Reports in SuccessFactors

Viewing the Status of the Planning Stage Forms

1. Click the Reports tab.
2. Click the + sign beside Date Options to show the Current Period.
4. Click the – Sign beside Date Options to collapse this data.
5. Click the Update button to refresh the data on the screen.
6. View the Form Status Grouped by Workflow pie chart (bottom left).
7. To view the details for any piece of the pie, click directly on the pie chart or the legend at the bottom of the chart.
8. You can e-mail employees in that status by clicking the envelope at the top of the column.
9. After viewing the details, return to the Dashboard by clicking the Dashboard tab at the top of the screen.
10. Make sure the Process in the Filter Summary at the top is set to UNIV – Planning. If the process does not say UNIV – Planning, you can change it with the following steps:
   a. Expand the Filter Options at the top left
   b. Choose UNIV – Planning from the Process drop-down list.
   c. Once you change the process, you can close the Filter Options.
   d. Click the Update button to refresh the data on the screen.

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