HR Part II

Lesson 02: User Administration, Admin Security and Access, Admin Reports

Overview

SAP SuccessFactors Learning is centered on the user and gives an admin the ability to identify the training that users have successfully accomplished, need to accomplish, or are in the process of completing. The goal of this lesson is to familiarize you with the attributes found in the user record.

Objectives

Upon completion of this lesson, you will be able to:

- Identify the characteristics of a user record
- Identify and describe the main tabs of the user record
- Access an existing user record
- Add and modify a user record

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User Main Concepts

A user is any person in an organization for whom past, present, and future learning records must be tracked. A user may be an employee or a contractor.

He/she has access to SAP SuccessFactors Learning from the SAP SuccessFactors Learning application to view his/her training information and, if identified as a supervisor or Human Resource Business Partner (HRBP), may view subordinate training information.

It is strongly recommended that a standardized naming structure be established or a feed from the Human Resource Information System (HRIS) be used to create user records.

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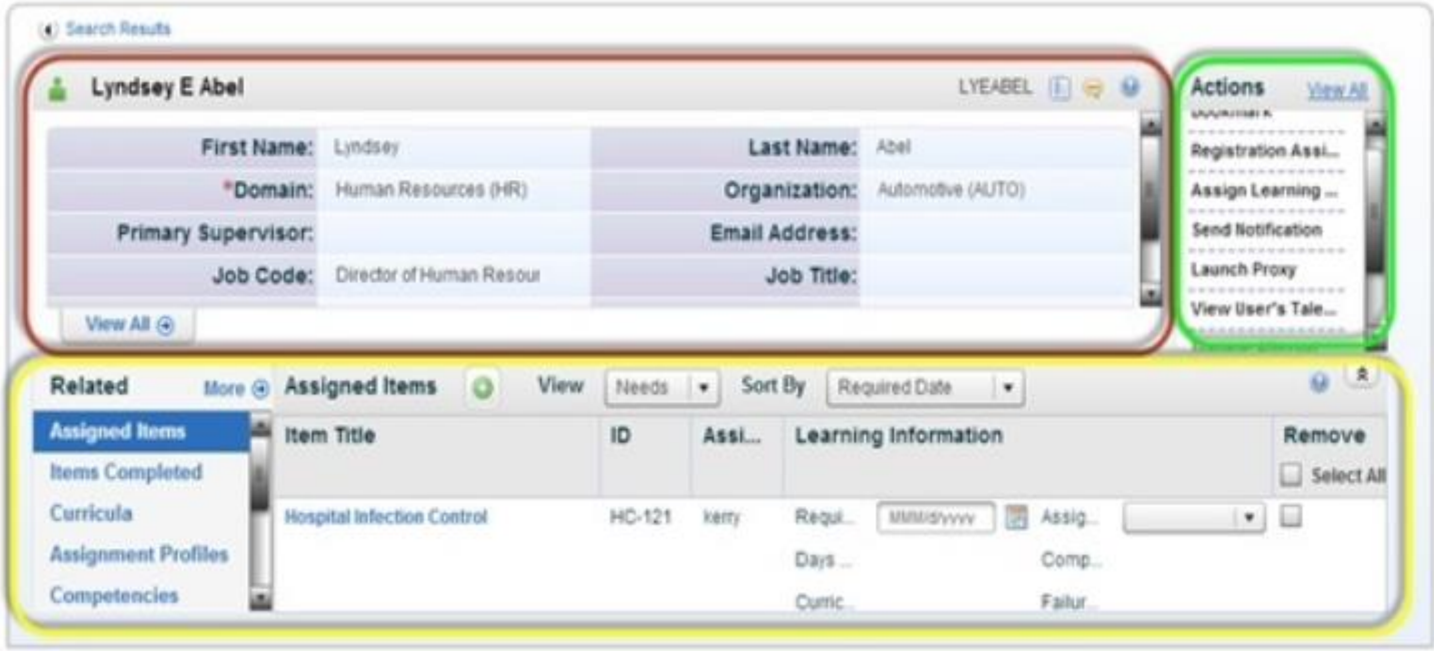
Main Areas of the User Record

The user record is divided into three main areas:

- Core (red outline at the top left) (also called the *Summary* Tab)
- Related (yellow outline at the bottom half)
- Actions (green outline at the top right)



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Core Area (Summary Tab)

The core area contains the basic information of the user record, including the user's name, position, email, organization, supervisor, and job code. To edit any field in this area, click in a displayed field and enter text or select a reference value (depending on the field type). You can also view and enter additional information by clicking *View All* located at the bottom left of the core area. Once expanded, the screen displays sections where updates can be made, including:

- *Summary*: name, position, domain, supervisor, job code, email, organization
- *Extended Summary*: active, role, coach, custom columns
- *Employment*: employment status, type, hire date, job location, job title, region, prior service time, related instructor, resume
- *Reset Password*: enter and confirm new password (for native login only)

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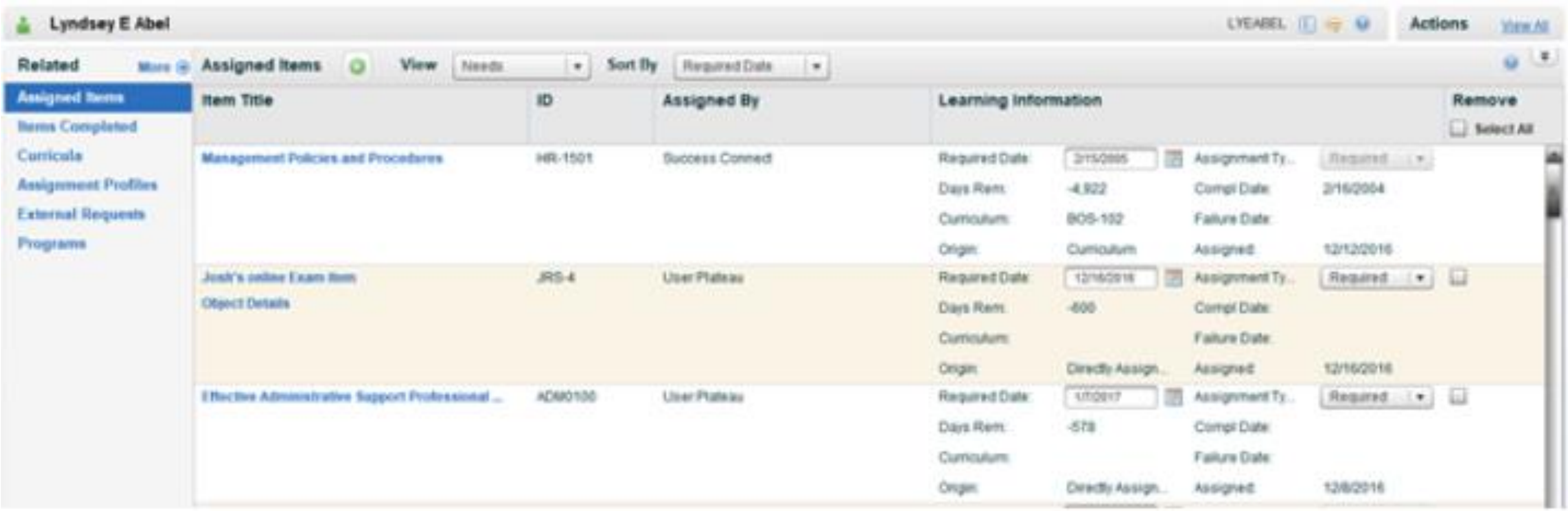
Related Area

The *Related* area of the user record contains additional tabs of information associated to the user.



The related area displays major tabs that administrators use when interacting with the user record. Select a *Related* tab on the left (i.e., *Assigned Items*) to display the details on the right. Click *More* to see additional *Related* tabs. The *More* link displays a list of items that administrators may be less likely to need regularly.

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Related Area

The table provides a list and descriptions of the available Related tabs.

Option	Description
Assigned Items	The *Assigned Items* tab is used to assign items to a user's learning plan and manage a user's assigned items.
Items Completed	The *Items Completed* tab is a transcript of all the items a user has ever taken (also called the Learning History).
Curricula	The *Curricula* tab is used to assign curricula as well as manage all the curricula that is assigned to the user, regardless of how the curricula was assigned.
External Requests	Requiring an add-on called SF-182 for U.S. Government customers, the *External Requests* tab is used to add, edit, approve, and withdraw the user's External Requests (a form used when users want to attend a training event that is not managed by SAP SuccessFactors Learning).
Assignment Profiles	You can use the *Assignment Profiles* tab to review all the assignment profiles that a user belongs to. This tab may not be used to add the user to or remove the user from any Assignment Profiles.
Programs	You can use the *Programs* tab to review all the Programs that a user belongs to. This tab may not be used to add the user to or remove the user from any Programs.

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Related Area

Available under More →	
Phone Numbers	The *Phone Numbers* tab is used to create or manage the different phone numbers that are associated with a user.
Registration	The *Registration* tab is used to view the user's scheduled offering registrations.
Requests	The *Requests* tab is used to view the requests that a user made from the user interface for instructor-led or blended items.
Online Status	The *Online Status* tab is used to review any of the items that 1) are assigned to the user's learning plan and 2) have online content, and 3) are currently in progress or outstanding (not completed). This tab may be used to give the user access to exams or content objects if they are locked out of them. It may also be used to mark an individual object complete (if the user has experienced a technical issue and may not move past the object on his own).
Commerce	The *Commerce* tab is used to edit the user's shopping account, billing, and shipping information.
Account Code	The *Account Code* tab is used to select an authorized account code to associate with a user so that the user can purchase items that have a price using the chargeback payment method.
Catalog Preview	The *Catalog Preview* tab lists all the catalogs that a user can access.

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Related Area

Preferences	The *Preferences* tab is used to set or change a user's time zone, currency, locale, and locale format options.
Approval Role	The *Approval Role* tab is used to associate the user with an approval role so that an administrator can assign the role to the user for an approval process.
Government Reporting	This tab can be used if you need to complete Declaration No. 2483 for reporting to the French government.
Approvals	Some items require that users receive approval before they gain access to the item. In these situations, users must request approvals, which administrators can review from the Approvals tab. The administrator may take action on this tab for any of the pending approvals that this user is responsible for approving.
Alternate Job Codes	The *Alternate Job Code* tab is used to add and edit alternative job codes (also called secondary job codes) that are associated with a user; you can find a user's primary job code in the Job Code box on the Summary tab (Core area).
Surveys	The *Surveys* tab is used to view information about surveys associated with the user and details for the items that are associated with each survey. When a user completes an item that is associated with a survey, SAP SuccessFactors Administration adds the survey to this tab. When a user completes the survey, SAP SuccessFactors Administration removes the survey from this tab.
Groups	This tab will display any groups the user is currently part of – for the purpose of slots or custom tiles.

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Assigned Items Tab

The *Assigned Items* (or Learning Plan) tab displays items assigned to the user individually or as part of a curriculum. The tab shows items not yet completed, and items completed but are part of a curriculum and need to be completed again (retraining). Admins can view the assignment type and required completion date for each assigned item. Admins may assign free-floating items directly to a user from this tab. Admins may see duplicate items here that might have been assigned multiple ways to the user. Admins may see items that have been hidden from the user's own view (such as items with retraining or that are due later than 90 days – or optional items in a curriculum that the user has chosen to hide).

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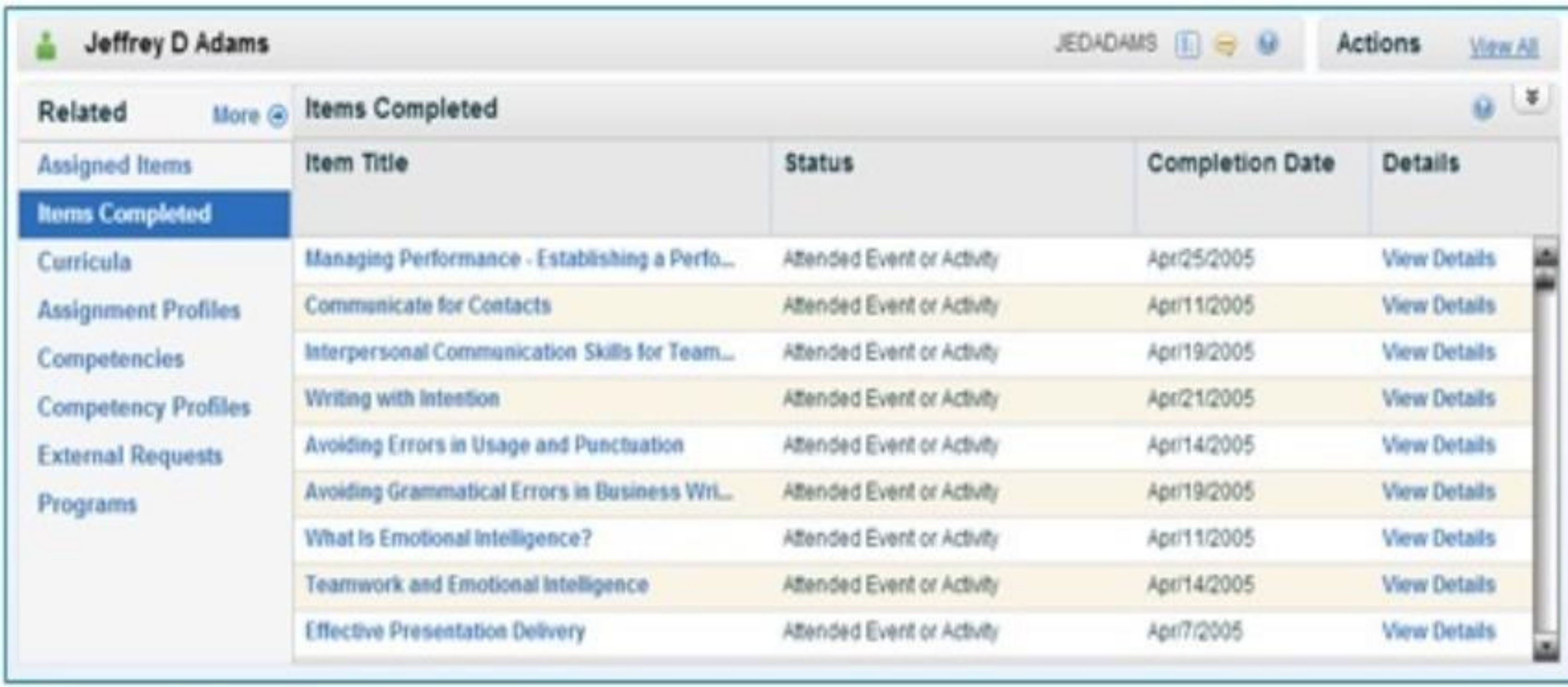
Items Completed Tab

The *Items Completed* (Learning History) tab displays the list of items completed by the user. It also displays external events (such as a college courses or seminars outside of the organization or for which there isn’t an item). Each learning event includes the completion status (For Credit and Not for Credit completions of items), completion date/time, and any other details (i.e., instructor, credit hours, and comments) entered when the learning event was recorded, as well as file attachments associated with the learning event.



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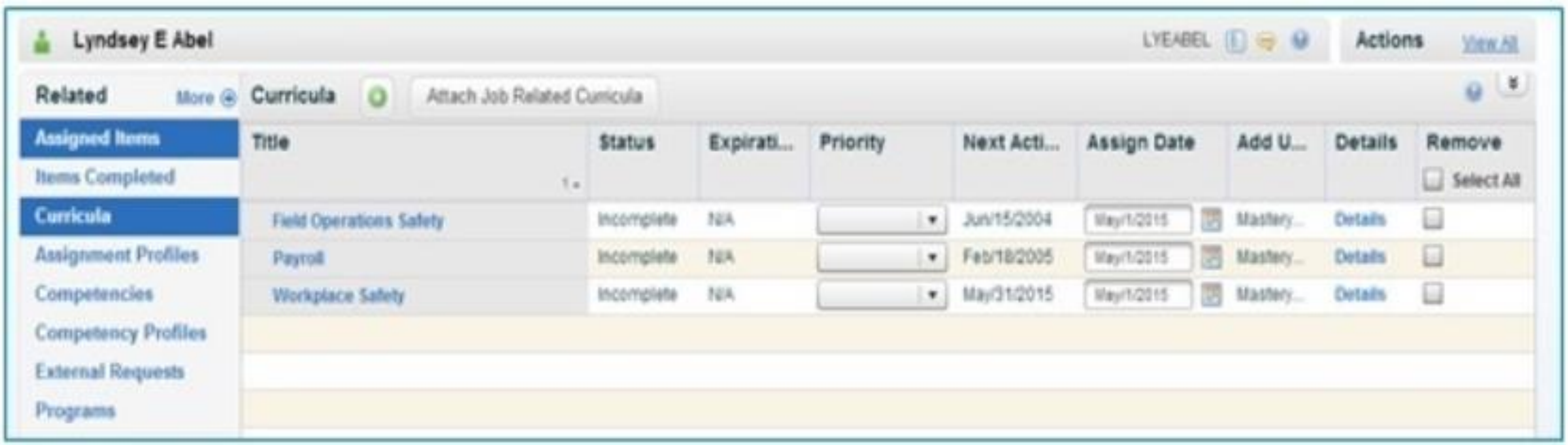
Curricula Tab

The *Curricula* tab lists each curriculum that has been assigned to the user. Admins can view the status and details of each assigned curriculum, including individual item completion statuses and curriculum requirements, if any. Admins can also assign a curriculum to a user through this tab.



Programs Tab

The *Programs* tab lists each program that has been assigned to the user. Admins can view the status and details of each assigned program; however, they may not assign programs to the user from this tab.

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Actions Area

The *Actions* area of the user record contains links to additional actions that can be taken on the user record, including:

- *Bookmark* (add the user to the admin bookmarks)
- *Registration Assistant* (initiates the Registration Assistant tool)
- *Assign Learning Needs* (initiates the User Needs Management tool to enable you to batch assign items and curricula to one or more users)
- *Send Notification* (initiates the ad hoc notification wizard)
- *Launch Proxy* (initiates proxy feature where an admin may become the user and perform most functions the user may do for him/herself or subordinates – except launching online items)
- *Manage Alternate Supervisor* (allows you to identify alternate supervisor for user)
- *Reset User Pin* (resets the user's pin)
- *Copy User* (opens the Copy User window that allows you to copy the user)
- *Delete* (deletes the user record)

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Adding Users to SAP SuccessFactors Learning

Most users are added to SAP SuccessFactors Learning as a result of a process called a connector. This will be configured globally to pull user records from SAP SuccessFactors HCM (the SAP SuccessFactors connector) or a third-party HR system (the User connector). Sometimes, however, you may need to create user records manually (for example, if they are not found in another system) or in other cases, users may be allowed to create their own user record by populating a form which requires an approval before the system adds the record.

If new user records are entered manually, follow your organization’s business rules or establish a naming convention for user IDs to maintain consistency and usability. SAP SuccessFactors Learning requires that each user record contain a unique user ID, which is used as the login ID for SAP SuccessFactors Learning.

Examples of user IDs:

- KSMITH
- ksmith123
- 00129800

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Adding Users to SAP SuccessFactors Learning

All user records are assigned to a domain. The domain is a way to show administrative ownership and determines which admin(s) will manage the user record. If the user's record is assigned to the "Public" (or Default) domain, the record will be editable by all admins who have the right to edit any user records in the system. When adding user records to SAP SuccessFactors Learning, always specify the domain to which the user record should belong. All fields indicated with a red asterisk (*) are required by the system and must be completed when adding records to SAP SuccessFactors Learning. Additional fields may be made required through global configuration.

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User Attributes

These are many attributes available in the user record. Customers must populate related reference tables with data that can be accessed enterprise-wide. This information is usually migrated to SAP SuccessFactors Learning from HRIS.

Key user attributes include:

- Job Codes: Job Codes is a job title in your organization
- Job Location
- Employee Type and Employee Status
- Supervisor and Alternate Supervisors
- Organization (covered in a later section)
- Domain (covered in a later section)
- Custom Fields

Discussion: User Attributes – Identify Important Fields

Identify fields used for searching, assigning learning, and running reports. Include a list of custom columns if relevant.

Discussion: User Search – Tailor User Search Criteria

You can tailor search criteria for records that admins access frequently, especially users. Ask your implementation team for examples of enhancing user search.

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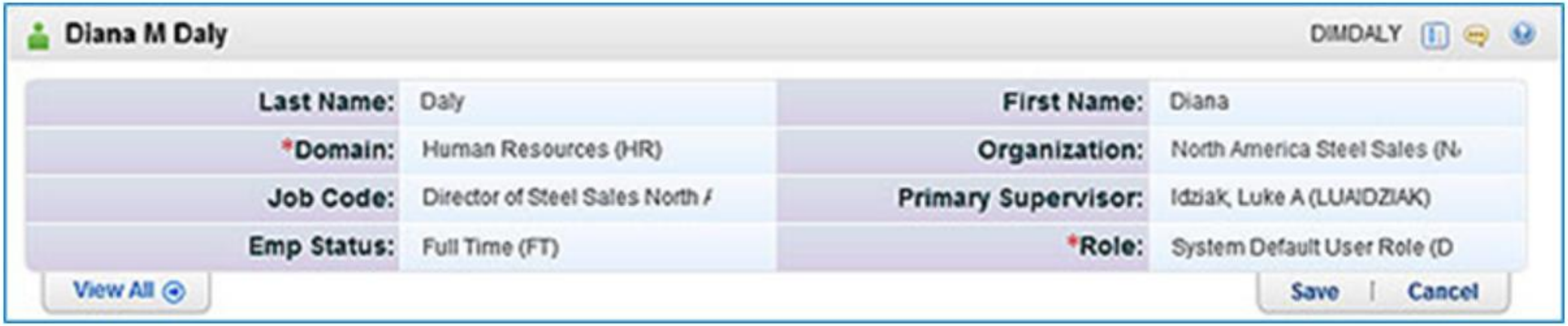
Admin Access to User Records



The facilitator will demonstrate the steps for an admin to access a representative user record, as shown in the figure.

Customers can set the record configuration to make commonly used information more obvious. In this way, you can make the admin interactions more intuitive. In addition, you can define fields as **required**. If the field is required, an admin cannot edit and save the record without providing an entry in required fields.

Decision: User Record Configuration – Define Default Layout

Decide the fields that admins will see by default. Identify required fields if relevant.

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Admin Action: Administrator Proxy

Administrator Proxy allows administrators to see much of what the user sees. There are many reasons administrators may need or want to view a user’s record, including viewing errors that may be occurring for the user, in order to better troubleshoot a potential problem.

To enable proxy access, the admins must be granted the Administrator Proxy for Learning workflow.

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Admin Security and Access

A multi-level security model allows administrators to access various functions in SAP SuccessFactors Learning along with specific sets of data. Administrators should be assigned permissions to SAP SuccessFactors Learning based on their job responsibilities and the area for which they have a need to access data. SAP SuccessFactors Learning security can be set up to restrict what information an admin can see, and what he/she can do to this information.

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Domains

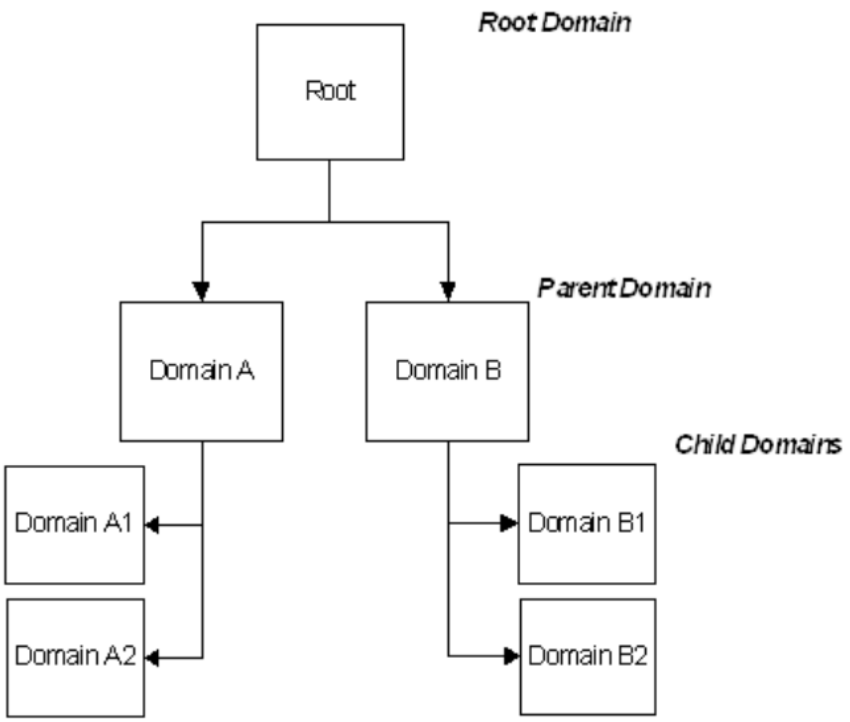
SAP SuccessFactors Learning creates areas of data access through the use of domains. These control all important entities in the learning application with the exception of references which are global. The use of domains is an important part of security strategy. Domains should be created wherever there is a need to restrict data to some administrators and prevent other administrators from searching, viewing, editing, adding, or deleting the data.

Domains are used to indicate what data can be seen and by whom. Domains act as an active filter for data, only allowing administrators with permission for the domain to view or manipulate data records that have been associated with that domain.

Domains can be built in a hierarchical structure, with each domain having one or more children. Each domain can have only one parent. The nested structure allows access to data within organizational structures with minimal work from the admin.

Discussion: Domains – Determine the Domains and Hierarchy

How will you develop a domain structure that supports your requirements?



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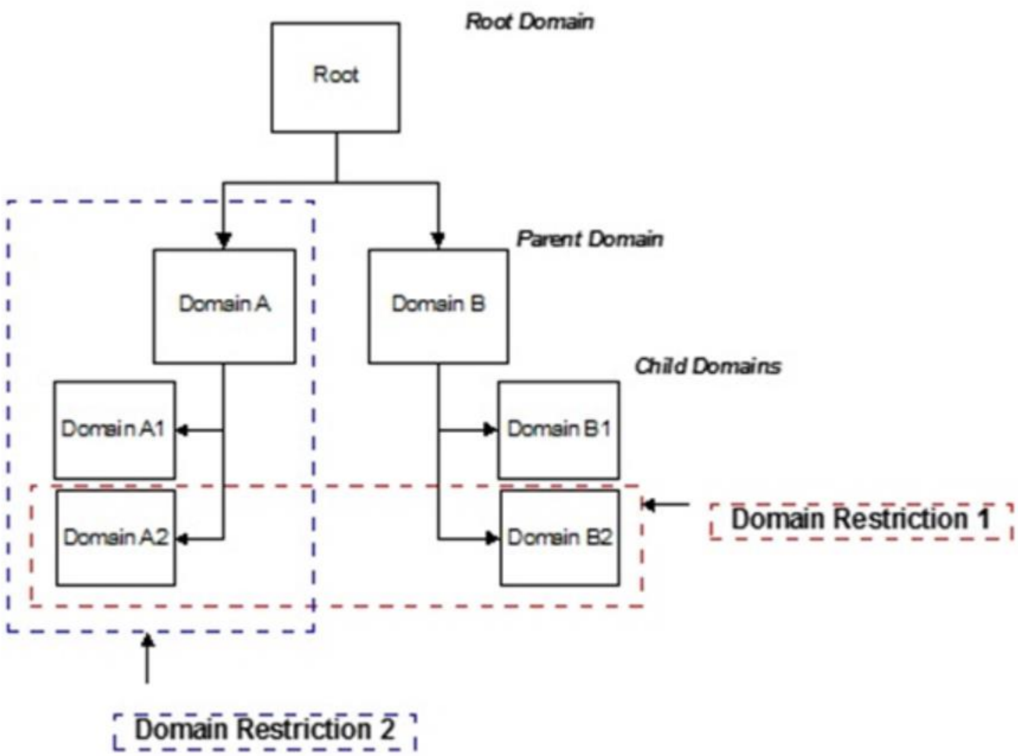
Domain Restrictions

Each individual domain can be included in a domain restriction, a group of domains defined to suit specific needs.

To provide the maximum flexibility, domain restrictions are applied at a more granular level than merely to an entire admin account – they are applied to the individual entities for which an admin has permission (such as users, items, offerings, or programs), and can even be applied to particular functions (e.g., view, add, delete, and others) that pertain to an entity.



For example, the system can be directed to allow an admin to only "search and view item records in domains A, A1 and A2," while allowing that same admin permission to perform all functions on curricula in domains B2 and A2 only.

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Admin Workflows

Workflows are what an admin can do within SAP SuccessFactors Learning. Workflows can range from viewing user data to recording learning events for users.

A workflow is comprised of a function tied to an entity. These functions can affect active records, inactive records, or both. An entity in the system includes, for example, items, users, and scheduled offerings.

Workflow	Function	Entity
User Management		
Add User	Add	User
Delete User	Delete	User
Edit User	Edit	User
View User	View	User

Functions are “actions” such as view, edit, and delete. The state of the record can be either active, inactive, or both. The combination of a function applied to an entity is a workflow. For example, a workflow might be “view items,” “edit users,” or “delete scheduled offerings.”

Any combination of workflows can be assigned to an admin role to match an admin’s set of required job tasks in the system.

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Roles = Workflows Plus Domain Restrictions

A role is made up of workflows and the domain restrictions assigned to them. The combinations of domains and workflows can be as diverse as they are numerous.

Workflow	Function	Entity	Domain Restriction ID	State Restr.	Domain Restriction ID	State Restr.
User Management						
Add User	Add	User			WEST-ONLY	Both
Delete User	Delete	User			WEST-ONLY	Inactive
Edit User	Edit	User			WEST-ONLY	Active
View User	View	User			PCW-ALL	Both

Discussion: Admin Roles – Identify Workflows and Domain Access

You will develop one or more roles to assign to admin accounts. Each role will have a set of workflows and can contain domain restrictions if needed.

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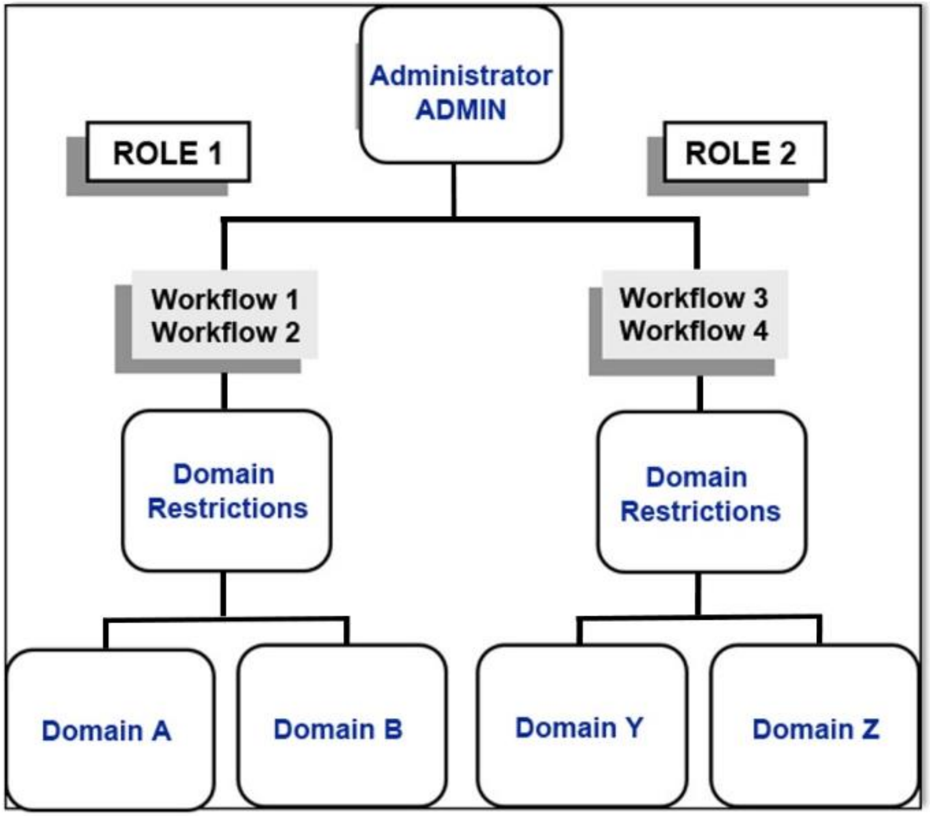
Admin Accounts

Administrators are logins created for individuals who will access SAP SuccessFactors Learning Administrator. Each admin will be assigned a role(s). This determines what functions he/she can perform and which set of data he/she has access to in which to perform those functions.

Admins can have one or more roles assigned to them based on their job requirements. Also, an admin's user ID can be added to their admin account, which then allows admins to navigate between their admin and user accounts.



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Organizations

An organization is an entity to which a user belongs. You define organizations to suit your needs. For example, an organization might be along functional lines (Manufacturing, Administration Corporate QA), or represent a business unit. You can also use another basis for defining organizations.

In the LMS, organizations can be used in the following ways:

- Users can be set up to use an organization's account codes to pay for an item that has an associated cost.
- Organizations can have slots (seats) reserved for a scheduled offering.
- Organizations can have an individual News page.
- Organizations can determine the notification layout with the header, footer and "From" fields.
- Organizations can have custom tiles that display only for users in that organization or suborganizations.
- Organizations can be the control entity for multilevel approvals (instead of domains).
- Organizations can be used to search for users and an attribute to assign training.
- Organizations can have Training Planner capability, which uses Training Budget and Training Manager as part of the organization.

Discussion: Organization – Determine the Orgs and Hierarchy
You will develop an organization structure that supports your requirements. Keep reporting and information tracking in mind. This structure can increase the value of assigning learning and running reports. The creation and assignment of organizations also helps to speed up searches and queries.

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SAP SuccessFactors Learning - Reporting Management

Overview

SAP SuccessFactors Learning is a Learning Management System (LMS). In this course, you will gain basic skills in how to run, save and create standard LMS Reports.

Unit Objectives

This unit has the following lesson:

- Lesson 1: Running, Saving, and Creating Recurring Reports

Upon completing this unit, you will be able to:

- Run, Save, and Create Recurring Reports

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Lesson 1 - Running, Saving, and Creating Recurring Reports

Lesson Overview

A priority for many administrators (admins) is to be able to run detailed reports. The overall goal of this Reports admin guide is to provide you with the knowledge needed to use the SAP SuccessFactors Learning report interface to run, save, and create recurring report jobs.

Becoming Familiar with the Report Interface

SAP SuccessFactors Learning is accessed either as an admin or as a user. Admins are able to run reports on users they have access to, which is determined by the domain restrictions applied to their admin accounts. Users, on the other hand, are only able to run reports on themselves; however, if the user is listed as a supervisor in SAP SuccessFactors Learning, that user is able to run a report on him/herself and any of his/her direct or indirect subordinates. The SAP SuccessFactors report interface is broken down into three main tabs:

- Saved Reports
- Reports
- Report Jobs

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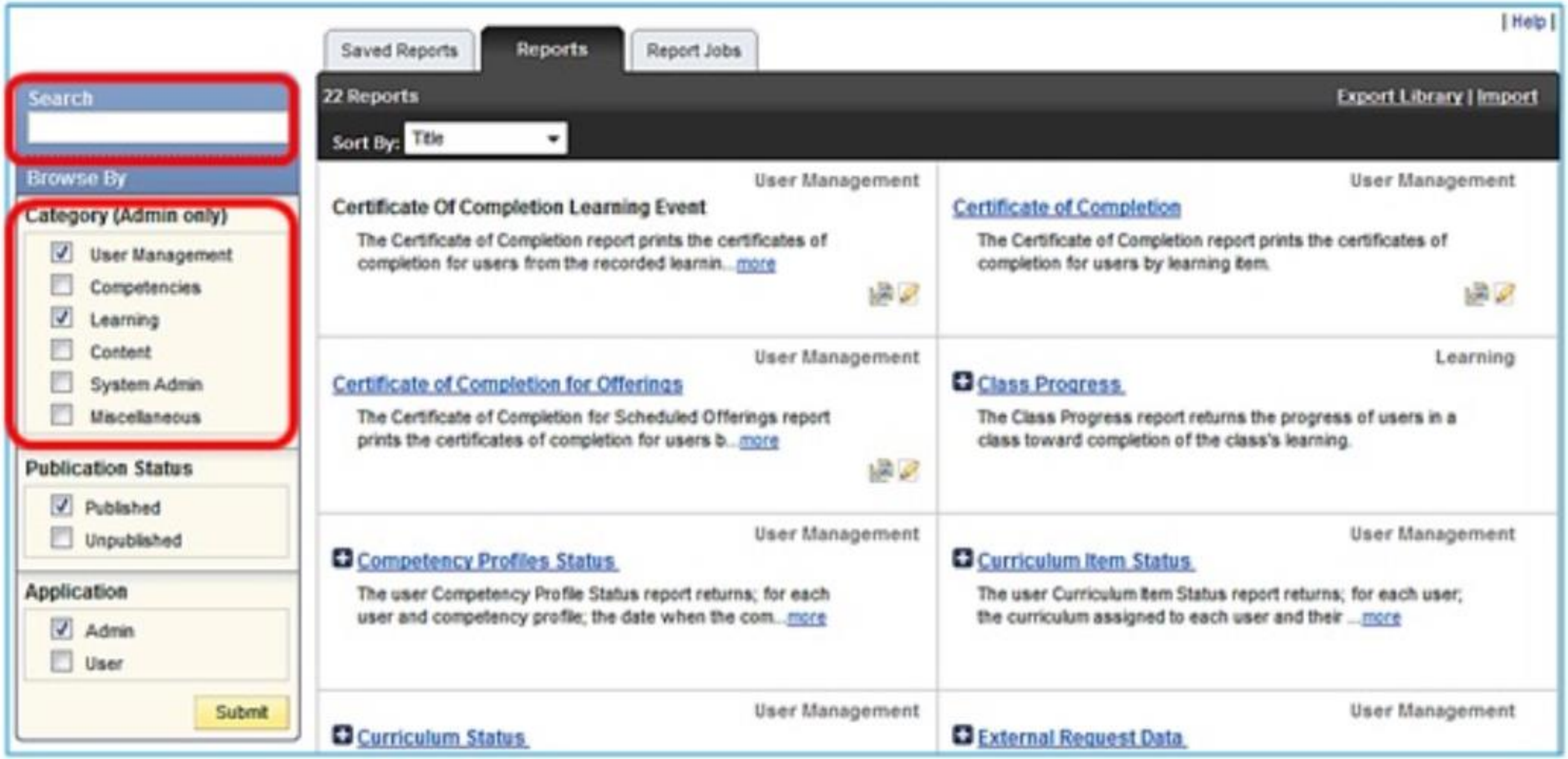
Reports

The most common use of the *Reports* tab is to run available reports within the system. To find the desired report, browse the provided list under the *Reports* tab or use the *Search* textbox and *Browse By* options on the left side of the report interface to search for reports by the title or description. To further assist in the search for a desired report, narrow the search results by checking the corresponding checkbox in the left hand corner to select very specific categories of reports.



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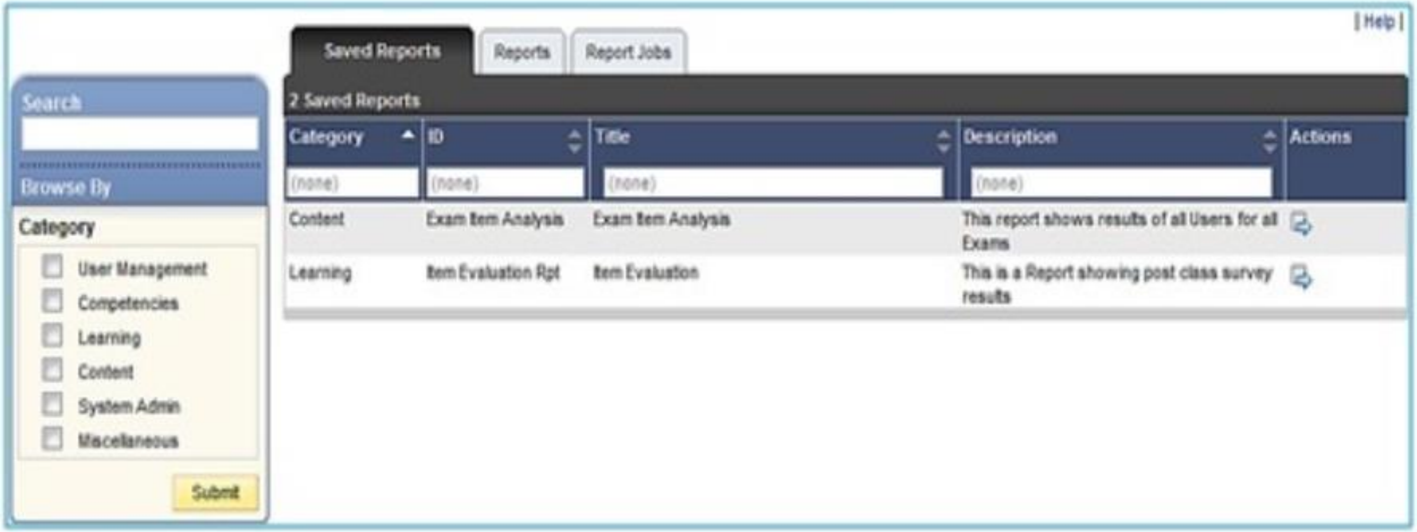
Reports

Depending on your security privileges, you may also perform advanced report tasks from the *Reports* tab, such as changing the description of reports, importing and exporting reports and libraries for customization in *Report Designer*, and publishing and un-publishing reports. The functions that you are able to perform in the reports section are controlled by report workflows given to you by the system administrator.

Saved Reports

Once you create a saved report, you can access the report and run it without reentering filtering options. Saved reports are located under the *Saved Reports* tab, and are specific to your admin account, meaning that saved reports are not shared among admins in the system. A saved report is very similar to a saved search in SAP SuccessFactors Learning – only the admin who created the saved report is able to see it.



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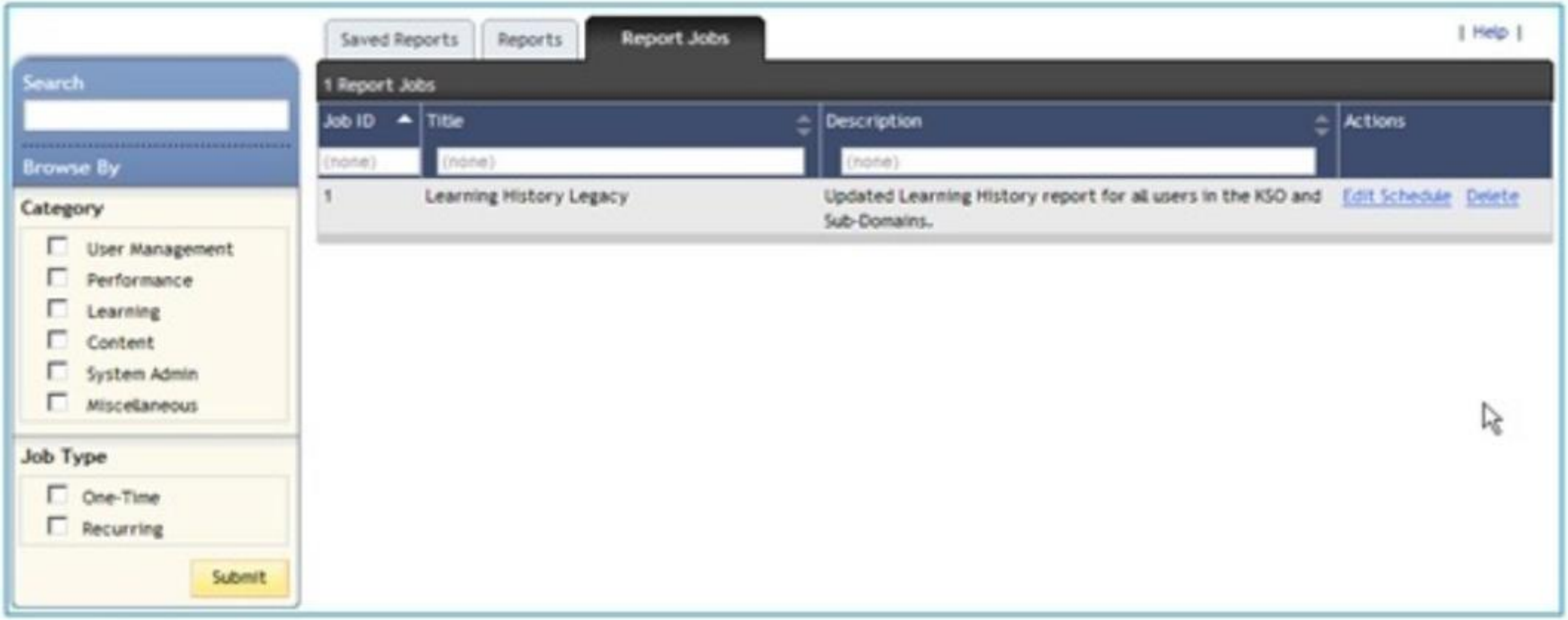
Report Jobs

The *Report Jobs* tab lists the current background report jobs which are automatically running in the background. Jobs are created under this tab when you schedule the report to occur on a recurring basis. On this tab, you can delete jobs from recurring or edit the schedule of when the report should run.

Note: Reports that are scheduled to run only once display under *System Admin > Background Jobs*.

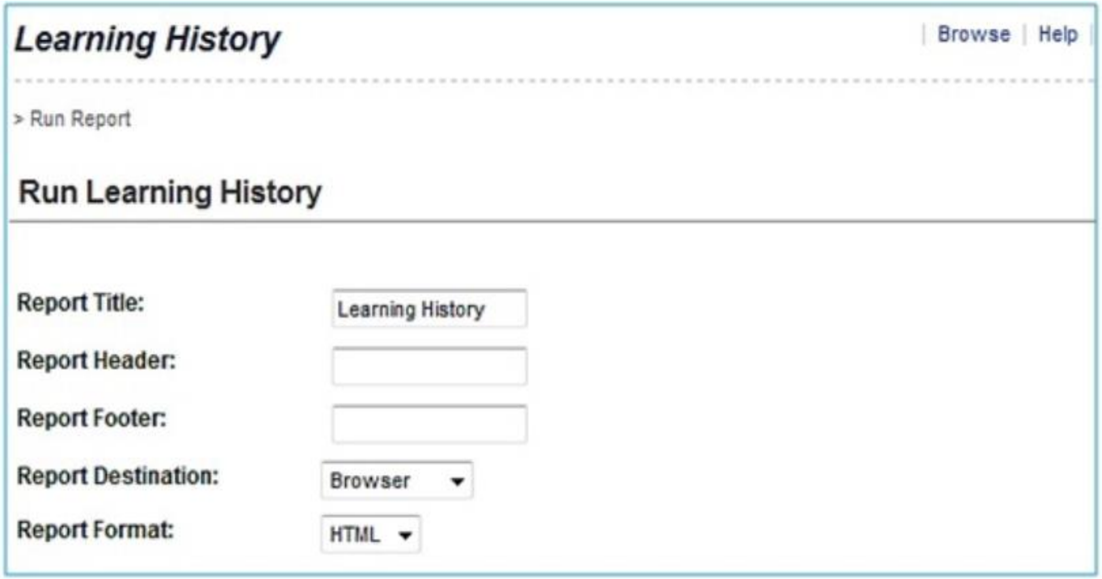


Identifying the Reports Sections

Each report is divided into two main sections: formatting and criteria.

Formatting
The top section of the Run Report screen contains the following formatting options:

- Modify the report title, header, and footer.
- Determine the report destination (the location where the report engine returns the data). You can return the data to the browser or to a local file. When you select Browser, the report is displayed in the internet browser window. When Local File is selected, you must save the report to a local drive before you are able to open it.
- Determine the report format. Table lists the available report formats and their usage. When selecting CSV, you may also select Tab, Comma, Pipe, Semicolon, Carat, or Tilde from the dropdown for CSV Report Delimiter.



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Identifying the Reports Sections

Format	Usage
XML – rarely used (May not be available for all reports)	Import the data into a database and for troubleshooting a report.
CSV	Open the data in a spreadsheet format, in an application like Microsoft Excel, or import data into a database, such as Microsoft Access. Although CSV reports typically output as comma separated values, admins have the option to choose a different delimiter.
HTML	View results quickly in a browser window.
PDF	Print, save, and email the report.

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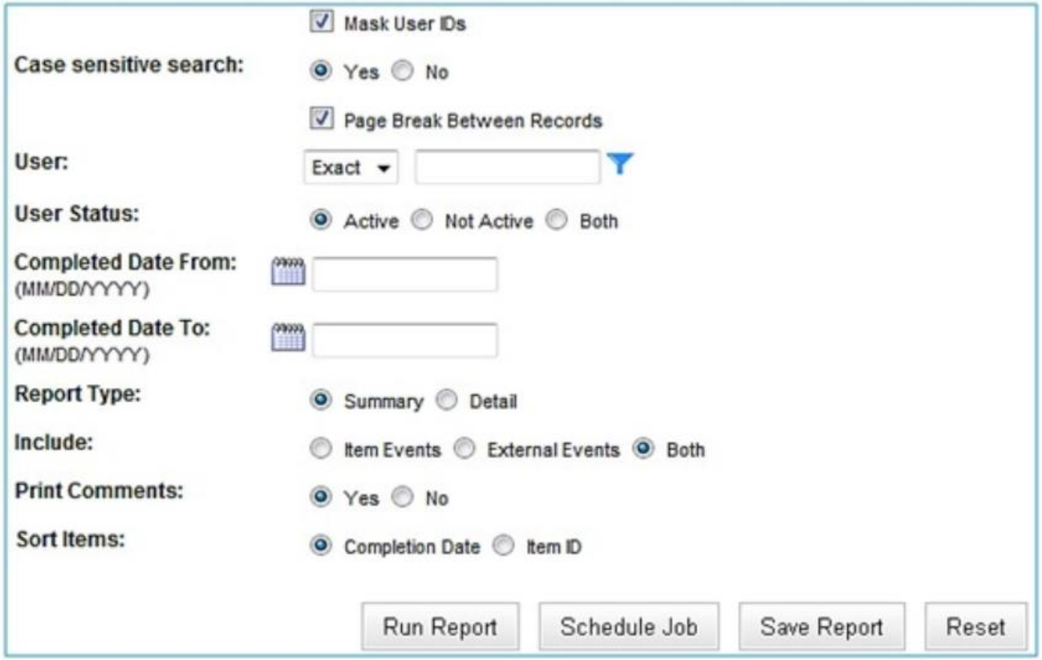
Identifying the Reports Sections

Criteria

The selected report dictates the criteria displayed at the bottom of the Run Report screen. This section provides all the tools and functionality from searching. Report pages filter the data that the report returns using specific search fields; however, many reports also contain the following controls for filtering the data that you want to return:

- **Mask User IDs:** For security reasons, the system can mask the user IDs so it displays as a series of asterisks. Check the checkbox to hide user IDs.
- **Case Sensitive Search:** You can choose to perform a case-sensitive search or a case-insensitive search. Case-sensitive searches return data elements only when the characters and case match. Case-sensitive reports run faster than case-insensitive searches.
- **Page Break Between Records:** For longer reports, there is an option to insert page breaks between records.
- **Filter by Criteria:** Some fields in the report pages contain a Filter by Criteria link. When you click the link, a page opens that contains multiple search fields in which you can select a set of data rather than a single data element. For example, you can return the set of users who are in the job location Washington, DC rather than entering multiple users in the search field.



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Submit Filter Information as Criteria

If you are saving a report to be run at a later time or scheduling a report to run on a recurring basis you may want the report to dynamically update the search filters. In this situation, you must save the criteria of the search instead of selecting results.

For example, Chase wants to run a report on all of Marcus Hoff's subordinates. Chase filters the user search using Marcus Hoff as the supervisor, and then selects all of his subordinate IDs to the filter. By doing this, Chase is selecting actual users to include on the report.

What happens if Marcus is assigned another subordinate next week? Chase would have to search again and add the new subordinate to the filter in order to include him/her on the report. An easier method, and one especially useful if you are going to save the report and run it later or set the report to recur, would be to submit Marcus Hoff's information as criteria.

Creating search filters in reports determines the contents of your results by listing only entities that satisfy all the criteria specified by the filter(s) created. For example, in this case we want to run a Learning History Report for all users who report to Marcus Hoff. You must specify the supervisor(s) in the user filter and apply that filter as criteria in order for the report to be dynamic.

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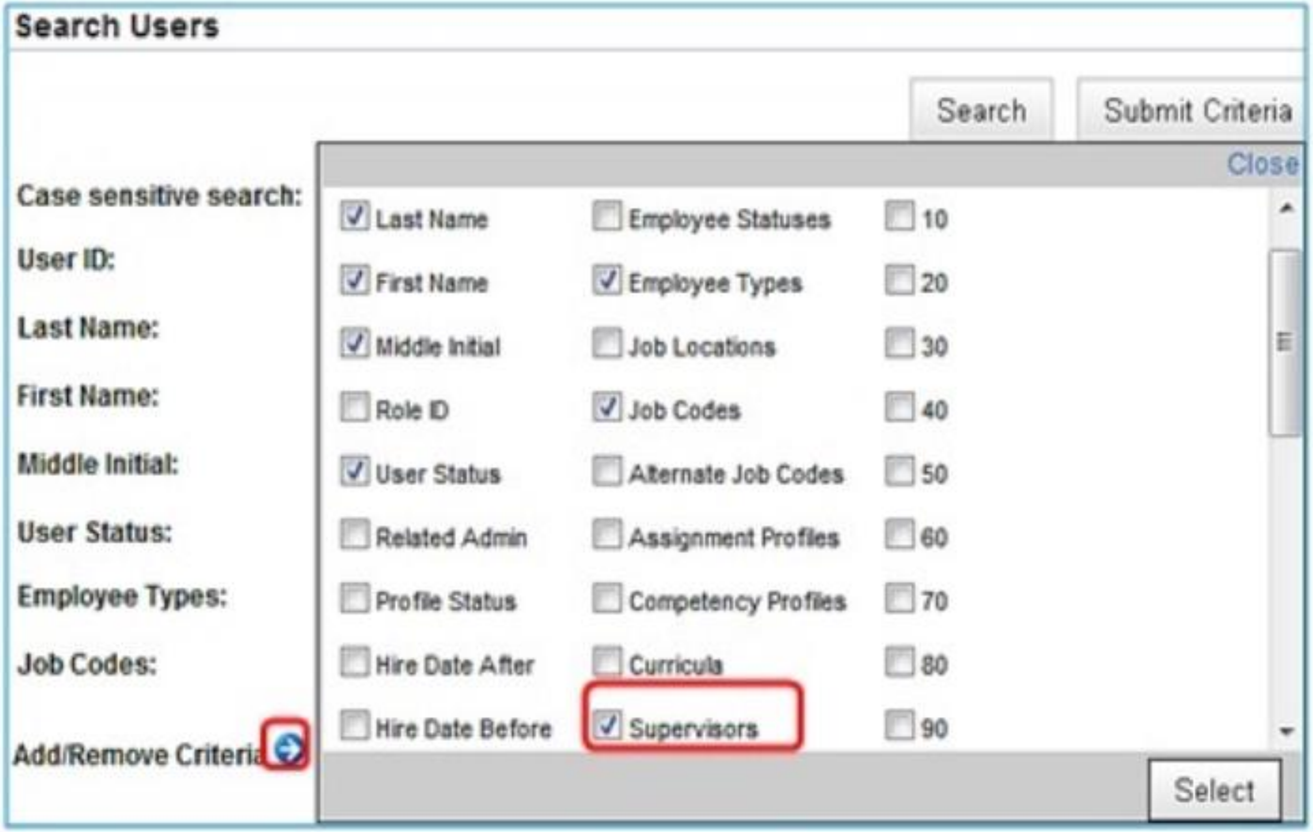
Submit Filter Information as Criteria

1. Access the *Learning History Report*.
2. Click the *Filter by criteria* icon ( ) next to the user criteria.
3. If necessary, click *Add/Remove Criteria* to add the supervisor search filter to the search screen to display the *Search Criteria* pop-up window.



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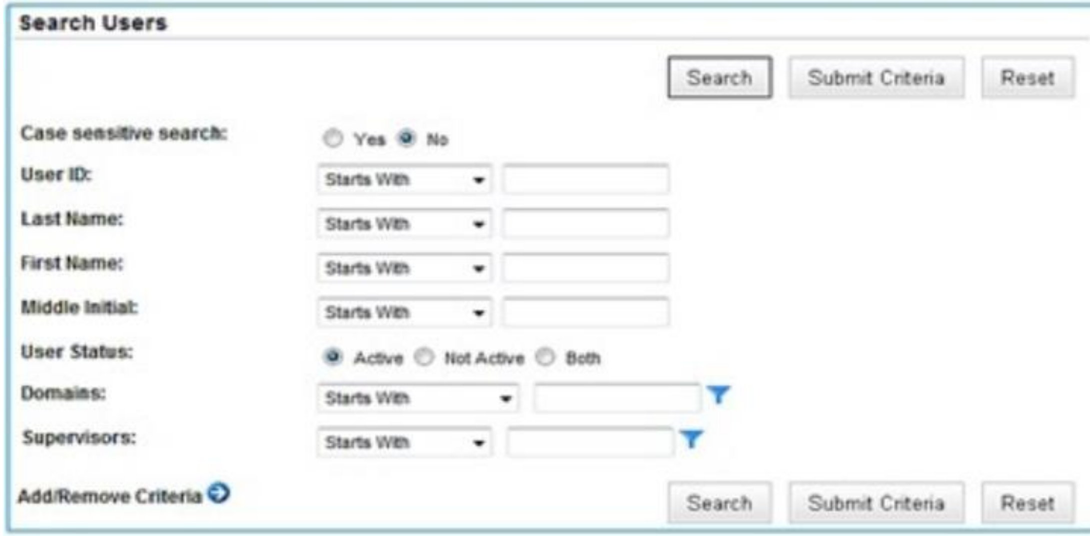
Submit Filter Information as Criteria

4. Select the *Supervisors* checkbox and click *Select*. The Supervisor search query displays.



4. To create the filter, click the Filter by criteria icon ( ). The Create Filter by Supervisor screen displays.
5. If you don't know the supervisor's ID, enter search criteria in the Last Name and First Name textboxes.

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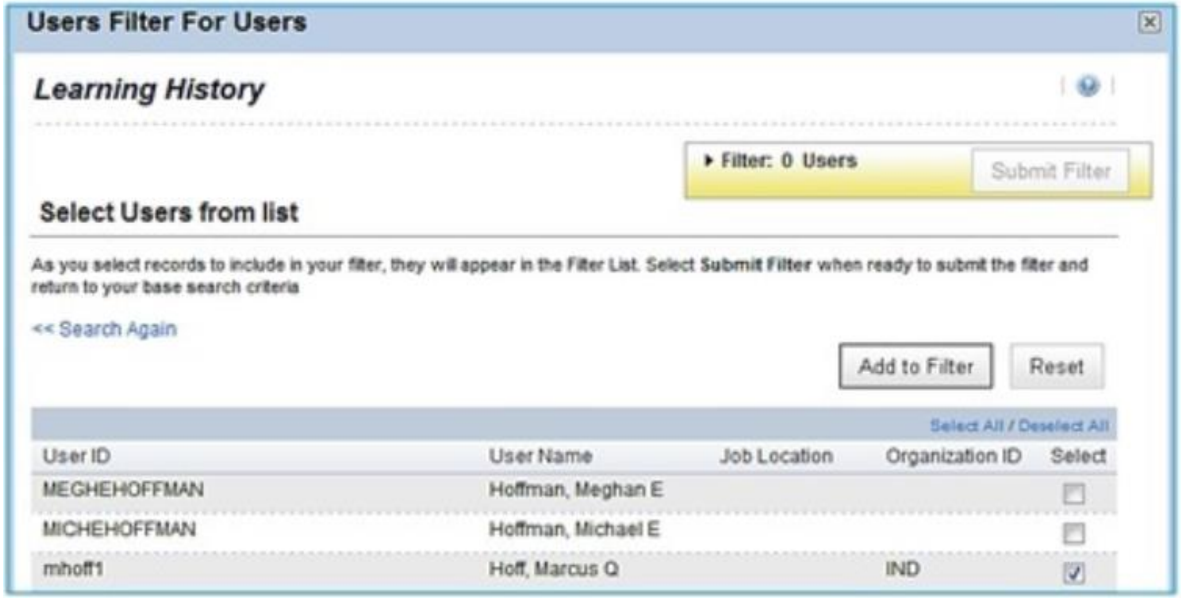
Submit Filter Information as Criteria

7. Click *Search*. Your search results are displayed.

8. Select the checkbox(es) to select your choice(s).



9. Click *Add* to Filter. The criteria are added to the filter.

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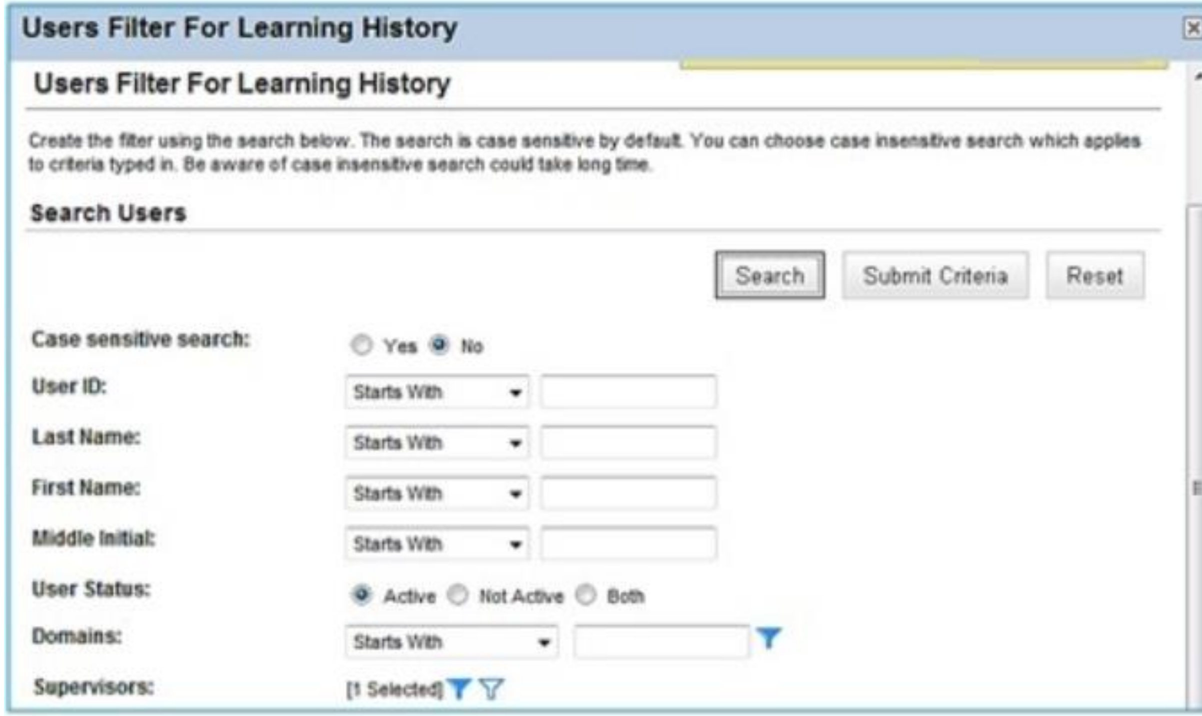
Submit Filter Information as Criteria

10. Click *Submit Filter*. You are returned to your original search screen. The supervisor search attribute has one (1) criteria selected for this filter.

11. You can modify this filter by clicking the **Filter by criteria** icon ( ), or you can clear the filter by clicking the Clear **Filter** icon ( ).

12. Click **Submit Criteria** to submit Marcus Hoff as criteria making the search dynamic.



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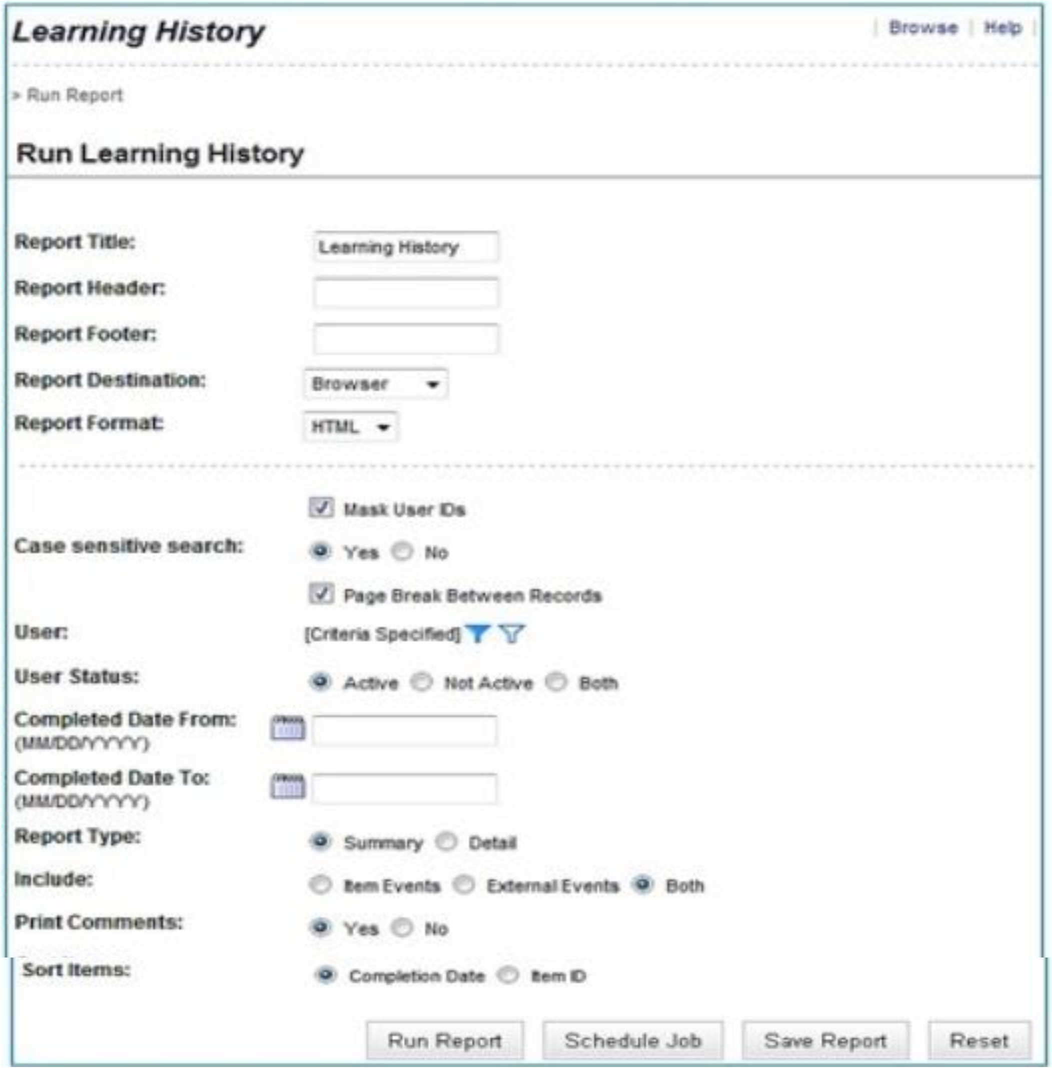
Submit Filter Information as Criteria

You are returned to the original report screen, with a supervisor submitted as criteria. Now, if the subordinate assignment changes, the system automatically updates the search filter of this report, and runs a Learning History report on all users who report to Marcus Hoff at the time the report is ran, especially if the report is saved or scheduled to recur.



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Running Reports in SAP SuccessFactors Learning

Once logged into *SAP SuccessFactors Learning*, navigate to the *Reports* menu then select the *Reports* tab. Access the report you wish to run by clicking the report title. You should notice that the titles of reports are links. Each report is different based on the data it is requesting, and returns different data elements.

To run a report:

1. Find the report you want to run. Use the Search textbox to look for reports by title or description, or browse the reports in the provided list. Select the proper category to narrow your search results. Read the provided report descriptions to verify it is the report you want to run.
2. If the report is a member of a report group (reports that run the same query but whose results are grouped differently), click the *expand* icon ( ) to the left of the report title to expand the group and see the reports that are part of the group.
3. When you find the report that you wish to run, click its title to open the *Run Report* form.
4. Complete the *Run Report* form to provide the report with the information that it needs to return the data you wish to display.
5. After formatting and criteria options have been determined, click Run Report to run the report immediately in the format you choose. If you selected Browser, the report displays in a separate browser window. If Local File was selected, you must first save the file to a local drive before you are able to open it.

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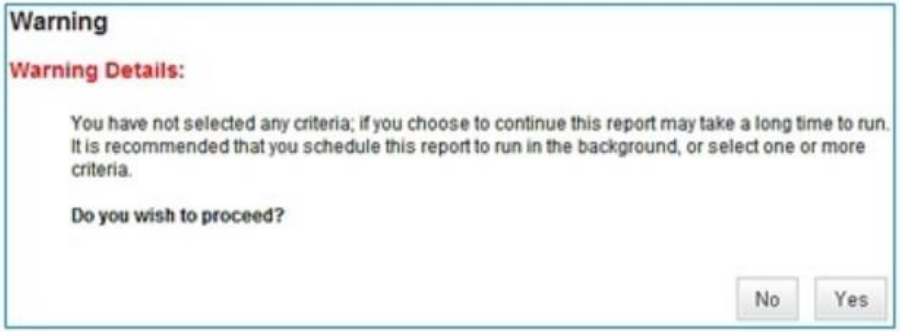
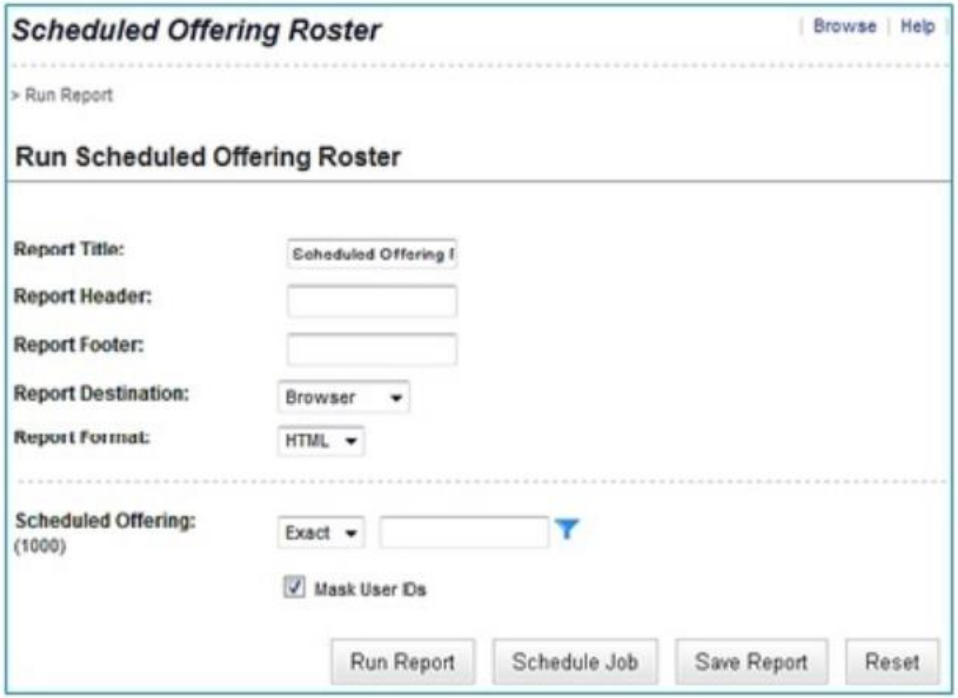
Running Reports in SAP SuccessFactors Learning

6. Administrators need to be aware that if you leave all filtering options blank, you could overburden the system. If the admin leaves all criteria blank, the admin receives a warning message, informing the admin that it may be better to schedule the non-filtered report to be run in the background or return the admin to the filter screen to apply one or more filters to the report.



7. Depending on your security privileges as an admin, you may not see all of the following buttons. Click:

- Run Report to run the report immediately
- Save Report to save the report to be run later at any desired time
- Schedule Job to schedule the report to run in one of three ways: as a background job to be run immediately, once at a future time, or on a recurring basis



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Admin Reports

The LMS enables admins to run a variety of reports on many aspects of training. In addition, a customer can customize their own reports and queries using our Report Designer tool. These custom reports may be added to and run from the Reports menu. Certain reports can be restricted to be run during designated hours. This helps ensure that large report jobs are not run during peak times, which could impact system performance.

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Standard Reports

The reporting system contains over 70 standard reports from the admin interface. Each report menu gives options of grouping and sorting output in various ways.

Admins can save the entered criteria for a report and execute it on demand at another time. When the admin executes the saved report later, the system displays the standard report criteria form with the saved criteria. Reports can also be set up to run as a scheduled and recurring event. Reports may also be scheduled to run remotely, on a recurring basis, and configured for FTP delivery or emailed to one recipient. Aside from these report configurations, standard reports can be customized (using SAP SuccessFactors Report Designer) to include additional fields and data.

Discussion: Admin Side Reports – Select Reports for Admins to Use

You can un-publish (hide) any reports that are not applicable or useful for any admin. Which reports are/are not applicable? If reports are relevant for a subset of admins, you can set up workflows to provide access.

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Examples of Commonly Run Reports

Some of the most commonly run reports in SAP SuccessFactors include:

- Scheduled Offering Roster report
- Learning History report

This section provides the details on how to run these two reports.

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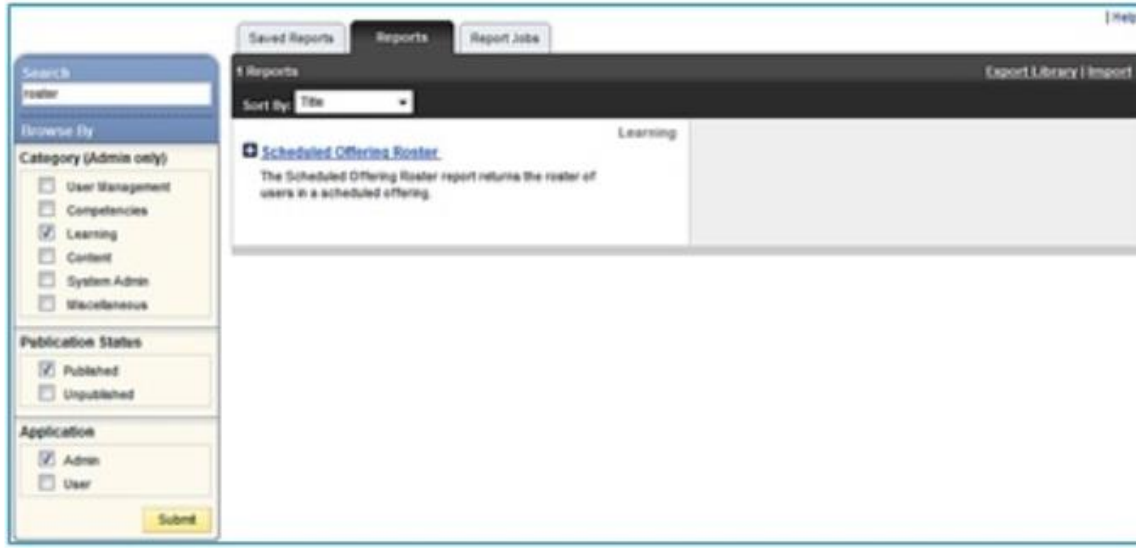
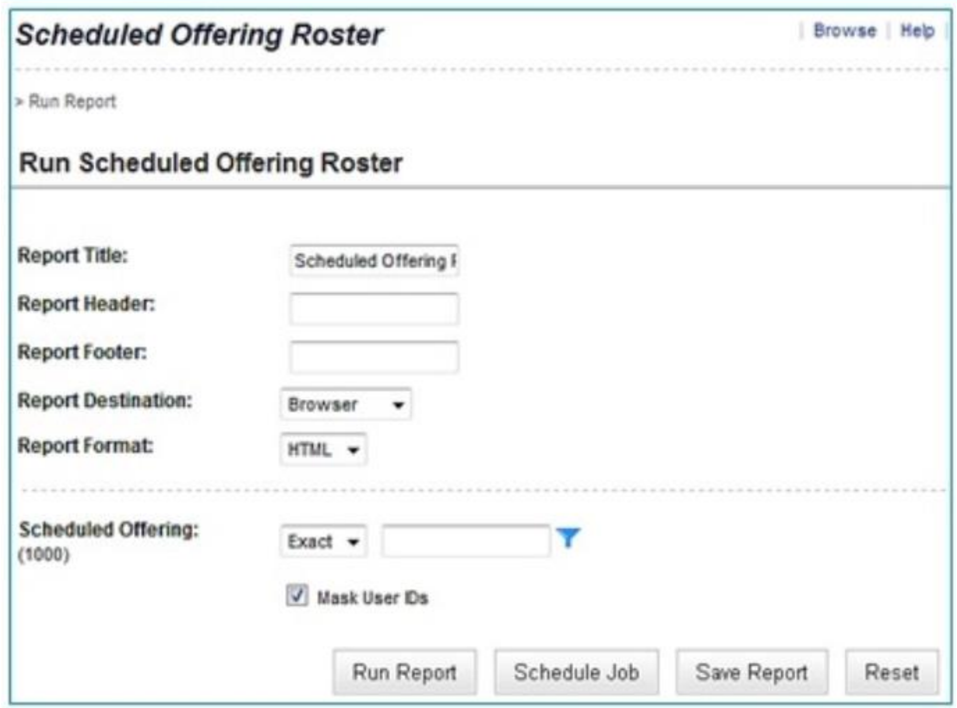
Scheduled Offering Roster Report

One report that many admins run is the Scheduled Offering Roster report. The Scheduled Offering Roster report returns: scheduled offering details including item title, segment dates/times, instructor location, and users with confirmed enrollments.

To run the Schedule Offering Roster report:

1. Navigate to Reports.
2. Enter **Roster** in the Search textbox.
3. Check the Learning category checkbox
4. Click Submit.
5. Click the report title link (i.e., click Scheduled Offering Roster). The Run Reports screen displays.





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Scheduled Offering Roster Report

6. Enter the title of the Scheduled Offering Roster report in the Report Title textbox.
7. Make the desired changes to the formatting section (report header, footer, destination, and format).
8. Click the scheduled offering Create Filter icon ( ).
9. Search for or enter the scheduled offering ID to search for the scheduled offering to run the report for.
10. Click Run Report. The Scheduled Offering Roster report displays.


successfactors BUSINESS EXECUTION SOFTWARE Scheduled Offering Roster

Schedule

Scheduled Offering ID: 1756
Title: Overview to Effective Business Communication
Item: COURSE HR-121 (Rev 2/2/2006 1145 America/New York)

Segment	Start Date/Time	End Date/Time	Instructor	Location
1 Business Communication Simulation	6/5/2013 0800 America/New York	6/5/2013 1200 America/New York	Scott, Aubry D	Washington, DC Classroom 02
2 Business Communication Simulation	6/5/2013 1300 America/New York	6/5/2013 1700 America/New York	Scott, Aubry D	Washington, DC Classroom 02

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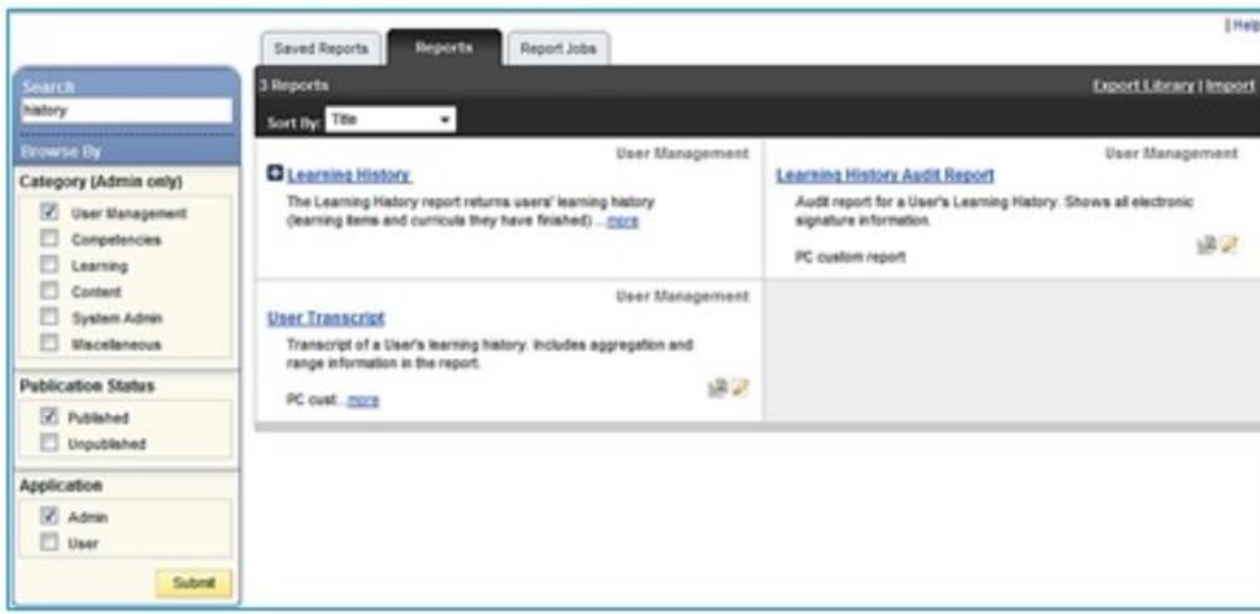
Learning History Report

A need for most organizations is the ability to run reports on the items that users have completed successfully or made unsuccessful attempts at completing. The *Learning History* report returns the learning events for each user recorded during the date range specified in the filtering options. The report can be sorted by completion date or by item ID. You can choose to run a detailed or summary report as well as display item events, external events, or both. If the date range is not specified, the report contains all learning events recorded for the selected users regardless of the date.

Note: SAP SuccessFactors strongly recommends entering a date range when running this report as to not impact system performance.

To run the Learning History report:

1. Navigate to *Reports*.
2. Enter **History** in the *Search* textbox.
3. Check the *User Management category* checkbox.



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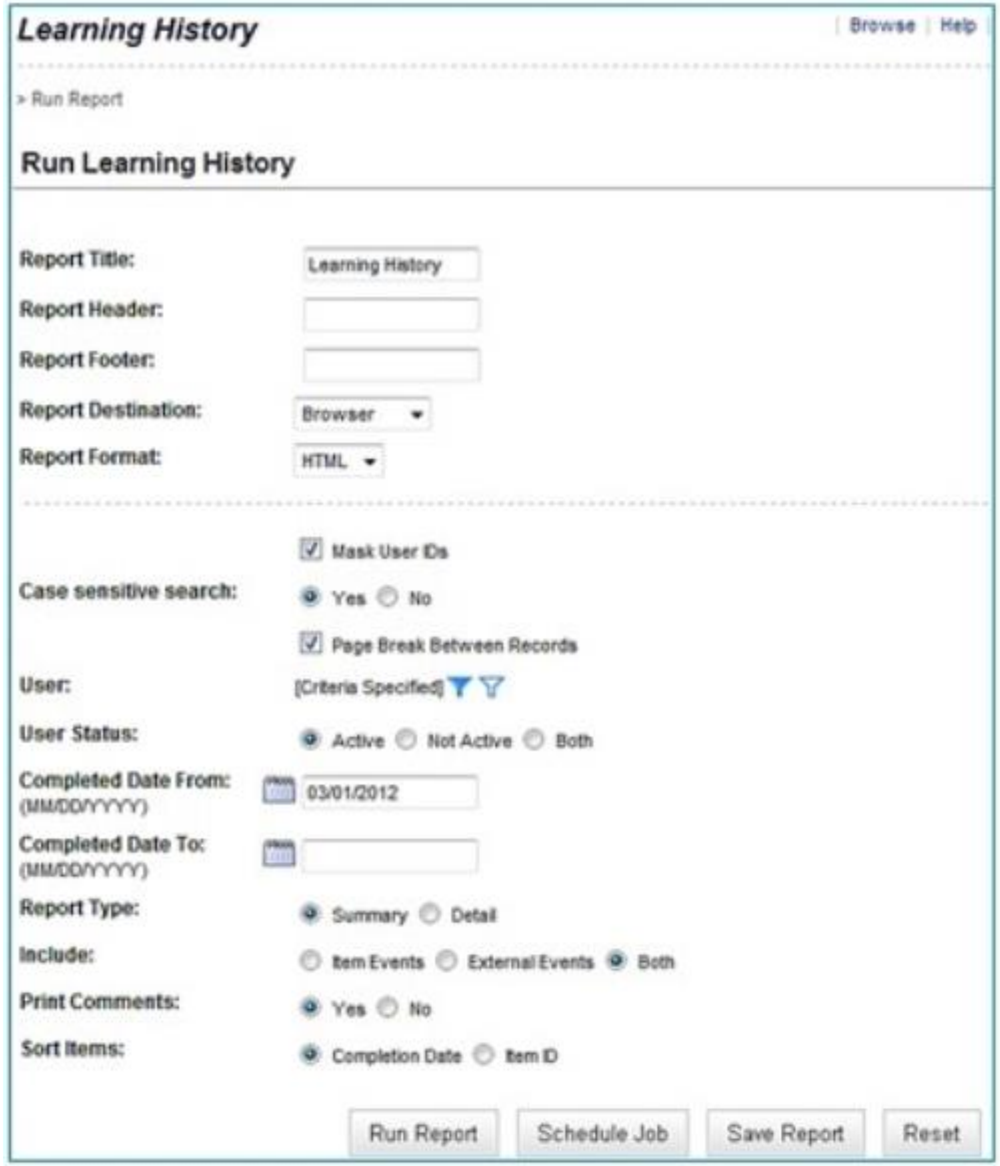
Learning History Report

4. Click *Submit*.
5. Click the *report* title link (i.e., click *Learning History*).
6. The *Learning History Run Report* screen displays.
7. Enter the title of the *Learning History* report in the *Report Title* textbox.
8. Make the desired changes to the formatting section (report header, footer, destination, and format).



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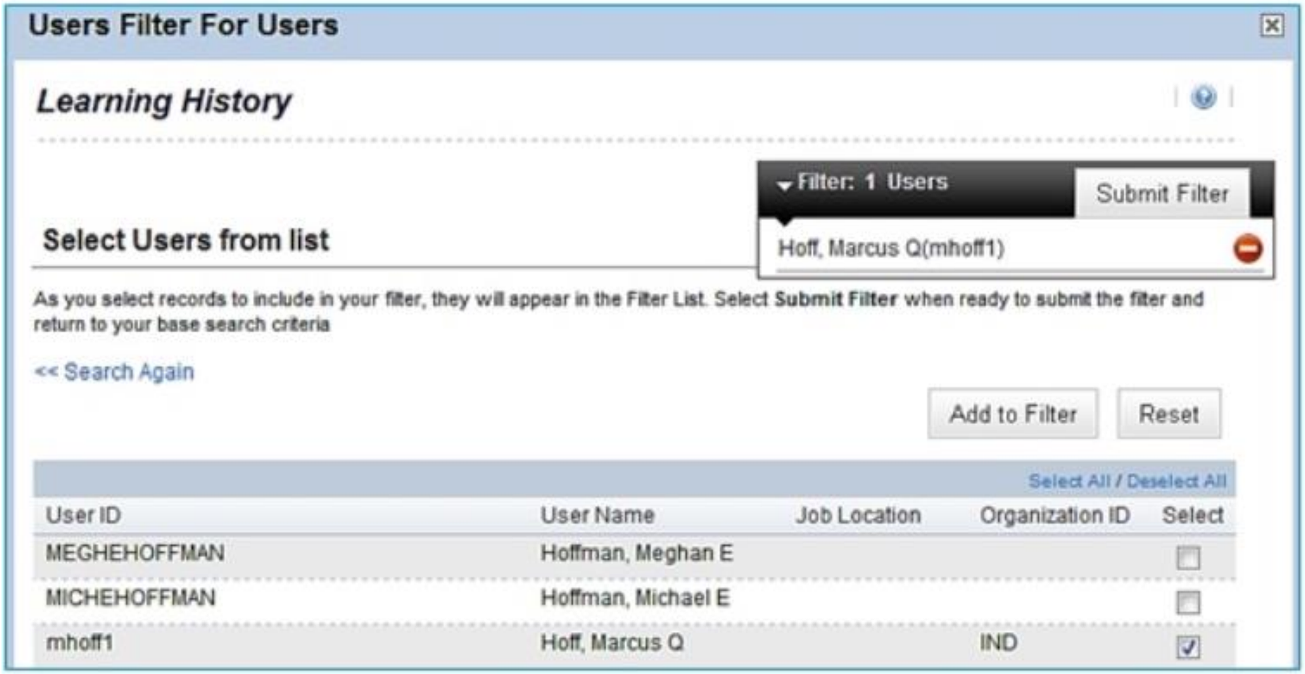
Learning History Report

9. You can select the users from a list by clicking the *Create Filter* icon to filter the search or by entering the ID into the *User ID* textbox. For example, to run a report to display all users who report to Marcus Hoff and their participation in a learning event, select the Supervisors filter icon and filter once more by supervisor. Search for and select a particular supervisor in your system (in this case, Marcus Hoff).



10. Click *Submit Filter* to return to the *Learning History Run Report* screen.

11. Specify completion date range as desired for the report. Notice in the *Learning History* page, the date range has been configured to display only the events that the users participated in after March 1, 2012.

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Learning History Report

12. Select the Summary or Detail radio button to determine the amount of detail displayed on the report.
13. Select the radio button to specify the event type to include in the report: Item Events, External Events, or Both item and external events.
14. In the Print Comments section, specify whether you want to include comments that were entered for the user when the learning event was recorded.
15. Specify the field by which you want to sort the entries in the report: sort by Completion Date or Item ID.
16. Click Run Report to generate the report.

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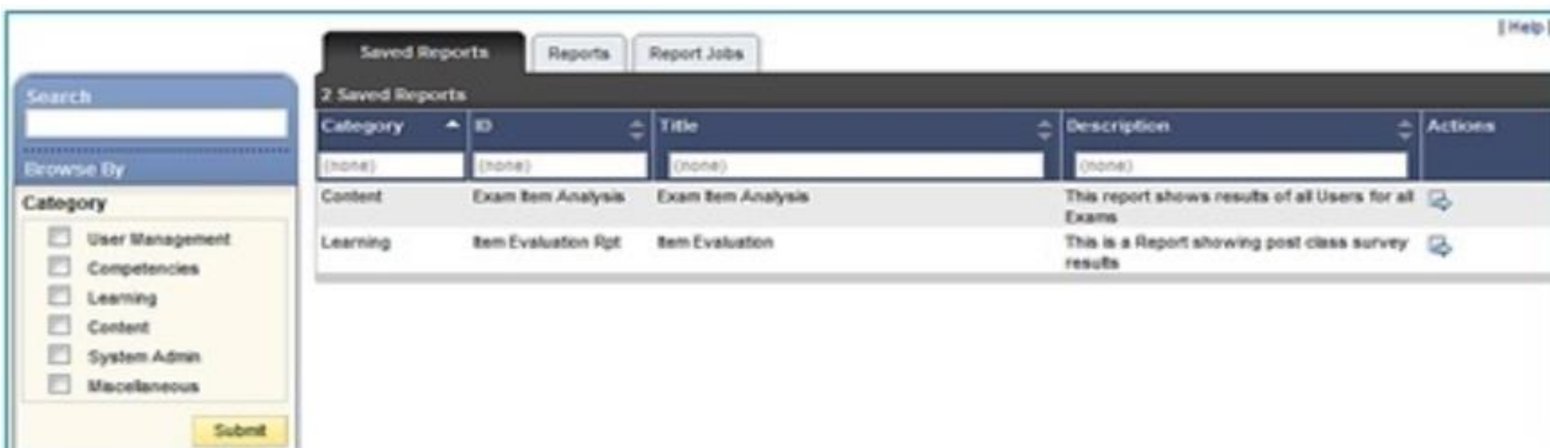
Creating Saved Reports

Saving a report is similar to saving a search. SAP SuccessFactors Learning prompts for a saved report ID and description when the Saved Report button is clicked. Saved reports are only available to the admin who created it.

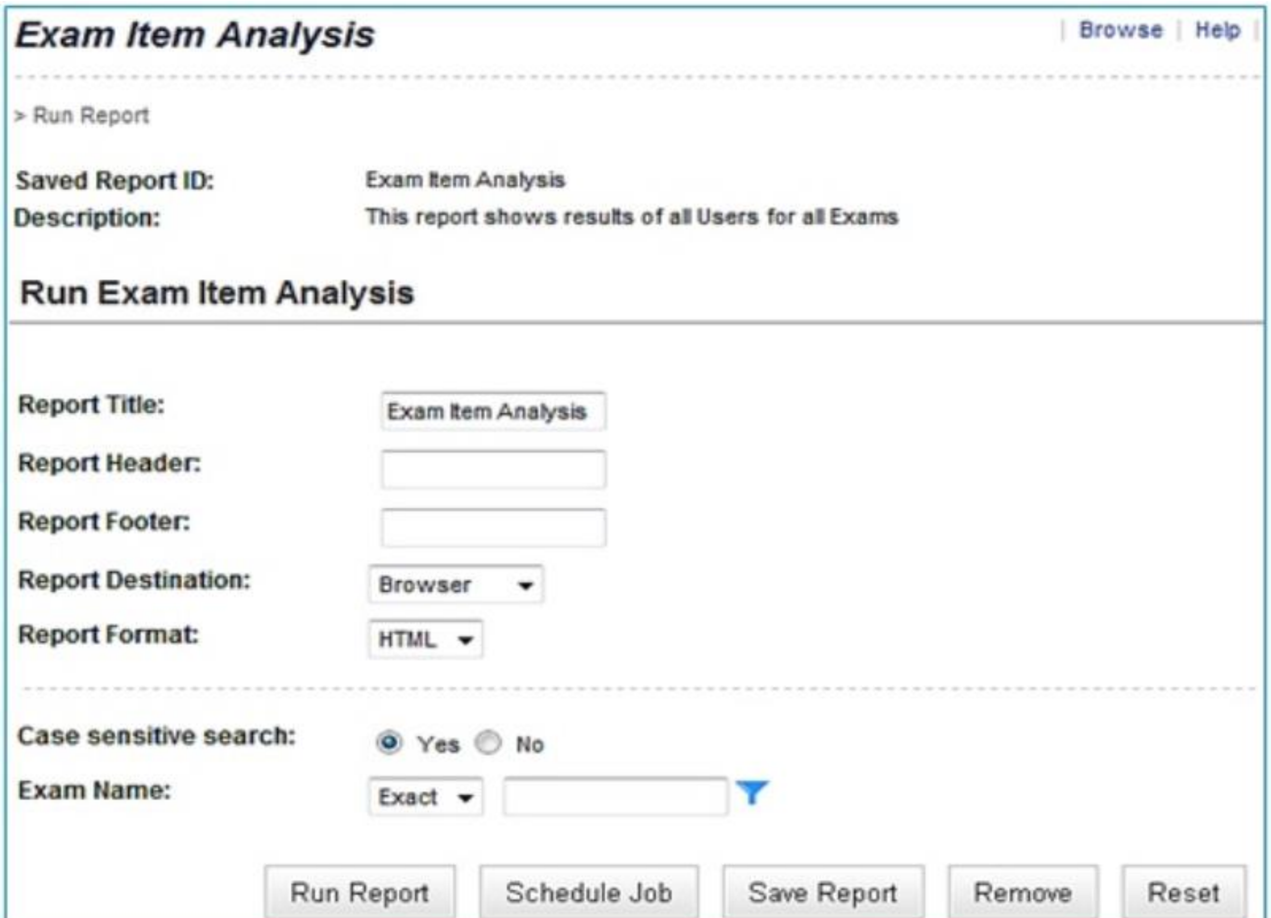
When you save a report, you save the report parameters you enter on the Run Report page; therefore, it may be beneficial to submit criteria as filter options. Saved reports are stored on the Saved Reports tab of the Reports interface. To run a saved report, navigate to the Saved Reports tab, locate the report you wish to run, and then click the Run ( ) button.



Creating Saved Reports

To sort the saved reports, click the ascending or descending buttons in the column headings. To filter the saved reports list, enter the filtering text in the textbox in the column headings.

To remove a saved report, click the Run( ) button and then click Remove at the bottom of the Report screen.



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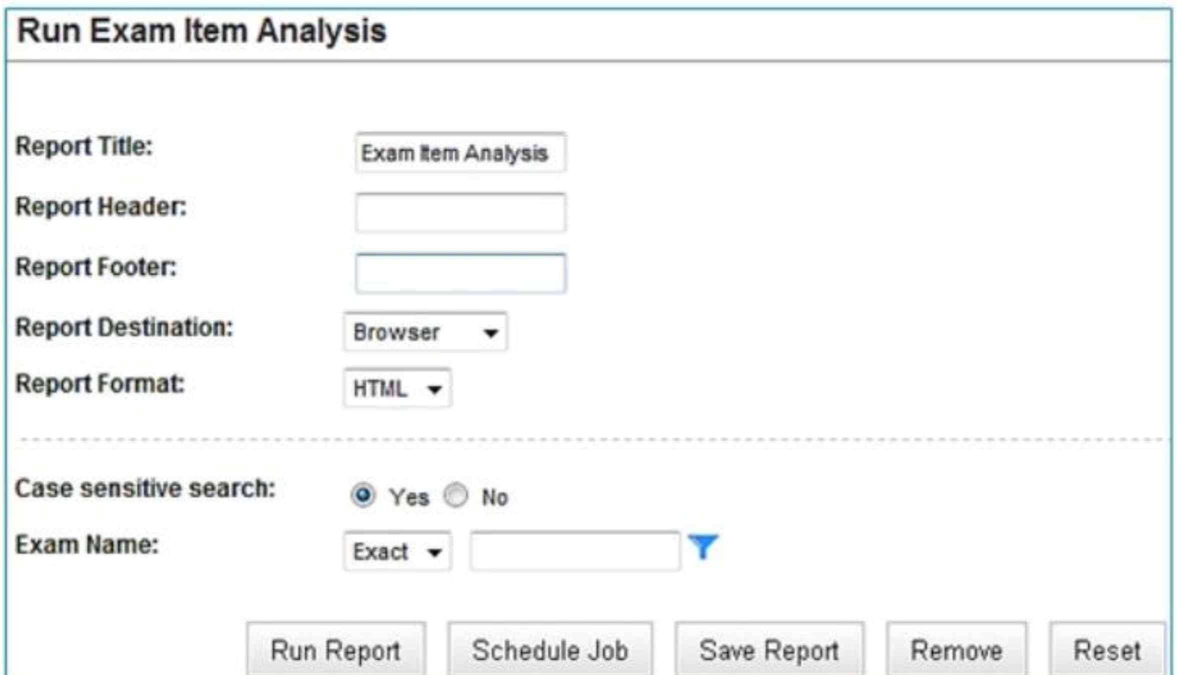
Create Recurring Reports

Any report can be scheduled to run one time in the future or recur on a daily, weekly, or monthly interval. Scheduling a report can be especially useful in the following conditions:

- You want to run a report that will return a large volume of records: by scheduling the report to run once at a later time during low usage, you reduce the report's strain on the system
- You need to run a report periodically: this can easily be achieved by scheduling the report to run on a recurring basis

On the *Run Report* screen, schedule a report by clicking the *Schedule Job* button.



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Create Recurring Reports

Once the Schedule Job button is clicked, you see the following scheduling options:

- Run the job immediately: This is the same as clicking the Run Report button on the previous page
- Schedule the job to be ran once in the future
- Schedule the job to recur: daily, weekly, or monthly

To be notified by email that the report has run, check the Notify via email upon completion checkbox and specify one or more email addresses. If you would also like the report to be sent to you or another recipient through email, check the Email the Report checkbox.

Multiple email addresses can be entered into the email address field, but must be separated by a comma, semicolon or colon (, ; or :). The report can also be downloaded once the report has run from the Report Jobs tab of the report interface. Reports that are only scheduled to run once display under System Admin > Background Jobs. Once the report has run as a background job, the Report Query data may be retrieved as a text file.

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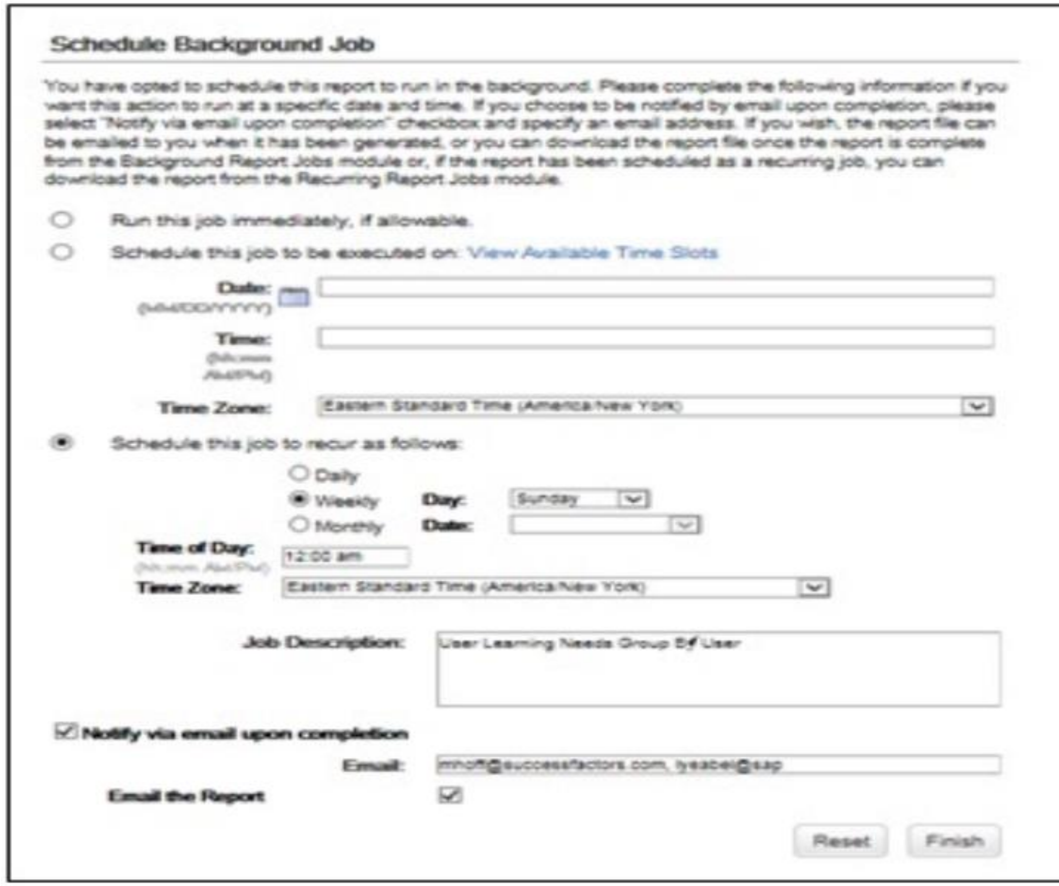
Create Recurring Reports

In this example, the report runs every Sunday at 12 AM, EST and sends copies of the report to Marcus Hoff and Lyndsey Abel.

Admins can only schedule reports to run during predetermined available time slots. Click the View Available Time Slots link to display the list of allowed days, dates, and times.



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When is Report Designer Necessary to Modify a Report?

There are many out of the box reports that may be useful to customers without modification to the report design. Most reports may be filtered by using advanced searching capabilities within existing search criteria fields.

However, if it is necessary to add additional search criteria or output fields to an existing report, an external tool called Report Designer may be used.

SAP SuccessFactors Report Designer (also known as Plateau Report Designer as powered by BIRT – Business Intelligence Reporting Tool) is a separate software program that may be installed on the computer of any one who will be modifying reports. A report design administrator will need access to certain workflows in the LMS such as the ability to import and export reports, publish reports and view and run unpublished reports. An understanding of the tool, SQL, (Structured Query Language) as well as the various database tables of the LMS are required in order to be an effective report developer.

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Custom Reports using Report Designer

SAP SuccessFactors allows you to create custom reports using SAP SuccessFactors Report Designer (Powered by BIRT), which is a free application which is not built in to the SAP SuccessFactors Administration interface.

Administrators with the appropriate workflows may export reports to customize them in SAP SuccessFactors Report Designer and re-import them.

Reports may also be built from scratch by using SAP SuccessFactors Report Designer and imported into SAP SuccessFactors Learning. Reports are all available in the Reports Dashboard depending upon the domain access (Standard and Custom reports are all located in the same searchable menu). When new reports are imported into SAP SuccessFactors Learning, workflows for administrators are automatically created so access to that specific report can be completely controlled through Admin Roles.

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Notable Reports by LMS Feature

Each feature of the *LMS* (such as *Learning Needs Management, Scheduling, Online Content, etc.)* has reports that might be most useful to administrators. Generally speaking, status reports and reports that are in the User Management category will provide information about how specific learning records affect users. For example, Learning Plan, Curriculum Item Status, and Online Item Status reports will show the users' learning needs and their progress. Data reports as well as reports in the other categories will typically provide more information about specific data records (such as Items, Curricula, and Scheduled Offerings).

Here is a brief list of some reports that might be useful by feature:

Learning Needs Management

- Item Data.

The Item Data report returns attributes of learning items.

- Item List.
  The Item List report, given learning items, returns the items' type/ID/revision code and title.

- Curriculum Data.
  The Curriculum Data Report returns curricula attributes; including the subcurricula in the curriculum.

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Notable Reports by LMS Feature

- Learning Needs.
  The Learning Needs report returns the learning needs of users. Learning needs are learning items or curricula that the user needs to complete.
- Learning Plan.

The Learning Plan report returns the learning plan of users. Learning plans are users' personal docket of learning items and curricula.

- Curriculum Status.

The user Curriculum Status report returns the curriculum assigned to each user and the curriculum status, and if applicable, the number of days remaining before required retraining to keep the curriculum current.

- Curriculum Item Status.

The user Curriculum Item Status report returns, for each user, the curriculum assigned to each user and their curriculum status, the items assigned to each curriculum and the completion date, completion status, and required date for each item.

- Program Status Report.

This report includes Programs that are in progress per user and Programs that have been completed by user. It includes completion status and completion date. This report also may be run by users and supervisors.

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Notable Reports by LMS Feature

Scheduling

- Scheduled Offering Data.

The Scheduled Offering Data report returns detailed information about each schedule offering including the item scheduled, dates scheduled, registration and waitlist data, instructor data, segment data, and delivery costs.

- Learning Calendar.

The Learning Calendar report returns all the daily learning events scheduled within an entered date range.

- Registration Status.

Returns, for offerings and users, a detailed list of registration information including registration dates and times, enrollment numbers, instructors, and scheduled offering details.

- Scheduled Offering Roster.

Returns the roster of users in a scheduled offering.

- Slot Status.

Returns, for groups, organizations and scheduled offerings, the current status of any slots that have been purchased. Where user names have been identified to fill the slots, the user names are included in the report, along with registration status, group slot data, and schedule information. You can group the report by groups, organization or scheduled offering.

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Notable Reports by LMS Feature

Scheduling

- Learning History.

The Learning History report returns users' learning history (learning items and curricula they have finished) with detail item events.

- Certificate of Completion for Scheduled Offerings.

The Certificate of Completion report prints the certificates of completion for users from their learning history (completed work).

- Item Status.

The User Item Status report returns, for each user and item, the user's completion status for the items they participated in during the given date range.

- Resource Data reports including: Facility Data, Location Data, Location Utilization, Instructor Data, Equipment Data, Equipment Status, Equipment Utilization, Material Data, Resource Conflicts, Holiday Profile, Region Data.

- Class Data.

The Class Data report describes a class, including the learning items, curricula, and offerings associated with the class, the users in the class, and other class attributes. Note: a class record in the LMS is not the same as a scheduled offering but is a group of users perhaps attending multiple scheduled offerings together such as cohorts.

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Notable Reports by LMS Feature

Scheduling

- Class Location.

The Class Location report returns the locations associated with a class, such as the location of scheduled offerings associated with a class.

- Class Progress.

The Class Progress report returns the progress of users in a class toward completion of the class's learning.

Online Content

- Online Item Status.

This report filters user, item, dates, status, and needs review. It returns the information listed under the Online Status tab.

- Item Object Details.

This report filters item and item status. It returns the basic item record information, all assigned content objects, and the item settings for each content object.

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Notable Reports by LMS Feature

Online Exams and Quizzes

- Exam Item Analysis.

The Exam Item Analysis report returns the questions that were associated with an exam at run time. Exams can be randomized; their questions drawn from a pool. The report accounts for randomization and pools.

- Exam Objects.

The Exam Objects report returns metadata about exams, including its objectives and questions, scoring data, and analysis actions.

- User Exam Data.

The User Exam Data Report returns (for all selected users, exams, and surveys) the details of users' performance on exams and surveys, including external exams.

- Quiz Item Details.

The Quiz Item Analysis returns questions that were associated with a quiz iteration and statistics on the answers selected by quiz takers.

- User Quiz Data.

The User Quiz Data report returns (for all selected users and quizzes) the details of user's performance on quizzes.

- Quiz Results Analysis.

This report returns (for all selected users and quizzes) the details of users' performances on the quizzes including scores and total attempts.

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Notable Reports by LMS Feature

Training Evaluations

- Item Evaluation Report.

Shows the mean score (the average results of the rating scale questions) for each survey; survey page; and survey question, and the percentage of users who selected each response.

- Item Evaluation by Individual Response Report.

Shows each user's responses to the survey questions.

- Item Evaluation by Instructor Report.

Shows the mean score (the average results of the rating scale questions) for each survey and survey page; grouped according to the instructor.

- Learning Evaluation Report.

Shows the training effectiveness of items based on the average pre-test and post-test mean scores.

- Follow-up Evaluation Report.

Shows the mean score (the average results of the rating scale questions) for each follow-up survey; survey page; and survey question.

- Follow-up Evaluation by Individual Response Report.

Shows the mean score (the average results of the rating scale questions) for each follow-up survey and survey page.

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Notable Reports by LMS Feature

Collections

- Collection Views (CSV).

This CSV report provides the details of the Users who have viewed the Collection.

- Collection Entry Views (CSV).

This CSV report provides the view statistics of the individual entries in the collection in addition to the view statistics of the Collection.

System Admin

- LMS Usage Metrics (HTML or PDF).

This report returns license related usage metrics. LMS Usage is defined as any active user that meets any of the following 3 criteria:

- User has learning history.
- User has registration status type “enrolled” for their course on their learning plan.
- User has launched content for an Online or Blended course on their learning plan.

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Conclusion

SAP SuccessFactors Learning offers many different reporting options. Admins can specify format, report file type, and viewing destination. Reports can be saved, scheduled on a recurring basis, and emailed. Finally, filters are saved using the Submit Criteria button to dynamically update search criteria for saved and recurring reports.

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Summary

In this lesson, you were introduced to user records along with the key information contained within each record. Step-by-Step instructions were provided for viewing and adding a user record to SAP SuccessFactors Learning. Additionally, the instructor demonstrated how to create the supervisor-subordinate relationship.

You should now be able to:

- Identify the characteristics of a user record
- Identify and describe the main sections of the user record
- Access an existing user record
- Add and modify a user record
- Run, Save, and Create Recurring Reports

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