

# THR92

## 1\_SAP SuccessFactors People Analytics: Reporting and Administration

### COURSE OUTLINE

Course Version: 2311

Course Duration:



# SAP Copyrights, Trademarks and Disclaimers

© 2023 SAP SE or an SAP affiliate company. All rights reserved.

No part of this publication may be reproduced or transmitted in any form or for any purpose without the express permission of SAP SE or an SAP affiliate company.

SAP and other SAP products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of SAP SE (or an SAP affiliate company) in Germany and other countries. Please see <https://www.sap.com/corporate/en/legal/copyright.html> for additional trademark information and notices.

Some software products marketed by SAP SE and its distributors contain proprietary software components of other software vendors.

National product specifications may vary.

These materials may have been machine translated and may contain grammatical errors or inaccuracies.

These materials are provided by SAP SE or an SAP affiliate company for informational purposes only, without representation or warranty of any kind, and SAP SE or its affiliated companies shall not be liable for errors or omissions with respect to the materials. The only warranties for SAP SE or SAP affiliate company products and services are those that are set forth in the express warranty statements accompanying such products and services, if any. Nothing herein should be construed as constituting an additional warranty.

In particular, SAP SE or its affiliated companies have no obligation to pursue any course of business outlined in this document or any related presentation, or to develop or release any functionality mentioned therein. This document, or any related presentation, and SAP SE's or its affiliated companies' strategy and possible future developments, products, and/or platform directions and functionality are all subject to change and may be changed by SAP SE or its affiliated companies at any time for any reason without notice. The information in this document is not a commitment, promise, or legal obligation to deliver any material, code, or functionality. All forward-looking statements are subject to various risks and uncertainties that could cause actual results to differ materially from expectations. Readers are cautioned not to place undue reliance on these forward-looking statements, which speak only as of their dates, and they should not be relied upon in making purchasing decisions.

# Typographic Conventions

American English is the standard used in this handbook.

The following typographic conventions are also used.

This information is displayed in the instructor's presentation	
Demonstration	
Procedure	
Warning or Caution	
Hint	
Related or Additional Information	
Facilitated Discussion	
User interface control	<i>Example text</i>
Window title	<i>Example text</i>

# Contents

vii **Course Overview**

**1 Unit 1: People Analytics Overview**

1 Lesson: Summarizing People Analytics Reporting Solutions

**3 Unit 2: Working with SAP SuccessFactors Report Center**

3 Lesson: Managing Reports with Report Center

3 Lesson: Administering Report Center

**5 Unit 3: Working with SAP SuccessFactors Story Reports**

5 Lesson: Providing a Story Overview

5 Lesson: Creating Queries for Story Reports

5 Lesson: Designing Story Reports

5 Lesson: Managing and Running Story Reports

6 Lesson: Administering Story Reporting

**7 Unit 4: Working with SAP SuccessFactors Table Reports**

7 Lesson: Providing a Table Report Overview

7 Lesson: Creating Table Reports

7 Lesson: Viewing Report Results

7 Lesson: Running Reports

7 Lesson: Administering Table Reports

**9 Unit 5: Working with SAP SuccessFactors Canvas Reports**

9 Lesson: Providing a Canvas Report Overview

9 Lesson: Creating Queries with Detailed Reporting on Live Data

9 Lesson: Building Pivot Data Queries

9 Lesson: Designing Report Pages

10 Lesson: Creating Queries with Advanced Reporting on Replicated Data

10 Lesson: Managing and Running Canvas Reports

11 Lesson: Administering Canvas Reports

**13 Unit 6: Working with Tile-Based Dashboard Framework**

13 Lesson: Providing a Dashboard Overview

13 Lesson: Creating Dashboards and Tiles

13 Lesson: Managing the Dashboard Framework

13 Lesson: Using Tiles and Dashboards

14 Lesson: Administering Dashboards



# Course Overview

**TARGET AUDIENCE**

This course is intended for the following audiences:





## Lesson 1: Summarizing People Analytics Reporting Solutions

### Lesson Objectives

After completing this lesson, you will be able to:

- Summarize People Analytics Reporting Solution



## Lesson 1: Managing Reports with Report Center

### Lesson Objectives

After completing this lesson, you will be able to:

- Manage Reports

## Lesson 2: Administering Report Center

### Lesson Objectives

After completing this lesson, you will be able to:

- Assign permissions for Report Center



## Lesson 1: Providing a Story Overview

### Lesson Objectives

After completing this lesson, you will be able to:

- Review the appropriate use of Story Reports
- Create a new Story Report

## Lesson 2: Creating Queries for Story Reports

### Lesson Objectives

After completing this lesson, you will be able to:

- Create a data source
- Create calculated columns in a data source
- Apply filters in Query Designer
- Enhance data coverage for queries

## Lesson 3: Designing Story Reports

### Lesson Objectives

After completing this lesson, you will be able to:

- Navigate the Story Report Interface
- Manage data sources in a Story Report
- Add images, shapes, and text to a Story Report
- Add and configure tables in a Story Report
- Add and configure charts in a Story Report
- Use calculations in a Story Report
- Set Page and Story level configurations

## Lesson 4: Managing and Running Story Reports

### Lesson Objectives

After completing this lesson, you will be able to:

- Manage Story Reports in the Report Center
- Run and interact with a Story Report

## **Lesson 5: Administering Story Reporting**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Enable Story Reports

## Lesson 1: Providing a Table Report Overview

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe Table Reports and their usage

## Lesson 2: Creating Table Reports

### Lesson Objectives

After completing this lesson, you will be able to:

- Create multiple Table Report types
- Define report scope of user data
- Select the data sets to display in the report output
- Select the columns to display and sort data
- Configure fields
- Filter data

## Lesson 3: Viewing Report Results

### Lesson Objectives

After completing this lesson, you will be able to:

- Preview report results

## Lesson 4: Running Reports

### Lesson Objectives

After completing this lesson, you will be able to:

- Edit an existing Table Report
- Manage an existing Table Report

## Lesson 5: Administering Table Reports

## Lesson Objectives

After completing this lesson, you will be able to:

- Administer Table Reports



## Lesson 1: Providing a Canvas Report Overview

### Lesson Objectives

After completing this lesson, you will be able to:

- Understand use cases of canvas reports
- Use case of Canvas Reports

## Lesson 2: Creating Queries with Detailed Reporting on Live Data

### Lesson Objectives

After completing this lesson, you will be able to:

- Create a new Canvas Report
- Create a new detailed reporting query
- Manage fields in a detailed reporting query
- Create calculated columns
- Configure people scope
- Create static and runtime filters
- Define data sets
- Configure additional query options
- Create a multi-domain query
- Identify LMS specific query configurations and limitations

## Lesson 3: Building Pivot Data Queries

### Lesson Objectives

After completing this lesson, you will be able to:

- Create pivots with numeric data
- Create pivots with textual data

## Lesson 4: Designing Report Pages

## Lesson Objectives

After completing this lesson, you will be able to:

- Use the canvas report page designer
- Manage report pages
- Utilize images and text components
- Utilize list report components
- Utilize components for pivot data

## Lesson 5: Creating Queries with Advanced Reporting on Replicated Data

### Lesson Objectives

After completing this lesson, you will be able to:

- Create a new advanced reporting query
- Manage fields in an advanced reporting query
- Create calculated columns
- Create aggregated calculated columns
- Configure tables in the query
- Define table restrictions
- Configure person context
- Create filters
- Configure additional query options
- Use change reporting
- Configure metadata changes with advanced reporting
- Navigate Employee Central data
- Configure date options
- Use date types to achieve desired results

## Lesson 6: Managing and Running Canvas Reports

### Lesson Objectives

After completing this lesson, you will be able to:

- Run reports
- Share reports
- Manage reports

---

## **Lesson 7: Administering Canvas Reports**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Manage SAP SuccessFactors Canvas Report permissions



## Lesson 1: Providing a Dashboard Overview

### Lesson Objectives

After completing this lesson, you will be able to:

- Identify use case of dashboards

## Lesson 2: Creating Dashboards and Tiles

### Lesson Objectives

After completing this lesson, you will be able to:

- Add a standard dashboard or tile
- Create a custom tile with tile builder
- Construct a tile-based dashboard

## Lesson 3: Managing the Dashboard Framework

### Lesson Objectives

After completing this lesson, you will be able to:

- Edit an existing tile or dashboard
- Set universal dashboard filter settings
- Set up date ranges
- Manage visual display of tiles
- Enable user access to tiles and dashboards

## Lesson 4: Using Tiles and Dashboards

### Lesson Objectives

After completing this lesson, you will be able to:

- Access Tiles and Dashboards
- Configure tile level settings for consumers
- Configure dashboard level settings for consumers

## **Lesson 5: Administering Dashboards**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Assign admin permissions to the dashboard framework