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Manual for use:

REPORTS in SAP SuccessFactors

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REPORT CENTER

What is it?

It is a centralized “self-service” report management tool for all SAP SuccessFactors report types.

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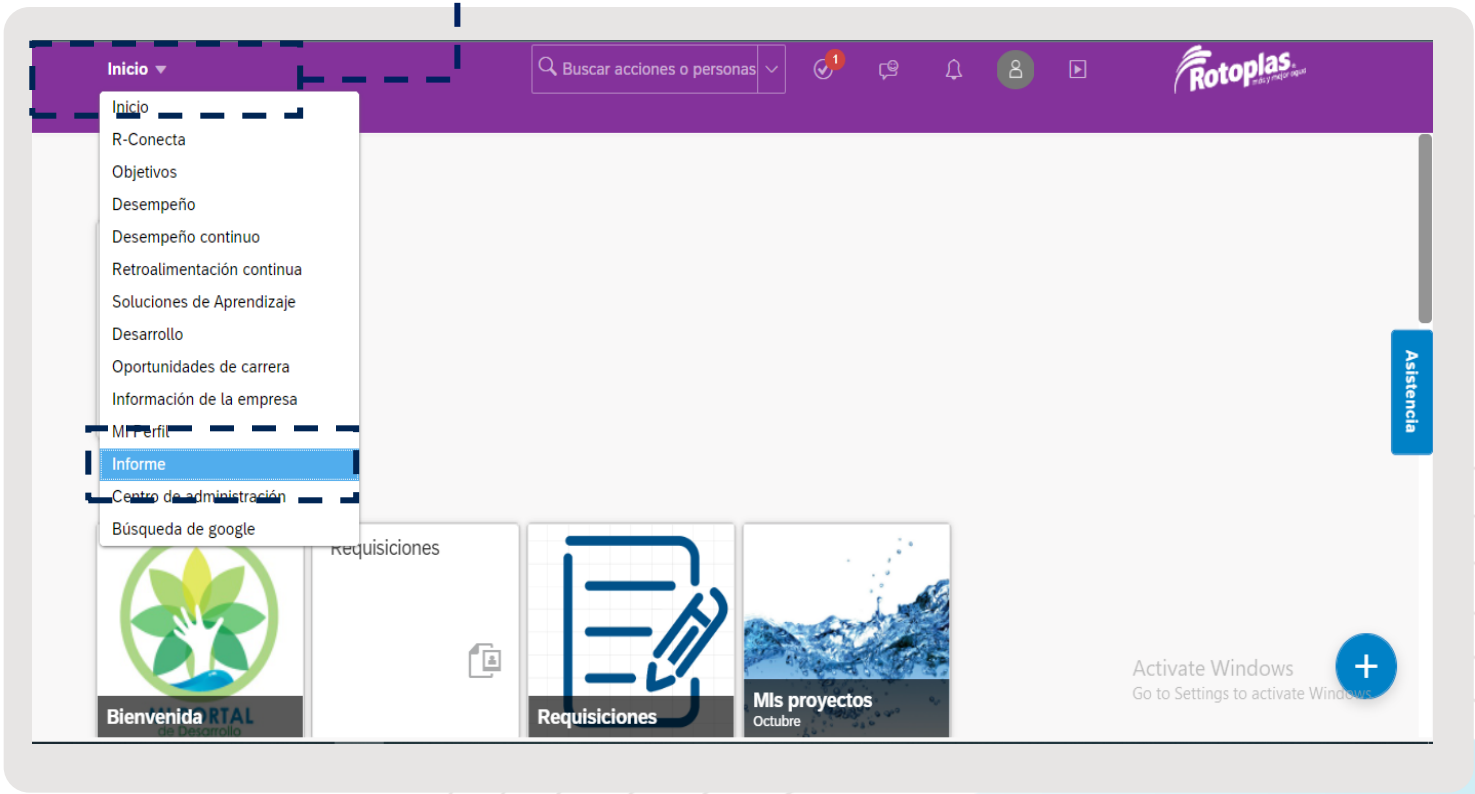
REPORTS

1 Accessing the SAP SuccessFactors Report Center: Click on the **"Start"** menu, then on the **"Reports"** option.



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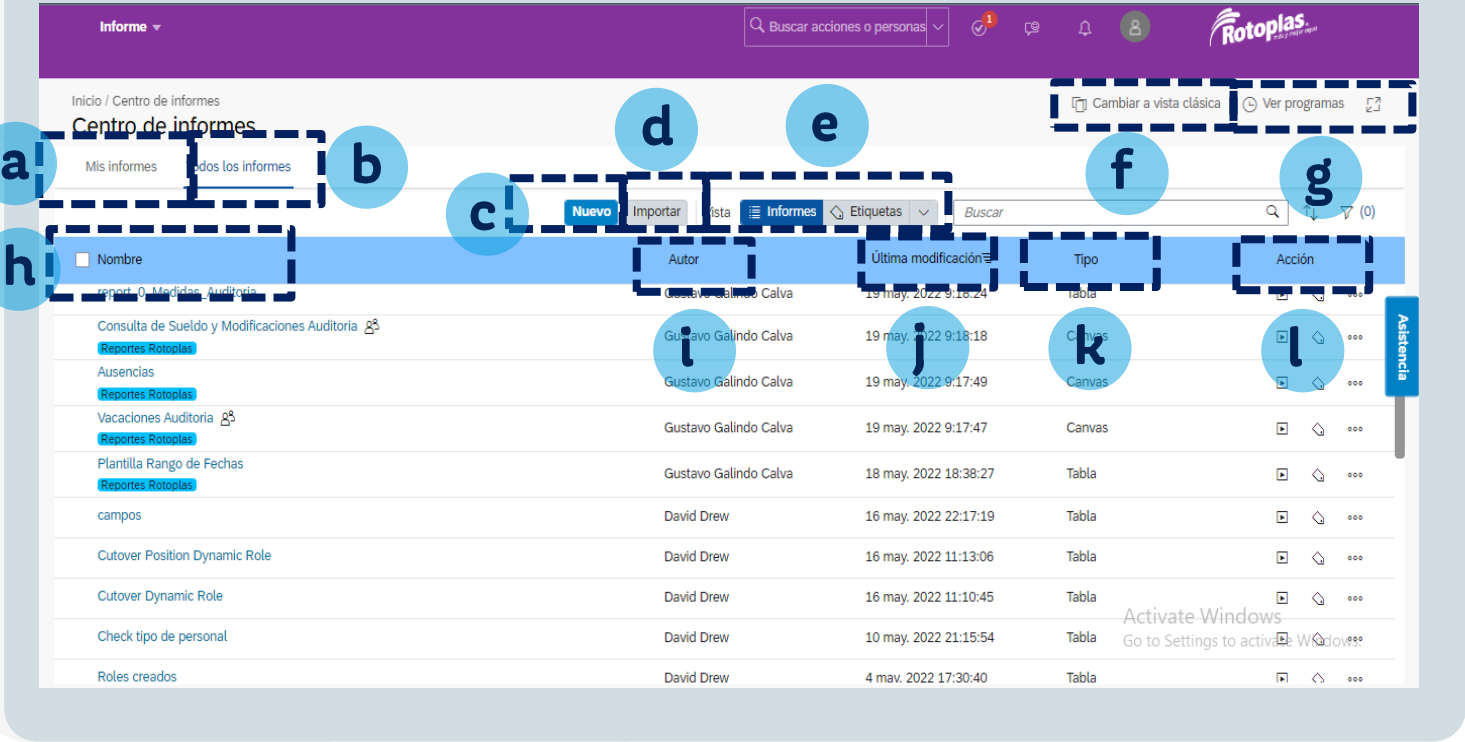
ELEMENTS OF THE REPORT CENTER



a) **My Reports:** The reports created by each user are displayed.
b) **All Reports:** Reports created by and shared with the user are displayed.
c) **New:** Used for creating reports.
d) **Import:** Used to import previously saved reports.
e) **View:** There are 2 view options: Reports, shows all reports; Labels, shows reports by sections.
f) **Switch to Classic View:** Shows another way of viewing the Report Center.
g) **View Programs:** Scheduled reports are displayed
h) **Name:** Name of the report
i) **Author:** Creator of the report
j) **Last Modified:** Date the report was last modified
k) **Type:** Refers to the report type
l) **Action**: It provides the different options that the report has

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REPORT TYPES

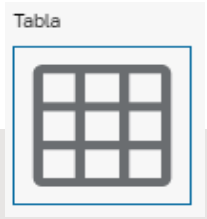

Table: Designed to be easy to use, this table can be easily exported, as needed.

Canvas: Table and visual format reports. These components can include tables, charts, images, and text.

Types of **report data execution**:

Single Domain. The information is obtained from a single SAP SuccessFactors module

Transversal Domain. The information is obtained from crossing 2 SAP SuccessFactors modules

Multiple Domains. The information is obtained from using more than 2 SAP SuccessFactors modules

Ways to **generate** a report:

Date range. This is to select the movements within a given period.

On Date. Generates the report as the movements stood on a given date.

Audit. Report with the breakdown of each movement generated.

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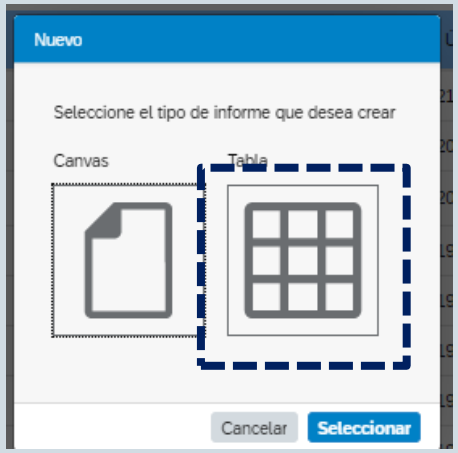
TABLE REPORT

Create Table Report

They are designed to be easy to use, they provide easy access to the information to create them. These tables can be easily exported as needed.

1. Navigate the **Report Center.**
2. Click on **New.**
3. Select the “Table” report template and click Select.
4. Select **“Single Domain”** and choose the domain type
5. The area to create the report will be loaded
6. In **“General Information”.** Name the report and you may provide a short description of the report.

3)



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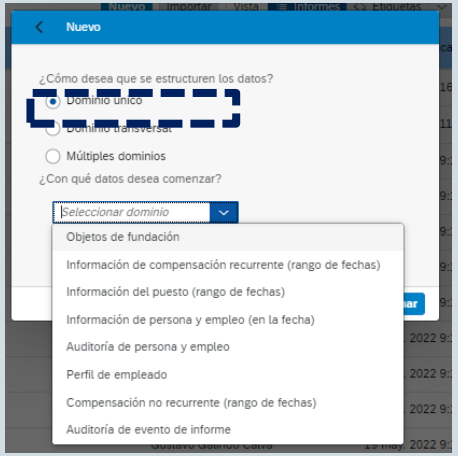

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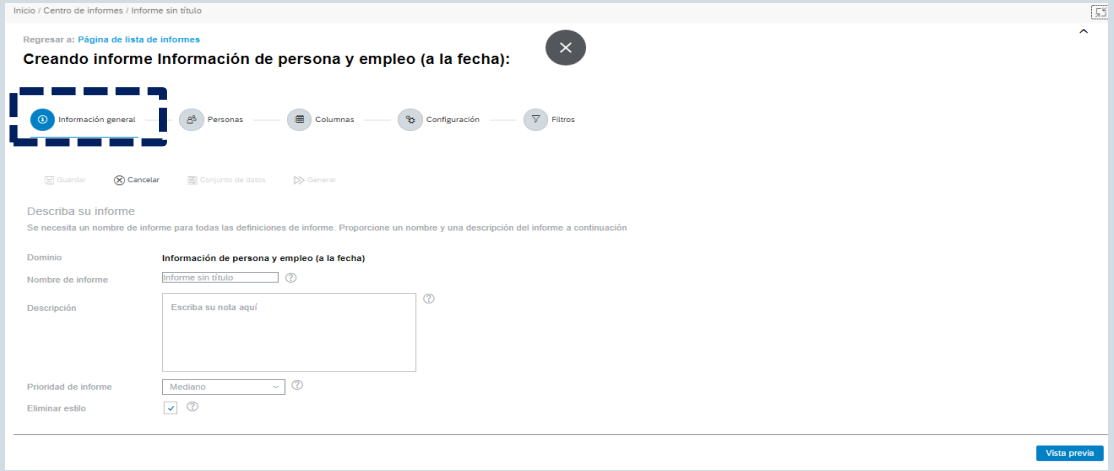

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TABLE REPORT
Create Table Report

7. Under **“Persons**

select **“Set Criterion”**, and it will display the “Define Team” screen.

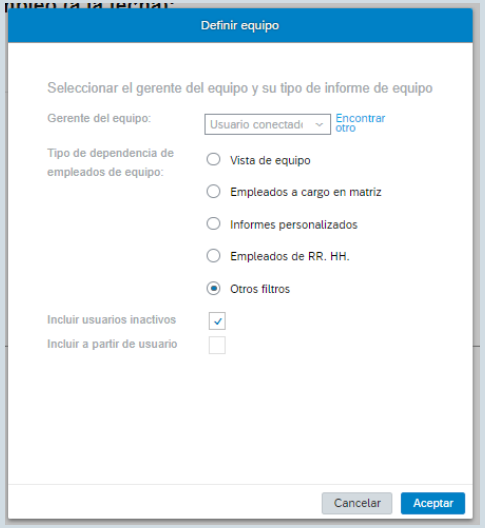
8. **Under “Define Team”**, the viewing permissions for the report are granted to the end users.

9. Under “**Define Team”,** You can select the “Inactive Users” option for the report to include them.

10. In the “Columns” option,

Click **on “Select Columns”** and it will display the “Select Columns” window, where you can select the data for the report.

9)



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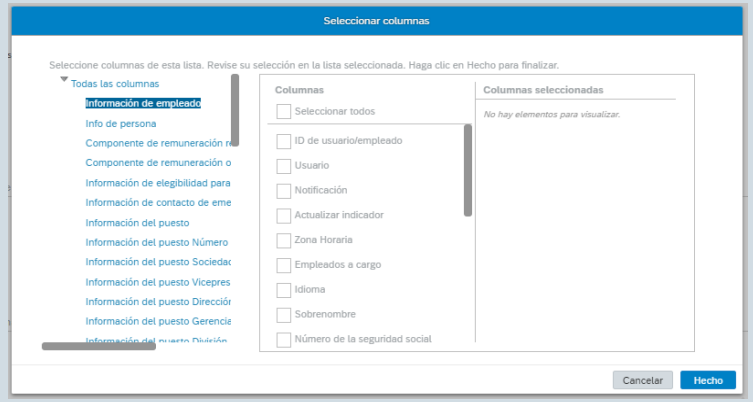

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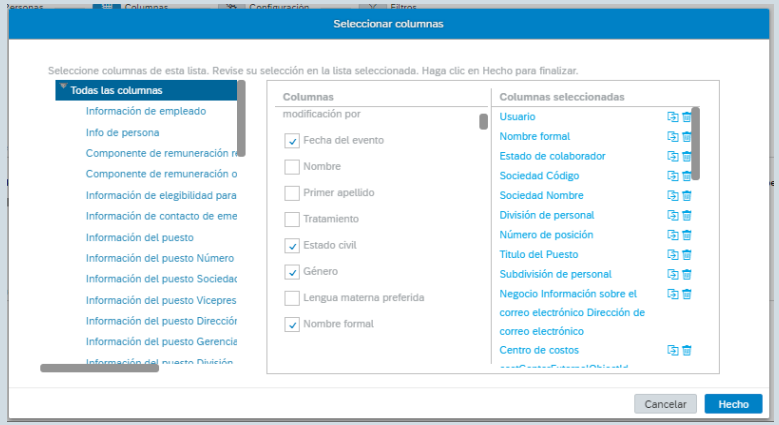

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TABLE REPORT
Create Table Report

11. Enable the “Enable Different” option, Activar Distintos to remove duplicate lines in the report.

12. Select **“Preview”** to view the report

13. Under **“Settings”**, Configuración you can change the column settings.

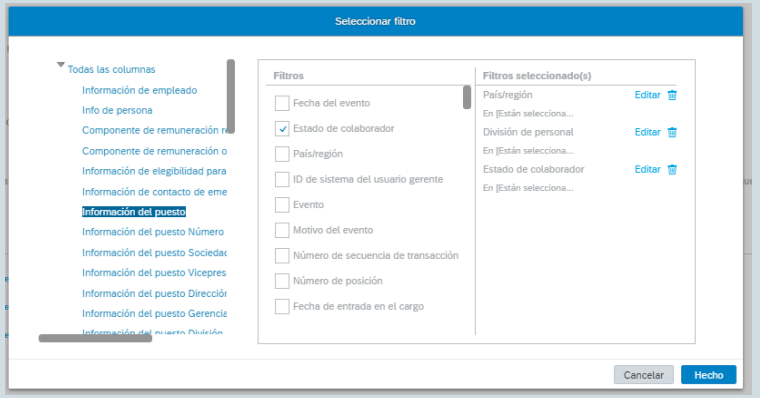
14. In the “Filters” option, Filtros you can use filters to apply criteria to the report.

15. Select **“Set Criteria”** to display the “ Select Filter” screen.

16. Selecting the field to be filtered displays the **“Define Filter” screen.**

17. Select **“Save”** Guardar to save the report

15)

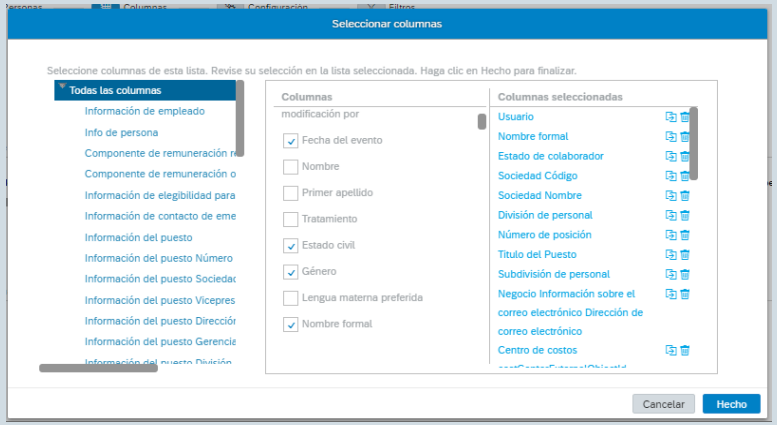


In this option, you can create filter rules.

Filters that will remain as the default for the report

Enabling this option allows the end user to edit the filters

16)



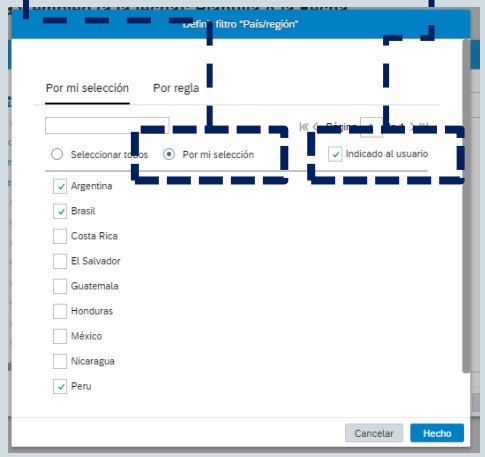


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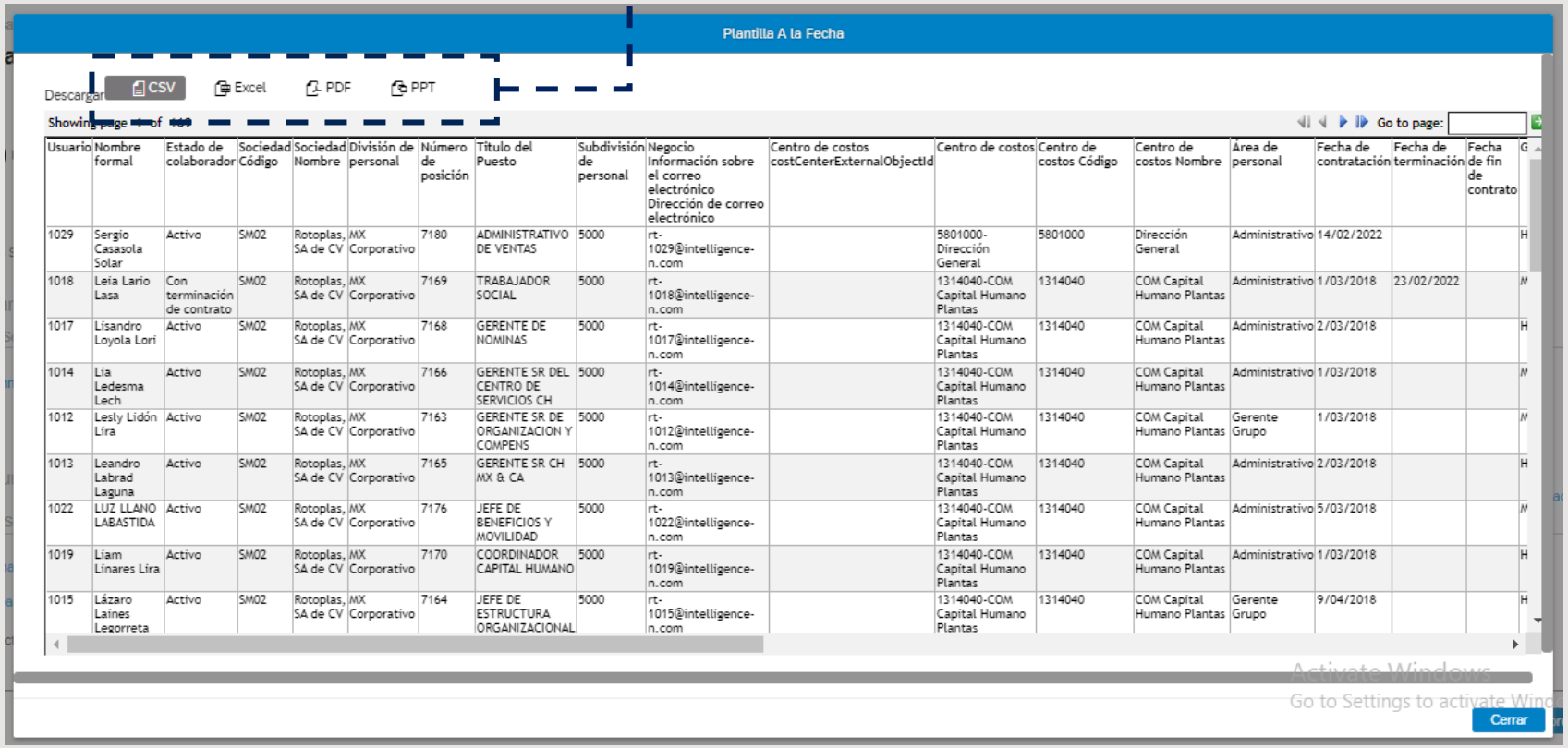
TABLE REPORT
Create Table Report

18 You can select **"Generate"** and it will take you to the next screen where you can download the report in different formats by clicking on the desired one.



Usuario	Nombre formal	Estado de colaborador	Sociedad Código	Sociedad Nombre	División de personal	Número de posición	Título del Puesto	Subdivisión de personal	Negocio Información sobre el correo electrónico Dirección de correo electrónico	Centro de costos costCenterExternalObjectId	Centro de costos	Centro de costos Código	Centro de costos Nombre	Área de personal	Fecha de contratación	Fecha de terminación	Fecha de fin de contrato	G
1029	Sergio Casasola Solar	Activo	SM02	Rotoplas, SA de CV	MX Corporativo	7180	ADMINISTRATIVO DE VENTAS	5000	rt-1029@intelligence-n.com		5801000-Dirección General	5801000	Dirección General	Administrativo	14/02/2022			H
1018	Leia Lario Lasa	Con terminación de contrato	SM02	Rotoplas, SA de CV	MX Corporativo	7169	TRABAJADOR SOCIAL	5000	rt-1018@intelligence-n.com		1314040-COM Capital Humano Plantas	1314040	COM Capital Humano Plantas	Administrativo	1/03/2018	23/02/2022		M
1017	Lisandro Loyola Lori	Activo	SM02	Rotoplas, SA de CV	MX Corporativo	7168	GERENTE DE NOMINAS	5000	rt-1017@intelligence-n.com		1314040-COM Capital Humano Plantas	1314040	COM Capital Humano Plantas	Administrativo	2/03/2018			H
1014	Lia Ledesma Lech	Activo	SM02	Rotoplas, SA de CV	MX Corporativo	7166	GERENTE SR DEL CENTRO DE SERVICIOS CH	5000	rt-1014@intelligence-n.com		1314040-COM Capital Humano Plantas	1314040	COM Capital Humano Plantas	Administrativo	1/03/2018			M
1012	Lesly Lidón Lira	Activo	SM02	Rotoplas, SA de CV	MX Corporativo	7163	GERENTE SR DE ORGANIZACION Y COMPENS	5000	rt-1012@intelligence-n.com		1314040-COM Capital Humano Plantas	1314040	COM Capital Humano Plantas	Gerente Grupo	1/03/2018			M
1013	Leandro Labrad Laguna	Activo	SM02	Rotoplas, SA de CV	MX Corporativo	7165	GERENTE SR CH MX & CA	5000	rt-1013@intelligence-n.com		1314040-COM Capital Humano Plantas	1314040	COM Capital Humano Plantas	Administrativo	2/03/2018			H
1022	LUZ LLANO LABASTIDA	Activo	SM02	Rotoplas, SA de CV	MX Corporativo	7176	JEFE DE BENEFICIOS Y MOVILIDAD	5000	rt-1022@intelligence-n.com		1314040-COM Capital Humano Plantas	1314040	COM Capital Humano Plantas	Administrativo	5/03/2018			M
1019	Liam Linares Lira	Activo	SM02	Rotoplas, SA de CV	MX Corporativo	7170	COORDINADOR CAPITAL HUMANO	5000	rt-1019@intelligence-n.com		1314040-COM Capital Humano Plantas	1314040	COM Capital Humano Plantas	Administrativo	1/03/2018			H
1015	Lázaro Laines Legorreta	Activo	SM02	Rotoplas, SA de CV	MX Corporativo	7164	JEFE DE ESTRUCTURA ORGANIZACIONAL	5000	rt-1015@intelligence-n.com		1314040-COM Capital Humano Plantas	1314040	COM Capital Humano Plantas	Gerente Grupo	9/04/2018			H

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CANVAS REPORTS
Creating CANVAS Report

The Canvas report is a tool for creating table and visual format reports, including tables, charts, images, and text.

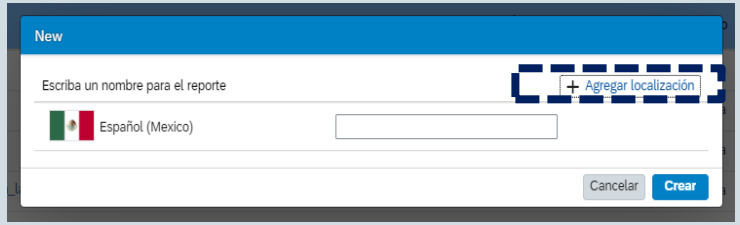
1. Navigate to the "**Report Center**"
2. Click on **"New"**
3. Select the Canvas report template and click Select.
4. Provide a name for the report and click **Create.**

A) You can include translated report names using **Add Location**.

5. **Layout Page**, will be loaded to create a new page.

1)

4)



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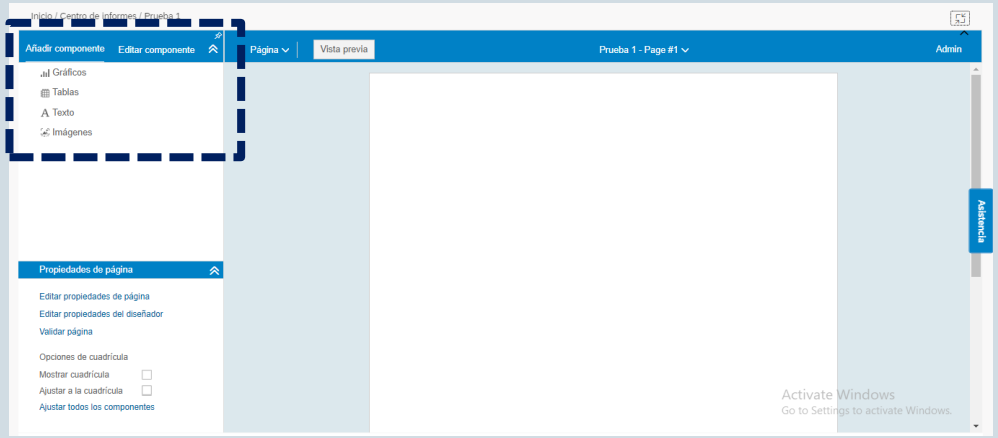

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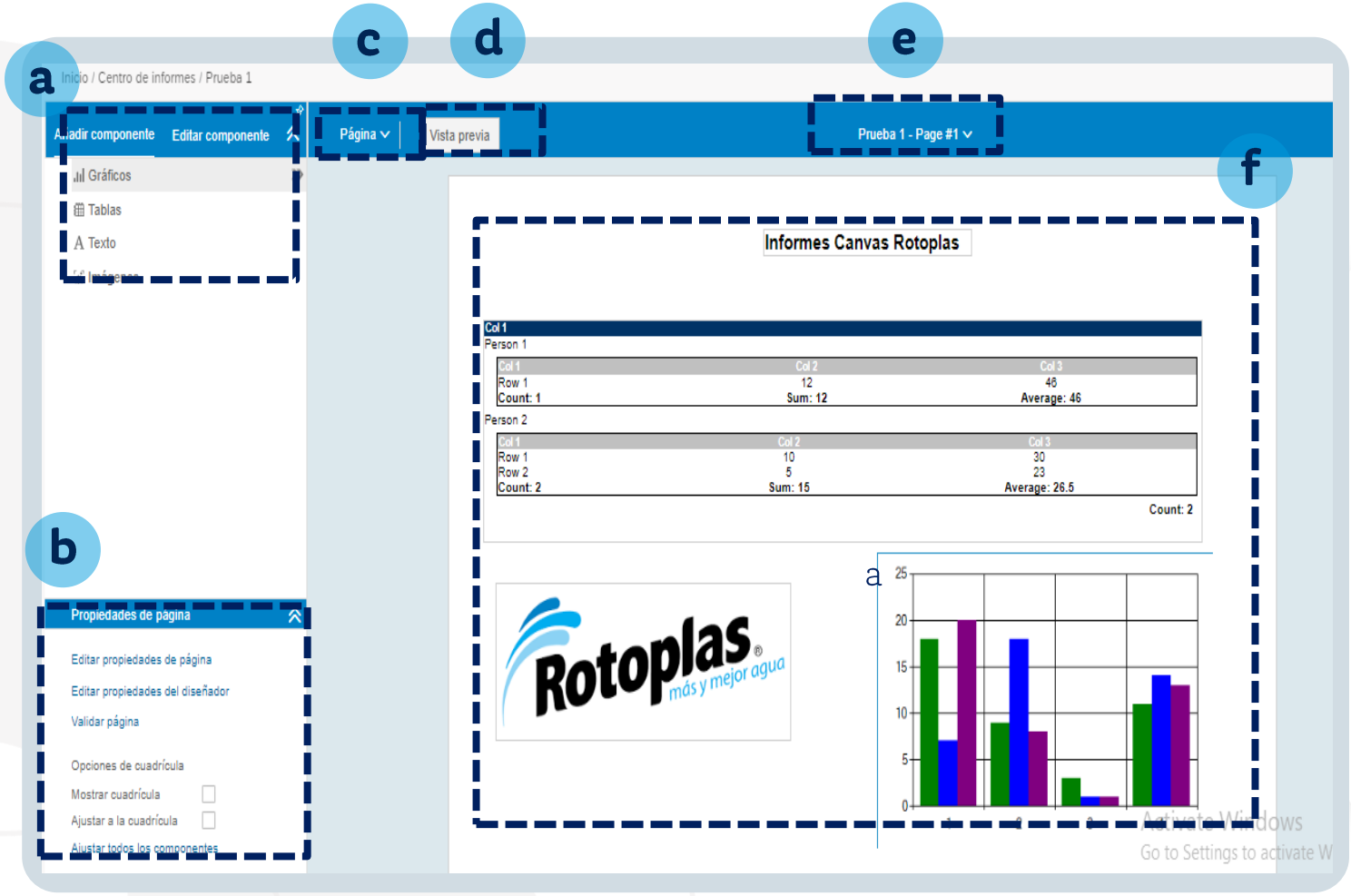
LAYOUT PAGE ELEMENTS (CANVAS)



a) **Components:** Component types are add and edited:

i. **Graph**
ii. **Tables**
iii. **Text**
iv. **Image**

b) **Page Properties:** The page properties are edited
c) **Page:** Used to import previously saved reports.
d) **Preview:** The final report is displayed
e) **Page Name:** You can edit the page name and move between the different pages
f) **Page:** It is the canvas where we will place the Components

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CANVAS REPORTS
Creating CANVAS Report

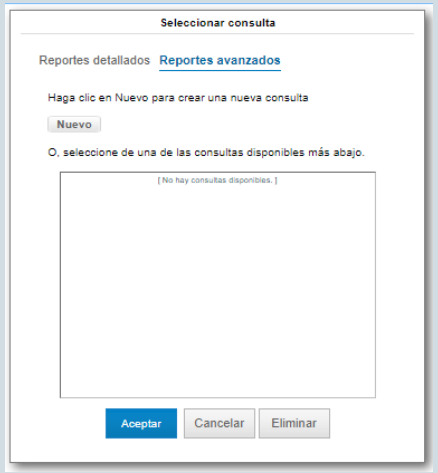
6. Select the **type of component** to be added

7. To edit component data, right-click and select **“Edit this component”**

8. Select **“Advanced Reports”** and then “New”.

9. The work page where the report is generated is displayed

8)



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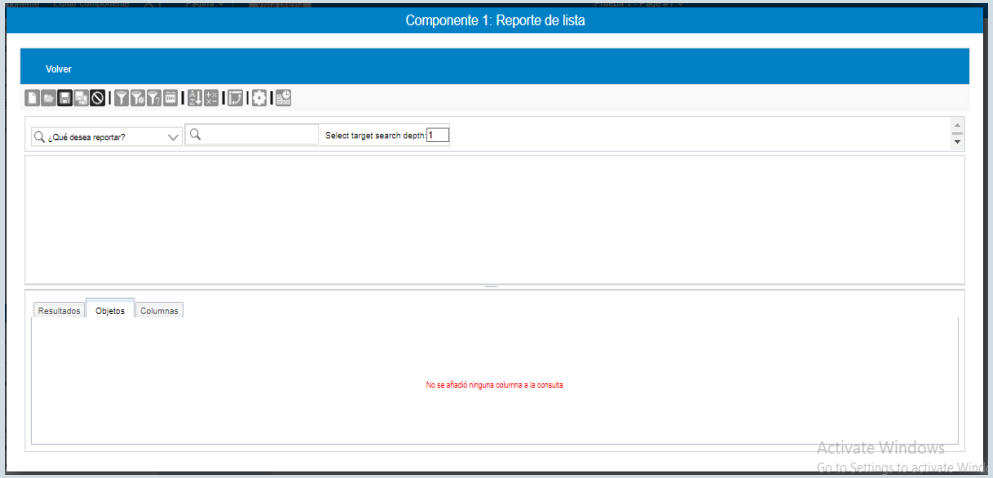

Activate Windows
Go to Settings to activate Windows.

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MENU BAR

1. **New Query:** It is not used after you enable the Report Center
2. **Open Query:** It is not used after you enable the Report Center
3. **Save Query:** Save the current query
4. **Save Query As:** It is not used after you enable the Report Center
5. **Cancel Query Modifications:** revert to last saved
6. **Manage Query Filter:** open the query filter designer
7. **Manage Runtime Filters** – Open Runtime Filter Designer
8. **Person Context:** Open the Person Context Selector
9. **Date options:** open date options
10. **Sort Columns –** Open column sorting
11. **Calculated Columns:** open the calculated column designer
12. **Pivot Table Query Designer:** It is not used after you enable the Report Center
13. **Module Configuration:** configuration of open module
14. **Modify reports column** – Open configuration of report changes

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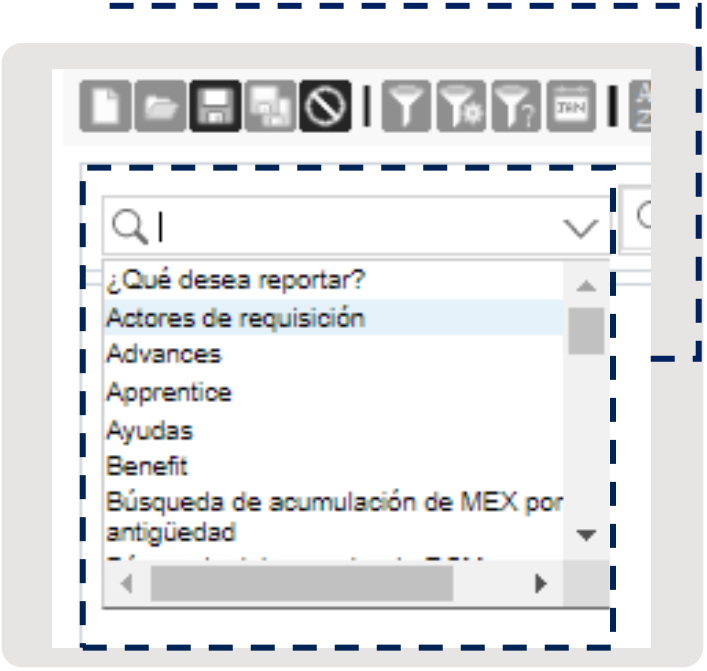
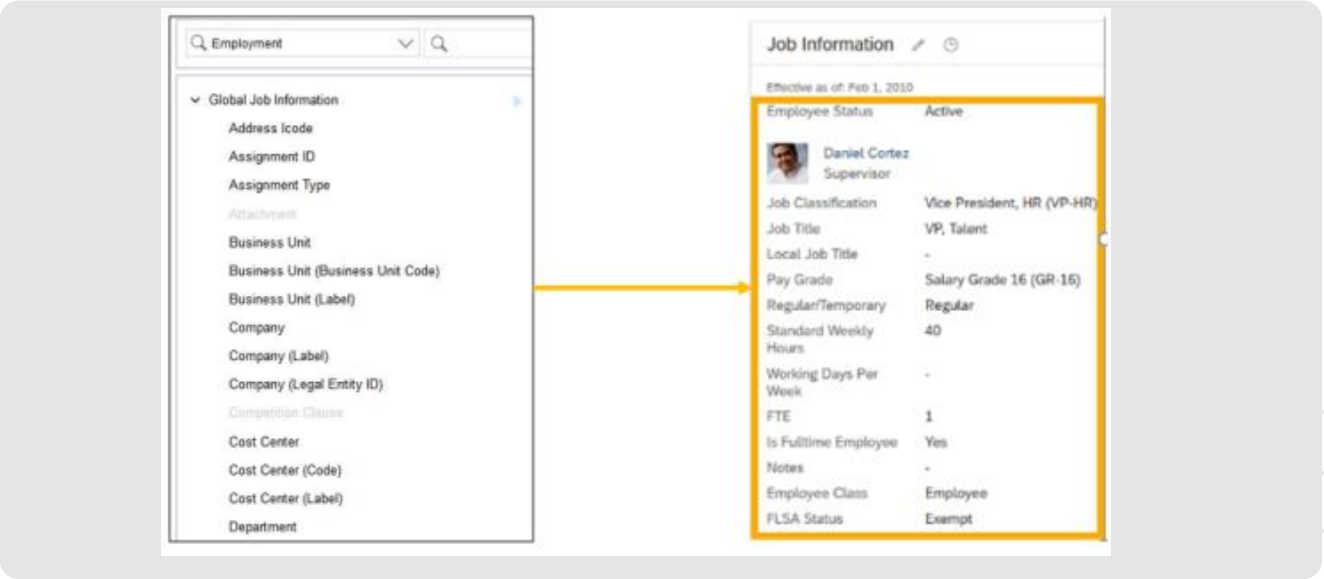
CANVAS REPORTS
Creating CANVAS Report

10 - Select the category you want to report.





The categories answer to the different employee data in SuccessFactors

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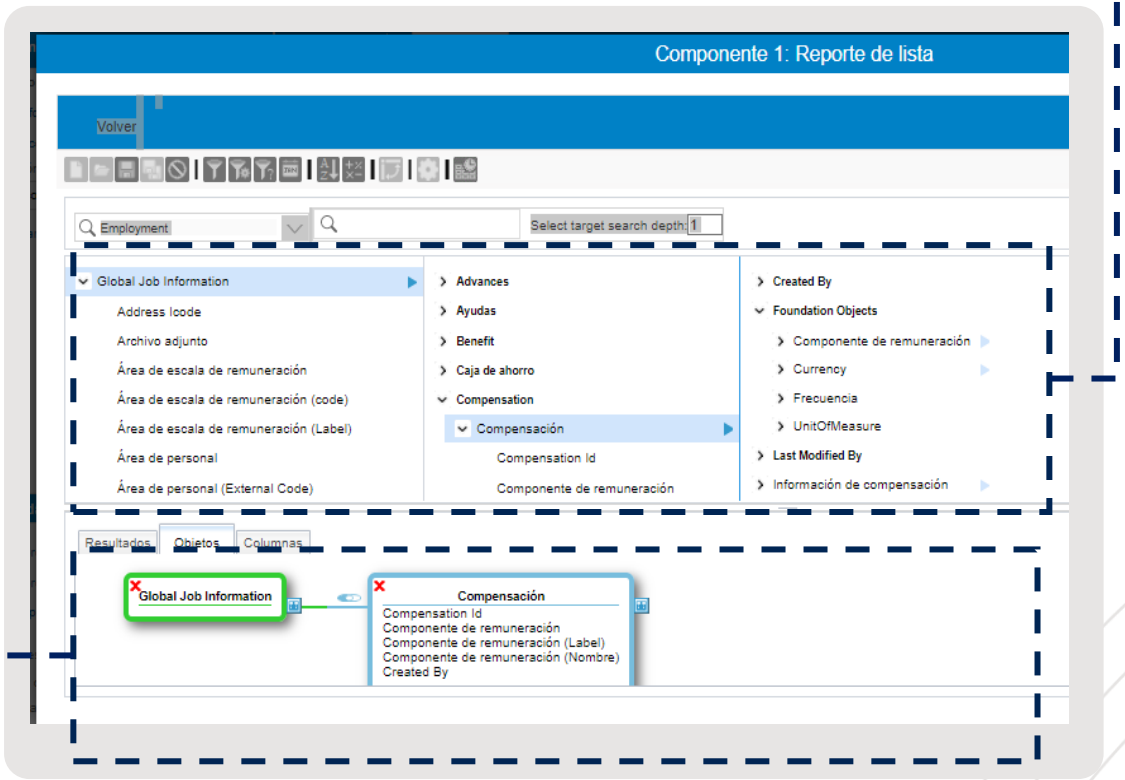
CANVAS REPORTS
Creating CANVAS Report

When you selecting the category and the menu drops down, it will display the information related to the selected category

- To select a piece of data, drag it to this area

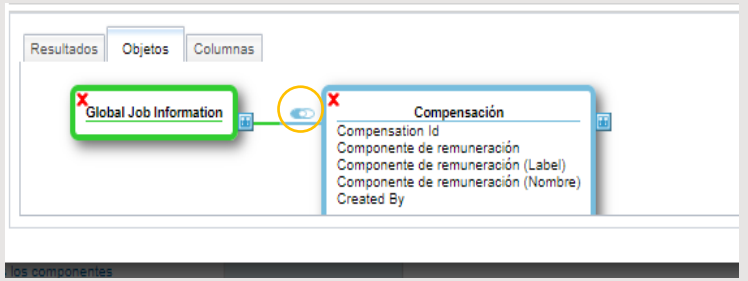


Selection Type

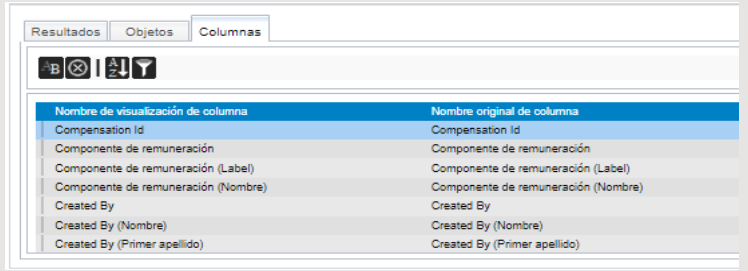
Internal Selection: Displays records existing in both objects

Left selection: Displays all the records of the object on the left and only the records that match from the object on the right

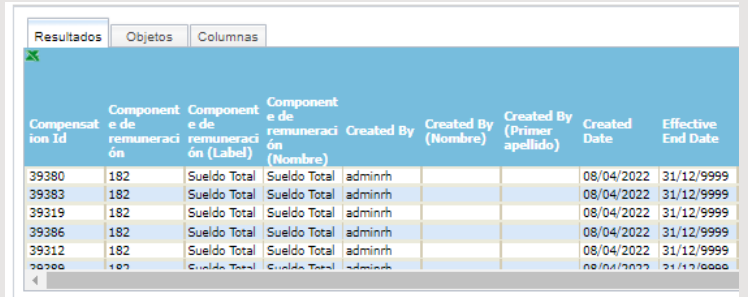
Data selection area



Column Options: Filter, sort, rename, delete.



Component Preview



CANVAS REPORTS
Creating CANVAS Report

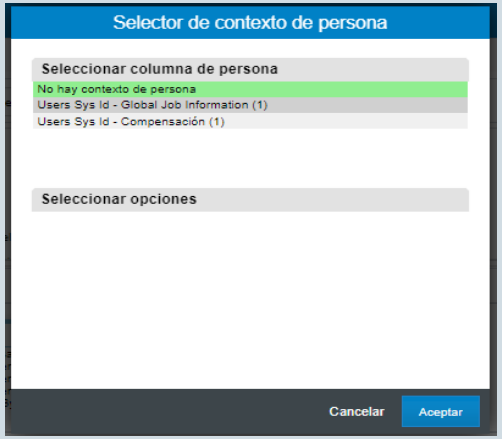
11. We select **“Person Context”.**
Here we can select the viewing range of persons

12. Select **“Save”**

13. Select **“Back” to** exit the editor and return to the main canvas

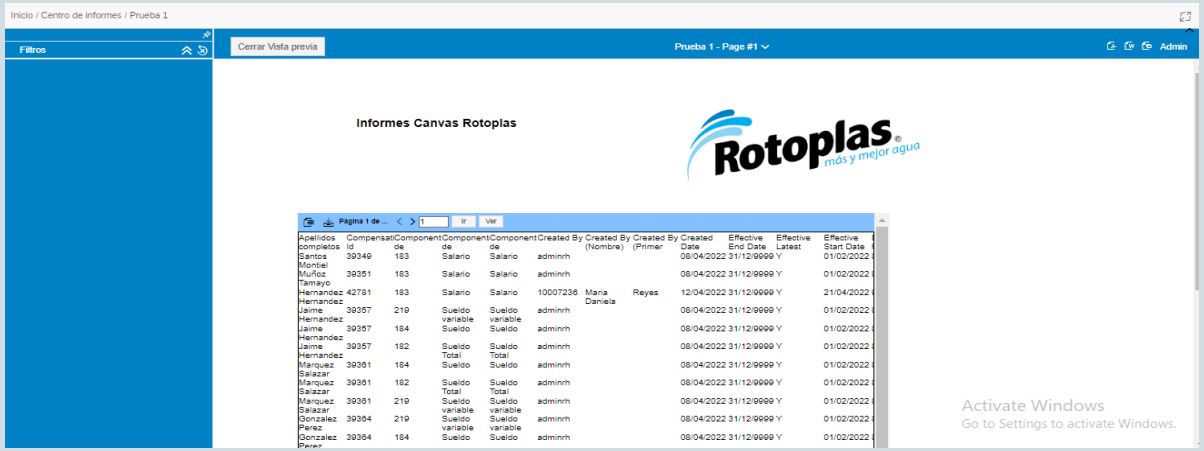
14. Select **“Preview”** to view the report

11)



Clicking on these options will allow you to export the report in these formats

14)



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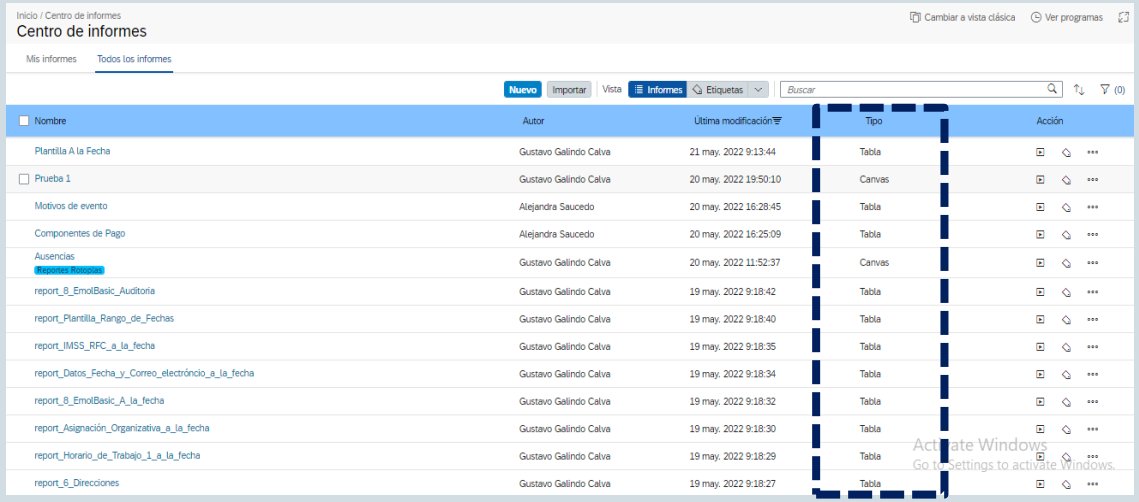
DOWNLOADING REPORTS

Downloading Table-Type Reports

1. Enter the **Report Center**
2. Identify the report you want to download as a table and click on the **report name.**
3. It will display a screen, where you will have to select the options for generating the file, the date parameters, and the filters you want to apply.

a) Report Generation Options: Online, the report will be displayed on screen;
Offline, the report download will be scheduled and can be viewed in Scheduled **Reports; CSV Download: Quick Download Format; Export**, will give you options to download the report in **Excel, PDF or PPT format.**
b) Date Parameters: Select the date or date range for which you want to generate the report
c) Filters: You can choose whether or not to filter using these options

2)

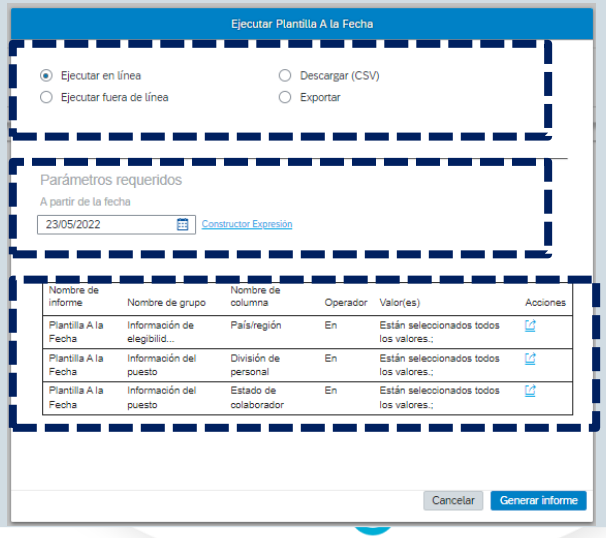


3)

a) Report Generation Options

b) Date parameters

c) Filters



DOWNLOADING REPORTS

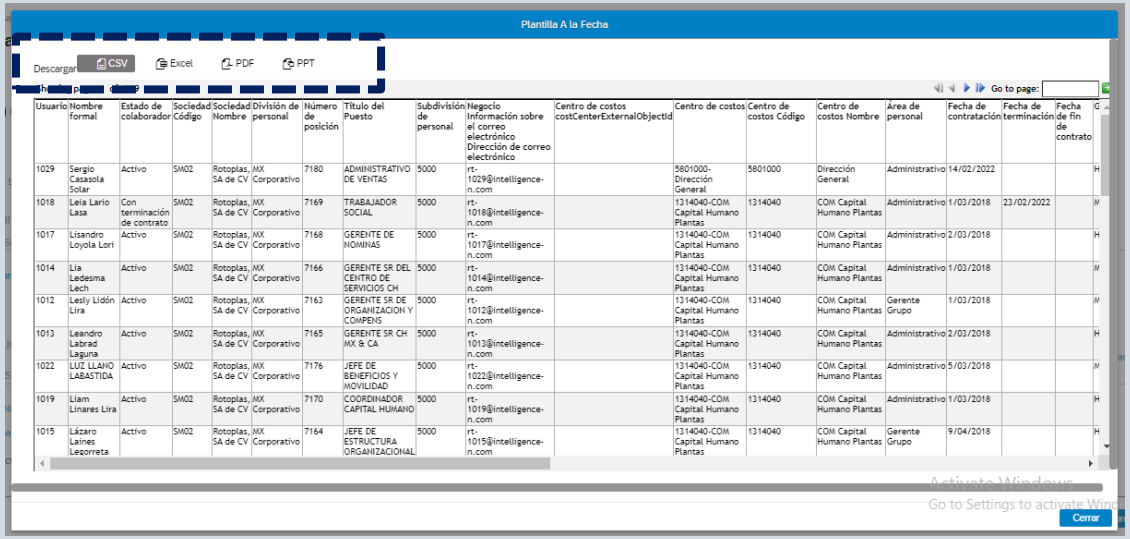
Downloading Table-Type Reports

4. When you click **"Generate Report"** with the Run Online option, the following screen is displayed, where we can view the report online.

5. Clicking on a **format type** will begin downloading the file.

6. When the file is very large, it displays a message stating that the report will be available in **Scheduled Reports** and that you will be notified via email when it is ready.

5)



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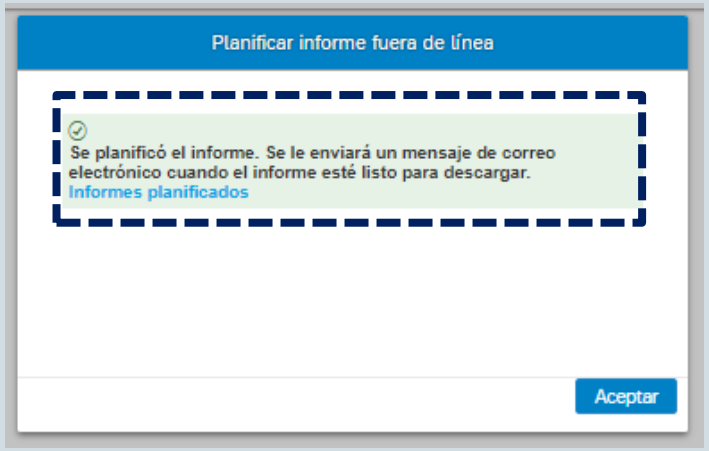

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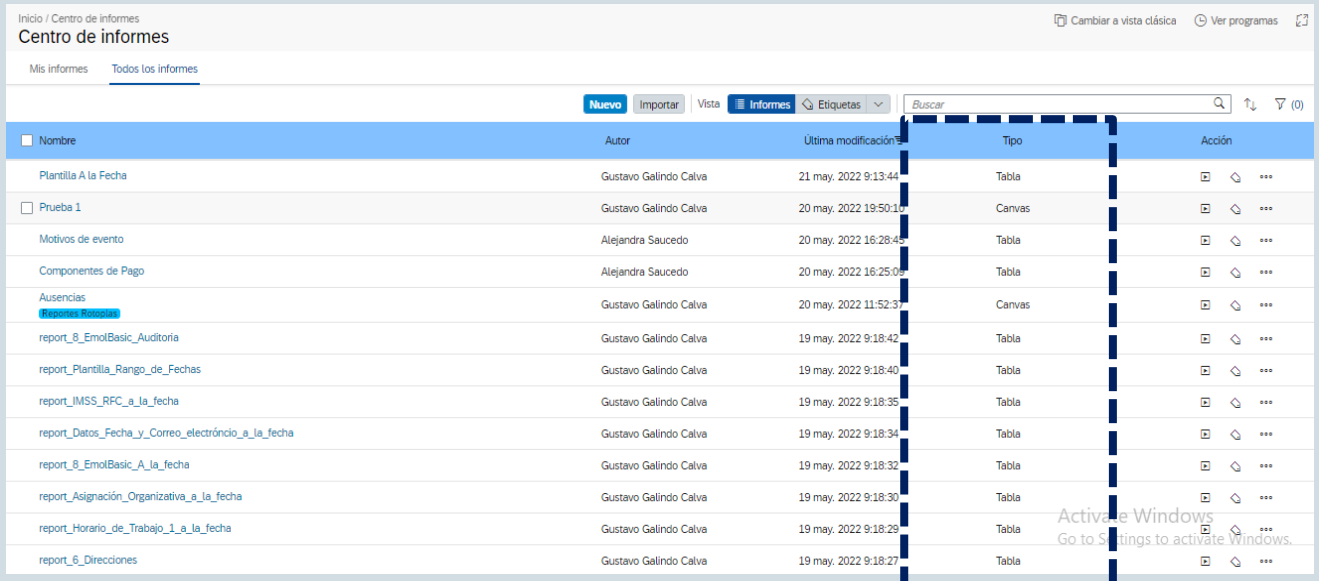
DOWNLOADING REPORTS

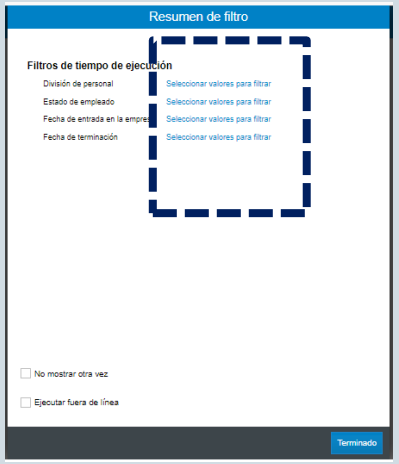
Downloading CANVAS-Type Reports

1. Enter the **Report Center**
2. Identify the report you want to download as canvas and click on the **report name.**
3. It will display a screen of filters, where you can select the ones you want to apply.
4. On this screen, you can also choose to run the report offline, which will schedule the report for download and can **be viewed in scheduled reports.**

2)



3)



DOWNLOADING REPORTS

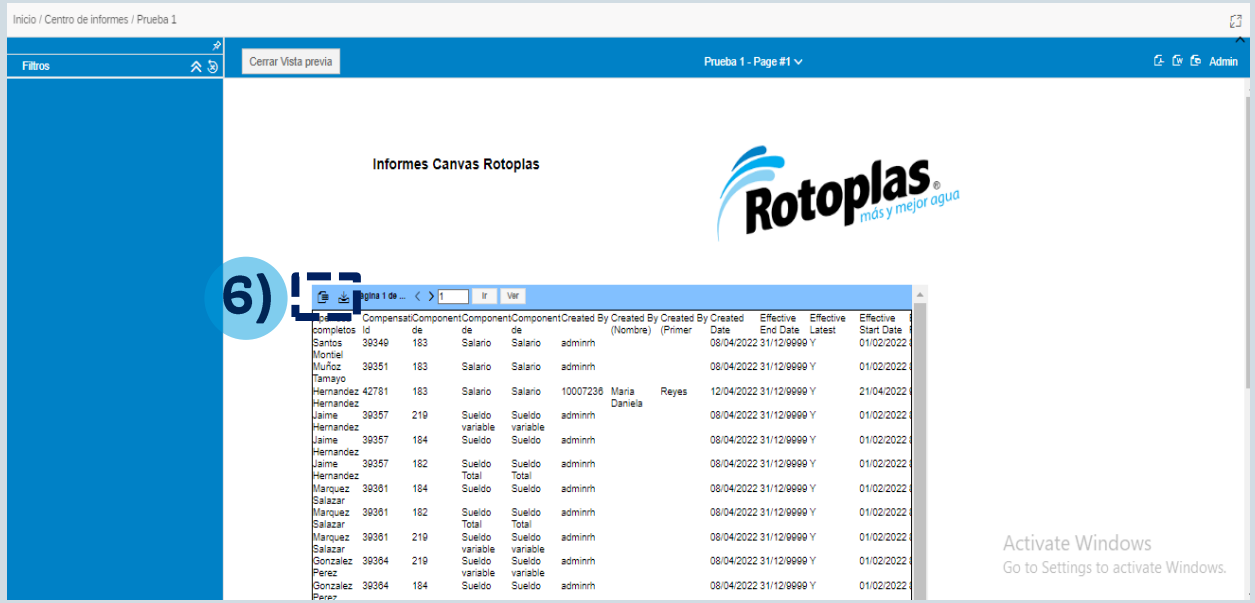
Downloading CANVAS-Type Reports

5. When you click on **“Done”,** the report will be displayed

6. Click on the Excel icon to start the download

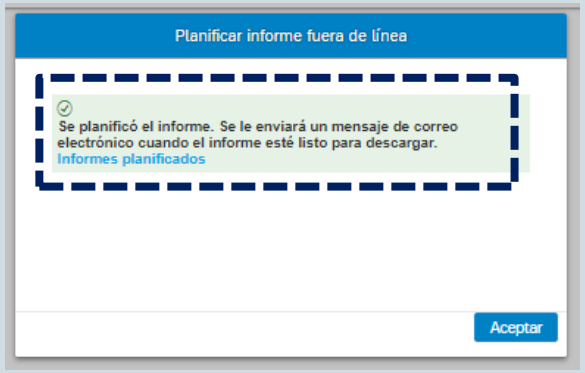
7. When the file is very large, it will display a message stating that the report will be available in **Scheduled Reports** and that you will be notified via email when it is ready.

5)



Clicking on these options will allow you to export the report in these formats

7)



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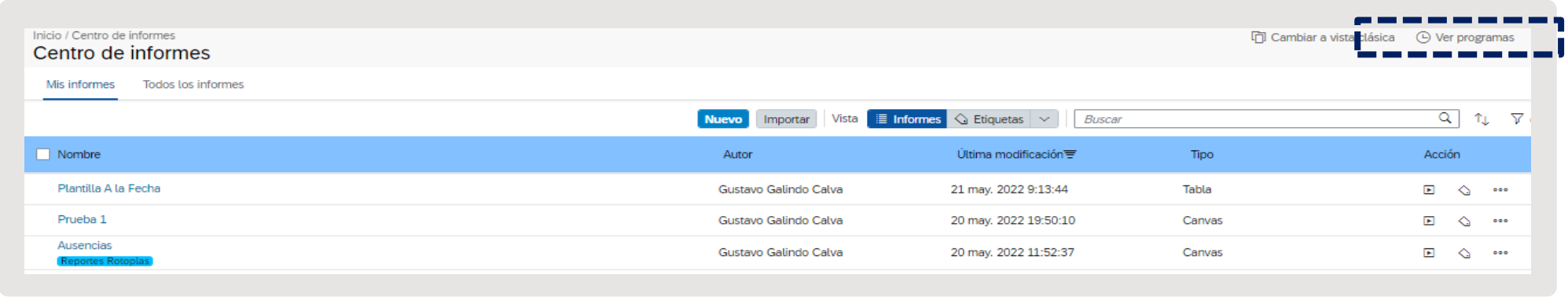
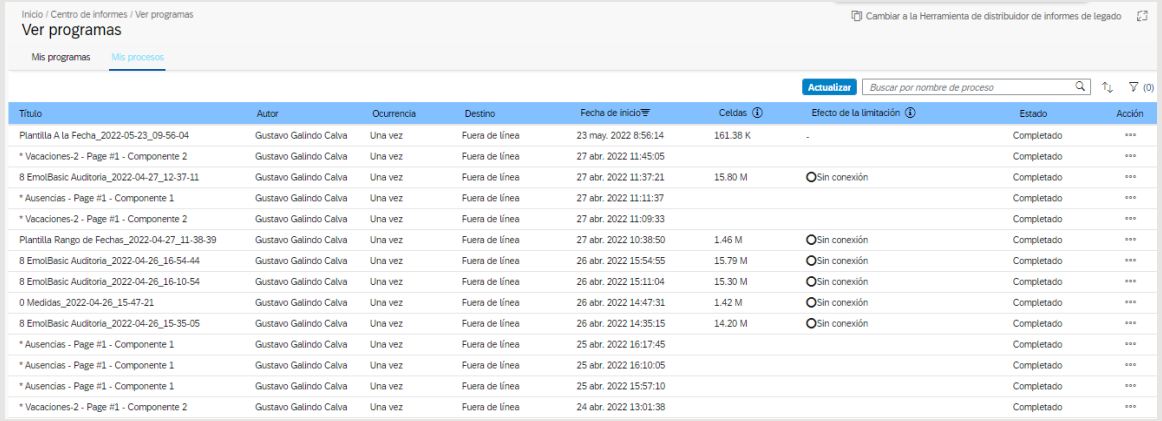
SCHEDULED REPORTS

1 To access the scheduled reports, enter the Report Center and click **on "View Programs"**



2 The following screen is displayed. Here, we will find the list of scheduled reports and reports executed offline.

3 To download the report, click on the report name.