**Transcript**

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 **Kelly Sotelo** started transcription

 **Kelly Sotelo** 0:30
All right.
Good morning, everyone, or good afternoon, depending on where you are.
We want to welcome you today to our Aspire HR webinar for key updates for this SuccessFactors 2H release. My name is Chris Kelly Sotelo.
I'm the marketing manager here for Aspire HR. I am here to welcome everybody and let you know that we have a full panel of our consultants today to discuss some key highlights and updates that are being made with this 2H release.
We certainly will not get a chance to cover everything, so if you do have questions, please.
Please feel free to use the Q&A button that you'll find at the very top of your webinar toolbar there and you can submit a question anytime throughout the webinar we will have AQ and a session an access the expert session at the end of the present.
Where we will go through those questions, anything that we don't get through, we will certainly do a follow up with the on demand version of the webinar and get those questions answered for you.
We will also have some contact information at the end that you can reach out with anything more you'd like to learn about.
Other questions you may have that we didn't get to address today.
I am going to go ahead and kick things off this this morning for me with our CEO and President Kevin Chase to get our webinar started.

 **Kevin Chase** 1:46
Alright, thanks, Kelly. I appreciate it.
So I'm just gonna give a quick overview some of you on the call are customers and clients that aspire. Some of you may not be as familiar with Aspire. So I just wanna give a quick two-minute overview of who are we and what are we focused on.
In serving our clients, so aspire is 100% focused in the HR industry.
We are a systems integrator and a managed service provider.
We also have our own proprietary software.
We are a strategic partner with SAP.
As a gold partner, we also.
Have a terrific relationship with workforce software and with ADP where we do a lot of implementations around their time and attendance platform.
We look to bring in every project we work on a level of capability that we think is superior in the industry where ISO and SOCK certified, we bring a lot of discipline to our managed service. We've done over 700 implementations over the last 25 years and.
I think what you'll hear today is from a number of our principles, we bring a lot of proactive expertise to our clients to help them think proactively.
Around how can they leverage the best from SAP? How can we leverage the best from workforce software and make sure that we're enabling your business to really thrive in the HR space?
So with that, Kelly, I'll go ahead and hand it over. I think is that Hugh, that's gonna be going first.

 **Hugh White** 3:04
Excuse me.
Hello everyone.
I'm Hugh white.
I'm the employee central practice lead here at SuccessFactors, and I'll be going over first employee central. The the enhancements there and then the benefits module.
So the the first thing with this release, what's really significant is the new profile.
So we're going to be getting a new employee profile.
It replaces the old one I was.
I was looking.
I believe it's probably 7-8 years and that it's been here.
So it is time, you know.
The and you'll hopefully you'll find what the new profile it does bring.
A fresh perspective and and with the navigation and that into it. The other thing too in in regards to the navigation you know with the last release it was introduced the spotlight. We heard some, I don't know if you would call it either complaints or just that the.
The navigation to the spotlight, then to the employee profile.
A lot of folks weren't happy with that. So with the new release to SuccessFactors has made the navigation easier that you can choose where you go to say from the quick card after you've done a search.
With the profile you know once again it's gonna be the the personal job and compensation information.
Where it's changed where it used to be, maybe blocks and sections you know.
Now it's gonna be more categories and cards.
I do have a display after I go over the other updates that we can walk through it as well.
Time management, you know, as far as information.
Timesheet summary, you know upcoming time offs all that will still be be within the profile. One of the things too though it it is enhancing.
I don't wanna steal away from anyone else, but.
With some of the performance and goals management, it's more now integrated into the profile.
So it's the profile is really bringing everything together as it did before and it just continues to do that.
Excuse me. One thing to note though, with with the the new release, if you are going to be doing any like take actions or you're going to be looking at the history or doing any edits, it still will navigate to the to the previous people profile I've not.
Heard, you know my the assumption would be, you know, that's probably part of the road map you know.
What would be next?
Is that the the history in the edits would be, you know, under the new sort of the new look and feel as well?
The next is something that that I think is pretty cool and it's AI generated insights into compensation and it's really a conversation now with whether it's the manager or with its HR is really looking at, you know, information pertaining to the employee on their, their compensation and even.
Say their job journey.
So what it'll do is it'll look at, look at your compensation history.
Your base salary one time payments. You know where your positions have been.
You know, within the existing ranges, job progressions, you know, have you been promoted?
Have you had different role changes and what it does?
Is it summarizes that at the top and then it will, you know, dig a little deeper into the the various, you know, call it historical changes in that and where that employee you know, even resides, you know within their their other team members.
The the one thing to note though with this with this.
Is it you know and and this is sort of keeping to what SAP or SuccessFactors is doing?
You know it's going to give you insights into it, but it's not going to provide or suggest any employee changes.
Do you know the SuccessFactors right now is to still make the decision making you know based on you know, the the manager or HR really taking this information in a much more consumable way, but making making their you know their decision based on that next is now.
Digital signatures in the document generation. So if if you know if you are on onboarding.
2.0 You know the new onboarding solution, you're already aware that you know you can get.
Signatures via DocuSign.
So now that has been progressed.
Now over to employee central for you know once an employee is live, if there's a document that would need signatures, it is.
It is now supported via DocuSign. One thing to call out here you know with onboarding there is the the SuccessFactors Z signature as well. Just at this time that's not supported.
So you would have to be on DocuSign to to to get this.
Final and maybe this was just for me, but the the pending request.
Has been replaced now by a pending workflow page. I always felt the pending request was something that was hidden or it was kind of like you. You had to go on a jury to journey to find it and was really never that apparent for you. But now with.
The you know what?
It's it's optimized.
It has a better experience. It also provides you, you know, a lot of times on the workflow. It's only showing what's changing. What it does do now.
It allows you to view also the employee and position information to help you know what that information was.
On the workflow that you could to get that to get that additional information.
So Kelly, if you could, if you would please go to the the next slide.
So this is the the the new profile.
Apologize I couldn't get a better screenshot but but really were the big changes are. If you look now on the left side, those are the categories.
Think of those more as the tabs or the the sections that you had before.
You know, so it's replaced now.
More in a a vertical versus horizontal and then if you.
Look to the right. Those what's referred to as cards and then you do see on the cards, you know, like you see personal information, biographical.
So you know, and you choose what you want to see as well too in these cards.
And then you do see the edit in the history buttons that are there.
So you know, if you do click on that, if you wanted to change or look at history, like I said, it still goes to the old profile. And then on the right hand side, you do see that's the mobile, the the right bottom, that's now the mobile exper.
So you know, once again it's taking that that cleaner effect.
I think too.
I want to call out with with.
This is, you know, it does need to be configured so it's not an automatic.
You know, you know when it's not implemented automatically. So it's definitely something, you know, aspire. We can help you with, you know, as far as configuring the the new profile. OK.
So that's it for employee central.
Like I said, the big thing there was was just regarding the the profile.
That was the the big piece for this this release.
Next is the employee central benefits.
This module is become near and dear to my heart, and especially with what I've seen with the what I would say the what SuccessFactors had done with it. You know, along if you're, if you're not aware there was earlier the the earliest really earlier release this year.
They released the new enrollment benefit enrollment experience, a new experience which really made to me the the enrollment a lot easier.
What we're now, what they're now adding with this release, is a benefits overview.
Which is really just a current overview of your existing benefits and also the actions you can take from my view now the the solution has become a very viable solution for not only global you know for global benefits, but also for us based benefits as well.
We just go on the benefit enrollment task manager now from the home page in the module picker up in the top left hand corner that's there.
Another nice thing is.
You're it now allows for the.
The employee, the way the benefits when they're doing in the enrollment before that was never offered.
So a lot of times and if employee had not enrolled in the benefits, you really didn't know, was it something they were opting out or was it, you know or was it just something they missed? So now they're going to have to make a decision, either enroll in.
The benefits or opt out with that, so that will really help you know when you're, you know, with the open enrollment when edits are going on.
Another one for our global partners out there.
You know, so that it does support benefits with different currencies.
It was always a little confusing before you could have different currencies on benefits, but it all rolled up to the same call it number.
So you really didn't know if it was 1000 was 500 of that in us and maybe 500 was in euros?
So now it does roll that up and break it out.
From an administration standpoint, just some changes in the user permissions. You know as far as viewing benefits and edit enrolling and claims you know, so it did.
It does provide for a greater granularity there for allowing the employees to do it.
Is this is more from I would once again from more the administrator side.
But there's a a job that will run that will consider benefit updates.
Let's say new rates at the beginning of the year.
That was always something you had to get either SAP or get a partner to do.
That's now available in the scheduled job manager to run, and then finally this is probably only for. I would say any of our our clients out there, customers who have.
Had been been implemented, say long for a while, with benefits.
There the the benefit fields had been moved off of the benefit enrollment object into an into objects, say around insurance.
And it's just that you have any AP is or reports.
It may be something you want to consider because since those fields was were were removed, it may impact your AP is and and reports OK. So Kelly, if you could go to the next slide.
And then finally, this is just the the benefits overview.
So you can see at the top as far as benefit actions, you know if you want to, you know if you for open enrollment would appear here. If you did have a life event, you know would appear here that you would report on the life event or also.
Manage your family members so you know where you used to go.
You know you would maintain that in the profile. It's now, which is very nice.
It's all contained within the the benefits module.
Then there's also a benefit summary where it lists, you know, the benefits you're enrolled in.
And so over to the right would be you know if you do have any changes that you want to make. And then finally at the bottom is just help and resources.
This could be links to 3rd Pride party providers, or if you do have benefit kits that allow you know with the employee and selecting their benefits, you could have links there.
So that's it from, you know from employee central and the benefits really appreciated sharing with with you. And now I'm going to pass it on to Naveen who's going to talk about employee central time.

 **Naveen Kumar Ramba** 13:31
It's Hugh.
Hello everyone, I'm Naveen.
I'm a senior consultant here at Aspire for Employee Central and onboarding modules.
I'm gonna cover the two H 2024 release items for employee central Time module quickly starting off with time off, we now have an enhancement to the out of office indicator on the latest people profile and orchure.
As we can see on the 1st screenshot there.
In both the latest people profile and on the org chart, the out of office information is now supported for LOA only enabled instances as well.
This was something that wasn't existing up until the new release. We also have a back on information now being determined and displayed right on top of the header that way.
Customers can leverage this feature to indicate the planned start and end time.
Of an employee's vacation schedule. The second item within employee central time that I'd like to discuss is the my calendar UI being it's being offered as an employee self-service.
It's a really nice feature to to have where employees can now get an overview of their planned working times, their temporary work schedules and holiday calendars, etc.
This enhancement was was made so that employees can sort of get in. They can get an overview of their working times easily. We did not have a a one stop solution where employees can.
Take a look at this information. Up until the new release of this is under important item.
Or release highlight within the EC time module Kelly. If we could go to the next slide.
OK, moving on to the timesheet, so the first item would be the temporary work schedule that's now being offered as employee self-service.
UI so employees themselves can now go ahead and request for adjustments of their work schedule.
This is a feature that was slacking up until now.
Where either admins had to do it for employees.
So this is more along the lines.
Of offering flexibility within the workplace, so to allow easy changes to plan working sessions.
Employee would want to change the working time from for a full day from a full day to 1/2 day. Or say they wanna change their weekday into a week off, etcetera, right?
So they can always create a new temporary work scheduled request and then have an admin approve that to make sure that the changes are reflected in their work schedule.
Along the same lines, we now have an option to create temporary holiday calendars.
You can now make temporary changes to employees, holidays, calendars based on the business requirements.
That could also be some regulatory requirements. 7 organizations need to consider some public holidays when, say, employees travel to a different work location.
So now employees will be able to, you know, should be able to create a temporary holiday calendar request for a specified period when they are traveling to another location to accommodate those requests as well.
Kelly, if we could move on to the next slide please.
The next feature would be the monthly time sheets.
You can now approve timesheets on a monthly rather than on a weekly basis.
Additionally, you can configure this feature without having the need to contact product support.
So it was really an early adopted adopted feature up until this release, but now the customers can configure or enable this by themselves.
There's also a monthly calendar view in time sheet that allows employees and managers to look at their monthly time submissions holistically. That way they get they can get an overview of employees, attendances, absence recordings, etcetera in a given calendar month. As indicated on the 1st screenshot on this.
Slide.
The next item would be the timesheet approval center.
This provides a holistic view of all the time sheets, along with some of the key information in a single place.
Allowing the manager or the approvals to review the timesheet submissions and then approve them from a single UI.
This shows details including the planned working times, recorded times, etcetera, so that the APPROVERS can determine if there is any missing time punches. You know they can review the alerts and make amendments if needed.
That's the time, the time sheet approval center.
The another item, and this is really a big one, would be business rules leveraging business rules to create time valuations. We now have a couple of new business rules called decision by business rule and a calculation by business rule.
They let you access the job information data through, you know, through the FLS criteria.
That way this combination lets you configure.
Different scenarios such as you could now configure or calculate the time valuations based on employees, FTE by having the rule look at the job information data it could. You know you can conditionally say you can conditionally configure different time valuations based off of locations or you could have.
A different multiplayer for these time valuations based on an employee's division or divisions or departments, right, so.
This is really a great addition with respect to calculating the time valuations in a more flexible manner.
Yeah. So again, another major release item that that's a part of the new release. You know that offers more flexibility that, well, pretty much concludes the highlights from an EC time standpoint. I'd like to turn it over to Gary to cover the recruiting.

 **Gary Fanucci** 20:05
Hello, thank you, Naveen.
Hello everyone.
I'm Gary fanucci.
I'm a recruiting lead here at Aspire.
I'm gonna walk through some of the enhancements that I think are kind of highlights of this new release.
The first one here is this first section here relates to the redesigned applicant dashboard management dashboard.
My if you haven't made the switch yet to the applicant Workbench.
You and hit the reworked applicant Workbench.
Now might be a good time to to enable it in preview and start to take a look at it because.
The enhancements going forward are really going to be built off of the new applicant Workbench and I know that some of made the conversion already. If you have, you can leverage these enhancements immediately.
If not, it's a good opportunity to to kind of get familiar with the new workbench.
So the first this first section here.
I included a really allenhancements that came from the customer community customer community inspired.
Request the from the from the initial roll out of the workbench. There were some things that were a little bit different than the the legacy. One of them was a historical assessment results.
They now have the ability to.
To have the screening questions that that you've had in the legacy, but they've added.
Level where you can get the assessment, any assessments that were conducted on a candidate in the past for any of the any of the jobs that they've applied to are now also available in a in a single view. So you can compare them if it's a similar job.
The the ratings and the screening questions against the current job that they've applied to.
So it's enhancement for the recruiters.
That, you know is a is something that was asked for and.
I think is a is a great thing.
The enhancement, the next bullet point, enhancement of the document download capacity. In the past, the documents you had to actually download one candidate at a time and it would only allow you to do 2 documents in a single download. What they've done is enhance that now that you.
Can in the dashboard itself.
You can download up to 50 candidates at the same time 2 documents.
Each and it actually works behind the scenes, so you can you can download all the documents for up to 50 candidates. Applicants it will you can go on with your work.
It'll download behind the scenes zip, file it and then save it to your local device, which in the past it was.
It was fairly manual.
So you don't have to wait for it to download it will. It will work behind the scenes for you.
And it just has a a much robust.
Oacity there for the downloads.
Then the next thing that was missing from the first, the first version that the legacy had was onboarding initiation status.
Now it's all in one screen you get a summary real time summary of not only the initiation, but there's an enhanced view pop up that tells you not only what's going on status wise, but gives you the eligibility of the hire, whether they're eligible or not eligible for H.
Based on rules.
So that I think is is something that's been asked for for a long time. So any rehire it can, it can tell you immediately on the screen what's going on and whether they're eligible for hire or not.
The workbench enhancements, like I said, they continue to to embrace and and work on and build.
So it's like I said, a good thing to to start to take a look at the next one is really overall a single sender.
E-mail notifications in the past you might have had the experience, and I know a lot of our clients have of emails going out to candidates in the recruiting space and some of them come from the notifications from the system. Some of them are from the recruiter, some are.
Say recruiting on them from the triggers.
There's a lot of emails that go out, trigger emails and standard.
Automatic emails that go out and it and it and it.
It's a little confusing to the to the receiver because sometimes a duplicative.
Now the single sender e-mail notifications you can set up that'll all come from a single place. It all have recruiting and you'll know exactly who it's coming from or from a from a the recruiter itself.
So it just makes everything less confusing for the for the candidates and for the users that are receiving the the notifications. It also at the same time improve the e-mail security.
And it has an enforced verification.
So everything is safer and more secure in the system.
Next slide, please, Kelly. Thanks.
So the rest of these enhancements on this and this is where they've done a lot of work on the AI assisted skills for recruiting, which it's it's basically twofold.
I tried to put some screenshots on the the right here to to give you a little bit of an example of some of the features.
But the first one is that the matching for recruiter users the recruiters can now not only pull skills directly from the job description.
That will pop up.
You can also tag those skills as there's new categories as.
Primary, secondary, related skills and tag them on the on the.
Requisition itself to be used as a screening filter for when Canada's.
Apply for a job so you can easily pull down the candidates.
See how many of the skills that were required for the positions.
They match with and do your your candidate screening from there.
There the you can also go in.
It'll pull up a list key skills on the right, and you can identify. You can add skills if needed, remove skills and identify the ones that are more critical for the position so it allows you that flexibility, and it also rolls into.
The next piece which is on the on the career side itself.
It it will, you can set up the career site.
On the the job layout profile, which is the job description to have this where it says key skills to the right here.
Word cloud that populates when you open up the job description itself to to tell the candidate searching for the.
For a position, what skills are critical for this position and then?
Even an advancement to that is below that.
It allows you the candidate the ability, once it's enabled, to upload their resume.
There's a pop up that allows you to.
For the the privacy statement to be accepted, they can upload the resume and it'll match against the key skills in the in the in the career site and give you a list of jobs that you match up with closely to take a look at and decide whether you.
Want to apply for them?
This, I think is one of the more interesting features that.
It also has the ability for once the person applies on the other end, goes back to the.
The recruiter and the users.
The HR users that it shows the candidates through the resume match where they match on the on the position.
So when you are looking at them.
Think you can take the skills?
And evaluate and download all the candidates together and match them against the the preferred skills for the job so.
These are both related to the AI assistant. There is some of the features in the AI assisted.
Are there is another license that's that is needed to to activate all this?
In the in recruiting for for the career site and for the recruiting management side. But I think this is a A.
An advancement for sure in the recruiting in the recruiting world.
Next, Sally please.
The last one that I wanted to highlight here, which I think is a biggie, again been asked for for a long time.
Story reports are now available for recruiting, reporting, and it allows you to to take all of the audit fields within recruiting and create reports against them.
They're all available now.
And the story report, which wasn't available in the past.
So any compliance reporting that is needed.
Based on any of these, one of them that I like.
The job requisition approval date it. It gives you a full line of sight.
When the job was created, who approved them?
The dates that they were approved.
Again, candidate applicants and candidate and applicant skills can be pulled out of the system based on any kind of audit.
So much more robust reporting capabilities now with the new release.
This.
Doesn't have to do with the the.
The new enhanced redesigned Workbench.
This is true for the legacy. Also, if you're still on the legacy, but.
That's it for me.
I will pass it over to Luky for onboarding.

 **Luky Lee** 30:41
Thank you, Gary. Hi everyone.
I'm luky Lee.
I'm the onboarding lead here, aspire HR.
And today I'll be taking you through some of the key enhancements and features from this release for onboarding to get us kicked off.
I want to start off with enhancements for your onboarding dashboard.
You now have three new filters that you can leverage, and that's location, department and division. And on top of that you the existing.
Hire type of filter has been expanded.
You have now new other options prior to this release.
You can only really start filter by whether they're external, internal.
Now with this release you have the ability to actually one of my favorite it's now to be able to filter by rehires.
Felt like that was a pretty big gap and now now you do have these new options. And aside from rehires, you have concurrent employment and global assignment. If that's something that you have turned on and you're currently using it. Next is compliance forms.
We have a new country added to the compliance bundle and that's India.
And you can see we had got several new forms for us and one for Canada for sake of time, I won't go through each one of them, but they're listed out here for you. So you can please review and see if these are some of the ones that.
You've been waiting for.
Next is. This is seen like a small enhancement, but extremely useful and functional. I've been waiting for this one for a while and this is the ability to actually search for your new hire upon initiation of onboarding in your global header.
Using the people search.
As many of you already know, this was not possible prior to this release.
You either have to wait till you complete manage pending hires and they reach their hire date, become an employee to be able to use that people search at the global header.
And so there was a long way to get to your onboardee, especially the future dated hires and but now you can use the search.
Next is now. Onboarding is going to support concurrent employment.
This is going to be very similar to the to the global assignment process, just some of the things that I listed here out here is that you obviously have to initiate it from employee Central and the start date is just make sure it's set in the future to.
Trigger that process.
Next slide please.
And here I want to cover some of the enhancements to process variant manager.
I'm really excited about this one.
Now you can.
You can actually split your new hire task block into two, so you got primary and secondary. This is going to give you a lot more control and let you control the timing and flexibility of when you want to trigger some of these tasks.
This is extremely good for if you're currently leveraging custom tasks so you can mix and match and put different tasks in in each of the.
Each of the blocks right now and other than that you can also link to a document flow.
Again, this is another way to expand our custom task functionality. Prior to this release.
You really just collect that data and you can really do anything with it now that you can attach it to a document flow, you can actually get that data, get it to a form, and collect signature if that's something.
That's gonna be useful to your process.
Next is on the process variant.
Oh, sorry. Sorry, Kelly.
Next on the on the process, last one on the process variant manager is that you actually can see your offboarding process flow prior to this release. It was just onboarding and if you have crossboarding, you have custom process variance, you can see that, but you you weren't you.
Weren't able to see the offboarding process and now you can.
So this is great because now it consistent with onboarding and you can actually customize.
Your offboarding process for it as well.
Thanks. Please, Kelly.
Thank you.
Here in this slide, I'm covering the key features for your new hire onboarding journey.
And so basically this means your new hires onboarding checklist.
Two big things I want to call out here is your new hire now has the ability to to view.
Their their submitted data when they complete their personal data collection step.
Prior to this release, once they complete that step, that's it.
You they don't get to.
They get a nice message saying that they've completed the the step and they're not able to actually go back and view what they actually provided. And so here at the top you can see I provided a sample screenshot.
So this is how it's gonna display. So you can see it's very, very easy like the way it's laid out. It's based on your different HIS element or portlets.
In this this is great.
I I I think this is really cool that you can now as a new hire you hire, you can go back and view the data that you you you provided during your.
Onboarding the next one.
This is huge is you can now as a new hire. You can actually go and look at your past onboarding checklist and that means you can see the data. You can also see the documents that you signed through your onboarding process as an employee.
Now that you've become an employee, you just have to go to your employee profile and you're going to see. Sorry, I have a screen. This second screen shot.
Sorry it's a little blurry, but you can go to actions and obviously you have to give them permission to do that and they cannot pull.
Their onboarding checklist.
One thing to note is you do need to have the latest people profile enabled.
I know some of them.
Some of you may not have that on.
So now it's a great time to turn that feature on, and so you can leverage all these new new functionalities.
Next slide please.
Please.
Next topic is here is around crossboarding or internal hire process.
You. I know this is one that is highly requested from customers and it's to be able to trigger workflow.
It is not supported.
You can leverage your existing ECM s s workflow that you've already built on top of that, you can actually create a new workflow that will be triggering from when you initiate onboarding from recruiting.
So this is this is another very.
Useful feature I think.
I really like this one and so you can see this screenshot is actually taken from recruiting.
So if you build that workflow.
That would trigger from when you initiate onboarding.
From recruiting, you can actually see the status from the recruiting module.
And here's just a sample screenshot from that.
A couple more things on the on the on crossboarding is that now it supports cross portlet business rules.
It also now supports any of your existing position update rules. Two of the ones that I can think of is your positions to job Info sync rule prior to this release, you actually have to make a copy of that rule and make it trigger available for onboarding only.
Now you don't have to do that anymore.
It now supports that.
So if you already have that those rules in place, it will just. It will just read those.
And the last one here on the crossboarding, I want to highlight is, is this new rule scenario?
That you can now leverage instead of using the trans.
The transfer event rule you can now use this new one that it's also specifically released for crossboarding to trigger.
The your crossboarding process, it's no longer restricted to just event reasons.
You can now expand that using this new rule scenario.
Next slide please.
Here, last but not least is, as you heard from a lot of different modules is now SuccessFactors is not ruling out AI and the support of SAP Joule. Many of you must already have must have already heard this for onboarding.
You now have the AI assistance writing feature, and this applies to your walk of message and onboarding. Your fellow message is offboarding your buddy messages and also if you have.
Goals management integrated you have you have the ability to use this AI assisted writing feature for your 306090 day goal content.
One of the things that's really cool that I, I I was really excited when I saw it was that it actually can translate into different languages.
So other than the translation, you can actually change your tone.
Make it shorter.
Make it longer.
Change your your your message into a bullet list.
So very cool features here.
To so definitely I encourage everybody to turning that on and give that a try and and make sure you provide any if you have any feedback, make sure you provide that to SuccessFactors. A SuccessFactors continues to.
Expand and enhance the onboarding module.
That's all I have for onboarding and so now I'm going to hand it over to Steve for compensation. Thank you.

 **Steve Heyer** 40:03
Alright, thank you luky.
Alright, I'm Steve Heyer, principal consultant for compensation and variable pay here at Aspire HR.
And there were about 22 enhancements for the compensation product in this release. I just picked what I thought were a good top five to start with and one of the ones that I think is really cool is the standard statements are now portable across instances. So what?
You do.
Instead of in the past where you would have to rebuild.
From your preview instance and just copy that by hand in production.
Now you can just export and import and you're all done.
So no mistakes and everything works just the way it should. The next one up here is the executive review permissions by route map step and what that does is it gives you a an extra level of granular control over your permissions.
So you can set somebody to read only until they get the worksheet in their inbox and then.
Executive review can be.
Editable at that step.
And any step after that.
So it's a really nice feature to have that extra granularity.
Next up is the approver of reward and recognition can change the amount. So in the in the past all you could do was either approve or reject.
Now there's an edit button so you can change the amount without having to reject and resubmit.
A next step is the export from executive review, based on the column selected. So for planners that like to have a a smaller, more compact list.
File to work from when they're doing their planning.
This is the way they can do that.
Next on the list, refresh employee history.
This is for variable pay and this allows you to do some work in employee central and only pick up that one or two employees that change rather than having to reprocess the entire batch.
So that's a nice handy enhancement as well. A couple other miscellaneous goodies here. The ability to open by default on the instructions or by default on the budget panel depending on your process, you might want to do that to enhance change management or.
If you really want some constraints on your budget, you want that the first thing.
That's a good way to do it.
We can also localize now in statements by your own language. So if English is not your native language you prefer to to do that statement work in Spanish. For example, you can do that now and then in the my forms page a few enhancements. There are some for.
Count some permission changes some new filters.
Next slide, Kelly.
And just some screenshots there, just to give you a visual on what those enhancements are.
Again, I'll just go through that clockwise the export two XML is now the standard statements are now portable.
The filter options then the columns list for export. Then you'll also see lower left the new grid for planning permissions with executive review notice on the bottom row.
We've got some read only and some edit steps and last is the the.
The interface now for importing.
The employee history.
So that covers the enhancements for compensation. So Next up is Jessica with performance and goals.

 **Jessica Dimaano** 43:22
Thank you, Steve. Hi everyone.
My name is and I'm the functional testing lead here at aspire, so I'll be going over the enhancements for performance and goals.
So the top two that we'll be going over is delegation in performance forms and AI assisted features in 360 reviews.
So this is going to cover summary comments and feedback, so it's also good to know that the latest.
Goals push is going to be late March 2025.
O please make plans to update the new version as soon as possible.
O going to the next slide, we have delegation in performance forms, so this is the biggest update within performance. So previously if a manager was unable to complete the performance form due to them going on vacation or if they are on leave, you would either have to wait.
For the manager to come back or use the proxy feature and get another.
Manager to complete that with this new enhancement.
This allows managers to delegate.
The form to other peers or managers however you want to set that U. It is managed through role based permissions and you can configure it to ensure that the manager can only delegate to peers and or managers above them in the hierarchy.
In order to delegate to others, you would go into your settings just like the screenshot we see here.
And then at the bottom you will see delegation. From there you would be able to select the specific performance form.
And the delic get will only be able to review that information that they're authorized to see.
Move into the next slide. We have AI assess assisted features in 360 reviews so you can use generative AI to summarize complex feedback.
Generate comments based on ratings provided and improve feedback by considering the ratings provided as well.
So the summarize complex feedback feature.
Enables you to get actionable insights in seconds.
Helps employees with professional growth and personalized content to individual users based on feedback and ratings. So as you can see on the screen shot to the right, you'd see detailed 360 report.
So you can see the graphical summary gap analysis and then hidden strength and blind spot as well.
With generative comments based on the ratings provided, the goal is to create the comments from scratch.
Based on the ratings, so as you can see with the screenshot below here you can select on the actions and then generate comments and then based on the ratings you had provided it will give you some options to choose from.
And the goal with providing feedback is to refine the reviewers initial feedback.
So Gen. AI can provide concise and professional feedback based on your initial feedbacks inputed, and then the ratings provided.
So to summarize, the top enhancements with performance and goals is delegation on performance forms and all of the AI assisted features within 360 reviews, we will now move to succession and development with Diane.

 **Diane Caruso** 46:48
Everyone, this is I'm Diane Caruso and I'm the senior practice lead for recruiting talent and change management.
So it's great to be on the call with you.
I'm actually happy to share this with you.
This is about the continuing ways that SuccessFactors is expanding the whole talent development experience.
There's a new view for the talent development area.
And part of this is based on if you've turned on the talent intelligence hub, this is an expanded view of what's what's happening there.
It gives you an easy way for you to kind of find your career path for your employees to find their career path and navigate their career with guidance. You need to. Also, it's it's important to have the growth portfolio built as well because you're going to be pull.
In data from that growth portfolio.
But it makes it easier for you to see it and figure out how to use it as you're targeting your next career path that you want to follow.
You can leverage AI to get a better understanding of the aspire roles.
Get some action oriented information and development guidance and it really allows the people to tailor the career paths and make those and have that be a skill based career role recommendation.
I think we're going to see a lot more enhancements in this area in the upcoming releases as well.
Can you go to the next slide?
This is one other feature that we're adding to from an AI perspective is the ability to get career insights.
So if you're looking at a certain role that you want to target.
It actually gives you more information about what you need to develop in yourself in order to prepare for that role.
Gives you better understanding of that role and I know it's a little blurry here, but a better understanding of the role and this way they when they're setting new targets on a particular role, they want to work with, you're doing it with confidence because they have a lot.
Of information about that particular role, and then finally it gives you development guidance on what you need to do. So based on where you are today, it'll give you guidance.
You need to do moving forward.
If you could go to the next slide.
I also found that there were a number of other kind of smaller enhancements that I think will really make a difference in when you're doing succession planning.
So the first one here has to do with when you have talent pools associated with different positions, you actually can. You don't have to go from the talent pool over to the card.
There's a lot of bouncing back and forth now. The succession planners can go right to the talent pool section on the position card.
That's in a succession org chart or position tile, and make nominations from there.
So they and they can add successors from there as well.
So it really makes it easy.
And it's a kind of efficient for you?
The next one is, I think one that I have had clients have been asking for this for many years and then in the career worksheet, the way it was established before as an employee.
Only an employee could launch their will. Ready this form for a particular target role.
But I had a number of organizations that said I know they have a conversation with their manager and the manager wants to initiate the form. Well, now you're able to do that.
There's a permission you can put into the career worksheet that gives access to more roles that are associated with the employee, like the manager, the HR role, and they're able to launch those role readiness forms for employees target role and then one organization that had a real career.
Center and they wanted to be able to do that.
So now they will.
From a mentoring perspective, for once the mentoring programs were often started.
You couldn't make a lot of changes.
With them now you can remove mentors and mentees from in progress, open enrollment and unsupervised programs.
Making it really easy from an admin perspective. There are also some other I didn't list them here, but there are some other permissions that admins can get in order to be able to manage different parts of the mentoring programs.
Another interesting piece I think is the is the integrate the Ms. teams integration when you have that set up you can use it.
In recruiting you use it in many different places, but there are some new cards for easier notifications in the succession and development space.
For talent pool nominees, when those nominees are made, you can have a card that allow you to either review and approve pending nominations to a tenant pool so you don't have to go and click on the to go find those you know, click a lot of different click.
You had to go to before.
Go to the menu, then go to the tab.
Now you'll be able to do it right from the card, and then there's some other improvements for mentoring.
So when there's a request to either approve or decline mentoring requests that are sent by mentees, you can also do that with the Ms. teams integration.
We've turned this Ms. teams integration on for a couple of clients and they're really fine, new and creative ways to use it.
So we're happy about that enhancement.
So I think I'll pass it over to Troy to talk about learning. Thank you.

 **Troy Duncan** 51:49
Thanks, Diane.
Hello everyone.
My name is Troy Duncan.
I am a learning consultant here with Aspire HR.
I just want to talk about a few of the many updates to the LMS from six factors.
1st we want to go over is the new manager view, so you know there's a new view for managers that kind of matches the look and feel of.
The new learning experience you still have the same functionality that you did with the old manager view and the old manager experience.
So you're still able to look at your direct reports.
See what's assigned to them. You're still able to perform a different bulk actions and run reports just like normal.
But they've added a new feature, which is a remind or send reminder feature. This allows you as a manager to just kind of nudge your direct report if they've got some training that's overdue.
So it sends a notification in them letting them know that they need to complete their training.
And we'll to the next one please.
Along with more enhancements to the new learning experience, they've added the ability to approve request straight from the straight from the homepage.
So now you'll if you're an approver, you'll see a tile.
With the ability to either approve or reject a request, there's also a new delegate experience.
So now once, once someone has been indicated as being a delegator for someone a delegate for someone.
Now they're able to.
Switch to that delegate role.
By just toggling to that role from the from the drop down menu in the upper right corner of the screen. Once they're in that role then then they can see and perform different actions as a as a delegator. As a delegate, I should say.
And that's still controlled by the role based permissions.
So once there in the role, they can see that they're in as a delegate.
Because there's like a a little ribbon that displays at the top of the screen letting you know that you're in as a delegate, and you can easily switch back to your normal learning view. Next slide, please.
We now have the ability to create custom pages from the new learning experience.
So now you can if you want to change kind of the way that your users experience the LMS, you can create a custom page along with the banners and cards that are now available in the new learning experience. Next page please.
So before with the new learning experience, we could only search for learning with a keyword search.
But now, since this update, we're able to search based on categories.
So if you're using categories for your courses, your users can now search for courses based on those categories and the next slide please.
And just like we saw with the other modules, there have been some AI enhancements to the learning module as well.
So with AI you can use it to create titles and descriptions for your courses. Once you've created your your title, you can adjust it by changing the tone. You can, you know, make it longer or shorter, and you can even add.
A creative bullet point list, but you know it's, you know, just like, you know.
Like I said, we've seen with the other modules with AI.
Now we're able to do the same thing some of the same things in the learning module. Next slide, please.
And this last one isn't really an enhancement.
It's actually the end of an error.
So with this next enhancement, no longer will you be able to sign in to the LMS directly as a user.
That's going away.
So as of November 15th, you will no longer be able to.
To use the native login feature as a user.
Now if you want to now the only way to access learning as a user is to talk into SuccessFactors 1st and then to the learning module and that is.
It for the updates I wanted to highlight and I'm gonna kick it back to you, Kelly.

 **Kelly Sotelo** 56:31
Thank you so much, Troy.
That was a lot of great information and.
As you I already mentioned before, we will definitely be going through.
Entering any of the questions that we don't get to today, I think we have a little bit of time.
I'm going to try and get through a couple of questions before we have to wrap up with our panellists here.
First one is asking for compensation slash BP if an employee moves under a new manager, will they automatically move on forms or will that still be a manual delete add process Steve.
Oh, you're on mute, Steve.

 **Steve Heyer** 57:10
And click both buttons there.
Yeah. So the ability to move is also available under update all worksheets which can be run manually on demand or scheduled to run daily overnight or any other frequency.
So hopefully that answers that question.

 **Kelly Sotelo** 57:24
Perfect. Yes.
Next question for the job profile, will competencies still be available or only key skills now?

 **Diane Caruso** 57:34
I know they're they're moving towards combining competencies and skills, but I don't think that that's fully been completed.
So you for the short term, you'll still be able to use competencies.

 **Kelly Sotelo** 57:44
Perfect. Let's see a couple of these got answered in the chat, but I will go ahead and read some of them out loud and just in Case No one had the chance to take a look at that, but the payroll tab is no longer visible on the latest.
People profile. Where would employees go to view their W2 or take state tax forms etc.

 **Hugh White** 58:05
So. So just as with the current profile, there's gonna be where you can configure, call it custom categories.

 **Kelly Sotelo** 58:05
Hugh.

 **Hugh White** 58:12
So that would be a category that we would just create as far as regards to payroll and just as we do today with it, excuse me, include the links in that as far as your W twos or tax forms, things like that and payroll and in your pay.
Stuff.

 **Kelly Sotelo** 58:28
Perfect for doc Jen.
How does the new E CIG integration impact current general dot Gen. forms that do not require E cig, if any at all?
Can Doc Jen still be used to generate general forms without having a DocuSign license?

 **Hugh White** 58:44
We definitely, definitely the the only issue is is you would not be wouldn't have the ability for signatures, but would work just the way it does today.

 **Kelly Sotelo** 58:53
Erfect last question, we'll get to for today for EC profile that can the left navigation sections be opened in separate windows. Meaning if I want to do a view comp info job info side by side.

 **Hugh White** 59:07
I've not tried it.
I don't believe it will, but but that's something we'll look at.
I mean, there's always the ability too to duplicate the sessions and just toggle between the two of them as well.
But, but that was a good question. We'll follow up.

 **Kelly Sotelo** 59:22
We are at the top of the hour, so I'm gonna wrap things up and say thank you to everyone. If you have any further questions, please feel free to reach out to us at contact us at aspireh-r.com or any of your SAP consultants that you.
See here on our panel and we will definitely be sending out an on demand link for this presentation as apdf as well as the video and transcript and so be on the lookout for that.
We'll also be sending out a quick and short survey to let let us know how we did here today and if there's any other modules or anything you'd like to hear about in the future.
As this will be a continuing series. So thank you so much everyone.
Have a great day. Bye.

 **Hugh White** 59:59
Thank you.

 **Kelly Sotelo** stopped transcription