

# Online Report Designer Validator

## Adhoc Data Source

A how to guide on installing and validating Online Report Designer Templates from Customer Community.



# Online Report Designer Templates

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**Customers are now able to download a number of pre designed online report designer (ORD) templates for a variety of SuccessFactors Modules.**

**These reports are able to be further customized by organizations to suit business requirements after being downloaded.**

**The ORD templates are available in the form of an encrypted xml file, which contains the report definition. Storing the templates in xml allows for quick and easy transportation of the report definition. It contains no data results and is a set of “instructions” for building the report in the target instance.**

***\*\*\* Note that the report transfer process will overwrite any existing report that has the same name as the transferred template. To prevent this, note the names of existing reports and rename any that has the same name as the report/s intending to be transferred***

# ORD Templates are found

The ORD templates can be found in the Customer Community > Reporting and Analytics > Reporting and Analytics Product Resources here:

<http://community.successfactors.com/t5/Reporting-and-Analytics-Product/bg-p/WorkforceAnalyticsProductResources>

\*Please note that at the time of publishing this document the templates are still to be uploaded

***For the particular ORD Templates to download the instance must have the required SuccessFactors Data Schema on their instance.***

***E.g. - Employee profile, Performance & Goals.***

The screenshot displays the SuccessFactors Community website interface. At the top, there is a navigation bar with the SuccessFactors logo (An SAP Company), the word 'COMMUNITY', and user options like 'Hart Trachelle', 'My Settings', 'Help', 'Corporate Site', 'Community', and 'LOGOUT'. Below this is a search bar and a 'Go To' dropdown menu. The main content area is titled 'SuccessFactors Community > Reporting and Analytics' and features a 'Welcome to the Reporting and Analytics Product Page' section. This section includes a bar chart icon and a paragraph explaining that Workforce Reporting and Analytics helps in making business decisions. Below the welcome message, there are two columns: 'Latest Posts' and 'Community'. The 'Latest Posts' column contains a table of recent posts, and the 'Community' column lists various discussion topics and their respective post counts.

Subject	Author	Posted
Status changed to: Scheduled for Release [R] Reporting and Analytics Ideas	Diana Kriucokas	01-08-2015 11:25 PM
Status changed to: Scheduled for Release [R] Reporting and Analytics Ideas	Diana Kriucokas	01-08-2015 07:48 PM
Intro to ORD training for non-customer community u... Reporting and Analytics Discussions	Kamil Mysiak	01-08-2015 02:22 AM
Re: Reporting out of Audit Trail Timestamp Dates Reporting and Analytics Quick Answers	TamekaPooserBaker	01-08-2015 01:11 AM
Multidataset Adhoc Query Reporting and Analytics Discussions	Ranjeet Nair	01-07-2015 08:27 PM

Title	Posts	New
Reporting and Analytics Discussions Collaborate with peers, partners and SuccessFactors	436	357
Reporting and Analytics Product Resources Find helpful assets, resources and informative blogs	122	85
Reporting and Analytics Ideas Provide product enhancement and development requests	834	725
Reporting and Analytics Quick Answers Monitored by Customer Support for simple how to questions	396	395

# New ORD Templates available on Customer Community

## Goals & Development

- Goal Ratings
- Goal Summary
- Overall Ratings Summary - 360 Reviews

## Performance

- Performance Overall Ratings

## Process Status & Documents

- Form Route Map Data
- Form Status Report
- Anonymous 360 Status

## Competencies

- Competency Ratings
- Competency Ratings

## Employee Profile

- Employee Profile Export
- Birthday List
- Employee Register
- Service Anniversaries
- Diversity Summary Report
- Login Report
- Proxy Report
- Security Audit Report

The image displays several SAP Analytics dashboards. The primary dashboard is titled 'Diversity Data' and features a table with the following columns: Employee, Manager, Location, Department, Location, Job Level, Job Code, and Job Title. The table lists various employees across different departments and locations, such as San Mateo (US\_SFO) and Mexico City (MX\_MEX).

Overlaid on the right side are two goal progress dashboards. The top one is titled 'Goals Progress Detail' and shows a table with columns for 'High Risk', 'None', 'Not Started', 'On Track', and 'Postponed'. Below this is a bar chart titled 'Overall Goal Progress' which shows progress bars for various categories. The legend indicates that red bars represent 'Completed', yellow bars represent 'Overdue', and blue bars represent 'Not Started'. The categories include Team Financial Measures, Team Customer Measures, Successful Customers, Innovation and Learning, Individual, Finance, Customer, Corporate Measures, Business Process, 90-Day Objectives, 60-Day Objectives, 30-Day Objectives, and 2012 Goals.



# Loading a Report Template

## Checklist – Before you begin

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- ❑ Ensure your account has the necessary permissions to access the **Report Transfer** function. This can be quickly confirmed by navigating to the **Admin** page in Analytics. If you can see **Report Transfer** option then you have the required permission. If you cannot see this option, please raise a case with Customer Support or have your SuccessFactors admin add the Report Transfer permission to your account.
- ❑ Ensure you have saved the report template package and/or the individual files from the Customer Community to your computer. This package will include individual report templates (for loading selected reports) and a single file that contains all report templates (for bulk loading all available report templates).
- ❑ *Note that the report transfer process will overwrite any existing report that has the same name as the transferred template. To prevent this, note the names of existing reports and rename any that has the same name as the report/s intending to be transferred.*

# Loading a Report Template

## Report Package templates and Single Report templates

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Templates can be in two forms:

- Report “packages” – these contain a set (i.e.: more than one report) of report templates
- Single reports – these contain a single report template.

Generally, the template name will identify the form of template. Report packages are typically named for the release version and contain “Report Package” in the file name. Single reports are typically named for the individual report contained in the template.

The Report Transfer process is the same, regardless of whether a single report or report package is being used. Report packages are useful when many templates need loading, single reports when only one template is required. Report packages can be used even if only a single template is required (discussed further in the following slides).

# Loading a Report Template

## Identifying Report Package templates and Single Report templates

The first template file in this list is a report packages, as identified by the release version they are suitable for (e.g.: 1505) and contain **Report Package** in the file name.

- 1505 ORD ReportPackage 2015-04-21 (19.41.56).xml
- 1505 Cost of Hire 2015-04-21 (02.10.56).xml
- 1505 Form Status Report 2015-04-21 (02.08.36).xml
- 1505 Birthday List 2015-04-21 (01.53.31).xml
- 1505 Service Anniversaries .xml
- 1505 Overall Performance Report 2015-04-20 (22.24.15).xml

The remaining template files in this example are single report templates. The report name is identified in the template file name (e.g.: 1505 Cost of Hire has only the Cost of Hire report to download



# Loading a Report Template

Navigate to the Report Transfer page in Analytics Admin

The screenshot shows the SAP SuccessFactors Analytics Admin interface. The top navigation bar includes the SuccessFactors logo, 'Analytics', and 'Admin User (admin)'. Below the navigation bar, there are tabs for 'Dashboards 2.0', 'Analytics', 'Reporting', 'Performance-Potential Matrix', 'How vs. What Matrix', 'Publishing', and 'Help & Tutorials'. The main content area is titled 'Workforce Planning and Analytics Administration'. On the left, there is a 'Home' dropdown menu with options for 'Analytics', 'Reporting', and 'Planning'. Below this, there is a list of languages. On the right, there is a list of administration options. A red arrow points from the 'Admin' link in the top right navigation bar to the 'Report Transfer' link in the left-hand menu. The 'Report Transfer' link is highlighted with a red box.

**Home**

Languages

- Deutsch (Deutschland)
- ελληνικός (Ελλάδα)
- English (United Kingdom)
- English (United States)\*
- Español (España)
- Español (México)
- Français (Canadien)
- Français (France)
- Italiano (Italia)
- 日本語 (日本)
- 한국어(한국)
- Nederlands (Nederland)
- Polskie (Polska)
- Português (Brasil)
- Română (România)

User Maintenance

Bulk User Load

Roles Maintenance

Target Setting

Site Statistics

Measure Overrides

Dimension Overrides

Organize Documents

Upload New Documents

Data Capture

FTP Configuration

Question Maintenance

**Report Transfer**

Audit Data Export

Instance Validation

Role & User Validation

*Note: your language and administration options may differ from those shown here.*

# Loading a Report Template

Select the xml package to be uploaded

Home Return Report Transfer

Download Upload

"To" Organization EESALES

File Location Browse...

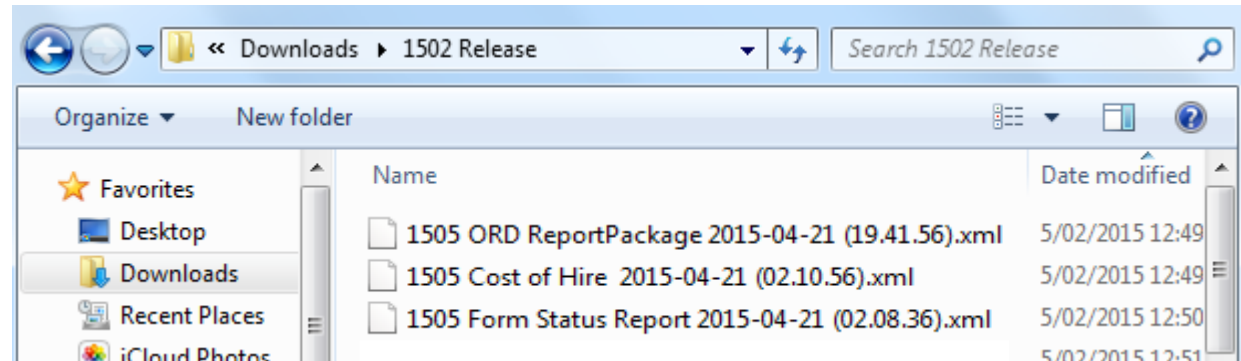
Load Package

Click **Upload**.

The **To Organization** field will be automatically populated with your instance name.

Click **Browse** and navigate to where the report template is stored / saved.

Select it and click **Open**.



# Loading a Report Template

Load the package

The screenshot shows the 'Report Transfer' interface. At the top, there are navigation buttons for 'Home' and 'Return'. Below that are 'Download' and 'Upload' buttons. The 'To' Organization is set to 'EESALES'. The File Location is 'C:\Users\Documents\1411 ReportPackage - Global.xml' with a 'Browse...' button. The 'Load Package' button is highlighted with a red rectangular box.

Click **Load Package**.

Once loaded, the reports available in the template file will appear in a list in the **Available Reports** box.

This screenshot shows the 'Report Transfer' interface after the package has been loaded. The 'To' Organization is now 'DemoSiteInt'. Below the organization dropdown is a instruction: 'Drag reports or folders from the 'Available Reports' tree and drop them on the 'Selected Reports' tree. Select reports or folders in the 'Selected Reports' tree and hit the 'Remove' button to remove them.' There are two tree views: 'Available Reports' and 'Selected Reports'. The 'Available Reports' tree shows a folder '[FOLDERS]' containing a sub-folder 'Workspaces'. The 'Selected Reports' tree is currently empty. At the bottom of the 'Selected Reports' area is a 'Remove' button. At the bottom of the interface are two buttons: 'Upload Selections' (green) and 'Unload Package' (red).

Note: The load may take from a few seconds to a few minutes depending on the size of the file, and the speed of your connection.

# Loading a Report Template

If selecting all available report templates

If loading all report templates available in the file, drag the top folder (called Workspaces in this example) from the **Available Reports** box, to the **Selected Reports** box and click **Upload Selections**.

The screenshot displays a web interface for loading report templates. At the top left, there are two blue buttons: "Download" and "Upload". Below them, a dropdown menu labeled "'To' Organization" is set to "DemoSiteInt". A central instruction reads: "Drag reports or folders from the 'Available Reports' tree and drop them on the 'Selected Reports' tree. Select reports or folders in the 'Selected Reports' tree and hit the 'Remove' button to remove them." The interface is divided into two main panels: "Available Reports" on the left and "Selected Reports" on the right. The "Available Reports" panel contains a tree structure with a root folder "[FOLDERS]" containing "Workspaces", "SuccessFactors Analytic Scorecards", and "Workforce Availability". The "Selected Reports" panel is currently empty, showing only "[FOLDERS]". A red arrow points from the "Workspaces" folder in the "Available Reports" panel to the "Selected Reports" panel. At the bottom of the "Selected Reports" panel is a blue "Remove" button. At the bottom left of the interface is a green "Upload Selections" button, which is highlighted with a red rectangular border. At the bottom right is a red "Unload Package" button.

# Loading a Report Template

If selecting individual report templates

If loading only selected report templates available in the file, individually drag reports from the **Available Reports** box, to the **Selected Reports** box and click **Upload Selections**.

**Download** **Upload**

"To" Organization: DemoSiteInt

*Drag reports or folders from the 'Available Reports' tree and drop them on the 'Selected Reports' tree. Select reports or folders in the 'Selected Reports' tree and hit the 'Remove' button to remove them.*

Available Reports

- [FOLDERS]
- Workspaces
  - SuccessFactors Analytic Scorecards
    - Workforce Mobility
    - Learning
    - Environment
    - Organizational Effectiveness
    - Workforce Availability
    - Workforce Composition
    - Succession Development
    - Performance & Goals

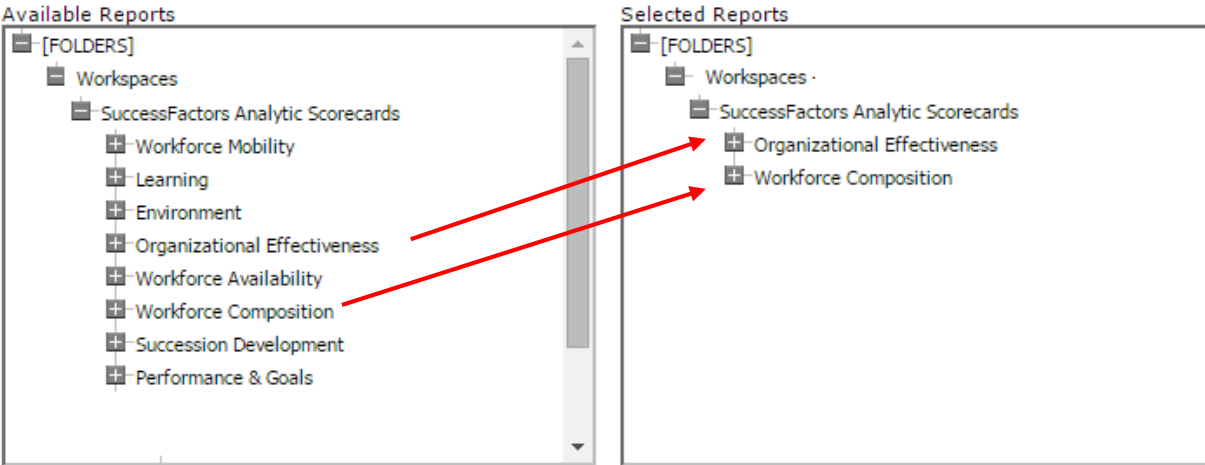
Selected Reports

- [FOLDERS]
- Workspaces
  - SuccessFactors Analytic Scorecards
    - Organizational Effectiveness
    - Workforce Composition

Remove

**Upload Selections**

**Unload Package**

The screenshot shows a user interface for loading report templates. At the top, there are 'Download' and 'Upload' buttons. Below them is a dropdown menu for the 'To' Organization, currently set to 'DemoSiteInt'. A central instruction reads: 'Drag reports or folders from the 'Available Reports' tree and drop them on the 'Selected Reports' tree. Select reports or folders in the 'Selected Reports' tree and hit the 'Remove' button to remove them.' The 'Available Reports' tree on the left contains a folder 'Workspaces' with a sub-folder 'SuccessFactors Analytic Scorecards' containing several report categories: Workforce Mobility, Learning, Environment, Organizational Effectiveness, Workforce Availability, Workforce Composition, Succession Development, and Performance & Goals. The 'Selected Reports' tree on the right shows the same 'Workspaces' folder, but only 'Organizational Effectiveness' and 'Workforce Composition' are selected. Two red arrows point from these two items in the 'Available Reports' tree to their counterparts in the 'Selected Reports' tree. At the bottom, there are three buttons: 'Upload Selections' (highlighted with a red box), 'Remove', and 'Unload Package'.

# Loading a Report Template

## Load status

A status screen will display showing the success/failure of the report transfer. **If there were existing reports with the same name, they will now be overwritten with the new template.** Please raise a case with Support should any reports fail to upload.

"To" Organization: DemoSiteInt

Drag reports or folders from the 'Available Reports' tree and drop them on the 'Selected Reports' tree. Select reports or folders in the 'Selected Reports' tree and hit the 'Remove' button to remove them.

Available Reports

- [FOLDERS]
- Workspaces
  - SuccessFactors Analytic Scorecards
    - Workforce Mobility
    - Learning
    - Environment
    - Organizational Effectiveness
    - Workforce Availability
    - Workforce Composition
    - Succession Development
    - Performance & Goals

Selected Reports

- [FOLDERS]
- Workspaces
  - SuccessFactors Analytic Scorecards
    - Workforce Mobility
    - Workforce Availability
    - Succession Development
    - Performance & Goals

**Remove**

**Upload Selections**

**Unload Package**

Upload Complete (4 upload(s))

Operation	Status	Organization	Report	Report Id	Message
Upload	Complete	DemoSiteInt	<b>Workforce Mobility</b>	273f82e7-9dd1-483e-8965-5ec36d9bafa2	
Upload	Complete	DemoSiteInt	<b>Workforce Availability</b>	77334594-f785-41b4-90b6-8fdc128cfcaa	
Upload	Complete	DemoSiteInt	<b>Succession Development</b>	9eaaa239-e6ee-4d9a-8669-011bef445a68	
Upload	Complete	DemoSiteInt	<b>Performance &amp; Goals</b>	9ee6057f-438a-470b-84af-7d23b090b466	



# Validation - Report Transfer (Upload) & in Report Designer

During the report transfer function validation for the ORD templates will occur automatically

Home | Return | Report Transfer

Export | Import | Transfer | Download | **Upload** | Download Query | Upload Query

To: Organization AnalyticsIDC1

Drag reports or folders from the 'Available Reports' tree and drop them on the 'Selected Reports' tree. Select reports or folders in the 'Selected Reports' tree and hit the 'Remove' button to remove them.

Available Reports

- [FOLDERS]
  - EK Sample Reports
    - SuccessFactors ORD Templates
      - Compensation Templates - Under PM Review
        - Budget Rollup
        - Discrimination Testing
        - Employee Summary
        - Pay for Performance
        - Validation /Exception

Selected Reports

- [FOLDERS]
  - EK Sample Reports
    - SuccessFactors ORD Templates
      - Compensation Templates - Under PM Review
        - Employee Summary

Remove

Upload Selections

Upload Complete (1 upload(s))

Operation	Status	Organization	Report	Report Id	Message
Upload	Complete	AnalyticsIDC1	Employee Summary	4fa455b3-4bae-46f4-8064-45c99bd76a3	Report Uploaded With Exception

Unload Package

Shows that the report has been uploaded but with exceptions (errors) Users are unable to edit these errors

SuccessFactors ORD Templates

- Compensation Templates - Under PM Review
  - Budget Rollup
  - Discrimination Testing
  - Employee Summary

Page List (click on page name to open for editing)

1	Employee Summary	SuccessFactors	✘	Remove
2	My Team	SuccessFactors	✘	Remove

Validate

Validation of an invalid report will produce the uploaded with exception message. Users are not able to edit these errors here

Red Cross indicates that the report has been loaded but with errors





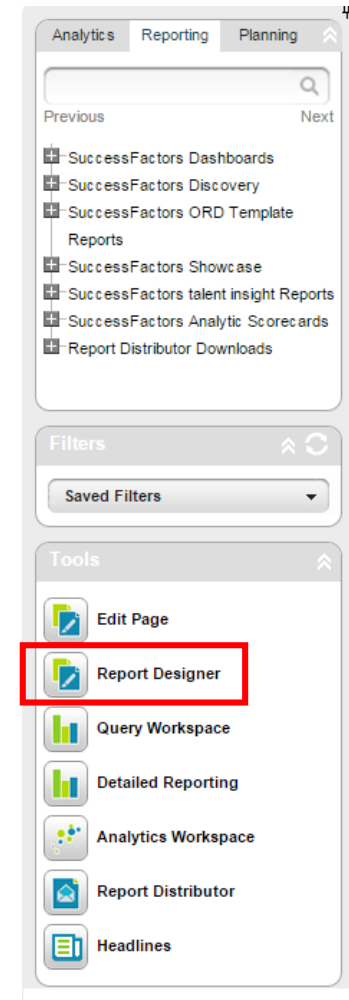
# Testing Reports

Once reports have been loaded and successfully validated, the final step is to confirm that the online report designer template is returning results.

# Loading a Report Template

## Checklist – Before you begin

- Ensure your account has the necessary permissions to access the **Report Designer** functions. This can be quickly confirmed by viewing the list of available functions for your user in the **Tools** menu:



# Testing Reports

Open report to check results

Navigate to Report Designer. For Example, these templates have been placed as reports under the Reporting Section & Folders section in Report Designer.

Select Preview

The screenshot displays the SAP Reporting Tools interface. On the left, a navigation pane is visible with tabs for 'Analytics', 'Reporting', and 'Planning'. The 'Reporting' tab is active, showing a search bar and a list of folders and reports. A yellow box highlights the 'SuccessFactors ORD Template' folder. Below this, a 'Filters' section shows 'Saved Filters' and a 'Tools' section with icons for 'Edit Page', 'Report Designer', 'Query Workspace', 'Detailed Reporting', 'Analytics Workspace', 'Report Distributor', and 'Headlines'. On the right, a tree view shows the 'SuccessFactors ORD Templates' folder expanded to '1505 Release - Master', which is further expanded to '1505 - Birthday List'. Below this, a 'Page List' section shows a table with columns for page number, name, author, and actions. A yellow box highlights the 'Preview' button in the actions column for the first row.

Page	Page Name	Author	Actions
1	Copy of Pg 1.	Carla Grant	Rename <b>Preview</b> Remove
+	1505 - 360 Overall Ratings Report		
+	1505 - Anonymous 360 Status		

# Testing Reports

Open report to check results

Here we can see that the report is returning all required fields and records

Last Name	Middle Name	First Name	Division	Department	Location	Country	Manager	Status	Employee ID	User Sys ID	Birth Date
Burns		Anita	Industries (IND)	Sales (SALES)	San Mateo (US_SFO)	United States	cgrant1	Active User		177	
Lo	Jennifer		Industries (IND)	Sales (SALES)	San Mateo (US_SFO)	United States	cgrant1	Active User	6005	jlo1	
Hoff	Marcus		Industries (IND)	Marketing (MKTG)	San Mateo (US_SFO)	United States	cgrant1	Active User	4002	mhoff1	8/9/1995 9:00:00 PM
Hoff	Marcus		Industries (IND)	Marketing (MKTG)	San Mateo (US_SFO)	United States	cgrant1	Active User	4002	mhoff1	3/14/1958 9:00:00 PM
Maxx	Richard		Industries (IND)	Sales (SALES)	San Mateo (US_SFO)	United States	cgrant1	Active User	4033	rmaxx1	
Mormony	Sid		Industries (IND)	Sales (SALES)	San Mateo (US_SFO)	United States	cgrant1	Active User	4036	smormony1	
Stokes	Vic		Industries (IND)	Sales (SALES)	San Mateo (US_SFO)	United States	cgrant1	Active User	4031	vstokes1	
Sown	Wilma		Industries (IND)	Sales (SALES)	San Mateo (US_SFO)	United States	cgrant1	Active User	4032	wsown1	



**Thank You**