCM suite, such as the candidate profile or employee profile. Administrators can use document management tools to view and manage these documents centrally.

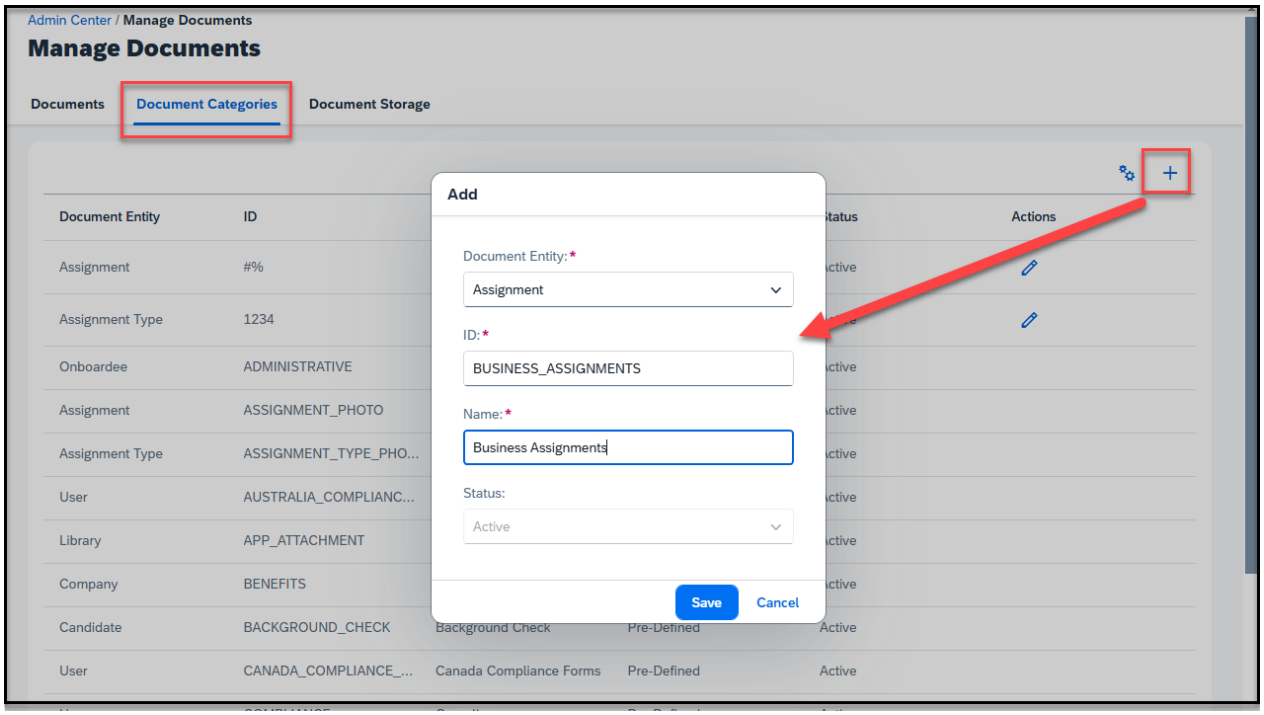
As an administrator, you can use the *Manage Documents* page in Admin Center to perform a variety of tasks. The redesigned layout displays three key sections side by side: *Documents*, *Document Categories*, and *Document Storage* for easier navigation.

Documents:



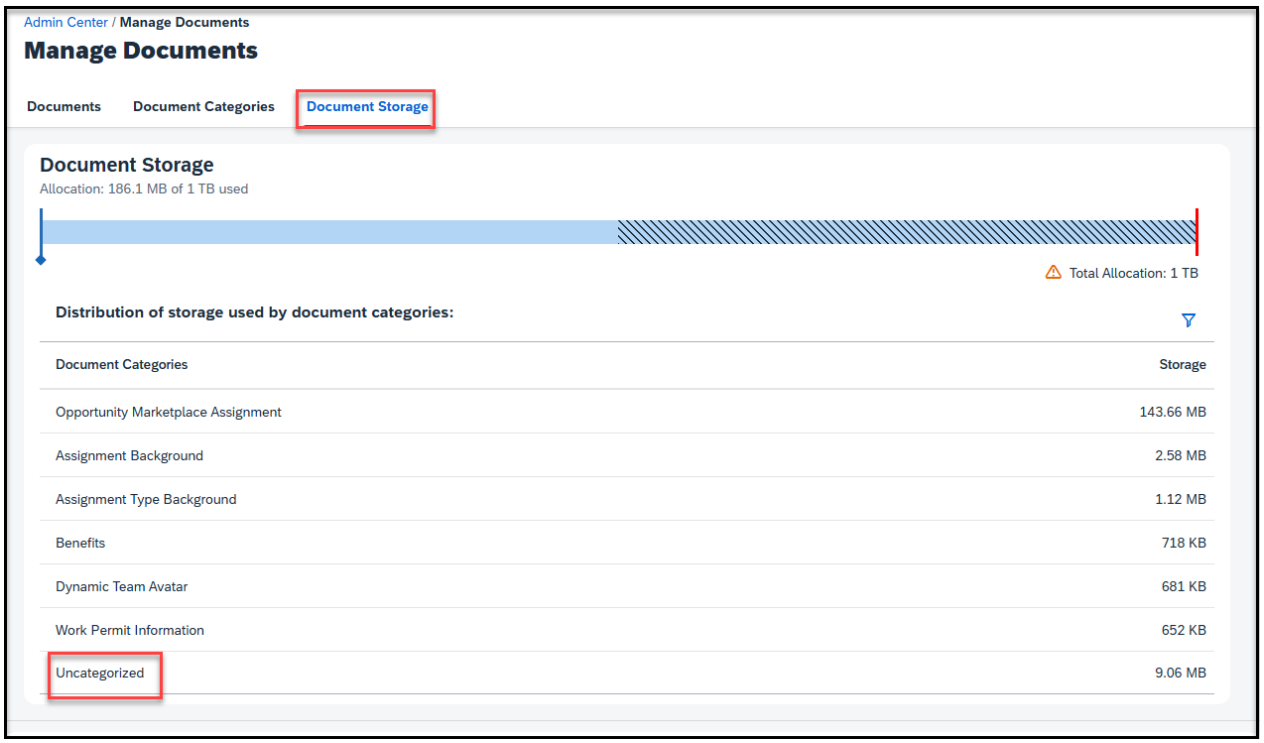
- View, sort and filter all uploaded documents
- Use *Advanced Filters*, including a new *Undefined* radio button for identifying documents without an assigned entity type
- View additional metadata in the results table.
- Download and upload documents, including bulk downloads and download history tracking

Document Categories



- You can now order the document list based on the document entity or category type
- Add and edit categories using an improved, more user-friendly dialog box

Document Storage



- View total storage usage by document category
- Filter storage data by document category and date range

- > **Note**
  >
  > To filter by document category and date range, click the new *Filter icon* in the *Document Storage* section.
  >
  > To view the available document categories after performing a filtered search, click the Filter icon again, clear the fields in the *Document Entity*, *Document Category*, and *Date Range* sections, and click *OK*. The number of categories displayed depends on the categories shown before applying the filter.
- See a clear breakdown of all categories that contribute to storage usage, along with the *Uncategorized* category for documents that do not have an assigned category.

Additional System Configuration Options

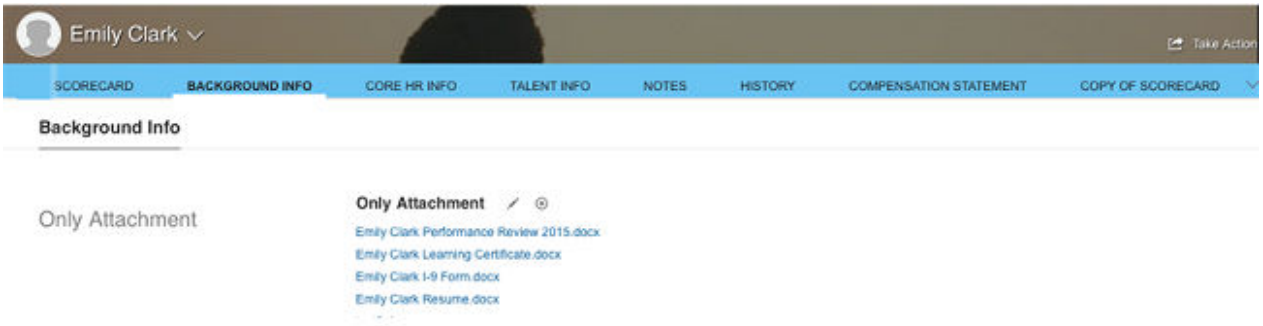
You can also use system configuration settings to:

- Configure document attachment settings such as file size limits and notification frequency. Refer to Configuring Document Attachment Settings [page 69]
- Integrate your system with OpenText. Refer to Setting Up Integration with OpenText. This integration provides extended document management capabilities, including support for compliance and data retention requirements, and helps organizations manage document attachments in line with long-term storage and regulatory needs.

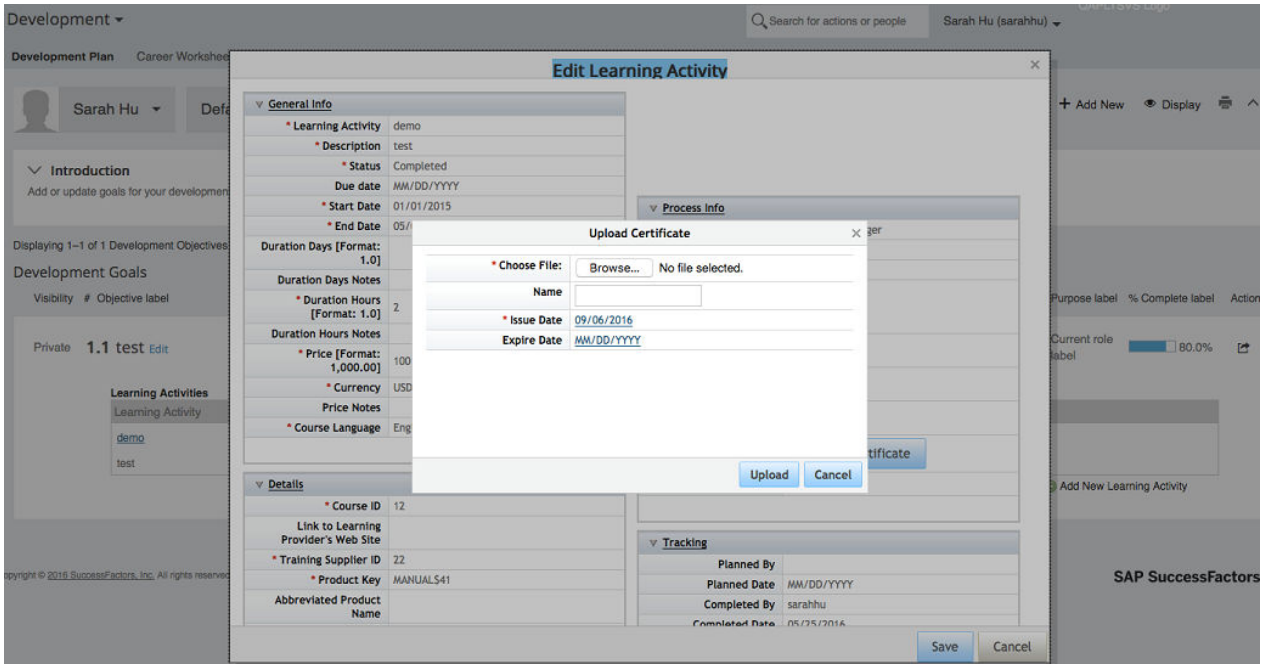
1.1 Review Examples of Document Attachments in the SAP SuccessFactors HCM suite

People can upload documents attachments on several screens in the SAP SuccessFactors HCM suite, such as the candidate profile or employee profile. Here are screenshots of some examples.

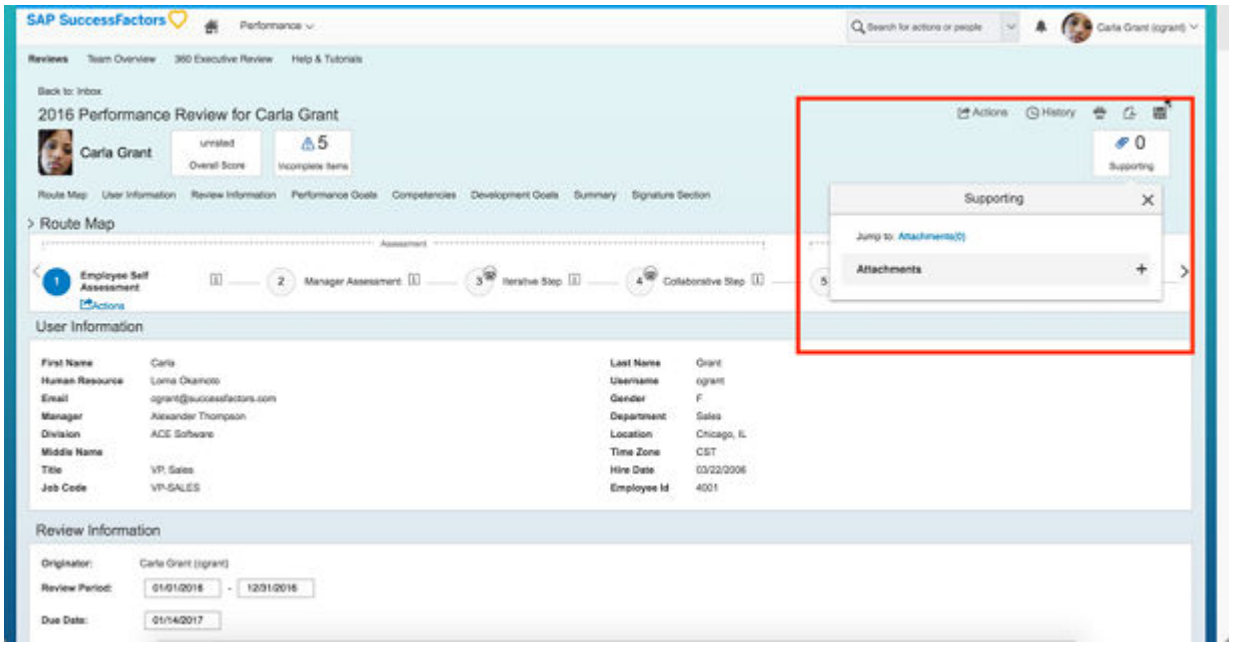
Employee Profile



Career Development Planning



Performance Management



1.2 Viewing All Documents as an Administrator

Use the *Manage Documents* screen to view, search, sort, and filter document attachments across the SAP SuccessFactors HCM suite.

Prerequisites

To manage documents, the following role-based permissions (RBP) are required:

- *User Permissions* > *General User Permission* > *Company Info Access* > *User Search*.

  > **Note**
  >
  > Grant this permission to search for users using the *Uploaded By* and *Document Owner* filters.

- *Administrator Permissions* > *Manage Document Categories*.
- *User Permissions* > *Employee Data* > *View* permission for the following fields:
  - First Name
  - Last Name
  - Status
  - User Name

> **Note**
>
> *Manage Document Categories* permissions determine which documents you have access to. Administrators with the Employee Export permission don't need the additional View permissions prerequisites, because the Employee Export permissions allow administrators to query all user fields.

> **Note**
>
> The *Manage Documents* page will display attachments for active and inactive users, however it will **not** display attachments for users that have been purged from the system. For more information on purged users, see **Inactive User Purge (Non-DRTM)** in the **Related Information** section.

Procedure

1. Go to *Admin Center* > *Manage Documents*.
2. View documents that you have access to.

   By default, active documents are sorted by *Last Modified* date, from newest to oldest. You can see all relevant data about the documents..
3. Choose (eye) to change view settings. You can change how documents are sorted and which columns are displayed.

4. Choose (filter) to search for and filter documents based on criteria you define.
    a. Select filter criteria.

        Basic filter options include *Status*, *Document Name*, *Uploaded By*, *Document Size*, and *Document Type*. Choose *Advanced Filters* to see more options, including *Document Owner*, *Document Category*, *Entity ID*, (for Person and User), or *Entity Type*.

        > **Note**
        >
        > The *Document Name* search field is non case-sensitive.

        > **Note**
        >
        > To filter by document category, you need to first select an entity type. Document categories vary for each entity.

        > **→ Remember**
        >
        > When an external candidate uploads documents, then becomes an internal user and uploads documents, they won't be able to see all of them under the same filter. Instead, they'll need to select *Internal User or Onboardee* or *External Candidate* on the *Documents* screen based on **when** they performed the upload.

    b. Choose *Apply Filter*.

Related Information

Inactive User Purge (Non-DRTM)

1.3 Uploading a Company Document

Upload a company document that can be accessed with the *View Company Documents* quick action on the home page.

Prerequisites

To manage documents, the following Role-Based Permissions (RBP) are required:

- *Administrator Permissions* > *Manage Document Categories*.
- *User Permissions* > *Employee Data* > *View* permission for the following fields:
    - First Name
    - Last Name

- Status
- User Name

- Permission required to delete a company document from Manage Documents: *Administrator Permissions* > *Manage Integration Tools* > *OData API Attachment Import*.
- If you want to assign the document to a custom category, create the custom category first, for the entity *Company*.

Context

Company documents are uploaded on the *Manage Documents* page. They're visible to users on the home page.

By default, company documents can be assigned to one of three predefined categories: Benefits, Policy, or Images. If you want to categorize a company document differently, create a custom category before you upload it.

Procedure

1. Go to *Admin Center* > *Manage Documents*.
2. Choose the upload option (↑).
3. Select a document to upload.

   > **Note**
   >
   > You can enter a description, but it isn't visible in the user interface at this time.

4. Select a document category so that people can filter company documents by category on the home page. Select:
   - Benefits
   - Policy
   - Images
   - Any custom document category for the entity *Company*.
5. Select a country/region. People can filter documents by country/region on the home page.
6. Choose *OK* to confirm and upload your document.

   > **Note**
   >
   > When the document is uploaded directly in the manage document page, a delete icon is shown and an administrator can delete that document.

Results

Uploaded company documents are visible from the *View Company Documents* quick action on the home page. People can select and search for document by name, file type, category, or country/region.

> **Note**
>
> You can't update a company document within the *Manage Documents* page. Instead, complete your update offline and then return to the *Manage Documents* page to delete (🗑) the old version and upload your newly updated version. Refer to the prerequisites section to ensure you have the required OData API Attachment Import permission to delete a company document from Manage Documents.

1.4 Downloading Documents in Bulk

The bulk download for attachments feature allows you to request offline downloads in bulk and to view your download history. Your requests are downloaded to a secure destination that you set up by configuring your SFTP settings.

Prerequisites

- You've configured your *Destination Settings* (SFTP)
- You've enabled the following role-based permissions:
  - *Administrator Permissions* > *Admin Center Permissions* > *Monitor Scheduled Jobs*
  - *Administrator Permissions* > *Manage Security Center* > *Access to Destination Settings*

Context

When you go to the *Manage Documents* screen, the feature for downloading attachments in bulk and the feature for viewing download history are both accessible by choosing the (download) icon.

> **Note**
>
> This feature is not available to customers who use OpenText as their document management vendor.

> **Restriction**
>
> The maximum limits for downloading documents are:
>
> - 50 GB per download
> - 20 concurrent downloads per tenant
> - 10 concurrent downloads requests per user

Procedure

1. In the *Admin Center*, search for *Manage Documents*.
2. From the *Manage Documents* view, select the (download) icon.
3. If you don't have an SFTP location set up, choose the *Create Destination Settings* link to configure your SFTP settings.
4. Select *Request New Download* to request offline downloads. Select *View Download History* to view the status and history of your downloads.

   When you request a new download, your attachments are downloaded offline and are compressed in a zip file. Each downloaded zip file contains up to 2000 files. So, depending on the size of the downloads, your system may contain multiple zip files and each zip file has a corresponding metadata file that describes the contents of the zip file. The metadata file is generated separately and displayed in your SFTP location alongside the zip files.

   When you select *View Download History*, select *View Details* for each of your downloads. By choosing *View Details* you're directed to the *Scheduled Job Manager*, providing the status details of your downloads.
5. Enter values for the three required fields in the download request form: Date Range, Document Entity, and Download Destination. Complete the optional fields to help in narrowing your request.
   - *Date Range* (The maximum date range you can select is 180 days.)
   - *Document Entity*

     > **Note**
     >
     > The Document Entity field allows you to select one of two options: *Undefined* or *Standard Document Entity*. The Undefined option is used to export documents that aren't associated with any standard SAP SuccessFactors document entities.

   - *Document Category*
   - *Download Destination*
   - *Division*
   - *Department*
   - *Location*
6. Select *Request Download*.

   Your downloads are processed offline and will be available in your SFTP location when the downloads complete.

   > **Note**
   >
   > Ensure that you do **not** exceed the maximum of 20 concurrent downloads per tenant.

Results

After your download request completes, your zip files can be found in your SFTP location. Each zip file contains up to 2000 attachments and your SFTP location contains a corresponding metadata file for each zip file.

Related Information

Creating SFTP Destination Settings

1.5 Exporting Filtered Document Lists

The *Export Document List* feature allows you to export a filtered list of document metadata directly from the Manage Documents page. The exported file is delivered to a secure destination that you configure using your SFTP settings.

Prerequisites

- You've enabled *Create, Edit & Delete* access to the *Administrator Permissions* > *Manage Security Center* > *Access to Destination Settings* permission.
- You've configured your *Destination Settings* (SFTP). Refer to **Configure SFTP Settings in the Related Information section.**

Context

From the *Manage Documents* page, you can export the currently filtered list of documents by selecting the (download) icon and choosing *Export Document List*.

> **Note**
>
> This feature is not available to customers who use OpenText as their document management vendor.

Procedure

1. Go to *Admin Center* > *Manage Documents*.
2. Select *(download) icon* > *Export Document List*.
3. In the *Export Document List* dialog, choose a destination from the *Export Destination* dropdown list.

   If no destination is available or you want to create a new one, select *Create Destination Settings* to configure a new SFTP destination in the Security Center.
4. Select *Export*.

Results

Your export request is processed offline and the resulting file is delivered to the selected SFTP location. The exported file contains metadata such as document names, types, and upload dates for all documents matching the current filters on the page.

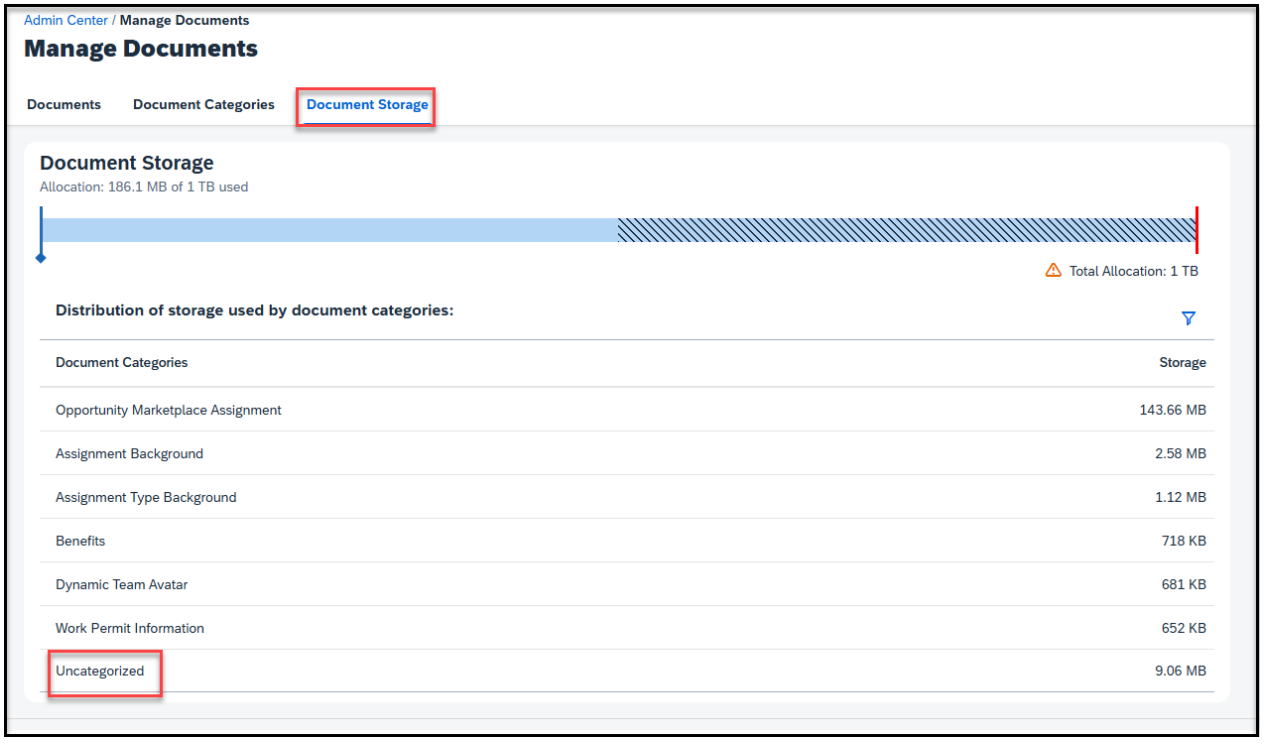
Related Information

Creating SFTP Destination Settings

1.6 Viewing Information About Attachment Storage Space

The *Manage Documents* screen, in the *Admin Center*, provides additional details about your tenant's attachment storage information, including the quantities of used and available attachment storage space.

The *Document Storage* section displays all document categories along with their storage usage, providing greater visibility into how storage is allocated. The *Uncategorized* category represents documents without an assigned category.



> **Note**
>
> The *Document Storage* section always shows total attachment storage usage across all modules, even when access to some documents is restricted.

Module specific system settings can prevent administrators from viewing certain documents in *Manage Documents* while their storage is still included here. For example, if the Recruiting setting, *Do not allow admin users to access Recruiting Attachment documents* is enabled, Recruiting and External Candidate attachments are hidden from Manage Documents, but their storage consumption continues to be reflected in the Document Storage section.

The attachment storage bar displays the amount and limits for your SAP SuccessFactors instance. The bar visually differentiates between storage types:

- Base allocation and purchased storage are shown in light blue.
- Out-of-compliance storage is highlighted with dark blue stripes.

Note

Out-of-compliance storage represents the amount of storage your instance uses beyond your allocated quota. The system calculates this value using the following formula:

Out-of-compliance storage = Total storage used – (Base allocation + Purchased storage)

For example, if your instance has a base allocation of 50 GB, purchased storage of 20 GB, and total storage used of 85 GB, your out-of-compliance storage is 15 GB (85 GB – 70 GB).

If your instance exceeds the allocated storage limit, a warning icon appears next to the bar. When you point to or select the icon, a message appears indicating that your storage is out of compliance with the allocated quota. The *Manage Documents* attachment storage does not include attachments for SAP SuccessFactors Learning, Onboarding 1.0, or Employee Central Payroll.

The *Manage Documents* attachment storage does **not** include attachments for SAP SuccessFactors Learning, Onboarding 1.0, or Employee Central Payroll.

Note

This feature isn't available to customers who use OpenText as their document management vendor.

1.7 Document Management on the Home Page

Document Management includes the following features on the home page.

Name	Description	Where Shown	When Shown	Prerequisites	On Mobile App?
• Latest - *Company Documents* • Legacy - *View Company Documents*	Enables you to browse and view company documents directly from the home page. **Note** Role-based-permission access control for document categories is limited to administrators and is applicable only on the *Manage Documents* page. It doesn't affect the access or display of document categories on the *View Company Documents* quick action on home page.	• Latest - Icon in toolbar • Legacy - Tile in *Quick Actions* section	Always shown, based on system configuration and user permission.	• Document Management is enabled and at least one document is categorized as a "company" document. • The *On-device Secure Storage* setting is selected on the *Enable Mobile Features* screen. • The *Allow Third-Party Viewers (Android)* setting is selected on the *Enable Mobile Features* screen and Android users in your organization have installed the necessary viewer on their device. **Note** The Android mobile app opens documents in a third-party viewer. Company documents can	Yes

Name	Description	Where Shown	When Shown	Prerequisites	On Mobile App?
				be different file types (such as PDF or PNG) so Android users may not be able to view documents properly if they don't have an appropriate viewer installed. • Mobile users have the *Administrator Permissions* > *Metadata Framework* > *Access to non-secured objects* > permission for access to the *Country* object. **Note** Without this permission, Android users see an "Unable to load" error in Android, and iOS users see an empty *Country/Region* fil-	

Name	Description	Where Shown	When Shown	Prerequisites	On Mobile App?
				ter selection page. • The *Attachment Download Restriction* setting **isn't** selected on the *Enable Mobile Features* screen. > **Note** > If the *Attachment Download Restriction* feature is enabled, the *Company Documents* quick action is visible, but doesn't work properly because users can't preview the documents. • It's enabled in the *Manage Home Page* tool. > **Note** > If Document Management is enabled, but you don't have company	

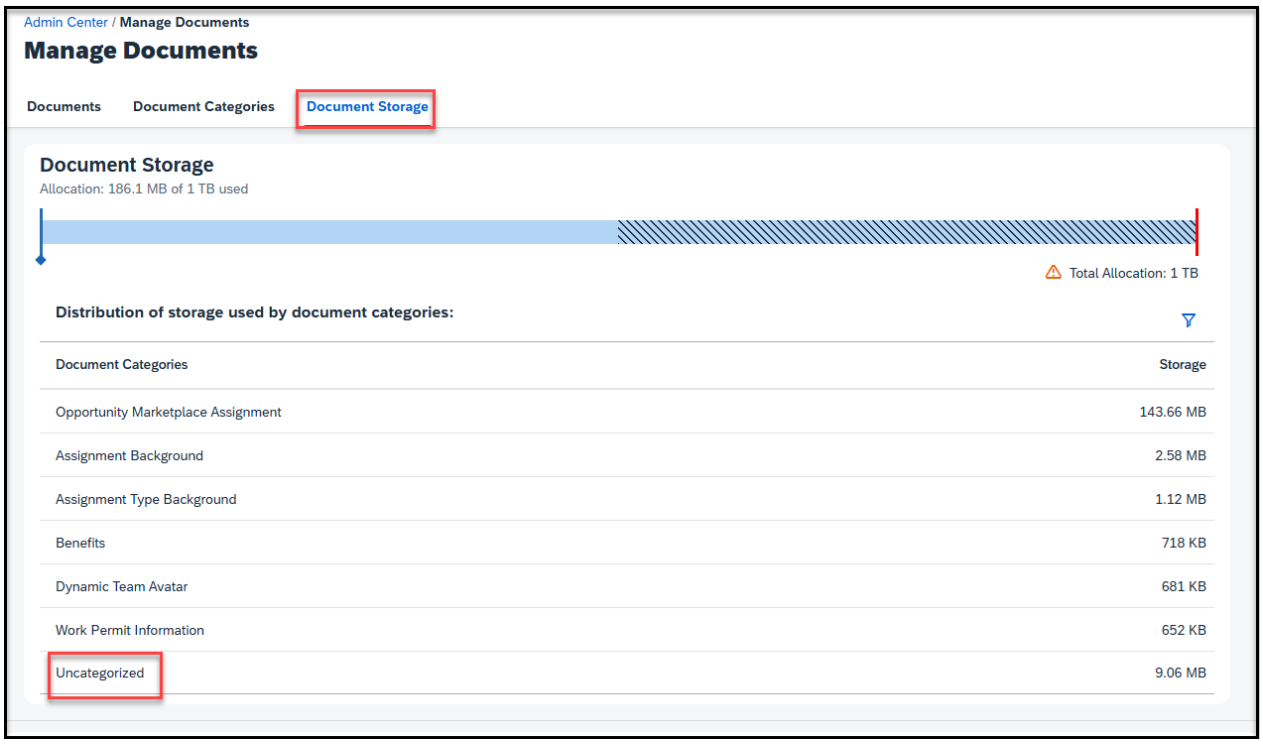
Name	Description	Where Shown	When Shown	Prerequisites	On Mobile App?
				documents uploaded, the quick action is still visible but doesn't work correctly. To hide it, go to *Manage Home Page* > *Quick Actions*.	

1.8 Predefined Document Categories

SAP SuccessFactors modules each use various predefined document categories within their systems. A list of all the available predefined document categories is provided in the **Current Mapping Between the Predefined Document Categories and the Entity Types** section.

Distribution of Document Storage Usage

The Document Storage section displays all predefined categories along with their storage usage, providing greater visibility into how storage is allocated. The *Uncategorized* category represents documents without an assigned category.



Document Categories

To find a list of all the document categories that exist for your company, navigate to *Admin Center* > *Manage Documents* > *Document Categories*.

There are various predefined *Document Categories* that have been created by the various SAP SuccessFactors modules. In addition, some document categories, such as those related to Employee Profile background elements, are dynamically created and are tenant-specific. An example of a *Document Category* includes *Resume* and *Offer Letter*, which is associated with a *Recruiting Job Application Interview*. Another example includes *Compliance*, which is associated with an *Onboarding Compliance* document for a new hire.

A *Document Category* can be linked to only one *Entity Type* whereas only one *Entity Type* can be linked to multiple *Document Categories*.

> **Note**
>
> The **Default** document category can be associated with either the **User** or **Person** entity type. This depends on how attachment fields are configured in the system, as some attachment field configurations or MDF object setups may store Default-category documents under the **Person** entity type. Because the *Document Categories* page displays only the *User* > *Default* mapping, Default-category documents stored under **Person** will appear in storage usage but will only be visible in *Manage Documents* when filtering by the **Person** entity type.

Document Entities

Every document category is related to an SAP SuccessFactors Document Entity. The Document Entity is used to tie a document to a specific SAP SuccessFactors entity, such as *User*, *Person*, *Candidate*, *Job Requisitions* etc. Each of the SAP SuccessFactors solutions uses various entities in their systems. Across the HCM suite, the names of those entities are varied and can be identical, similar, or different. This table below summarizes the mapping between the entity types and the predefined document categories. Additional examples of some of the Document Entity types include *Background*, *Calibration*, *Candidate*, *Company*, and *Email Template*. Company is an example of a general document you have uploaded for your company and it doesn't belong to a specific personnel or employee record. It may pertain to a company document or policy announcement.

Current Mapping Between the Predefined Document Categories and the Entity Types

> ⓘ Note
>
> **Person** and **User** are similar entity types relating to one employee. **Person** is a record of the employee's non-employment related functions, whereas **User** is a record of the employee's employee-related functions (for example, there's a National ID Information document category that's tied to a Person, but a Work Permit document category that is tied to a User).

> ⓘ Note
>
> Background document categories (for example, Background Awards, Background Education, and similar categories marked with an * are dynamically created based on Employee Profile background elements. These categories are tenant-specific and are not part of the predefined document category set. The exception is the *Background Check* category, which is predefined.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Career Development	Mentoring	User	Mentor Application	No	No	Yes	Mentor application attachments (documents) uploaded for a Career Development Planning employee are tracked using this document category.
Career Development	Learning Activity	User	Transcript Certificate	No	No	Yes	Transcript certificate attachments (documents) uploaded for a Career Development Planning employee are tracked using this document category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Compensation	Rewards and Recognition	Company	Images	No	No	Yes	Company-related images uploaded for the Rewards and Recognition Spot Awards program are tracked using this category.
Dynamic Teams		Team	Dynamic Team Avatar	Review in Progress	Review in Progress	Yes	Avatar images for Dynamic Teams are tracked using this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Employee Central	Personal Information	Person	Biographical Information	Yes	No	Yes	Supporting documents uploaded for an employee related to this information (for example, birth certificate) are tracked using this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Employee Central	Contingent Workforce-Personal Information	Person	Personal Information	Yes	No	Yes	Supporting documents uploaded for managing a contingent workforce (such as a contract between the vendor providing the contingent workforce and your company) are tracked using this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Employee Central	Contingent Workforce-Job Information	User	Job Information	Yes	No	Yes	Supporting documents uploaded for managing a contingent workforce (such as a contract between the vendor providing the contingent workforce and your company) are tracked using this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Employee Central	Contingent Workforce-National ID Information	Person	National ID Information	Yes	No	Yes	Supporting documents uploaded for managing a contingent workforce (such as a contract between the vendor providing the contingent workforce and your company) are tracked using this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Employee Central	Contingent Workforce-Home Address	Person	Home Address	Yes		Yes	Supporting documents uploaded for managing a contingent workforce (such as a contract between the vendor providing the contingent workforce and your company) are tracked using this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Employee Central	Contingent Workforce-Biographical Information	Person	Biographical Information	Yes	No	Yes	Supporting documents uploaded for managing a contingent workforce (such as a contract between the vendor providing the contingent workforce and your company) are tracked using this category.
Employee Central	Time Off	User	Time Account Payout	No	No	Yes	Supporting documents required for a payout from an employee's time account are tracked using this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Employee Central	Personal Information	User	Compensation Information	Yes	Review in Progress	Yes	Supporting documents for compensation uploaded from the Compensation Information, Pay Component Recurring, and One-Time Payment pages and are tracked using this category.
Employee Central	Personal Information	Person	Dependents	Yes	Yes	Yes	Supporting documents required for listing dependents, such as a marriage or birth certificate are tracked using this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Employee Central	Dependent-Personal Information	Person	Personal Information	Yes	Yes	Yes	Supporting documents required for listing dependents are tracked using this category.
Employee Central	Dependent-Biographical Information	Person	Biographical Information	Yes	Yes	Yes	Supporting documents required for biographical information, such as identification records are tracked using this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Employee Central	Dependent-National ID Information	Person	National ID Information	Yes	Review in Progress	Yes	Supporting documents required for national identification, such as passports, social security cards, or government-issued ID records are tracked using this category.
Employee Central	Dependent-Home Address	Person	Home Address	Yes	Review in Progress	Yes	Supporting documents required for an employee's home address, such as utility bills and proof of residence are tracked using this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Employee Central	Personal Information	Person	Home Address	Yes	Yes	Yes	Supporting documents required to list the address of the employee are tracked using this category.
Employee Central	Personal Information	Person	National ID Information	Yes	Yes	Yes	Supporting documents required to prove the national ID of the employee are tracked using this category.
Employee Central	Personal Information	Person	Personal Information	Yes	Yes	Yes	Supporting documents uploaded for an employee for example, proof of name change) are tracked using this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Employee Central	Personal Information	Person	Global Information	No	No	Yes	Supporting documents about country/region-specific personal information uploaded for employees or their dependents are tracked using this category.
Employee Central	Job Information	User	Job Information	Yes	Yes	Yes	Supporting documents uploaded for an employee related to their job are tracked using this categpry.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Employee Central	Work Permits	User	Work Permit Information	Yes	No	Yes	Supporting documents required to prove the work eligibility of the employee (for example, a visa) are tracked using this category.
Onboarding	Compliance Forms	Person	General Compliance Documents	Yes	Yes	Yes	PFS Generated, Attachments uploaded (can be used for Compliance forms other than the forms that fall under other compliance document categories) are tracked using this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Onboarding	Compliance Forms	User	USA Compliance Forms	Yes	No	Yes	Compliance forms for a New Hire other than the forms that fall under compliance document categories specific to USA(like CC-305) are tracked using this category.
Onboarding	Onboarding	Onboardee	Administrative	Yes	No	Yes	Administrative documents uploaded for new hires are tracked using this category.
Onboarding	Onboarding	Onboardee	Custom New Hire	No	No	Yes	Custom new hire documents uploaded for new hires are tracked using this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Onboarding	Onboarding	Onboardee	Policy Agreement	Yes	No	Yes	Policy agreement documents uploaded for new hires are tracked using this category.
Onboarding	Compliance Forms	Person	Other USA Compliance Documents	Yes	No	Yes	PFS Generated, Attachments uploaded (can be used for Compliance forms other than the forms that fall under compliance document categories specific to the USA) can be tracked using this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Onboarding	Compliance Forms	Person	Supporting Documents	Yes	No	Yes	Supporting documents uploaded for an Onboarding employee are tracked using this category.
Onboarding	Compliance Forms	Person	USA E-Verify Forms	Yes	No	Yes	USA E-verify documents uploaded or generated by the system for a new hire are tracked using this category.
Onboarding	Compliance Forms	User	India Compliance Forms	Review in Progress	Review in Progress	Yes	Compliance forms uploaded for Onboarding employees in India are tracked using this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Onboarding	Compliance Forms	User	Spain Compliance Forms	Review in Progress	Review in Progress	Yes	Compliance forms uploaded for Onboarding employees in Spain are tracked using this category.
Onboarding	Compliance Forms	Person	USA I9 Forms	Yes	No	Yes	USA Form I-9 documents uploaded or generated by the system for a new hire are tracked using this category.
Onboarding	Compliance Forms	User	Australia Compliance Forms	Yes	No	Yes	Compliance forms uploaded for a new hire in Australia are tracked using this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Onboarding	Compliance Forms	User	Canada Compliance Forms	Yes	No	Yes	Compliance forms uploaded for an Onboarding employee in Canada are tracked using this category.
Onboarding	Compliance Forms	User	Compliance	Yes	No	Yes	Compliance documents uploaded for Onboardees are tracked using this category.
Onboarding	Compliance Forms	User	Custom Compliance Forms	Yes	Yes	Yes	Custom compliance forms uploaded for an Onboarding employee are tracked using this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Onboarding	Compliance Forms	User	New Zealand Compliance forms	Yes	No	Yes	Compliance forms uploaded for an Onboarding employee in New Zealand are tracked using this category.
Onboarding	Compliance Forms	User	Japan Compliance Forms	Review In Progress	Review In Progress	Yes	Compliance forms uploaded or generated by the system for Onboarding employees in Japan are tracked using this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Onboarding	Compliance Forms	User	UK Compliance Forms	Yes	No	Yes	Compliance forms uploaded for an Onboarding employee in the United Kingdom are tracked using this category.
Onboarding	Compliance Forms	User	USA Additional Tax Forms	Yes	No	Yes	USA additional tax forms uploaded for an Onboarding employee are tracked using this category.
Onboarding	Compliance Forms	User	USA Wage Theft Protection Act Forms	No	No	Yes	USA WTPA forms uploaded for an Onboarding employee are tracked using this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Onboarding	Compliance Forms	User	USA Withholding Forms	Yes	No	Yes	USA withholding documents uploaded for an Onboarding employee are tracked using this category.
Opportunity Marketplace	Opportunity Marketplace Assignments	User	Opportunity Marketplace Assignment	Yes	No	Yes	Documents about applicants' profiles uploaded for Opportunity Marketplace Assignments are tracked using this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Opportunity Marketplace	Opportunity Marketplace Assignments	Assignment	Assignment Background	Yes	No	Yes	Images uploaded for Opportunity Marketplace Assignments by assignment owners or co-owners are tracked using this category.
Opportunity Marketplace	Opportunity Marketplace Assignments	Assignment Type	Assignment Type Background	Yes	No	Yes	Images uploaded for Opportunity Marketplace Assignment Types by administrators are tracked using this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Performance and Goals	Pods	User	Performance Review	Yes	No	Yes	Performance and Goals performance review documents uploaded for an employee are tracked using this category.
Performance and Goals	Continuous Performance Management	User	Continuous Performance Management Activity Attachments	No	No	Yes	Documents uploaded by an employee to support a Continuous Performance Activity that they created in Continuous Performance Management.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Platform	Calibration Session	Calibration Session	Calibration Session	No	No	Yes	Calibration session documents uploaded for your employee are tracked using this category.
Platform	Document Management	Company	Benefits	No	No	Yes	Your company-related documents and images around Benefits are tracked using this category. These documents are company-based and not specific to individual employees.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Platform	Document Management	User	Default	No	No	Yes	Documents stored using attachment field configurations or MDF object setups that map to the Default category are tracked using this category. Depending on the configuration, Default-category documents may be associated with either the **User** entity type or the **Person** entity type. When filtering in *Manage Documents*, Default-cate-

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
							gory documents stored under the Person entity type appear only when the *Person* filter is selected.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Platform	Document Management	Person	Default	No	No	Yes	Documents stored using attachment field configurations or MDF object setups that map to the Default category are tracked using this category. Depending on the configuration, Default-category documents may be associated with either the **User** entity type or the **Person** entity type. When filtering in *Manage Documents*, Default-cate-

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
							gory documents stored under the Person entity type appear only when the *Person* filter is selected.
Platform	Document Management	Company	Images **Note** You can also find images for *Rewards and Recognition* in this category.	No	No	Yes	Image documents uploaded as part of Company Documents are tracked using this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Platform	Document Management	Company	Policy	No	No	Yes	Your company-related documents and images around Policy are tracked using this category. These documents are company-based and not specific to individual employees.
Platform	Employee Profile	Trend	Trend Block Overall Competency	No	No	Yes	Documents uploaded for the trend information block of Overall Competency in Employee Profile are tracked by this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Platform	Employee Profile	Trend	Trend Block Overall Custom 1	No	No	Yes	Documents uploaded for the trend information block of Overall Custom 1 in Employee Profile are tracked by this category.
Platform	Employee Profile	Trend	Trend Block Overall Custom 2	No	No	Yes	Documents uploaded for the trend information block of Overall Custom 2 in Employee Profile are tracked by this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Platform	Employee Profile	Trend	Trend Block Overall Objective	No	No	Yes	Documents uploaded for the trend information block of Overall Objective in Employee Profile are tracked by this category.
Platform	Employee Profile	Trend	Trend Block Overall Performance	No	No	Yes	Documents uploaded for the trend information block of Overall Performance in Employee Profile are tracked by this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Platform	Employee Profile	Trend	Trend Block Overall Potential	No	No	Yes	Documents uploaded for the trend information block of Overall Potential in Employee Profile are tracked by this category.
Platform	Employee Profile	Background	Background Awards *	Yes	Yes	Yes	Documents uploaded for Background Awards in Employee Profile are tracked by this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Platform	Employee Profile	Background	Background Certificates *	Yes	Yes	Yes	Documents uploaded for Background Certificates in Employee Profile are tracked by this category.
Platform	Employee Profile	Background	Background Courses *	Yes	Yes	Yes	Documents uploaded for Background Courses in Employee Profile are tracked by this category.
Platform	Employee Profile	Background	Background Education *	Yes	Yes	Yes	Documents uploaded for Background Education in Employee Profile are tracked by this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Platform	Employee Profile	Background	Background Functional Experience *	Yes	Yes	Yes	Documents uploaded for Background Functional Experience in Employee Profile are tracked by this category.
Platform	Employee Profile	Background	Background Inside Work Experience *	Yes	Yes	Yes	Documents uploaded for Background Inside Work Experience in Employee Profile are tracked by this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Platform	Employee Profile	Background	Background Languages *	Yes	Yes	Yes	Documents uploaded for Background Languages in Employee Profile are tracked by this category.
Platform	Employee Profile	Background	Background Leadership Experience *	Yes	Yes	Yes	Documents uploaded for Background Leadership Experience in Employee Profile are tracked by this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Platform	Employee Profile	Background	Background Memberships *	Yes	Yes	Yes	Documents uploaded for Background Memberships in Employee Profile are tracked by this category.
Recruiting	Applicant Management	Candidate	Background Check	No	No	Yes	Background block documents uploaded for Employee Profile are tracked using this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Recruiting	Applicant Management	Candidate	Candidate History	Yes	Yes	Yes	Documents uploaded for Recruiting Candidates are tracked using this category. Recruiting Candidate documents include: general attachments, resumes, cover letters, candidate history, profile attachment, and background check.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Recruiting	Candidate Profile	Candidate	Cover Letter	Yes	No	Yes	Cover letters uploaded by candidates are tracked using this category.
Recruiting	Candidate Profile	Candidate	General	Yes	No	Yes	Other attachments uploaded by candidate in candidate's profile are tracked using this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Recruiting	Candidate Profile	Candidate	Profile	Yes	No	Yes	Documents uploaded for Recruiting Candidates are tracked using this category. Recruiting Candidate documents include: general attachments, resumes, cover letters, candidate history, profile attachment, and background check.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Recruiting	Applicant Management	Candidate	Resume	Yes	Yes	Yes	Resumes uploaded by candidates are tracked using this category.
Recruiting	Interview Scheduling	Job Application Interview	Email	No	No	Yes	Document(s) uploaded as part of Job Application Interview Email Invite are tracked using this category.
Recruiting	Applicant Management	Job Application Interview	Interview	Yes	No	Yes	Documents uploaded by interviewers as Interview Notes are tracked using this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Recruiting	Job Requisitions	Job Requisition	MISC	No	No	Yes	Job requisition documents (requisition attachments) uploaded for Recruiting are tracked using this category.
Recruiting	Job Requisitions	Job Requisition	Requisition	No	No	Yes	Job requisition documents (requisition attachments) uploaded for Recruiting are tracked using this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Recruiting	Job Applications	Library	Application	No	No	Yes	Library documents uploaded for Recruiting are tracked using this category. Documents include: application attachments uploaded by recruiters, candidates.
Recruiting	Applicant Management	Library	Candidate	No	No	Yes	Library documents uploaded for Recruiting are tracked using this category. Documents include: application attachments uploaded by recruiters, candidates.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Recruiting	Offer Approvals	Library	Job Offer	No	No	Yes	Library documents uploaded by Recruiters in offer approval for a candidate are tracked using this category.
Recruiting	Offer Letters	Library	Offer Letter	No	No	Yes	Other attachments sent to candidate along with offer letter are tracked using this category.
Recruiting	Offer Letters	Offer Letter	Offer	Yes	No	Yes	Offer letters sent to the candidate are tracked using this category.

Module	Feature	Document Entity Type	Predefined Document Category	Available in Open Text Workspace? *	Mobile Enabled?	Attachments Supported?/Appears on Manage Documents page?	Description
Time Management	Audit Reports	User	Time Sheet Change Audit Report	No	No	Yes	Audit reports from the Time Sheet Change Audit Document, showing updates to employee time sheets are tracked using this category.

> **Note**
>
> Categories marked with an * are only available in Document Management Core by OpenText.
>
> Background categories marked with an * are dynamically created based on Employee Profile background elements and are tenant-specific.

2 Enabling Document Management with OpenText

To enable document management, complete the following steps.

Prerequisites

- Metadata Framework (MDF) enabled.
- You have access to Provisioning.

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

Procedure

1. In Provisioning, select the relevant settings based on your requirements. To enable OpenText solutions for SAP SuccessFactors, select *Enable OpenText Integration* in addition to the first setting. For more information, see:
   - Setting Up Integration with OpenText
   - SAP SuccessFactors Extended ECM by OpenText (X2HR)
   - SAP SuccessFactors Document Management Core by OpenText

   > ⚠ Caution
   >
   > Enabling integration with OpenText is a system-wide setting. Once enabled, all newly uploaded documents are stored in OpenText, and this applies to all documents, not just a subset (e.g., specific countries or departments). Additionally, once you begin migrating existing documents into OpenText using Provisioning, this process is final and cannot be reversed.
   >
   > Disabling the integration will result in loss of access to the migrated documents, as switching back to SAP SuccessFactors native storage is not supported. Ensure that OpenText integration is fully set up and successful before initiating the migration.
2. Save your changes in Provisioning.
3. Grant role-based permissions to the relevant roles.
   - Grant *Manage Document Categories* permission to roles who can use the *Manage Document Categories* to search for and view categories of documents.
   - Grant *User Permissions* > *Employee Data* > *View* permission for the following fields:

    - First Name
    - Last Name
    - Status
    - User Name
- Grant *Configure Document Management* permission to roles who can set up integration with OpenText.
- Grant *Company System and Logo Settings* permission to roles who can configure document attachment settings.

4. Save your changes to role-based permissions.

2.1 Control Access to Document Management Categories

You can grant your users access to categories of documents by setting Role-Based Permissions (RBP).

Set the following role-based permissions to control access to users for managing or accessing documents.

- *Administrator Permissions* > *Manage Document Categories*.

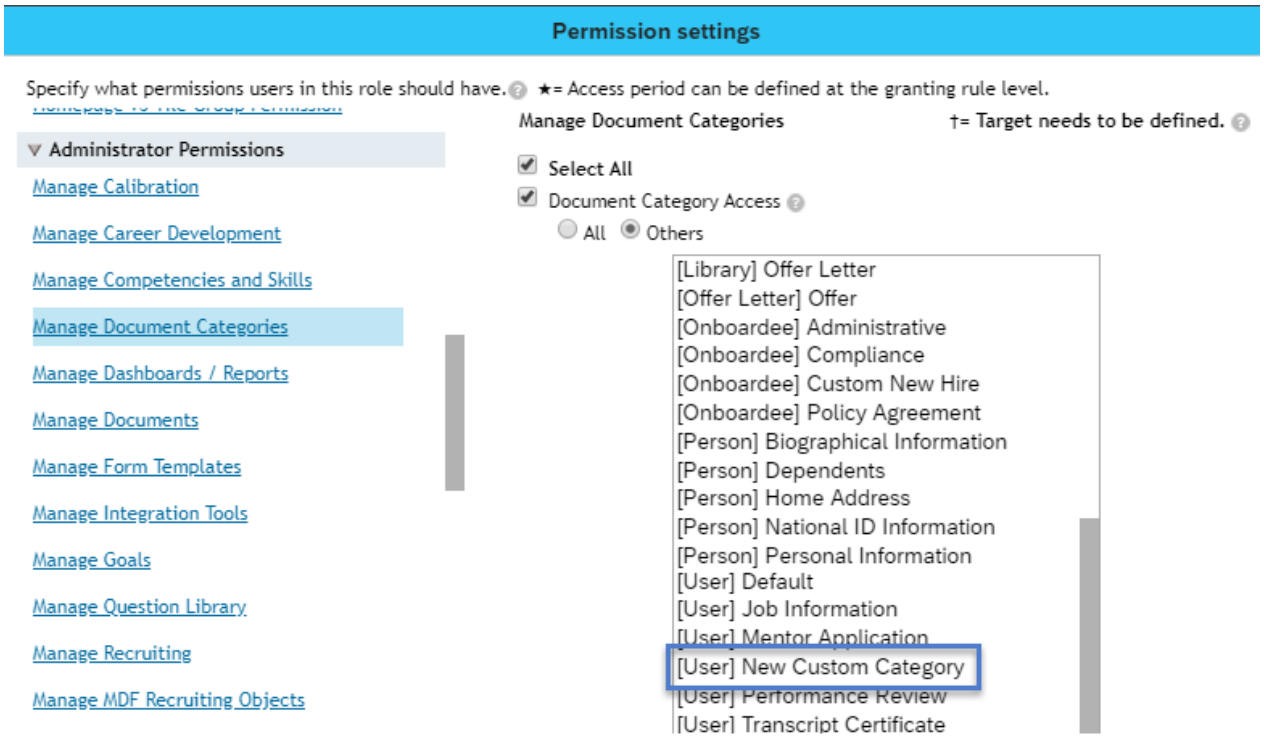
  > ⓘ Note
  >
  > The legacy permission, *Manage Documents*, gave access to all categories of documents and has been replaced with the Manage Document Categories permission.

- *User Permissions* > *Employee Data* > *View* permission for the following fields:
    - First Name
    - Last Name
    - Status
    - User Name

The *Manage Document Categories* permission is an administrative permission, that allows users to control access to any of the predefined document categories and to any of the custom document categories you create. When you create custom categories on the *Manage Document Categories* page, they display under the *Permission Settings* > *Manage Document Categories* view. After you've selected the group or user level access for this permission, you can determine how many document categories you want the assigned user to have access to.

By default, administrators have access to all document categories available in your system since the permission is set to *All*. You can update this configuration by selecting *Other*. Then, multiselect the categories you want to grant to your users. If *Other* is selected, you must select at least one *Document Category Access* for the user.

> → Remember
>
> Using the *Manage Document Categories* permission to control access to document categories is a feature that is applicable only on the *Manage Documents* page. It doesn't affect the access or display of document categories using the *View Company Documents* quick action on the home page.


Permission settings
Specify what permissions users in this role should have.
★= Access period can be defined at the granting rule level.
Administrator Permissions
Manage Calibration
Manage Career Development
Manage Competencies and Skills
Manage Document Categories
Manage Dashboards / Reports
Manage Documents
Manage Form Templates
Manage Integration Tools
Manage Goals
Manage Question Library
Manage Recruiting
Manage MDF Recruiting Objects
Manage Document Categories
†= Target needs to be defined.
Select All
Document Category Access
All
Others
[Library] Offer Letter
[Offer Letter] Offer
[Onboardee] Administrative
[Onboardee] Compliance
[Onboardee] Custom New Hire
[Onboardee] Policy Agreement
[Person] Biographical Information
[Person] Dependents
[Person] Home Address
[Person] National ID Information
[Person] Personal Information
[User] Default
[User] Job Information
[User] Mentor Application
[User] New Custom Category
[User] Performance Review
[User] Transcript Certificate

3 Configuring Document Attachment Settings

Use document attachment settings to optimize usage and stay within storage limits.

Prerequisites

You have the *Company System and Logo Settings* permission.

The allocation is set for you in Provisioning.

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

Context

Document attachment settings in the Admin Center are only relevant if you use SAP SuccessFactors for attachment storage. If you use a third-party storage vendor, such as OpenText, configure your settings in the third-party vendor application.

As an implementation consultant, you can configure **some** document attachment settings in Provisioning. We document how to proceed in Admin Center.

By default, a tenant has 500 GB of attachment storage. Additional document storage space can be purchased if needed.

Procedure

1. Go to *Admin Center* > *Company System and Logo Settings* > *Document Attachments*.
2. Look at *Attachment Storage Allocation* to check your current SAP SuccessFactors storage allocation.
   By default, you are allocated 500 GB. You can increase your allocation for a fee.
3. Set limits to help your company stay within its attachment storage allocation.

Option	Description
Attachment User Limit	The storage allocated to each user in your system. Consider the employees who will add attachments and divide your allocation by those users. Think about the size of their attachments. **Default: No Limit**.
Define users who should be excluded from the attachment user limit (username separated by semicolon). Please note that these users will have the user limit set to "No Limit"	If you have employees who must have additional storage, add their user names here. Separate the user names with a semicolon. When you add their user names, their *Attachment User Limit* is set, in the background, to *No Limit*.
Attachment Max File Size	The maximum allowable file size of any one attachment. If users try to exceed the limit, they receive an error and cannot store the attachment. The max file size applies even to users who are excluded from the attachment user limit. **Default: 5 MB**.

4. Set notifications to warn a team to check attachments and stay within your purchased allocation.

> **Note**
>
> Notifications are sent to users with the *Administrator Permissions* > *Manage Document Categories* > *Document Category Access* > *All* permission. Proxy users are included. Users with other administrative permissions will not receive these emails.

Option	Description
Enable alerts for Attachment Storage	Select to turn on alerts. Turn on alerts to help you stay within your purchased allocation.
Attachment Limit Notification Monitor Period	Set the frequency for the monitoring job to run. A shorter period checks your storage more often. A longer period checks your storage less often. Most customers can set the monitor period to seven days. If you frequently run near the limit of your allocation, however, consider a shorter period. **Default: 7 Days**.
Start sending alerts when the storage usage reaches the following percentage of the total allocation	Choose when you want to start receiving alerts, as a percentage of your allocation. For example, if you set the threshold to 75% and if your allocation is 500 GB, then the monitor starts sending alerts when you reach 375 GB or more. **Default: 75%**.
Additional Recipient List for Attachment Storage Alerts (maximum 5 recipients separated by semicolon)	Notifications go to users with all document category access permissions. If you want additional users to receive the alerts, add them, separated by a semicolon. You can add a maximum of five additional recipients.
Recipient List for Attachment Virus Scan Alerts (maximum 5 recipients separated by semicolon)	Set up to five users to receive alerts triggered by virus scans. Choose people at your company who can manage security issues.

5. Save your changes.

4 Uploading Static Content and Generating a Public Link

You can use the *Public Content Links* feature to upload files, generate publicly accessible URLs, and manage hosted content directly from the Admin Center.

Prerequisites

- You have the the *Administrator Permissions* > *Public Content Links* > *Upload* permission.
- Email notifications must be enabled for the administrator uploading the file. If email is disabled, the public link appears only once in the confirmation dialog and can't be retrieved later.
  - To ensure emails are enabled, go to *Admin Center* > *Change User Email Notification* and verify that *Email Notification* is enabled for the user.
  - Additionally, the user must enable the *Settings (under their profile icon)* > *Notifications* > *Send emails to me* setting.

Context

This feature gives administrators a self service way to upload and manage publicly accessible files such as logos, PDFs, and images. It is especially useful in scenarios where publicly hosted content is needed, for example in external job postings or company branding. By generating a public URL, administrators can easily reference these assets across SAP SuccessFactors without needing to submit support requests.

From the *Public Content Links* page, administrators can also:

- View all uploaded documents in a centralized list
- Search by file name or URL
- Open public URLs direcly
- Replace or delete documents based on permissions

> **Note**
>
> This feature isn't accessible when acting as a proxy. Only the logged-in user's own session allows access to the *Public Content Links* tool.
>
> These files are delivered via the Akamai content delivery network and may be stored outside of SAP data centers.

File Type and Size Limits

- **mp4**: up to 100 MB

- **jpg, jpeg, png:** up to 1 MB
- **pfd, doc, docx, ppt, pptx, csv, xls, xlsx**: up to 10 MB

Procedure

1. Go to *Administrator Permissions* > *Public Content Links*.
2. Choose *Upload New File*.
3. Select *Browse* to choose a file for your public content link.
4. On the confirmation dialog, select *Upload*.
   The system adds the file to the document list view, and the public URL is available in the *URL* column. You can open the link directly from the list.
5. Copy the link to use wherever needed in SAP SuccessFactors (for example, branding or job posting templates) or externally.

Results

A confirmation email is sent with a link to the file. If a customer leaves SAP SuccessFactors, all uploaded documents are permanently deleted.

> ⚠ Caution
>
> This feature is intended for non-sensitive static content only. Avoid uploading files that contain confidential or personal information.

> ⓘ Note
>
> If the Provisioning setting *Enable Strict URL Check* is enabled, external URLs may be removed during HTML sanitization. As a result, public URLs generated using this feature might not display in applications that render HTML content, such as Recruiting.

Related Information

Replacing Existing Static Content at a Public Link [page 73]

4.1 Replacing Existing Static Content at a Public Link

You can update the content of an existing public link by replacing the uploaded file. This is useful when you want to maintain the same public URL but update the content it serves, such as swapping out a branding image or document without having to change the link location.

Prerequisites

- You have the the *Administrator Permissions* > *Public Content Links* > *Replace* permission.
- Email notifications must be enabled for the administrator uploading the file. If email is disabled, the public link appears only once in the confirmation dialog and can't be retrieved later.
  - To ensure emails are enabled, go to *Admin Center* > *Change User Email Notification* and verify that *Email Notification* is enabled for the user.
  - Additionally, the user must enable the *Settings (under their profile icon)* > *Notifications* > *Send emails to me* setting.

Context

Use this procedure when you need to update the content of an existing public link with a new file, without changing the link itself.

From the *Public Content Links* page, administrators can also:

- View all uploaded documents in a centralized list
- Search by file name or URL
- Open public URLs direcly
- Replace or delete documents based on permissions

> **Note**
>
> - This feature isn't accessible when acting as a proxy. Only the logged-in user's own session allows access to the *Public Content Links* tool.
> - Files that were previously uploaded for public hosting before the introduction of this self-service tool cannot be replaced using this feature.
> - These files are delivered via the Akamai content delivery network and may be stored outside of SAP data centers.

Procedure

1. Go to *Admin Center* > *Public Content Links*.
2. Locate the document you want to update.
3. Choose *Replace* from the *Actions* column.
4. Select *Browse* to choose the new file for your public content link.
5. After reviewing the terms and conditions, check the box and click *Upload*.
6. In the confirmation dialog that appears, review the replacement details, then click *Upload*.

> ⓘ Note
>
> The file at the specified public link will be replaced, but the URL will remain the same.

> → Tip
>
> Updates to the content may take up to 24 hours to appear due to caching.

Results

The public link remains unchanged, but the file it points to is updated with the newly uploaded content. A confirmation email is sent with a link to the file. If a customer leaves SAP SuccessFactors, all uploaded documents are permanently deleted.

> ⚠ Caution
>
> This feature is intended for non-sensitive static content only. Avoid uploading files that contain confidential or personal information.

5 Strategies for Purging Attachments

The retention management strategy may vary depending on the type of attachments. Learn about strategies on how to purge different types of attachment.

Available Options for Purging Attachments

- *Purge MDF Attachments*
- *Auto Data Purge*
- Module specific purge options

Retention Time Configuration

You can only configure retention periods specifically for attachments that are included in *DRTM Onboarding Purge* and *Auto Data Purge*. They can be purged independently.

As for attachments for custom and pre-delivered MDF objects, you can specify the date range of attachments to be purged when setting up a purge request using *Purge MDF Attachments*.

> ⓘ Note
>
> You can't configure retention periods specifically for other types of attachment. These types of attachment can only be purged together with other data using module specific purge options.

Related Information

Data Included in the DRTM Onboarding Purge
Impacts of Auto Data Purge
Purging MDF Data (Non-DRTM)

6 Creating a Custom Document Category

Create a custom document category that you can use, in addition to predefined categories, to organize documents in your system.

Prerequisites

To manage documents, the following Role-Based Permissions (RBP) are required:

- *Administrator Permissions* > *Manage Document Categories*
- *User Permissions* > *Employee Data* > *View* permission for the following fields:
  - First Name
  - Last Name
  - Status
  - User Name

To Control Access to Document Management Categories, there are Role-Based Permissions settings you need to set. Refer to the **Control Access to Document Management Categories** topic in the Related Information section below.

Context

Document categories help you organize and filter documents on the *Manage Documents* page and on the home page (in the *View Company Documents* quick action). By default, most documents are automatically assigned to a predefined category. If you want to categorize documents differently for Metadata Framework (MDF) objects having standard and custom attachment fields, you can create a custom document category and associate it with the attachment field on the MDF object.

A document category is always associated with a specific entity in the HCM suite, defining the application or business process it belongs to.

> **Note**
>
> Currently, custom document categories can't be used to override predefined document categories supplied by SAP SuccessFactors modules.

Procedure

1. Go to *Admin Center* > *Manage Documents* > *Document Categories*.

2. Choose the + icon to open the *Add* dialog.
3. Enter the required information:

Field	Description
Entity Type	Select the entity you want to attach the document to. To use the category for company documents, select *Company*.
ID	Enter an ID that is similar to the display Name but without any spaces or special characters.
Name	The display name that is visible in the user interface, on the *Manage Documents* page and on the home page.
Status	The Status field is read-only and defaulted to *Active* when creating a document category because categories must be active to be assigned to documents. You cannot create an inactive category. However, you can later edit an existing category and change its status to *Inactive*, provided no documents are associated with it. Additionally, a category must be set to *Inactive* before it can be deleted.

4. Click *Save*.

Results

The new custom document category is saved and visible on the *Document Categories* screen, where you can edit, activate, inactivate, or delete it at any time.

If active, the custom category is also available to use when uploading a document or when filtering by category on the Manage Documents page.

Related Information

Control Access to Document Management Categories [page 67]
Assigning Document Categories to Attachment Fields in MDF [page 77]
Creating a New object Definition
Configuring the Object Definition
Adding Fields

6.1 Assigning Document Categories to Attachment Fields in MDF

Administrators can assign document categories in the Metadata Framework (MDF) to apply the necessary metadata for attachment fields, ensuring documents are properly categorized, stored, and compliant with data governance requirements.

Prerequisites

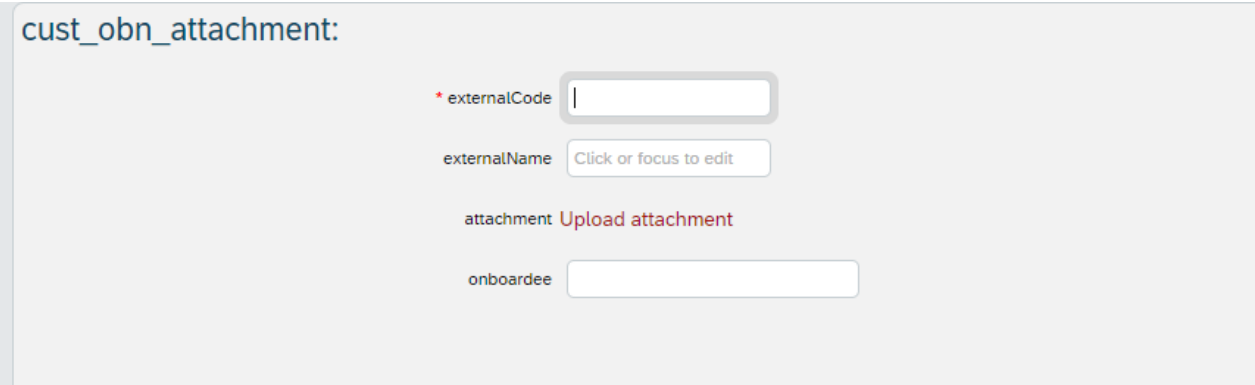
- You have the required document categories configured.
- For custom MDF objects with sensitive personal data, ensure that you configure Legislatively Sensitive Personal Data (LSPD) to indicate the inclusion of sensitive data.

> **Note**
>
> To comply with data protection and privacy requirements, it is crucial to configure any custom Metadata Framework (MDF) objects containing personal data appropriately. This includes setting up the Legislative Sensitive Personal Data (LSPD) configuration for custom MDF objects that have an attachment field enabled and use a *Subject User Field* of the type *User*.
>
> LSPD configuration is essential for any custom MDF object where the attachment field may contain personal data. Without it, regulatory user details related to data privacy won't be recorded for attached documents.
>
> For detailed steps on how to define a custom object as containing sensitive personal data and to configure LSPD, please refer to:
>
> - Defining a Custom Object as Containing Sensitive Personal Data for a Given Module
> - Legislatively Sensitive Personal Data Configuration

Context

Document categories in the Metadata Framework (MDF) enable consistent management of document attachments. You may define a new object for your business needs, and that object may include an attachment field. After defining the object, you can associate that attachment field with a document category so uploaded documents are handled correctly. This ensures that uploaded documents are accurately categorized, stored, and compliant with data governance standards, such as GDPR and other regulations.

You have defined a new object that contains an attachment field, as shown in the following example.



To associate the attachment field with a document category, decide which MDF object and which attachment field you want to manage. Your MDF object depends on your requirements. The following are two examples.

- A *Position* object that has a `positionDescriptionDoc` field as the attachment field.

- A custom MDF object called *cust_DrivingLicence* that has a `scannedCopyFODL` field as the attachment field.

To manage the association between the attachment field and the document category, complete the following tasks:

Procedure

1. Log on to the application as an administrator.
2. Go to *Admin Center* > *Tools Search* and enter **`Manage Data`** and then select.
3. Choose the *Create New* dropdown and select *Attachment Field Configuration*.
4. Enter the following:

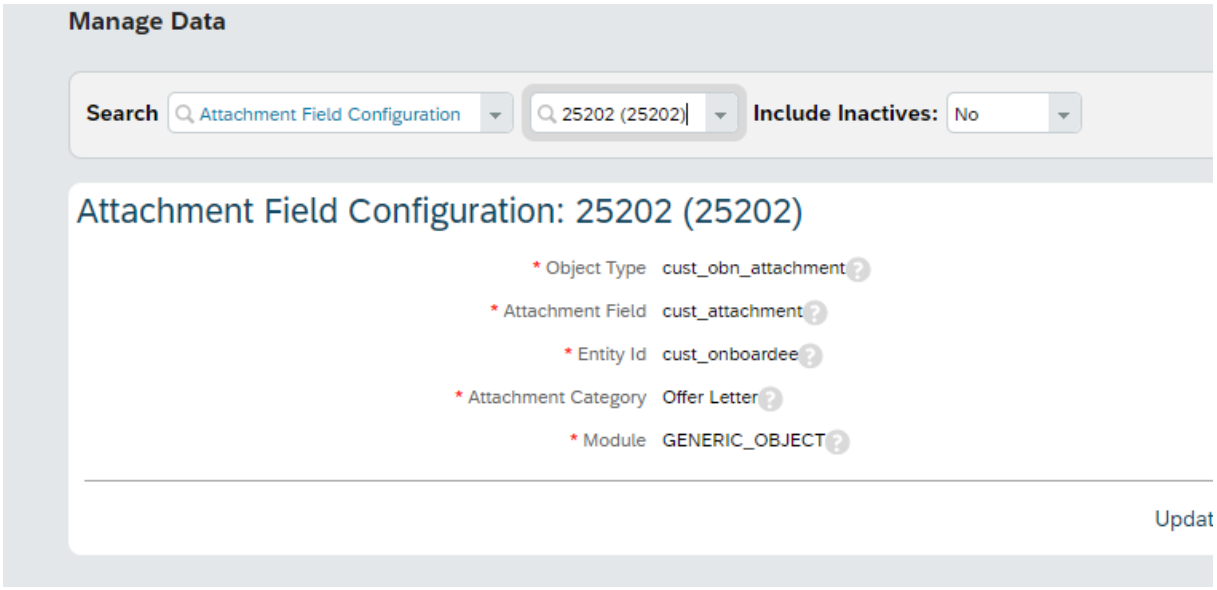
Field	Entry
Object Type	<MDF object> See the examples in the Context.
Attachment Field	<field> A list of all attachment fields is shown that are available for the selected object. Select the field from that list for which you want to manage the document category.
Entity ID	<ID> Select the key field for this object.
Attachment Category	<category> Select a category from the list.
Module	<module> Select a module from the list.

> ⚠ Caution
>
> Use the *Module* value *ALL* only for documents that are intended to be company documents. Company documents can be viewed by all users with the *View Company Documents* quick action on home page.

> ⓘ Note
>
> Ensure that you give the attachment field an *Attachment Category*.

5. Choose *Save*.

Example of completed Attachment Field Configuration.



> **Note**
>
> Custom Document Categories created and associated to attachment fields are only applied to documents uploaded after this configuration is completed.

> **Note**
>
> If you get a `This combination of "Object Type" and "Attachment Field" already exists. To make any changes to this configuration, please review and edit the existing configuration or specify a different field for which no configuration exists` error message, make the appropriate correction.

7 Behavior of Attachments for OpenText-Enabled Tenants During Instance Refresh

When your system undergoes an instance refresh, how attachments are handled depends on the storage setup of both the source and target systems.

What Happens to Attachments During an Instance Refresh

- The target system keeps its original storage setup. If it used OpenText before the refresh, it will continue to use OpenText afterward. The same applies if it used SAP SuccessFactors internal storage.
- Only when both source and target systems use SAP SuccessFactors internal storage can customers choose to copy attachments from source to target during the refresh.

  > ⚠ Caution
  >
  > If the source instance is your production system, please be aware that choosing to copy attachments will result in all documents from your production instance being copied into the target instance.

  - If you choose **not** to copy attachments, dummy files will replace the original documents in the target system. All document references in the target SAP SuccessFactors UI will open these dummy files.
- For all other combinations of source and target storage setups, we recommend choosing **not** to copy attachments. This will replace original files with dummy files in the target system, and document references within the target SAP SuccessFactors UI will open the dummy files.
  - If you choose to copy attachments in these other storage combinations, only file references will be copied, not the actual file content, which will cause broken links in the target system.

We recommend reviewing the OpenText documentation to understand the pre- and post-instance refresh steps required for the OpenText instance to ensure proper handling of attachments.

Related Information

Post Refresh Activities

Change History

Learn about changes to the documentation for Document Management and Attachment Storage in recent releases.

2H 2025

Type of Change	Description	More Info
New	We added the following topics: • Exporting Filtered Document Lists • Uploading Static Content and Generating a Public Link • Replacing Existing Static Content at a Public Link	Exporting Filtered Document Lists [page 12] Uploading Static Content and Generating a Public Link [page 71] Replacing Existing Static Content at a Public Link [page 73]
Change	We added a new document category, "Time Sheet Change Audit Report" to the Predefined Document Categories table.	Predefined Document Categories [page 18]

1H 2025

Type of Change	Description	More Info
Changed	We added the **Spain Compliance Forms** and **India Compliance Forms** document categories to the Predefined Document Categories table. We also updated the document category Feature names and their associated categories for better clarity.	Predefined Document Categories [page 18]
Changed	We updated our guide to reflect new UI changes and behavior to the Manage Documents page.	• Using Document Management [page 3] • Viewing All Documents as an Administrator [page 7] • Viewing Information About Attachment Storage Space [page 13] • Creating a Custom Document Category [page 76]

Type of Change	Description	More Info
Changed	We added a link to the "Enabling Document Management" topic for the setup of the Document Management integration with OpenText	Enabling Document Management with OpenText [page 66]
Changed	We added a note to specify which document attachment settings are available in Provisioning.	Configuring Document Attachment Settings [page 69]

2H 2024

Type of Change	Description	More Info
Changed	We added a caution note about the irreversability of migrating documents to OpenText.	Enabling Document Management with OpenText [page 66]
Changed	We updated the description for the Email and Interview document categories	Predefined Document Categories [page 18]
Changed	Added information about LDPR and GDPR requirements for custom MDF objects that contain personal data and an attachment field.	Assigning Document Categories to Attachment Fields in MDF [page 77]
Changed	We updated the note on the "Viewing Information About Attachment Storage Space" topic to clarifViewing Information About Attachment Storage Space [page 13]y that additional documents can't be uploaded once the Total Allocation limit is reached, until more storage is purchased.	Viewing Information About Attachment Storage Space [page 13]

1H 2024

Type of Change	Description	More Info
Changed	• We've updated the path name for "Enable Document Management Service" to "Enable Open Text Integration". • We've updated "Step 1" to better clarify the two settings for enabling Document Management and OpenText. We've also added links to the SAP SuccessFactors product page for OpenText.	Enabling Document Management with OpenText [page 66]

2H 2023

Type of Change	Description	More Info
Changed	We have moved the Change History to the end of the guide.	Using Document Management [page 3]
Changed	We updated the bullet point description on **Using Document Management** to include the new feature of vieweing total storage by document category over a specific period of time.	Using Document Management [page 3]

1H 2023

Type of Change	Description	More Info
Change	Added the following fields to the **Document Attachment** table along with a description of their settings: • Start sending alerts when the storage usage reaches the following percentage of the total allocation • Additional Recipient List for Attachment Storage Alerts (maximum 5 recipients separated by semicolon) • Recipient List for Attachment Virus Scan Alerts (maximum 5 recipients separated by semicolon)	Configuring Document Attachment Settings [page 69]

2H 2022

Type of Change	Description	More Info
March 28, 2022		
Changed	Added document category **Continuous Performance Management Activity Attachments** to the table.	Predefined Document Categories [page 18]
September 22, 2022		
Changed	Made the following changes to the document category table: • Added **USA Compliance Forms** document category. • Updated description for **USA E-Verify Forms**.	Predefined Document Categories [page 18]
July 7, 2022		
Changed	Added note to Viewing All Documents as an Administrator topic stating that the Document Name fields are non case-sensitive.	Viewing All Documents as an Administrator [page 7]

1H 2022

Type of Change	Description	More Info
May 17, 2022		
Changed	Added note to Attachment Storage Location column about exceeding 500GB storage limit.	Configuring Document Attachment Settings [page 69]
April 29,2022		
New	Added new topic on explaining DMS predefined document categories	Predefined Document Categories [page 18]
Changed	Updated the name of the quick action on home page from *Company Documents* to *View Company Documents*.	Uploading a Company Document [page 8]Creating a Custom Document Category [page 76]
Changed	Added Caution note advising of the ramifications of using the Module list item ALL in the Attachment Field Configuration	Assigning Document Categories to Attachment Fields in MDF [page 77]

1H 2021

Type of Change	Description	More Info
June 25, 2021		
New	The following topics have been updated with information about Role-Based Permissions (RBP).	• Viewing All Documents as an Administrator [page 7] • Control Access to Document Management Categories [page 67] • Uploading a Company Document [page 8] • Enabling Document Management with OpenText [page 66] • Creating a Custom Document Category [page 76]
April 9, 2021		
New	This topic includes the follow new information: • Two Role-Based Permissions added as prerequisites. • Information on limits for downloading documents. • Three new filters added to the Download Request form: Division, Department, and Location.	Downloading Documents in Bulk [page 10]
New	Added new information about viewing your attachment storage.	Viewing Information About Attachment Storage Space [page 13]

2H 2020

Type of Change	Description	More Info
Changed	Default storage allocation increased from 10 GB to 500 GB.	Configuring Document Attachment Settings [page 69]
Changed	You can set a percentage threshold for storage capacity and an alert is sent when threshold is exceeded.	Configuring Document Attachment Settings [page 69]
Changed	You now can have a threshold email notification sent to up to five additional users (other than default admin).	Configuring Document Attachment Settings [page 69]

Important Disclaimers and Legal Information

Hyperlinks

Some links are classified by an icon and/or a mouseover text. These links provide additional information.
About the icons:

- Links with the icon  : You are entering a Web site that is not hosted by SAP. By using such links, you agree (unless expressly stated otherwise in your agreements with SAP) to this:
  - The content of the linked-to site is not SAP documentation. You may not infer any product claims against SAP based on this information.
  - SAP does not agree or disagree with the content on the linked-to site, nor does SAP warrant the availability and correctness. SAP shall not be liable for any damages caused by the use of such content unless damages have been caused by SAP's gross negligence or willful misconduct.
- Links with the icon : You are leaving the documentation for that particular SAP product or service and are entering an SAP-hosted Web site. By using such links, you agree that (unless expressly stated otherwise in your agreements with SAP) you may not infer any product claims against SAP based on this information.

Videos Hosted on External Platforms

Some videos may point to third-party video hosting platforms. SAP cannot guarantee the future availability of videos stored on these platforms. Furthermore, any advertisements or other content hosted on these platforms (for example, suggested videos or by navigating to other videos hosted on the same site), are not within the control or responsibility of SAP.

Beta and Other Experimental Features

Experimental features are not part of the officially delivered scope that SAP guarantees for future releases. This means that experimental features may be changed by SAP at any time for any reason without notice. Experimental features are not for productive use. You may not demonstrate, test, examine, evaluate or otherwise use the experimental features in a live operating environment or with data that has not been sufficiently backed up.
The purpose of experimental features is to get feedback early on, allowing customers and partners to influence the future product accordingly. By providing your feedback (e.g. in the SAP Community), you accept that intellectual property rights of the contributions or derivative works shall remain the exclusive property of SAP.

Example Code

Any software coding and/or code snippets are examples. They are not for productive use. The example code is only intended to better explain and visualize the syntax and phrasing rules. SAP does not warrant the correctness and completeness of the example code. SAP shall not be liable for errors or damages caused by the use of example code unless damages have been caused by SAP's gross negligence or willful misconduct.

Bias-Free Language

SAP supports a culture of diversity and inclusion. Whenever possible, we use unbiased language in our documentation to refer to people of all cultures, ethnicities, genders, and abilities.

www.sap.com/contactsap

© 2026 SAP SE or an SAP affiliate company. All rights reserved.

No part of this publication may be reproduced or transmitted in any form or for any purpose without the express permission of SAP SE or an SAP affiliate company. The information contained herein may be changed without prior notice.

Some software products marketed by SAP SE and its distributors contain proprietary software components of other software vendors. National product specifications may vary.

These materials are provided by SAP SE or an SAP affiliate company for informational purposes only, without representation or warranty of any kind, and SAP or its affiliated companies shall not be liable for errors or omissions with respect to the materials. The only warranties for SAP or SAP affiliate company products and services are those that are set forth in the express warranty statements accompanying such products and services, if any. Nothing herein should be construed as constituting an additional warranty.

SAP and other SAP products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of SAP SE (or an SAP affiliate company) in Germany and other countries. All other product and service names mentioned are the trademarks of their respective companies.

Please see https://www.sap.com/about/legal/trademark.html for additional trademark information and notices.

