Demo Script:

Employee Central Overview

Employee Central (EC) Overview

for Internal SAP and Partner Use Only

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Objectives:

To enable/familiarize yourself with demoing EC.

To use as a starting point for planning your EC demo.

Tips and Tricks:

Simplicity is good. Consider simplifying your People Profile and manager self-service role so that everything that isn’t relevant for your story is removed.

Reflect your prospect’s HR delivery model. If they work with a shared service center and HR business partners, you may want to reflect it in your workflow definitions.

Preparation:

Workflows - Correct the transfer without pay change workflow to remove the manager role so they are not the approver for the transaction (This is fixed in the 2018 Summer Release).

o HOW:

Log in as sfadmin

Go to Admin Tools -> Manage Organization, Pay and Job Structures

In the first drop down, select Workflow

In the second drop down, select XFER

In the upper right corner, select Take Action -> Make correction

In the first step of the workflow, change the context field from Target to Source

Scroll down and Save

Make sure an absence approval for the manager you’re using is available.

o HOW:

Login as the employee you will be using

From the Home Page, select the Time Off tile

Select the time off bucket at the top that you want to use (e.g. vacation or your regional equivalent)

Select 1 or several days in the future for the leave request

Select Submit. You will be notified that the request has gone to the manager for approval.

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Delete the transfer of the employee you’re using if necessary.

o HOW:

Log in as the manager who created the original transfer request

Go to Manage Pending Requests via Action Search

Select the employee you are using and go to their Employee Profile

Locate the requested transfer under My Requests Waiting for Approval

Select the request

Scroll Down and click on Withdraw at the bottom. Select Yes when prompted.

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As an admin, verify the absence balances available for the employee and make sure they’re meaningful. Update as necessary.

o HOW:

Login as sfadmin

In Action Search, enter Administer Time

Enter the employee name who you are using

You will then be in the Time Workbench

Select Time Accounts

Note the time balances for the account you want to use

If there are not enough days:

Scroll down to Account Postings

Select Add Manual Adjustment

Enter in number of days

Select Save

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Before you start the mobile demo just go to the steps beforehand to make sure you have cached the main steps. Loading times can be long.

The user mentioned in the script reflects the German user in the NGD2 master (Version 1708). You can use the global and other local users in the same way. Make sure that the data and processes behave like expected.

Germany: Vanessa Wagner, Freda Hoch

France: Amelie Verrier, Coline Gage

UK: Sandra Gray, Liam Seaward

US: Mya Cooper, Gordon Elliston

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Introduction:

The digital revolution heavily impacts the way we work. Companies have to become increasingly global to remain successful or to find talent in other regions. In addition, there’s a shift in technology. Artificial Intelligence (AI) will help us deliver more automation and improve self-service concepts. For commerce, as well as for HR, people will start communicating with chat bots to get their questions answered on the spot because we’ve gotten used to technologies provided by LinkedIn, Facebook or Twitter to collaborate and communicate on the spot.

If the expectations of employees are different, business models are different, and technology is different, what kind of answer should technology provide us? At SuccessFactors, we think that technology should allow us to be in continuous dialogue with employees. To connect people to the purpose of your business. The usage should be continuous (mobile), engagement should be continuous, and it should allow people to be able to ask HR questions 24/7.

Technology also needs to be extensible because we know that every company works slightly different. While the majority of HR processes are the same, for those that aren’t, companies can have the competitive edge to plan their workforce smarter, train them better or connect them to the goals of the organization in a unique way.

Above all, solutions need to be intelligent. When all HR processes are harmonized on one platform, the amount of data you’re capturing is huge. Modern technology such as Machine Learning (ML) allows you to use this data to suggest better training for your employees or to hire better because technology allows you to remove unconscious bias from your processes.

This allows companies to react very quickly to market demands and pressures. This connects people to purpose.

What if you could have a fully digital consumer grade HR experience…one that provides you a single core platform based on best practices and built on a global HR

template? A platform where employees and managers can use their mobile devices to get real-time updates and allow speed to task. What if you can use this technology to connect your people to your purpose? With our Employee Central solution, you can implement a global HR template, and of course keeping in mind local variances, take advantage of the deep localization concept that SuccessFactors deliver. Our Local Product Managers ensure your application remains up-to-date so that you can ensure compliance with ever changing law and regulations. We deliver this deep localization in 90+ countries around the globe.

Today we’ll look at Employee Central from three perspectives: as an employee, a manager and a HR Administrator illustrating how you can connect your people to your purpose.

Let’s start as a manager and assume you’re sitting on a train on your way to work. The same way you use your email, Amazon, or other Apps, the SuccessFactors App has become a regular companion in your daily work. Let’s see how…

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Steps & Demo Tips

Message

Mobile

As with any other application, you receive notifications from the SuccessFactors (SF) App. This tells you the to-do’s and makes it easy for you to stay on top of your HR related tasks.

Vanessa Wagner (or

regional equivalent)

Open SF App

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The intuitive user experience has been developed in tight partnership between SAP and Apple to make use of the impact on a mobile experience at its best.

To-Do site

Also, research shows that adding mobile capabilities provides 49% of employees with a better user experience of HR functions (Sierra-Cedar 2014–2015 HR Systems Survey White Paper) and HR organizations who embrace mobile applications outperform organizations that don’t.

Here you find a pending leave request, performance reviews and a summary review of your performance calibration meeting that requires your attention.

The App also makes you aware of new functionality you should try out. This embedded

education allows your users to quickly become familiar with the possibilities.

Your first to-do is a leave request so letś see what an approval workflow looks like.

Open Leave

Request

Here’s all the information you need for the approval request. The type of leave, the requested amount, and information on other absences from your team members.

You can see the duration of the request as well as who else is on a leave from your team in that timeframe. In one place, you get all the relevant information on which to make your decision.

This is a great example of a user experience that is simple and engaging.

Approve the

request

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Time Off from the

Another common example on simplifying HR processes is the absence request.

More Menu

With the App, it’s easy to review all your own planned absences, entitlements and your team absence calendar to help you schedule your time off.

Select the +

You can attach documents or photos to your request. As an example, sending sick notes to your manager.

Select Annual

Leave (or your

A one-stop shop right at your fingertips!

regional

equivalent)

Select the start

and end dates

Select Send

Select the request

you just did

The App makes it not only easy to submit the request, but also helps you to block your calendar, delete appointments and automatically notify team members of your upcoming absence. These

Click on block

are intelligent, helpful services!

your calendar

Select ADD

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Cancel

Then click on

Done

Pay Statement

After you decided to take some time off, it’s also a good idea to check your financials before booking a hotel.

With one click, you see your pay statement. With everything in one place, navigation is easy and intuitive. Go for the five-star hotel!

Beside these services, you’re also able to maintain your personal information. Let’s take a look at how easy it is.

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Profile

The profile gives you full transparency about your job, compensation and personal

information…and the ability to update your personal information.

The experience is designed to be intuitive for all employees in order to provide a quick and easy way of updating their information from wherever they are. Along with the outstanding user experience, you have improved data quality which is critical for driving accurate reporting.

From your profile, you can also directly access the org chart. The org chart gives you full

OrgChart

transparency into the organization with its solid and dotted reporting lines. The search

functionality allows you to have a look at all your colleagues.

From the profile, you can also change anything from your address, bank information, dependent data, down to your development and geographic work preferences. No need for emails, tickets, or phone calls.

Now that we’ve seen the employee experience, let’s see what you as the manager can view about your team.

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Team

The team view gives you direct access to information and actions on your team members and

Scroll down to

employee details.

Team location

For example, from your discussions with Freda ( Note: or regional equivalent) you know she wants to move to Berlin. Let's look to see how the team is distributed.

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You already have team members in Berlin, so she wouldn’t be alone there.

Go to Freda (or

Here you have transparency on Freda’s (or regional equivalent) current activities. You can assign regional

regular activities and topics for your next meeting with our Continuous Performance process equivalent)

(CPM). All activities and comments are captured with the SF App.

You know Freda (or regional equivalent) wants to move to Berlin and she’s added and

documented the topic prior to your last meeting using our Continuous Performance

Management platform (CPM). This allows you to track topics, activities, achievements and collect

Note: Add Topic

feedback, which can turn an annual backward-looking performance process into a forward

move to Berlin

looking…a value-added process.

before demo

(CPM)

From here you can initiate the transfer as part of Manager self-service.

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Click the three

The change can be effective at any time (past, now or future). For movement to another location dots

and job, your future date the change (i.e. first of next month).

Change Job and

Compensation

Info

Enter as of date

(e.g. Choose first

of next month)

Freda (or regional equivalent) takes over a vacant position you have in your team in Berlin. She’s going to work as Health and Safety manager.

Enter “Berlin

Health” (or the

regional

equivalent for the

position)

Note: The

position should

appear. When

there, select it.

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That’s it! You don’t have to do anything else. All attributes of the position automatically populate

the job information which This dramatically reduces maintenance efforts and makes even a

Scroll down to

complex HR process a consumable service for managers to do themselves.

Location and Job

Title

Why? The solution recognizes you want to initiate a transfer without a Pay Change and

automatically applies the prescribed business process for you. In the past, you had to know the HR process and select the right form.

Your HR Business Partner (in our example Tessa Walker or regional equivalent) will pick it up, review it and finalize it eliminating the paperwork or cumbersome administration often

associated with an HR transaction.

Save

After the request is approved, the data will change as of the effective date you have entered.

This mobile experience allows you to automate your processes with self-service in order to meet Show Workflow

today's and future requirements for digitalization and bring a consumable service environment participant

to your workforce.

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Submit

To summarize…This mobile experience brings HR processes closer to your daily job. You saw how easy it is to maintain data as an employee as well as a manager. Making it simple to be in charge of your own data, you’ll increase the quality of it.

Now that you’ve seen how easy and intuitive the experience for managers and employees is, letś see how an HR Professional will work with SuccessFactors in order to improve HR services.

Steps & Demo Tips

Message

Login as

Here’s an example of the Home Page for a HR Professional. It gives you easy access to all Twalker (or

your to-dos and information is relevant for you, both as an employee/manager and as an

regional

HR Professional.

equivalent)

You could also share company news like upcoming HR events or policy changes, etc. It’s the perfect place to share information quickly and easily.

Show how to move

tiles and

personalize home

page

Click on “Approve

Let’s start with what you need to do right now. You see next to other requests the

Requests”

transfer Vanessa (or regional equivalent) just initiated. Let’s review the proposed changes.

Click on Filter

Here you see the requested change in detail and can open supporting information that

Click on “transfer

helps you in your decision making.

w/o pay change”

for Freda (or

The transaction is correct so you approve the request.

regional

equivalent)

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Additionally, all the approvals can be filtered. As an HR Professional getting multiple requests per day, this allows you to search for workflows and easily navigate or answer

questions.

Approve

As you’ve already seen in the mobile experience, the approval directly changes the data so no further activity is requested. That improves the service of HR…for employees,

managers and you!

Another important aspect of having all data in one common HR platform is the quality of advice to your business leaders. Today only 52% of all leaders have data and analytics at their fingertips (Bersin by Deloitte Global Human Capital Trends 2016 report). Having

visibility into your data at a moment’s notice is critical.

Back to the home

One of Tessa’s (or regional equivalent) tasks is to monitor Key Performance Indicators page

(KPIs) and conduct ad-hoc queries.

In this example, great progress has been made in reducing termination rates. This looks

Click Link

good but you still want to know more; so, you dig a bit deeper.

Termination rate

You see the yearly development and a measurement against performance. This, too, looks good as you seem not to lose too many high performers.

Drilling down further, you want to know the exact calculation of the termination rate. This

Click Question

is one of the 2000 metrics that are predefined with Workforce Analytics. A subset,

mark icon

including this one, comes with Employee Central.

\*( Note: WFA is not included with EC but you always want to show it during the demo.) Employee Central (EC) Overview

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With these capabilities on people analytics, you gain the deep, real time insights you need

Analyze By

to credibly influence decision making and improve business results. -- Data at your

Select All Ages

fingertips!

You’re also able to analyze the data against different dimensions in order to understand impacts and challenges. For example, with age distribution, you see that your highest

termination rates are from the ages 30-39. This seems critical as these experienced

employees are the biggest source for new leaders. Tessa (or regional equivalent) will

explore this later, but this may be related to your latest survey, which indicated issues with child care and flexible working options. Besides the analysis of termination, Tessa (or regional equivalent) also received a request about equal pay in the organization.

Click Home Page

You want to analyse if the company pays equitably without any gender bias. Normally

Investigate

such a question couldn´t be answered without days of work and manually collecting data

from different sources.

Start new

Now you’re able to analyse the data…based on various metrics, dimensions, trends and

investigation

forecasting. The visualization allows to clearly communicate the findings.

Use search field

After the analysis is completed, the can be shared by simply downloading the results.

to…

Select Average

comp-ratio metric

Select gender

dimension

Select job

function

dimension

To deliver such insights and increase the quality of the advice to business leaders, it’s important to have all data in one common HR platform. With Employee Central you have

all data and HR processes in one place. Letś now look at the underlying data and HR

Click Analyze

processes in more detail.

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Type org chart in

This is the org chart that shows you the current reporting lines that we have already seen the action search

in mobile. It’s the “daily” entry point for your managers and employees, alike, providing detail on all employment relationships – permanent employees, contingent works, global

assignments. All within one view.

Search for Ralph

Brunnert (or

regional

equivalent)

Besides the manager/employee relationship, the solution also allows you to combine all organizational information through position management.

Your position data flows seamlessly throughout the solution, driving data and

Click on next tab:

processes in areas such as recruiting, succession and headcount planning. In one quick

Position org chart

view, you’re presented with a snapshot of your current capacity plan -- empowering

Search for people:

you to make critical business decisions based on possible headcount gaps and total

Ralph Brunnert

workforce utilization.

(or regional

Whenever someone is hired or transferred into a position like Freda (or regional

equivalent)

equivalent), the attributes of the position will flow to those of the employee’s job,

ensuring excellent data quality and eliminating extra manual work.

Click on his

position and

position hierarchy

details

Finally, span of control is visible which is an important KPI when we talk about

organizations, and also indicates the efficiency of the organizational set up.

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You can look at your organization in the future and the past. If the as of date is

Click on Today to

changed (1st of the next month) the chart reflects the transfer of Freda (or regional

show that

equivalent).

visualization can

be changed

(choose the date

that was used for

the position and

location change

Now that we’ve seen how the manager/employee relationship and Position

previously)

Management allows you to manage the workforce efficiently, letś review what an

organizational unit relationship looks like.

Click company

This view shows the org units in relation to each other. This can be either on a legal entity structure

basis or as we see here on a functional view.

overview

This view represents the functional structure of the company. Legal structures, cost center hierarchies, etc. can be visualized in the same way.

Click Business

View

Furthermore, you can add a new department directly on this view which allows you to

redesign your organization to drive organizational efficiency.

Select Business

Unit

The flexibility in Employee Central allows you to design your organizational structure in an

Select Products

agile way. The possibilities combine a best practice structure with Business Unit, Division and Department, as well as configurable organizational elements based on your specific

Open a division to

needs. This provides easy access to all relevant information about your organizational set show

up and the allocated people and positions.

departments

Now that we’ve seen the underlying organizational set up to gain better insight into your

Go back to home

organization, let’s look more into the details of your employee data and HR processes.

page

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First, the employee profile where you can view an employee’s complete HR and talent

landscape.

Search for Freda

Core profile information can be split into different, configurable sections making all the (or regional

data available in one place.

equivalent) in

Depending on your permissions, the appropriate data like personal, employment, payroll action search and

and benefits information can be viewed and changed.

open the people

By combining core and talent data into one profile, managers, HR and employees

profile

themselves have a holistic view on all relevant data to make the right decisions.

This one stop shop concept allows for efficient and intuitive self-service, empowering and engaging your entire workforce.

In addition, one of our main advantages of Employee Central is the delivered localization.

We offer this for 89+ countries for personal information (address formats, IBAN, Social

Security, etc.); but, more importantly, for employment information. Every legal change

comes to you via the Upgrade Center. That’s critical for integration to payroll as well as for legal reporting, etc. This allows you to stay on track with no effort on your part.

Beside this unique offering of localization in the core HR solution, we also provide audit

Click on show

capabilities in alignment with the rules and regulations of General Data Protection

more in Personal

Regulation (GDPR).

Information

Click Clock Icon in

Here you have the full view of your employee’s job history in an easy to read format with job information

the changes on the left side and the details on the right, including date and originator of portal

the last change.

As the HR admin, you can easily update data here with all history available for audit

purposes.

Close the overlay

window

Additionally, retroactive adjustments will occur based on changes in the past and will trigger a payroll recalculation.

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Scroll to

Here you find the gross pay components of Freda (or regional equivalent) that are

compensation

contractually agreed upon (or based on a tariff, if applicable).

info

Additional graphs provide a quick snapshot of an employee’s compensation structure that provides key decision-making information for you/HR and the manager.

Click on a specific

Local payroll information can be maintained from the same screen, regardless of the SAP

regional example

Payroll solution you use.

for your country

( Note: Keep in mind that this is only valid for ECP or on-premise SAP HCM Payroll solutions (ex: Germany:

that are run by customers or partners like ADP, NGA.)

social insurance;

US: IRS Limits;

This is a great advantage for you/HR so data is visible and maintained from one place.

Australia:

Superannuation,

etc.)

Another advantage, especially when it comes to transactional processes, is the capability

Login: Twalker;

to also generate documents according to the processes.

Welcome1 (or

regional

equivalent)

Note: Keep in

mind you have to

log on every time

you try to open

this.

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Click Take action

Here’s where other processes are initiated and documents can be printed. These are

Show the action

guided activities for you as the HR person as well as managers using self -service.

which can be

taken

We’ve seen the employee data, how processes are initiated and how changes are

reviewed. Now let’s take a look at initiating a new hire into your HR solution.

Pending Hires in

SuccessFactors, being a full HR suite, makes it efficient and quick to hire a new employee Action Search

unlike the pain that is often experienced with siloed systems. Here you can simply verify the information collected during recruiting and onboarding with the option to add or

Click on

override as needed.

Recruiting>Select

Onboarding

During onboarding, your employee can complete all the necessary paperwork from which

Hire Ingrid

their verified information flows to their new hire record, eliminating duplicate entry and Schmid (or

ensuring data integrity.

regional

equivalent)

All HR processes provide an experience for your managers and employees which will

increase engagement and allows you as HR to optimize your service.

Go back to

homepage for the

overall summary

Today we saw how SuccessFactors Employee Central provides a fully digital consumer

grade HR experience. By using mobile at the beginning, we saw that our solution is

designed to be a full self-service solution which drives your automation and improves your

service as a HR Professional.

CLOSING

By combining all relevant data into one single source by using Employee Central, you as

HR can get insights and analytics to challenge people decisions with your business leaders.

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Our best practices and innovations build the base for your digital transformation and will allow you to put people to the purpose of your company.

Optional: The following steps are optional according to your prospect’s opportunity

Steps & Demo Tips

Message

LOCALIZATION

One of the main differentiators for us is localization. Aside of implementing the solution,

Home>

we provide all compliance and regulatory changes around the world and ongoing

Employee

maintenance support.

Localization Tile

Can you image how much effort it would be for you to take over this maintenance by not using a global platform?

At the moment, we provide localizations for 89+ countries around the world as you can

see on this world map.

Besides general localizations, like currencies and national idś, we also provide all fields

Overview Map

requested by regulatory or compliance requirements.

Our team of Localization Product Managers ensures that we are on track with legal

changes around the world and we deliver those changes four times a year.

Note: Take a

Letś review these localizations.

country that fits

to your prospect’s

landscape>Go to

Localizations>Sho

w fields

Along with offering a variety of fields, we provide localized reports that we offer within the report repository.

With this localization, you’re able to run your solution on a global scale.

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UPGRADE CENTER

The application is built on a very powerful platform which is updated four times a year.

Back to SF

This ensures you’re current and can take advantage of new innovations we deliver.

Search for

Utilizing these new innovations doesn’t require alignment with your IT, defining upgrade upgrade center

projects, or new hardware investments anymore.

You can use our Upgrade Center to simply switch on the new innovations and to roll it out to your business. It’s just that easy!

This is also where you’ll find detailed information about upcoming new functionality

occurring every three months. If there’s new functionality that will provide your

organization value, you can perform the upgrade directly from here.

Our upgrades are split into mandatory and optional upgrades. We also provide best

practices within the Upgrade Center, allowing you to take advantage of pre-built content

from SuccessFactors. This content is based on customer successes.

For example,… ( Note: insert an EC customer story!)

TIME

Within SuccessFactors, we offer Employee Central Time and Attendance Management.

Go to time

This is a native part of Employee Central, so there’s no additional subscription.

section in profile

Administer Time>

The time work bench is your central place from which to monitor and adjust/correct

Time Accounts

employee’s time information as needed.

One of our biggest strengths within Employee Central Time Management is our ability to offer time management in compliance with local laws and regulations. We offer a

platform with many components and logic, such as holiday calendars, accrual rules,

business rules, etc. which you can use to be compliant with collective labor agreements,

and local and federal laws.

If your customer’s main purpose for time administration is to correctly pay people, EC

Time is a great solution. It handles all your employee absences and provides a correct

time evaluation to correctly pay your employees.

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BENEFITS

Employee Central also comes with a native Benefits Management solution. The Global

Back to People

Benefits framework is an intelligently designed system that is scalable, flexible and

profile

ensures delivery and management of benefits for any organization in any country.

Go to Benefits

Section>

Take for example “allowances” which is basically a fixed amount of money that’s available Benefits overview

to an employee to pay for something. It may not cover the whole cost but nevertheless,

there’s money put aside to allow for this expense. For example, in the Philippines, there’s a “rice bag allowance” or in some countries in EMEA, there’s an “allowance” set aside to

pay for warm clothing.

Our Global Benefits solution is flexible enough to enable you to implement your benefit

types by country and effectively enable employees to enroll, file a claim and get

reimbursed.

( Note: When required to position US Benefits work with your EC Solution Advisor.) EXTENSION CENTER

Every company is unique. Using the Extension Center, you can configure forms, business

Search for

logic and approval processes that meet your company’s specific needs.

Extension Center

There is a dedicated script here.

Through the SAP Cloud Platform, you can take advantage of applications developed in our ecosystem. In our Application store, you can locate some great examples of those

extensions like the Alumni Network.

To summarize:

• The partnerships allow you to extend the capabilities of our solution as needed to

meet your business needs via productized integrations and partner developed apps.

• Our partners also support you and us with deep implementation expertise and

accelerators.

• We call this collective capability the ‘Power of SAP’.

CLOSING 2

Today we saw how SuccessFactors Employee Central provides a fully digital consumer

grade HR experience. By using mobile at the beginning, we saw that our solution is

designed to be a full self-service solution which drives your automation and improves your service as a HR Professional.

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By combining all relevant data into one single source by using Employee Central, you as

HR can get insights and analytics to challenge people decisions with your business leaders.

Our best practices and innovations build the base for your digital transformation.

Localization ensures a scalable solution runs on a global level. Additionally, our Extension capabilities and ecosystem provides you with ‘The Power of SAP’.

All this together enables you to connect your people to the purpose of your company.

Additional topics to consider adding to your EC demo (Often these items are shown and can complement your demo) --

HR or system admin demo topics:

o Mass Changes

o Role Based Permissions (RBP)

o Intelligent Services/Integration Center

o Admin Center – Workflow/Data Alerts

o Business Configuration, New Fields

Global Mobility

Org Modelling (Nakisha/Ingenui’s)

Document Management (Open Text)

Contingent Labour

APPENDIX:

This Scripts was designed to support data and configurations for instance 1708

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