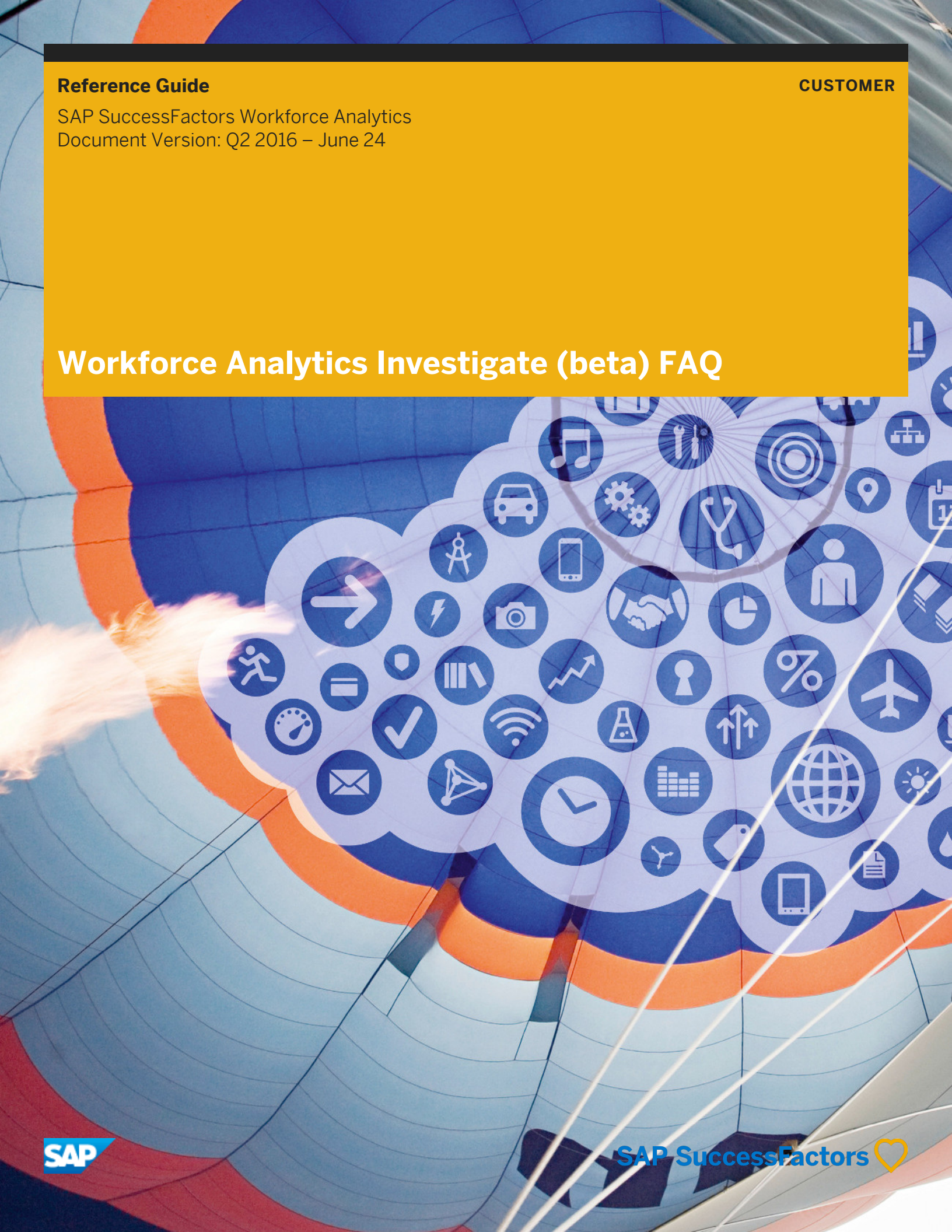

Reference Guide

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SAP SuccessFactors Workforce Analytics
Document Version: Q2 2016 – June 24

Workforce Analytics Investigate (beta) FAQ

SAP

SAP SuccessFactors

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1 FAQ: Workforce Analytics Investigate

1.1 What is Workforce Analytics Investigate?

Investigate is the next generation of Query Workspace and the first tool to be released as part of the reinvention of the overall Workforce Analytics user experience.

1.2 Why should you enable Investigate in Workforce Analytics?

Investigate accelerates the process that HR Analysts go through to analyze issues by surfacing recommended metrics and analysis dimensions, as well as recommended visualizations.

New search capabilities allow Analysts to quickly find metrics and the introduction of Collections is an engaging way Analysts can share and export insights for storytelling. Our next generation Analytics product combines a clean, modern look and improved usability based on SAP Fiori design principles making interactive analytics readily accessible.

> **Note**
>
> Investigate is a beta release in Q2 2016. It includes the core componentory of Query Workspace. However some of the more advanced features such as creating custom calculations are not included in the beta release. Please refer to What is included in the beta release of Workforce Analytics Investigate? [page 4] for a detailed list of these features.

1.3 Who should enable Investigate (beta) in Workforce Analytics?

Investigate is only available to current Workforce Analytic customers.

Customers who wish to be early adopters, contribute to the quality of our Analytics product and/or network with people who share similar interest should sign up for beta testing. To enable Investigate in your instance, please register by joining the Workforce Analytics: Investigate (beta) group on *SuccessFactors Community* > *Reporting and Analytics* > *Workforce Analytics: Investigate (beta)*. See How can you enable Investigate? [page 5] for the steps to enable Investigate.

Once Investigate is enabled in the Workforce Analytics application, all roles that have been granted **Query Workspace** permission will default from *Query Workspace* to *Investigate*.

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> **Note**
>
> It is recommended that you enable *Investigate* in your Preview environment for testing.

1.4 What is included in the beta release of Workforce Analytics Investigate?

The table below includes features or functions in the Investigate beta (Q2 2016) release and Query Workspace comparison.

Table 1:

Feature / Function	Query Workspace	Investigate (beta Q2 2016)
UI5 / Fiori	No	Yes
Filtering	Yes	Yes
Recommended Metrics/Dimensions	No	Yes
Chart Components	Yes (limited)	Yes
Recommended Chart Components	No	Yes
Metric Search capability	No	Yes
Explain mode	No	Yes + pre-selection
Export	Yes	Yes (limited)

The table below includes features or functions that we are building or planning post-Q2 2016 and Query Workspace comparison.

Table 2:

Feature / Function	Query Workspace	Investigate (beyond Q2 2016)
Filtering	Yes	Yes + multi select
Recommended Metrics/Dimensions	No	Yes + recent & hotspots
Chart Components	Yes (limited)	Yes + new charting components
Explain mode	Yes	Yes + input results
Accessibility	Yes (basic)	Yes
Export	Yes	Yes

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Feature / Function	Query Workspace	Investigate (beyond Q2 2016)
Share / Import	Yes (Report Designer)	Yes + more sharing options
Trend line Comparisons	No	Yes
Forecast with Comparisons	No	Yes
Drill to Detail	Yes	Yes
Custom metric/ dimension/ calculations	Yes	Yes
Comparisons	No	Yes
Thresholds / Targets	No	Yes
Automated Alerts/Notifications	No	Yes
Internationalization	Yes	Yes
Styling / Theming	Yes	Yes
Help Tour	No	Yes

Note

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1.5 How can you enable Investigate?

This section describes how to enable *Investigate*.

Context

Investigate is the next generation of Query Workspace. It will be available in June as a beta release.

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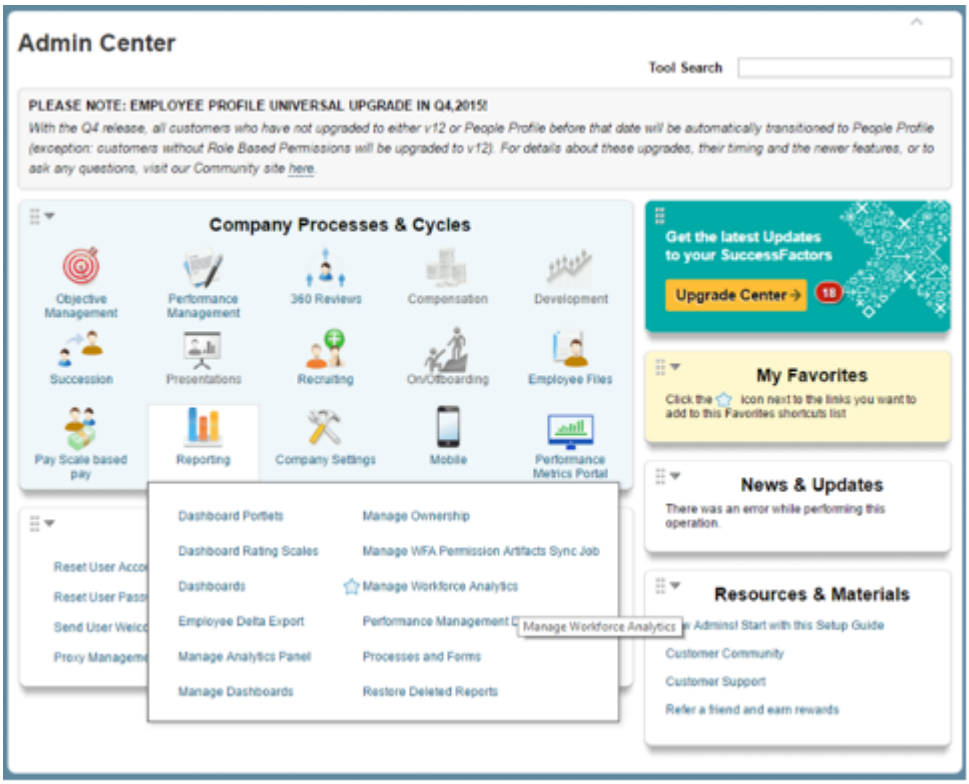
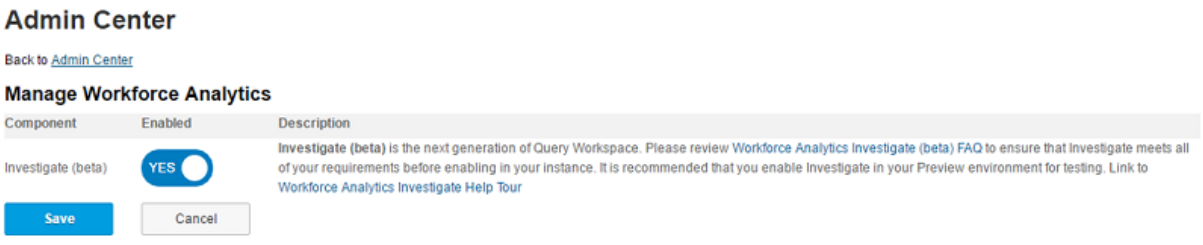
> **Note**
>
> Please register as a beta tester by joining the Workforce Analytics: Investigate (beta) group on *SuccessFactors Community* > *Reporting and Analytics* > *Workforce Analytics: Investigate (beta)*.

Procedure

1. Go to *Admin Center* > *Reporting* > *Manage Workforce Analytics*.



2. Enable *Investigate*.



3. Click *Save*.
   The *Investigate* icon appears in the *Tools* panel in place of Query Workspace.

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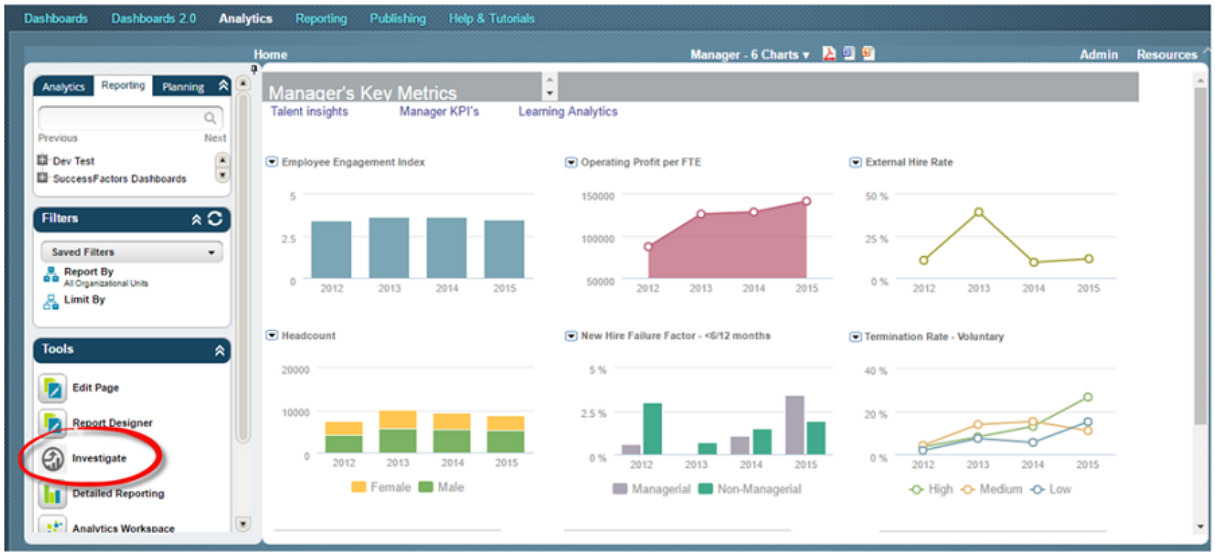
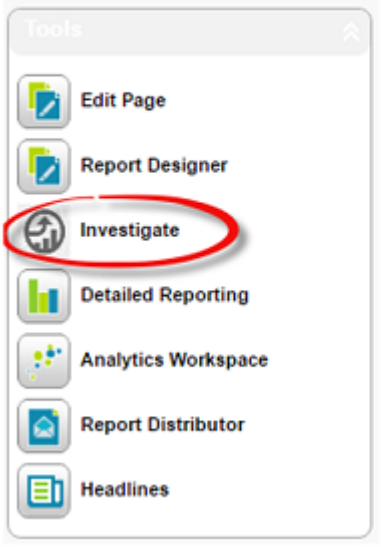


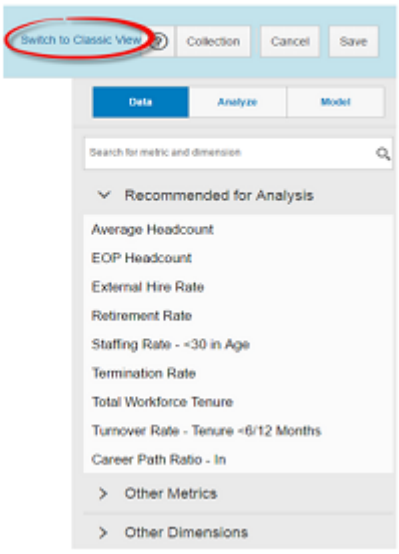
1.6 Can you revert back to Query Workspace after you have enabled Investigate?

Once you have enabled Investigate, it becomes the default framework for querying and investigating data. However, you can toggle back to the classic view of Query Workspace at any stage by clicking the Switch to Classic View link at the top of the page. Query tables or visualizations created in one framework are not available in the alternative environment. For example, if you have created a query and visualization in Investigate, you cannot retrieve it if you toggle to Query Workspace. From Query Workspace, you can toggle back to Investigate by selecting Investigate from the tools panel on the left.

Navigating to Investigate from Workforce Analytics page



Navigating to Query Workspace from Workforce Analytics Investigate page



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You can disable Investigate at any stage. To disable,

1. Go to *Admin Center* > *Reporting* > *Manage Workforce Analytics* .
2. Disable *Investigate*.
3. Click *Save*.

> **Note**
>
> Administrators may need to Purge Server Cache from the Administration Menu for the option to be reset.

1.7 Can you start using Investigate immediately?

Investigate is designed to be self-explanatory, offering intuitive, user-friendly interactions that support the Analyst's data exploration.

Context

The steps below outlines key components to assist with first time navigation and discovery.

Procedure

1. Select any metric or dimension to add on the canvas which is your main work area.

   The selected metric or dimension shows as a visualization or a table.
2. Click *Data* tab to find metrics and dimensions to analyze. Click on one of them to add it to the main canvas.
3. Click *Analyze* tab to find out recommended views for your selected data query to update your visualization on the main canvas.
4. *Switch to Classic View* to go back to Query Workspace.
5. Click + next to Collection to save the contents on your current canvas.

   You can manage your collection items and export / share them later, if required.
6. Click + on the bottom tab bar to start building your analysis on a new and empty canvas.

   You can also create a copy of your current analysis by selecting *duplicate* from the tab options.
7. Click *Back to: Analytics* to go back to *Workforce Analytics* screen.

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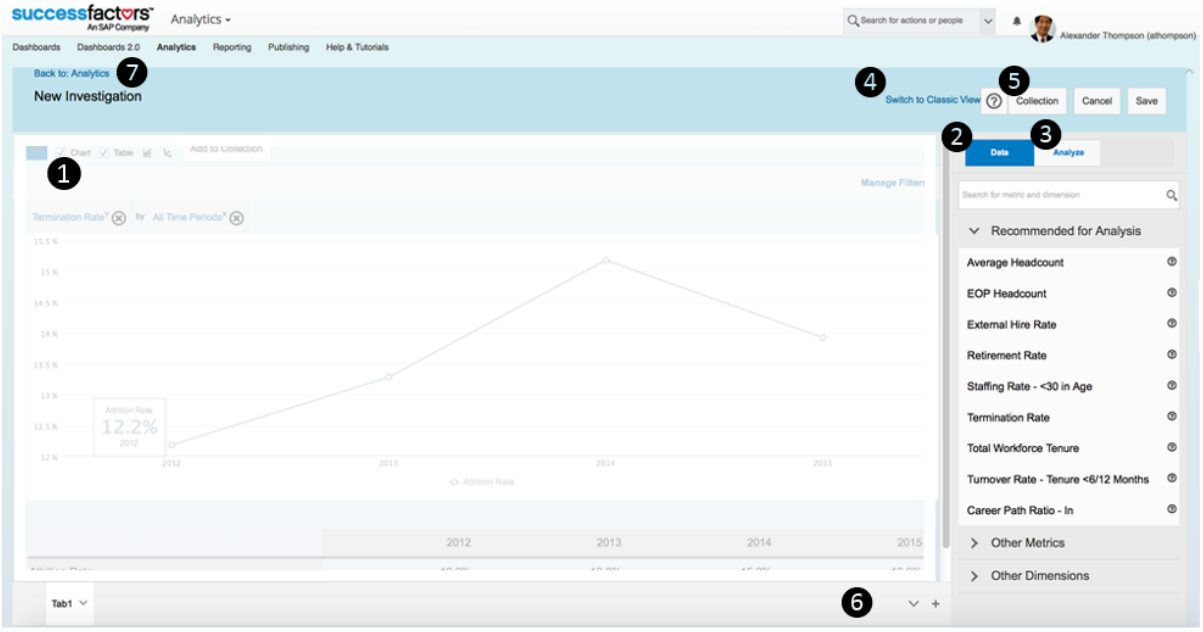

1.8 How do you Report Issues or New Ideas for the Investigate Roadmap?

Investigate is a beta release. We expect some glitches or issues to arise. Please report issues or submit new ideas and enhancements for the Investigate roadmap to Workforce Analytics: Investigate (beta) group on *SuccessFactors Community* > *Reporting and Analytics* > *Workforce Analytics: Investigate (beta)*.

When recording issues, please include as much information as possible such as, Issue, Description, Priority [High, Medium, Low], how to replicate, and screenshots.

> **Note**
>
> Please check the Known Issues log on the Workforce Analytics: Investigate (beta) page before submitting new issues or enhancements.

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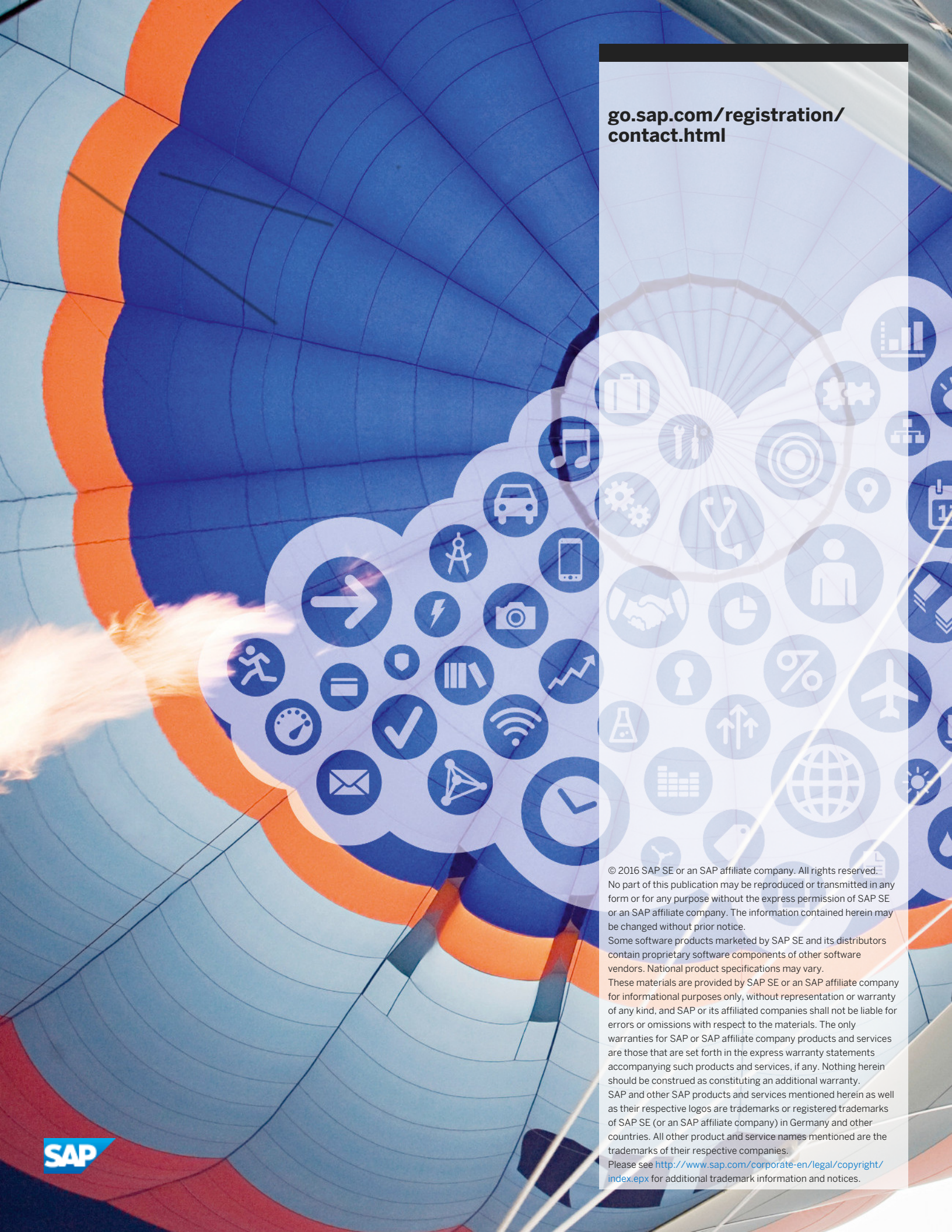

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