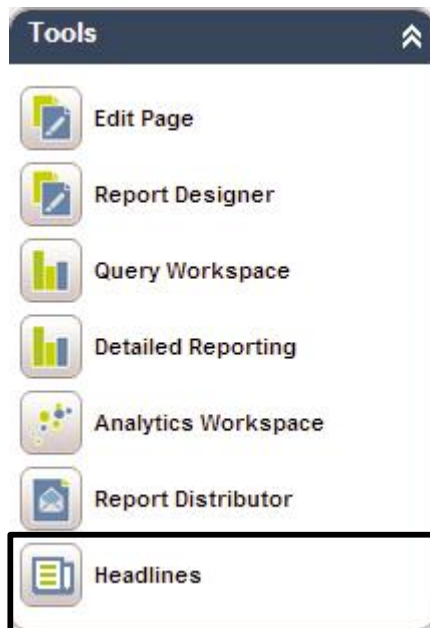# Headline Designer (for Customer Admins)

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Getting to the Headline Designer

Go to the Headlines → Click the gear → Headlines Designer

Headline Designer
Description and Terminology

The Headline Designer contains all* of the admin functionality for Headlines.

Key terms for the Headline Designer:

Insight- A set of criteria applied to one WFA measure that includes dimension breakdowns, comparables, and text for different measure cases.

Public- Determines if the Insight will be available in the Subscription list.

Comparison- The value ranges that the actual measure value is compared against to define the results displayed on the Headlines. The options include targets, a prior period, or the organizational average.

Measure Case- A description of where the measure value sits compared to the comparison. Each range must have a color (Significance) assigned to it, as well as Headlines text and subtext.

These are the Significance colors & labels that can be assigned to ranges. The Headlines are ordered based on the significance. The rankings are listed next to the name.

- Acceptable (4) or Insignificant (6)
- Tolerable (3)
- Significant (2) or Insightful (5)
- Urgent (1)

Story Item- Visual displays of the results (e.g. top 5 values) that can be grouped into Story Layouts.

*SuccessFactors will still need to configure these three items:
1) Setting targets a the dimension node level, e.g. a different Termination Rate target for Sales vs HR.
2) Setting a minimum sample size for a measure, e.g. Only show the Termination Rate for groups with at least 10 people.
3) Creating company specific defaults for text and layout mappings so when you create a new Insight something shows up as a starting point.
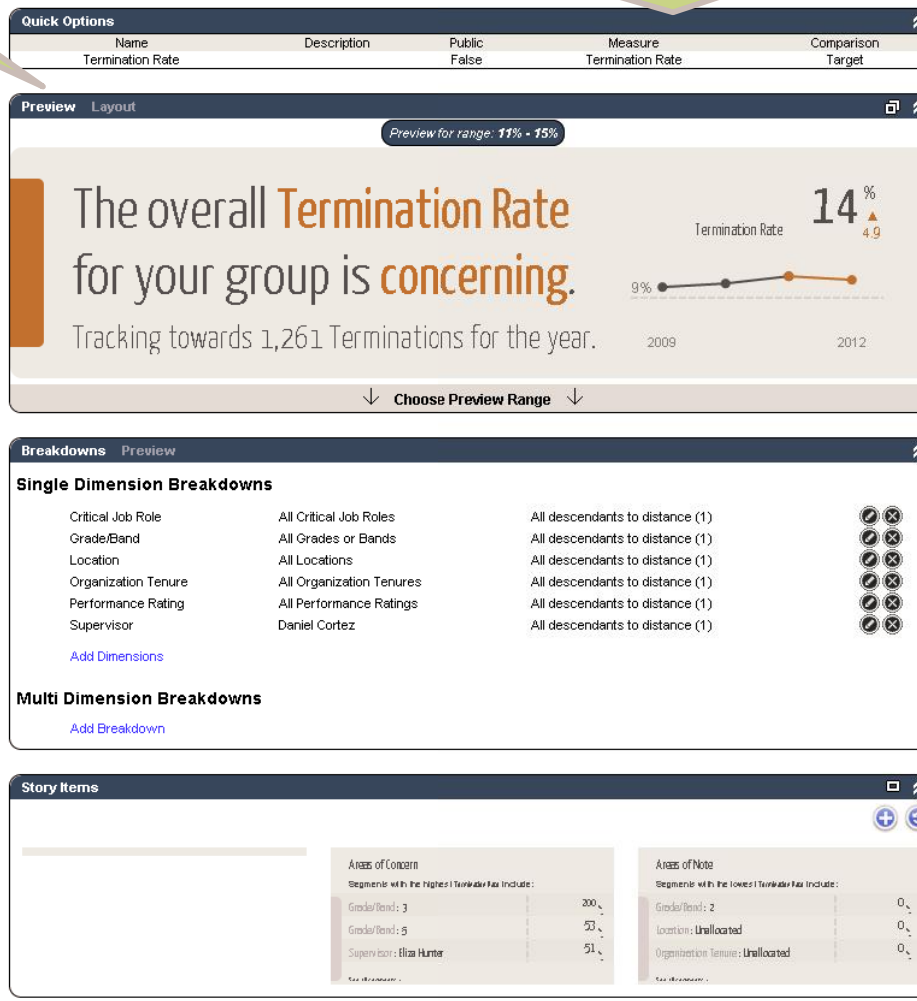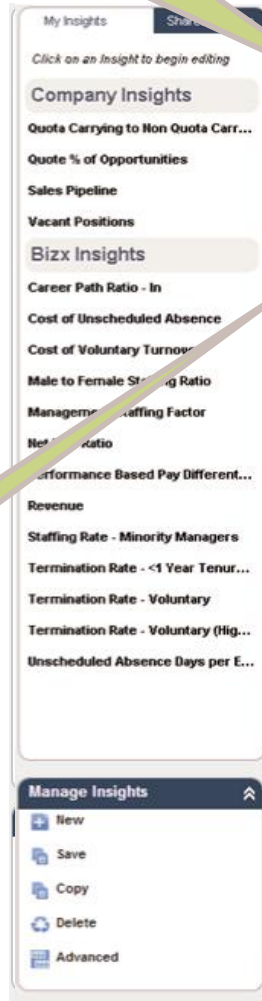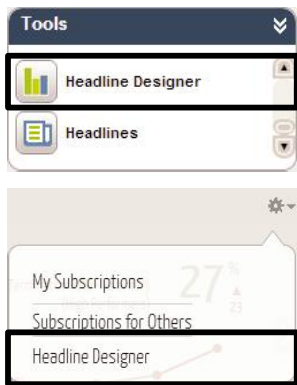
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Headline Designer
Page Layout

Takes you to the Headline Designer.

Web Headlines vs. iPad Tile appearance.

Changes the measure display name, description, make the Headline public, or change the comparable value to target, prior period or org average.

Text ,subtext, significance, and time periods can be edited using pre-packaged content by rolling over and clicking on them when a yellow circle appears. Comparables (targets, Prior Period, or Org Average) are editable here as well.

Measure Case Preview.

Breakdown Editor.

Select story items and drag and drop them into the desired order to create the Story Layout.

Options to create new, save or delete an Insight. Also access the Advanced screen for org average and prior period default threshold setting.

Headline Designer
Selecting an Insight

An Insight is a set of criteria applied to one WFA measure that includes dimension breakdowns, comparables, and text for different measure cases.   You can either select and edit an existing Insight, or start from scratch.
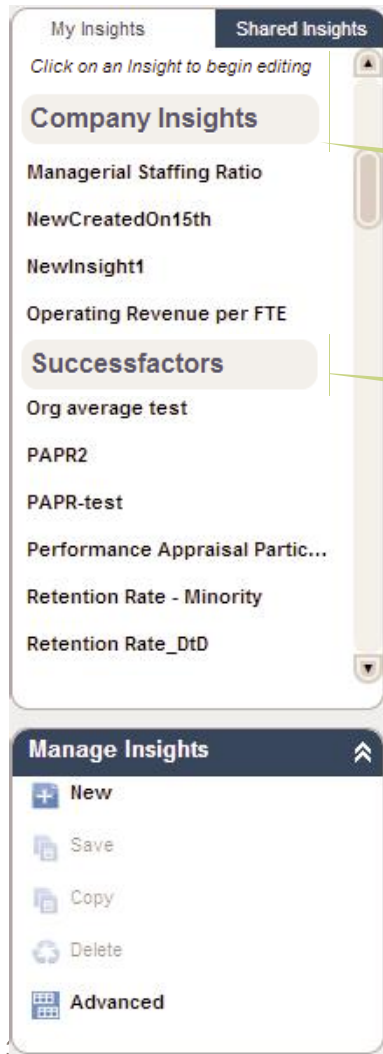
Select an existing Insight by clicking on it.

Be sure to check the Shared Insights tab for Insights created by other admin users.

Company Insights could have been created by either a SuccessFactors employee or a Headlines Admin. These insights are only available on the customer instance. Any customer with Headlines Admin permissions can edit these insights.

SuccessFactors Insights were created by SuccessFactors users and are available on all company instances. You will need to copy these Insights if you want to edit them.
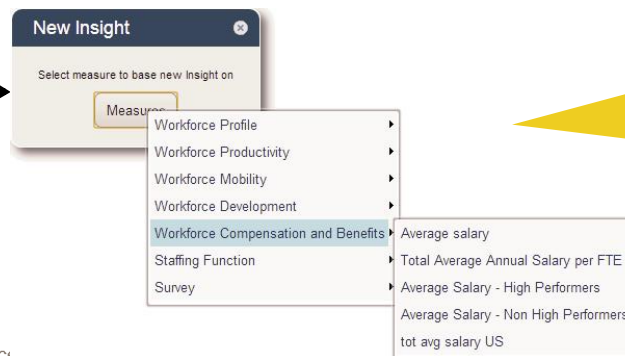
Start from scratch by selecting a measure from the measure catalogue (you can use the same measure for multiple Insights.) Note: Custom formulas made in Query Workspace are not available yet.

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Headline Designer
Selecting an Insight - Quick Options

This name can flow through to the Headline text if the Measure Name token is used.

Description of Insight.

Defines whether or not the Headline shows up in the Subscription list. Click to toggle between True and False. You will always be able to see your own Headlines, even if you haven't made them Public yet.

Measure used for Headline. Clicking here will bring up the measure catalogue.

Chose the comparison type. This could be a target ranges, a prior period or the organizational average.

Quick Options

Name	Description	Public	Measure	Comparison
DEMO_Termination Rate	Demo measure	False	Termination Rate	Target

DEMO_Termination Rate

Update

Demo measure

Update

Target

Target
Prior Period
Org Average

Termina... Workforce Mobility ▸ Termination Rate
Termination Rate - Involuntary

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Headline Designer
Measure Case Significance

When the value falls in this range, this is the text, colors that will display for the Headlines.

Each "Measure Case" has a comparable range, Headlines text and subtext, and Significance. You can view all of the difference cases from the Preview section and edit them individually on this screen.

Change color by clicking here.

Changes measure case by clicking here. See Measure Case Preview for details.

Changing the Headlines Text, Subtext, comparable values and time periods are covered in the next few pages. They are all tied to a specific measure case.

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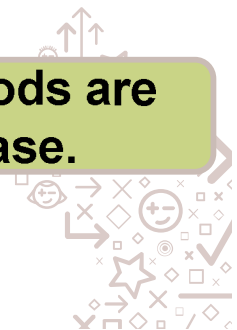
Headline Designer
Measure Case Headlines Text and Subtext (existing text)

You can scroll through existing text to chose what you want to display for the measure case or you can create new text. This is how you scroll through existing text.

Hover over text to get a yellow outline and click to see and select other options. Note that this is the text for the specific measure case.

Scroll or click to move up or down the list, then click on the text you would like when it's in the yellow circle.

New text.

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Headline Designer
Measure Case Headlines Text and Subtext (new or edit text)

Create new text, edit, copy or delete existing text, or restore the default text.

New Edit Copy Delete Restore Defaults

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Headline Designer
Measure Case Headlines Text and Subtext (new or edit text)

When you select New or Edit, you have new menu options.

Restrict this text to a specific measure, measure case or comparison type if applicable. This will default to the specific measure, so be sure to change it to All if you want it available elsewhere.

Save   Delete

Making text **Bold** and/or a Color

The easiest way to do this is copy existing text that looks how you want it to look and replace the text in the XML.
To start from scratch:

- To make text **bold**, use this XML around the text:

  Your text will be bold

- To make text the significance color use this XML around the text:

  Your text will be a color.

- To make text the **significance color and bold** use this XML around the text:

  Your text will be bold and a color.

```
The <span class="highlighted strong">
[%AI_INSIGHT_NAME%]</span> for your group is <span
class="highlighted strong"> [%AI_MEASURE_VALUE%]
[%AI_MEASURE_FORMAT%] </span>.
```

Measure
Termination Rate

Measure Case
All

Comparison
All

Use tokens where possible to make the text apply in multiple situations. Note that the third column is a preview of the results for that token.

Simple Tokens		
Token	Description	Value
[%AI_DEVIATION_VALUE%]	The most relevant deviation value	4.9
[%AI_DEVIATION_PERCENTAGE%]	The most relevant deviation percentage	55%
[%AI_DEVIATION_INDICATOR%]	Arrow indicating the direction of deviation	▲
[%AI_MEASURE_CASE%]	The most relevant measure case	Above High Threshold
[%AI_COMPARISON_TYPE%]	The most relevant comparison type	Target
[%AI_HEADLINE_TEXT%]	The most relevant headline text	The overall [%AI_MEASURE_LABEL%] for your group is concerning. Tracking towards
[%AI_SUB_TEXT%]	The most relevant sub text	[%AI_MEASURE_VALUE(Term)%] Terminations for the year.
	Value of the main measure for the headline / current	

Parameter Tokens

Parameter Tokens are used to make formulas in the text.

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Headline Designer
Measure Case Time Periods

Headline Item   Tile Item

Preview is for measure case: **Above Comparison Acceptable**

Your group's **Termination Rate** is on target.
About to surpass last year's total.

DEMO_Termination Rate 14% ▲ 4.9

9%
Last 4 Years
Last 4 Quarters

Headline Item   Tile Item

Preview is for measure case: **Below Comparison Tolerable**

The **Termination Rate** for your group is **too low.**
Tracking towards 361 Terminations for the year.

DEMO_Termination Rate 4.1% ▼ 4.9

9%

2012 Q1   2012 Q4

Hover over text to get a yellow outline and click to see and select other options.

Scroll or click to move up or down the list, then click on the time period you would like when it's in the yellow circle. The options are currently:
- **Last 4 Years**
- **Last 4 Quarters**
- **Last 4 months**
- **Last Months Last 4 Month**
- **Last Quarters Last 4Quarter**

New time period and results for the most current period.

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Headline Designer
Measure Case Comparables

Headline Item | Tile Item

Preview is for measure case: Ab

Your group's **Termina**
Rate is on target.
About to surpass last year's total.

9%
2009

Select target threshold values to compare to the measure value.

Highest Threshold	0.100
High Threshold	0.090
Target	0.090
Low Threshold	0.050
Lowest Threshold	0.025

Update

Target

L4 %
4.9

A box will pop up giving you the option to change the comparable ranges for all the measure cases for that Headline. Note that the type of comparable was defined in the Quick Options section and is either targets, a prior period, or the org average. The latter two would be set as the target and you can define the ranges relative to it.

Hover over comparable value to get a yellow outline and click to see and select other options.

Entering target text : These are entered in number format, so a % would be 0.###. These are the actual values that will be used for comparison.

Select the % variance thresholds. These will apply to org average and prior period comparisons.

Highest Threshold	50.000
High Threshold	40.000
Org Average	3716.363
Low Threshold	30.000
Lowest Threshold	40.000

Update Default Thresholds

716 $
0
3716

Comparison
Org Average

Entering thresholds for Org Average & Prior Period: Org Average and Prior Period are just different time periods for the same result. Org Average is the current period, and Prior Period is any of the earlier time periods. As such, the thresholds for BOTH are set in the Org Average comparison type and apply to BOTH.

The threshold are a % difference from the actual value. If you want to use 40%, you can enter 40.000. If it's a high threshold it will be 40% higher than the value, and if it's a low threshold, it will be 40% lower than the value. Note this is a different to how targets are set.

Note: These will have to be regenerated with each refresh. See setting Defaults.

When you chose Prior Period as the comparison type, you will have the option to chose the time period.

Comparison
Prior Period (2009 Nov)

Prior Period ▼
2009 Nov ▼
Update

For these defaults to be pulled through, all of the values on the Headline Designer screen for the specific Headline must be zero. On the actual value should show. Clicking "Default Thresholds" will do this.

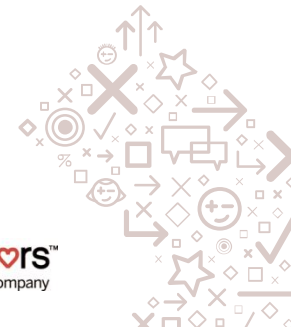**successfactors**
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Headline Designer
Measure Case Comparables – Regenerating Org Avg and Prior Period

The Prior Period and Org Average values need to be regenerated whenever they change, i.e. once per refresh. Otherwise the comparison values might not be accurate.

It takes about 15-30 seconds and will regenerate it for every Headline at once.

Click regenerate to have the org average and prior period recalculate for every measure that has a Headline.
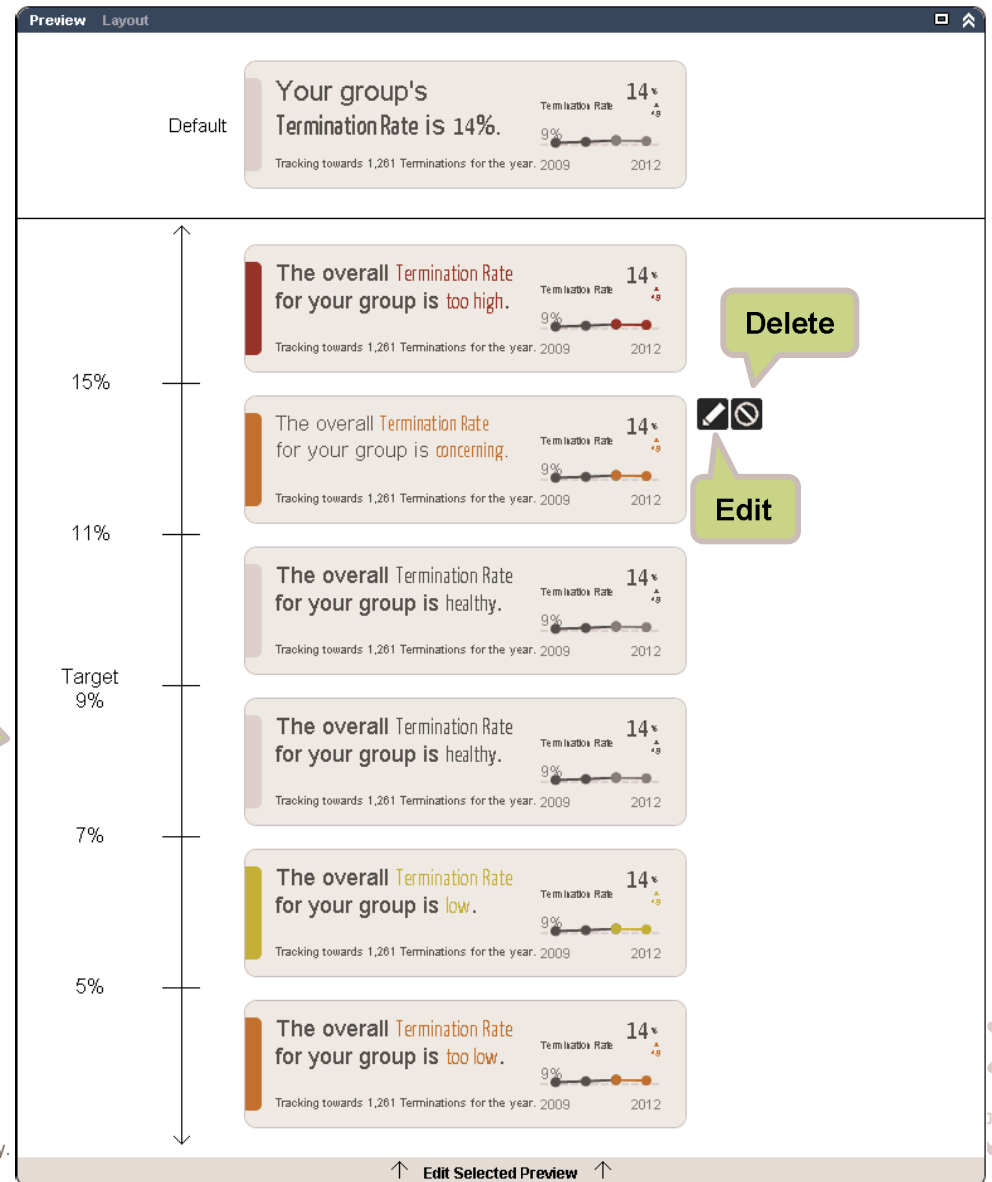
Headline Designer
Measure Case Preview

Measure cases are what would be returned based on the value of the result for the user that logs in. For example, a manager that has a 12% Termination Rate would see the tile that sits between 11-15%. The overall result is show in the preview.

Click Chose Preview range.

Select a case (a tile that falls within a range) to edit or delete it.

Delete

Edit

Headline Designer
Breakdown Editor Overview

The Breakdown Editor is where you can add, edit or delete the dimensions that are used in the Headlines Story.

This is a Preview of how the dimensions are applied.

(Not all of the above dimensions are shown in this screenshot but they will in the app.)

Headline Designer
Breakdown Editor Selections

Click Add Dimension to add nodes from a single dimension to the breakdowns.

Click Add Breakdown to add crossed dimensions to the list, e.g. Performance by Critical Job Role = Yes.

Breakdowns Preview

Single Dimension Breakdowns

Critical Job Role	All Critical Job Roles	All descendants to distance (1)
Grade/Band	All Grades or Bands	All descendants to distance (1)
Location	All Locations	All descendants to distance (1)
Organization Tenure	All Organization Tenures	All descendants to distance (1)
Performance Rating	All Performance Ratings	All descendants to distance (1)
Supervisor	Daniel Cortez	All descendants to distance (1)

Add Dimensions

Multi Dimension Breakdowns

Add Breakdown

Add Dimensions

- Location
- Location 2
- Organizational Unit
- Organizational Unit 2
- Supervisor
- Age
- Age Five
- Critical Job Role
- Disability
- EEO Job Category
- Employment Level
- Employment Status
- Employment Type
- Employment Type 2
- Ethnic Background
- Future Leader
- Generation
- Gender

All descendants to distance   1

OK   Cancel

Add Breakdown

- Location
- Location 2
- Organizational Unit
- Organizational Unit 2
- Supervisor
- Age
- Age Five
- Critical Job Role
- Disability
- EEO Job Category
- Employment Level
- Employment Status
- Employment Type
- Employment Type 2
- Ethnic Background
- Future Leader
- Generation
- Gender

All descendants to distance   1

OK   Cancel

Use the Crtl button to select multiple dimensions.

Select nodes

- All Critical Job Roles
  - Yes
  - No
  - Unallocated

If the standard qualifiers do not select the exact nodes that you want, then edit the dimension and click the nodes you would like to include.

All descendants to distance   1

OK   Cancel

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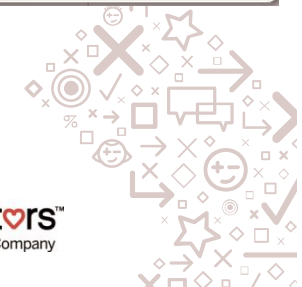
Headline Designer
Story Items – Adding a New Story Item

The template story items will display below the Headlines Preview. New Story Items can be added by clicking the plus sign, ticking the desired story items, and clicking Add at the bottom of the list.

Click the revert arrow to restore the default story items.

New Story Item

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Headline Designer
Story Items – Deleting an Existing Story Item

Drag a Story Item to the top right corner and a red trash bin will appear. Drop the Story Item on top to delete it.

Drag and drop Story Items to order the layout.

Click to Preview.

Setting Defaults

Setting Defaults
Overview

Defaults can be set for parts of Headlines so that when you create a new Headline, content will pre-populate.

Headlines will always look first to see how a specific Headline is configured, if it is not configured in a given area, it will look for your company defaults. If company defaults do not exist, it will fall back to standard defaults set by SuccessFactors.

- [Drill to Detail](#)

- [Organizational Average and Prior Period](#)

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Setting Defaults
Set up Drill to Detail Views in Query Workspace

Drill to Detail for Headlines reads the views set up in Query Workspace for a given drill through set. A drill through set is the columns (dimensions), that apply to a particular measure. They will vary depending on the type of measure, e.g. the dimensions that make sense for a Workforce Profile measure may be different to a Compensation measure.

UserDefault (Default)

Default View
UserDefault (Default)
HL_Default- WPF (Headlines Default)
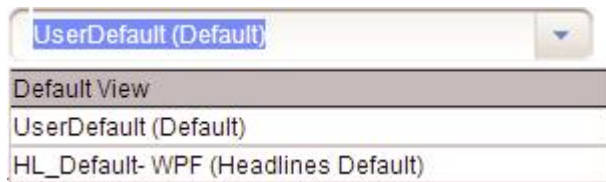
Headlines will look for views in the following order and stop when there is a match: User Default View, Headlines Default View, DBI view. It will only read the first three columns. If the measure does not have DtD, or the user does not have DtD permission, then the user will not have the option to navigate to the DtD page.

Drill To Detail

Default View   Edit View   Create New View   Set Default   Set Headlines Default
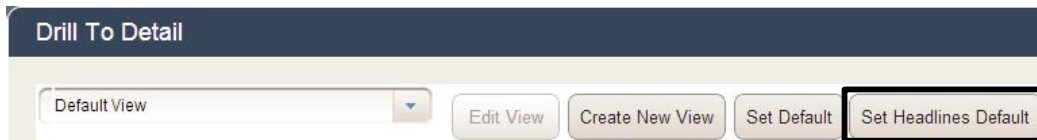
The Headlines default view is a new button that allows Headlines admin to set the org default for each drill through set, by selecting a view and then clicking this button. Only those with Headlines Admins permissions will see this button.

DtD Editor

View Name: UserDefault   Save   Save As   Change Name   Delete   Return

Columns not in View	Columns in View	Remove duplicates ☐
[$Age].[t Age Ten - Level 3]	Employee ID	
EEO	Location	
Employment Level	Organization Tenure	
Employment Status		
Employment Type		
Ethnic Background		
Gender		
Grade Test		
Job Family Test		
Date		

* = filtered column

Your group's Staffing Rate - Minority Managers is 6.6%.

Staffing Rate - Minority Managers 6.6% ▾ 1,253

64 minority managers.

Who are contributing to this?

Below are the details of the 50 people in **Risk of Loss : High**

Employee ID	Location	Organization Tenure
Encrypted 1	Mid West	<1 Year
Encrypted 2	Mid West	2-<3 Years
Encrypted 3	Mid West	2-<3 Years
Encrypted 4	Mid West	2-<3 Years

EOP Headcount - Female, 2008, Medium

Employee ID	Location	Organization Tenure
Encrypted	Australia	<1 Year
Encrypted	Germany	<1 Year
Encrypted	United Kingdom	<1 Year

Note: For the new view to take effect immediately in Headlines, you must hit Crtl+F5 to force a cache refresh.

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Setting Defaults
Organizational Average and Prior Period

There are two types of global defaults for Org Average/Prior Period. One is SuccessFactors (applies to all customers), and the other is company specific. You can see both but only edit your Company defaults.

Headlines will first check to see if a Headline has had text created for it, then the measure, then the company default, then the SuccessFactors default. This ensure that some text will always appear, but you can customize as much as they would like.

Manage Insights
- New
- Save
- Copy
- Delete
- Advanced

Create a new or edit the existing defaults for your company.

The Prior Period and Org Average values need to be regenerated whenever they change, i.e. once per refresh. It takes about 15-30 seconds and will regenerate it for every Headline at once.

Advanced settings

Default Thresholds | Regenerate

Set default comparison thresholds for Org Average and Prior Period below.
Thresholds should be entered as a whole number which will be used as a percent variance to the value.
Example: Entering 15 for High Threshold would trigger a value that is 15% higher than the org average.

Organisation	Highest Threshold	High Threshold	Low Threshold	Lowest Threshold
TestDemo	200	40	20	30
[ALL]	50	20	10	15

Close

Create on [ALL] org? ☐

Highest Threshold
High Threshold
Low Threshold
Lowest Threshold

OK   Cancel

For these defaults to be pulled through, all of the values on the Headline Designer screen for the specific Headline must be zero. Only the actual value should show.

Advanced settings

Default Thresholds | Regenerate

Click below to regenerate Org Average and Prior Period comparisons for all existing Insights.
(Note: This should be done after every data refresh on your system.)

Regenerate

Close

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Admin functionality that requires opening a case

There is still some admin functionality that SuccessFactors must configured for customers:

- Setting Minimum Sample Size for a Headline

- Dimension Level Target Setting

- Entering Strategies

We plan to eventually give customers control over these items as well. In the meantime, if you would like to take advantage of this functionality, please open a case.

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