



SAP SuccessFactors 

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Migrating Reporting Functional Permissions to RBP (User Guide)

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1 Change History

Learn about changes to the documentation for migrating reporting functional permissions to role-based permissions in recent releases.

2H 2021

Type of Change	Description	More Info
None	We did not update this document.	

1H 2021

Type of Change	Description	More Info
None	We did not update this document.	

Q4 2018

Changes to this Guide in Q4 2018

What's New	Description	More Information
<i>November 30</i>		
Updated the snapshot	The image in the "Target Customers and Dependencies" topic was outdated. Replaced it with the new Manage Workforce Analytics page.	Target Customers and Dependencies [page 4]
Updated the topic on Configuring the Permissions	Updated the screenshots and restructured the content for ease of use.	Configuring the Permissions [page 4]
Added a new topic for turning on the opt-in switch	After enabling the role-based user permissions for Analytics, you need to enable <i>Functional and Option Permissions</i> on the Admin Center Manage Workforce Analytics page.	Turning on the Opt-In Switch [page 6]

2 Migrating Reporting Functional Permissions to RBP

2.1 Target Customers and Dependencies

Any customer can consider adopting this feature.

Customers with Workforce Analytics and/or Workforce Planning should also adopt the Measure and Dimension Permissions being maintained from the RBP Role, as per the second switch shown below.

The screenshot shows the 'Admin Center' interface. Under 'Manage Workforce Analytics', there is a section titled 'RBP Role to Maintain WFA permissions'. It contains two toggle switches: 'Functional and Option Permissions' and 'Measure and Dimension Permissions'. The 'Measure and Dimension Permissions' switch is highlighted with a red box. A callout box provides instructions: 'Use SFSF RBP role to maintain Workforce Analytics, Workforce Measure, Dimension and Tree Security permissions (rather than Reporting & Analytics Role). Prerequisite for this switch to be enabled is that either the Provisioning switch "Online Report Designer – Workforce Analytics Client" OR the "Analytics in Employee Central" switch must be ON. Your guide is here: [Measure and Dimension Permissions Installation Guide](#)'.

2.2 Configuring the Permissions

Prerequisites

If the Single Sign On (SSO) option is enabled in Provisioning, the Analytics Permissions will be available to be set.

The screenshot shows the 'Analytics and Dashboard Tabs & Misc Reporting' configuration page. A red box highlights the 'WFA/WFP/talent insight Integration (all fields in this section are case sensitive)' section. It includes a checked checkbox for 'Single Sign On (SSO)', an 'Application URL' field with the value 'https://qant3-gwary-ec01.sfsf.com/portal/login.aspx', and a 'Data Service URL (supporting home page tile integration)' field with the value 'https://qant3-gwary-ec01.sfsf.com/portal/login.aspx'.

→ Remember

As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner. If you're no longer working with an implementation partner, contact Product Support.

Context

This is a two step process:

- Configuring the Permissions
- Turning on the Opt In switch

Procedure

1. Go to ► [Admin Center](#) ► [Manage Permission Roles](#) ► [\[Role\]](#) ► [Permission](#) ► [User Permissions](#) ► [Analytics Permissions](#), select *Functional Permissions* and *Option Permissions*, and select the appropriate options within *Functional Permissions* and *Option Permissions*.

Specify what permissions users in this role should have. ⓘ

▼ **User Permissions**

- [Objectives](#)
- [Career Development Planning](#)
- [Compensation](#)
- [Employee Data](#)
- [Employee Central Effective Dated Entities](#)
- [Employee Views](#)
- [Payroll Permissions](#)
- [SAP System Configuration](#)
- [General User Permission](#)
- [Reports Permission](#)
- [Analytics Permissions](#)**
- [Succession Planners](#)
- [Variable Pay](#)
- [Miscellaneous Permissions](#)

Analytics Permissions †= Target needs to be defined. ⓘ

- Select All
- Show Analytics ⓘ †
- Show Planning (module picker)†
- Functional Permissions ⓘ
 - All
 - Others
 - User Maintenance
 - Role Maintenance
 - Edit Footnotes
 - Document Management

Ctrl-Click to select multiple

- Option Permissions ⓘ
 - All
 - Others
 - Reporting Metrics
 - Questions
 - Resources

Ctrl-Click to select multiple

i Note

The number of items available for setting in the *Functional Permissions* and *Option Permissions* are dependent on which of the Online Report Designer options are set in *Provisioning*.

→ Remember

As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner. If you're no longer working with an implementation partner, contact Product Support.

2. The *Show Planning* option is available only if the *Enable Workforce Planning* option in Provisioning has been enabled.

i Note

The *Show Planning* option has been moved from the Reports permissions group.

Results

After you set these permissions, it does not automatically effect the tools and options available on the Workforce Analytics Admin page. You can configure the appropriate *Functional and Option Permissions* on as many roles as required.

Next Steps

Next, you need to turn on the Opt-in Switch.

2.2.1 Turning on the Opt-In Switch

You can spend as much time as you need to configure the appropriate Functional Permissions, on as many Roles as required.

Context

Setting these Permissions will not automatically affect the tools and options available to you, since the process so far is really configuration.

Procedure

1. When you are ready for these permissions to take effect, go to [Admin Center](#) > [Manage Workforce Analytics](#), and enable the Opt In switches.

2. There are 2 switches available. Enable the *Functional and Option Permissions* switch now.

i Note

The second switch - Measure and Dimension Permissions covers the Analysis Dimensions, Measures and Tree Security. Customers with Workforce Analytics should consider configuring the related permissions and then turn this switch on also. First read the "[Migrating WFA Permissions to Role-Based Permissions](#)" guide for this.

Results

With this switch ON, the Permissions defined in the RBP Role will be used to control the tools and options available to you. The permissions previously defined on the Analytics Role will be ignored.

Admin Center
Back to: [Admin Center](#)

Manage Workforce Analytics

Please make sure that you read the linked implementation guide before making or changing these settings.

RBP Role to Maintain WFA permis

- Functional and Option Permissions ?
- Measure and Dimension Permissions ?



Use SFSF RBP role to maintain Workforce Analytics Functional and Option permissions (rather than Reporting & Analytics Role). Prerequisite for this switch to be enabled is the Provisioning switch "WFA/WFP/talent insight Integration – Single Sign On (SSO)" must be ON. Your guide is here: [Functional and Option Permissions Installation Guide](#)

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