Development Goals and Learning Activities - Ad Hoc Reports

Purpose

The purpose of this page is to explain the reporting capabilities for Development Goals and Learning Activities using Ad Hoc Reports and the configuration steps considering the different configuration scenarios, such as having LMS integrated or not.

Overview

The Ad Hoc Reports framework allows customers to report on Development Goals and Learning Activities data. Which Ad Hoc Report domain to use will depend on whether you have the "Transcript" (integration with SuccessFactors Learning Management System) feature enabled or not. And, by default, the standard fields are reportable, but custom fields need a special configuration. These two aspects of reporting on Development Goals data are discussed below.

Ad Hoc Report Domains

Development Goals

The "Development Goals" Ad Hoc Report domain allows you to report on the development goals, associated competencies and Learning Activities information. It can be used regardless of having Transcript enabled, but, if you don't have Transcript enabled, the Learning Activity fields will only be available after defining the fields as reportable. For information on how to make the fields reportable, please refer to the below section. If Transcript is enabled, there are specific field IDs that are supported by the Learning Activities template and they are reportable by default. For more information on the Transcript supported fields, please refer to the Career Development Planning: Implementation and Administration Guide - About the Transcript Template.

Learning Activities

The "Learning Activities" Ad Hoc Report domain, on the other hand, does require having "Transcript" enabled. It allows you to report on both custom Learning Activities and on Learning Items from the LMS Catalog.

Learning Activities - historical

The "Learning Activities - historical" Ad Hoc Report domain allows you to report on the same information as the "Learning Activities" domain. The difference is that the historical one does not have a "People" pill tab, which means that it does not respect RBP and will bring all data available in the instance, including data from inactive users. Since it does not respect permissions, it is intended for admin users who should have access to everyone's learning items and want to get a full export of the Learning Items available in the system.

Making custom fields reportable

There are two situations where a field must be configured as a reportable field in the Development and Learning Activities plan templates:

- In case it's a custom field in the Development Plan template.
  Only standard fields are reportable by default. For a list of standard fields, refer to the Goal Management Guide - Defining Goal Plan Fields page.

- If "Transcript" is disabled, all fields from the Learning Activity template must be set as reportable so that they appear in Ad Hoc Reports.

Description field

The standard ID of the description field is "desc", and not "description". If you previously specified "description", treat it as a custom field and make it reportable with the configuration specified below.

The configuration to make a custom field reportable needs to be done in provisioning. If you need to have this done for several fields, please engage your Implementation Partner. Otherwise, if it only needs to be done for a couple of fields in one template, you may engage Cloud Product Support to complete this change for you through a Software Change Request. There are two steps in making this configuration:
1. Define the custom field as reportable in the Development Plan / Learning Activities Template

Add the code `reportable="fieldXX"` to the `field-definition` of any custom fields you want to make reportable, where "XX" is a number between 1 and 20. In total, you can configure up to 20 fields as reportable per template.

Example:

```xml
<field-definition id="testReportable" type="text" required="true" detail="true" viewdefault="on"
showlabel="false" reportable="field1" field-show-coaching-advisor="false" cascade-update="push-down">
<field-label>Reportable Text</field-label>
<field-description>Reportable Text</field-description>
</field-definition>
```

- Make sure that the `fieldXX` value you define is not used by other fields in the same template. This value should be unique within a template. For example, there can't be two fields using field4 in the reportable attribute.
- If there's a field with the same ID and same reportable number in different templates for the same domain (e.g. two fields with ID "results" and reportable ID "field1" in two Development Plan templates), you may face issues while viewing the data in Ad Hoc Reports, so it's recommended to choose different reportable numbers for the same field IDs if they are being used across different templates (ref 2391614).

2. Sync the data from the template to the newly defined reportable field IDs

After completing step 1, the custom fields will be available in the column selection in Ad Hoc Reports. However, if you already had any data in those fields, you'll notice that this data will not appear in Ad Hoc Reports yet. To make existing data appear, it's necessary to run a Sync process, to synchronize the data from the custom fields to the reportable field IDs. This task is completed in Provisioning, so you'll need to contact your Implementation Partner or engage Cloud Product Support to have it completed.

1. Go to Provisioning > Company Settings > search for the "Career & Development Planning" section.
2. You'll see the options "Sync development goal data to ad hoc report" and "Sync Learning Activities data to ad hoc report". Click on "Sync" for the option that corresponds to the template that was modified.
3. A "Create New Job" dialog will be displayed. Select a "Job Owner" and the "Development Goal Plan" and click on "Create & Run Job".
4. Go to Provisioning > Monitor Jobs to check if the Sync process completed successfully.

After completing the Sync process, you should be able to report on the custom fields, including existing data.

Related Content

Related Documents

Career Development Planning: Implementation and Administration Guide - About the Transcript Template

Goal Management Guide - Defining Goal Plan Fields
Related SAP Notes/KBAs

SAP KBA 2391614 - Unable to view a particular Development/Objective field in ad hoc reporting