

Headlines Navigation Guide

b1405



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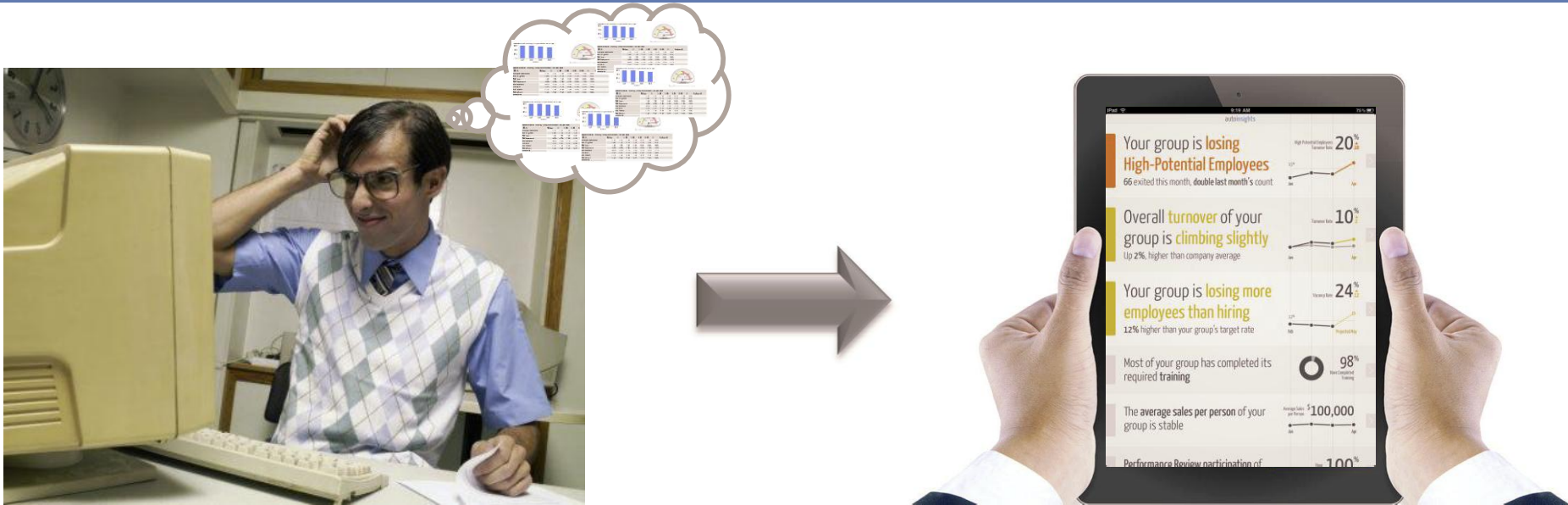




Headlines Overview & Getting Going

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Headlines - What is it?



What it is:

A mobile-device-ready SuccessFactors add-on tool that pulls insights from workforce analytic data automatically, and pushes them out to managers who need them. These analytical insights are communicated in simple human language and offers actionable next steps for any critical issue.

What is isn't:

A deep-dive, slice n dice analytics tool. Other aspects of the Analytics application are suited for traditional power users, or analysts. Headlines is designed to communicate insights to help manager make better decisions.



From data to Headline

User / Admin decides which metrics to track and sets trigger points to flag when a metric goes out of bounds. Metrics can be compared to:

- Target values
- Prior period
- Overall company values.

For example, these parameters...

Metric:	High Potential Attrition Rate
Value:	15%
Comparable:	10% [target]

...yield this headline text.

Your group is **losing High Potential Employees.**

Full Headline examples

Your group is **losing High-Potential Employees**
66 exited this month, double last month's count

Overall **turnover** of your group is **climbing slightly**
Up 2%, higher than company average



Getting Going...

This is an overview of what you'll need to do to get started with Headlines. Step by step instructions are on the subsequent slides.

- ✓ Understand the different [Headlines roles](#).
- ✓ Set up [your subscriptions](#). You must do the set up over the web (as opposed to an iPad).
- ✓ *BizX Customers with a tile homepage* - Add the [Headlines tile](#) to your Homepage if it is not already there.
- ✓ *BizX Customers with a tile homepage* - Set up [iPad App](#).
- ✓ The recommended browser for the web are either Chrome, Internet Explorer, or Firefox. The recommended browser for the iPad is Safari.





Headlines Roles

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Subscription Roles

Admin → Role Maintenance → Roles (select a role) → Permissions

Permissions

Edit

Functionality Access	Description	Role Permission		
		Headlines	Headlines Management	Headlines Admin
No view of Options gear	Can only see and navigate through Headlines subscribed to for user by admin.	✓		
My Subscriptions	Control over which Headlines appear in their feed.		✓	✓
Subscriptions for Others	Create subscriptions and assign them to roles or users.			✓
Headlines Designer	Created and edit Headlines.			✓

Details

Org Id: TestDemo

Role Id: HL_Admin

Permissions

Show un-restricted permissions
 Show restricted permissions

Save Cancel Checked permissions are Un-Restricted

Actions Dimensions Options

- Select All
- Edit Users
- Edit User Roles
- Edit Footnotes
- Menu Building
- View All Menus
- Site Statistics
- Target Maintenance
- Edit Measure Overrides
- Data Capture
- Document Upload
- Query Workspace
- Detailed Reporting
- Detailed Reporting for Audit
- Drill to Detail
- Workforce Planning
- Workforce Planning Admin
- Workforce Planning Financials
- Analytics Workspace
- Report Distributor
- Report Designing
- Report Designing Admin
- Headlines
- Headlines Admin
- Headlines Management
- FTP Configuration
- Report Transfer
- Question Maintenance





Subscriptions

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My Subscriptions

Requires "Headline Management" Permissions

Search, multi-select, then drag and drop or use the arrows to select your Headlines.



My Subscriptions

Choose Headlines to include/remove from your subscription list. Note that some Headlines may appear in the list because they have been selected for you by a system admin. You can choose to view or hide them in by selecting "Include/Exclude Company Subscriptions".

Drag across/use the arrows to add or remove Headlines from your Subscription. Use Ctrl+Click to select multiple Headlines.

Select Headlines

Search: Clear

- DemoSiteInt
- Successfactors
 - Average Time Lost
 - Career Path Ratio - In
 - Cost of Unscheduled Absence
 - Cost of Voluntary Turnover
 - Development Goal Completion Rate
 - Male to Female Staffing Ratio
 - Management Staffing Factor
 - Net Hire
 - Net Hire Ratio
 - Performance Based Pay Differentials
 - Performance Based Pay Differentials
 - Revenue
 - Staffing Rate - Minority Managers
 - Termination Rate

My Subscription

Preview

Include/Exclude Company Subscriptions

- DemoSiteInt
 - Vacant Positions
 - Employee Goal Participation Rate
 - Vol Term % (2-<3 Years Tenure)
- Successfactors
 - External Hire Rate
 - Termination Rate - Voluntary
 - Training Hours per Employee
 - Termination Rate
 - Termination Rate - Voluntary (High Performers)
 - Net Hire Ratio

OK Cancel



Decide if they would like to include Headlines subscribed to for your by your system admin.



Subscriptions for Others

Requires "Headline Admin" Permissions

The screenshot displays the SuccessFactors user interface. On the left, a navigation menu includes 'My Subscriptions' (with a count of 67,739), 'Subscriptions for Others' (highlighted with a red box), and 'Headline Designer'. Below this is a yellow callout box with the text: 'Admins can create a new subscription, add Headlines to it, and then subscribe roles and/or users to it.' The main content area shows the 'Subscriptions' section with a list of existing subscriptions and a 'Manage Subscriptions' dropdown menu where the 'New' option is highlighted with a red box. The 'New Subscription' page is visible in the background, featuring a 'Preview' button and a text area for insights. An 'Add New Subscription' dialog box is overlaid on the page, containing the following fields and options:

- Subscription Name:** Execs
- Subscription Description:** Headlines feed for Execs (with a US flag icon)
- Active:** Click to activate this subscription.
- Buttons:** OK, Cancel



Subscriptions for Others

Requires "Headline Admin" Permissions

Subscriptions

Execs

New

Subsc

New S

TestD

New S

Subsc

Test S

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De

Tools

New Subscription

Please add some insights for this subscription.

Preview

Create Subscription

Name: Exec
Description: Subscriptions for L1-L3

Drag across/use the arrows to add or remove Headlines from your Subscription.
Use Ctrl+Click to select multiple Headlines.

Select Headlines

Search: [] Clear

- DemoSiteInt
 - Successfactors
 - Average Time Lost
 - Career Path Ratio - In
 - Cost of Voluntary Turnover
 - Development Goal Completion Rate
 - External Hire Rate
 - Male to Female Staffing Ratio
 - Net Hire
 - Net Hire Ratio
 - Net Hire Ratio
 - Performance Based Pay Differentials
 - Performance Based Pay Differentials
 - Revenue
 - Staffing Rate - Minority Managers
 - Termination Rate

→

←

My Subscription

- DemoSiteInt
 - Performance Review Participation Rate
 - Sales Pipeline
 - Termination Rate
- Successfactors
 - Cost of Unscheduled Absence
 - Management Staffing Factor

OK Cancel

Select Headlines for the subscription.



Subscriptions for Others Requires "Headline Admin" Permissions

My Subscriptions
67,739

Subscriptions for Others
Headline Designer

Subscriptions

Execs

Name	Measure	Owner	Org	Public
Customer Satisfaction Index	Customer Satisfaction Index	Raiesh Parupalli	TestDemo	true

Manage Subscribers

Assign Roles Assign Users

Choose the Role(s) that you would like to have view this Headline Set.
Note: If a Headline set is assigned to a user, that set will override the set that is assigned to their role.

Search Role(s) *

Choose Roles:

- Copy of HL_Customer_Admin
- Copy of System
- Demo - Entry Page
- Designer
- DesignerODS
- ellen_role_1
- End User
- Full Access
- Headline End User
- Headline End User without headline mgmt
- HighchartsDemo
- HL_Customer_Admin
- HL_Customer_Non-Admin
- HLs_user
- Implementation Partner

Selected Roles:

- Report Admin
- Report Creator
- Report Consumer

Select Select All Remove Remove All

OK Close

Subscribe Roles and Users to the Subscription.

Note that if you do not know what user or role to search for, you can search for "*" to return the full list.



Subscriptions for Others

Requires "Headline Admin" Permissions

Execs

Name	Measure	Owner	Org	Public
Customer Satisfaction Index	Customer Satisfaction Index	Rajesh Parupalli	TestDemo	true
Termination Rate	Staffing Rate - Managerial	HL_customer	TestDemo	false
EOP Headcount	EOP Headcount	Rajesh Parupalli	TestDemo	true
Operating Revenue	Operating Revenue	Rajesh Parupalli	TestDemo	true
Management Staffing Factor	Management Staffing Factor	HL_customer	TestDemo	true

Preview

Preview to see what the Headlines subscription will look like in the feed.

My Subscriptions 67,739

- Subscriptions for Others
- Headline Designer

Subscribers

Roles

Name
Report Admin
Report Consumer
Report Creator

Users

Name
dreinitz
rparupalli
tonya

Preview

Your group is behind in the **Number of Employees Reviewed.**

5,634 out of 68,521.

Your group's **Span of Control** is on target.

One manager per 15 people.

Performance Appraisal Participation Rate **8.2%** ▼ 87

95% >

2009 Sep 2009 Dec

Management Staffing Factor **15** ▲ 13

14 >

2009 Sep 2009 Dec





Accessing Headlines

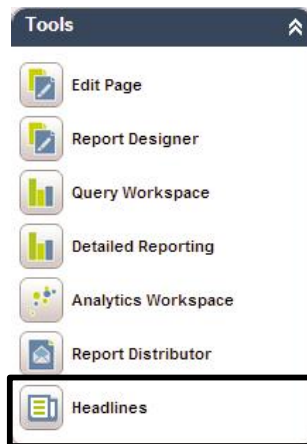


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Options for Accessing Headlines

There are five possible ways to access Headlines:

- The Tools menu.



- [Add a link to your homepage](#) like a report.
- [Make Headlines the homepage](#) for a role.
- If you are a BizX customer, you can add a [Headlines tile](#) to your tile homepage.
- Via the [iPad App](#).



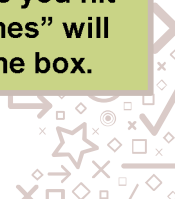
Accessing Headlines – Link on Homepage

Create a Simple Text box and select Dynamic Token Link

Add {%AUTOINSIGHTS()%}

You may get an error when you hit ok. Just hit OK again.

Note that the word "Headlines" will not render in the Preview as you set up the text box, but once you hit OK, "Headlines" will appear in the box.



Accessing Headlines – Make the Homepage

Admin → SuccessFactors Admin → Role Maintenance → Select Role → Settings → Analytical Headlines

Settings

Save

Cancel

Start Page

1. Select the start page type.

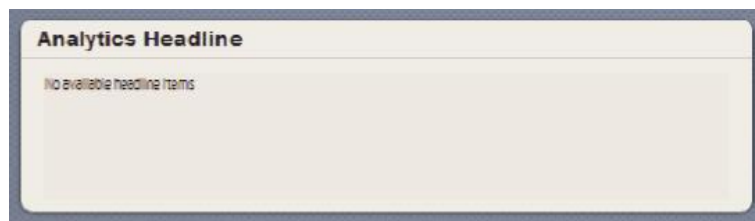
- KPI Page
- Report Book
- Analytical Headlines



Accessing Headlines – Homepage Tile

If you don't see the Headline tile on the *Home Page* or in the *Tile Browser* then:

- *Admin Tools* → *Manage V12 Home Page* (under *System Properties* in the old *Admin Tools* or *Company Settings* in *One Admin*)
- The Headline tile will be on the *Not Used* tab
- Click the little cog and move the Headline tile to either the *Default* (always shows on the *Home Page*) or *Available* (available via the *Tile Browser*) tabs.
- If you see the below in your Headline tile then you do not have any active subscriptions.



- If you see the below then the role your user is in does not have permission to access Headlines. Contact Analytics Product Management



Accessing Headlines – iPad App

- Download the SuccessFactors SuccessFactors Mobile app from the app store and follow the instructions to connect to your instance.

