Taleo Enterprise

Taleo Reporting
Getting Started with Business Objects XI3.1
- User Guide

Feature Pack 12A
January 27, 2012

Confidential Information and Notices

Confidential Information

The recipient of this document (hereafter referred to as "the recipient") agrees that the Confidential Information disclosed herein by Taleo shall be retained in confidence by the recipient, and its respective employees, affiliates and/or subsidiaries.

For the purpose herein, the term "Confidential Information" shall mean the following:

1. Any information, know-how, data, process, technique, design, drawing, program, formula or test data, work in process, business plan, sales, suppliers, customer, employee, investor or business information contained in a document, whether in written, graphic, or electronic form; or
2. Any document, diagram, or drawing which is either conspicuously marked as "Confidential", known or reasonably known by the other party to be confidential, or is of a proprietary nature, and is learned or disclosed in the course of discussions, demonstrations, or other collaboration undertaken between the parties.

Limited Rights Notice (Dec 2007)

1. These data are submitted with limited rights under Subcontract No. 6896589. These data may be reproduced and used by the Government with the express limitation that they will not, without written permission of the Contractor, be used for purposes of manufacture nor disclosed outside the Government; except that the Government may disclose these data outside the Government for the following purposes, if any; provided that the Government makes such disclosure subject to prohibition against further use and disclosure: None.
2. This notice shall be marked on any reproduction of these data, in whole or in part.

Table of Contents

Prerequisites

Technical Configuration and Software Performance

Technical Configuration and Software Performance

For the latest information, refer to the *Taleo Enterprise Technical Configuration and Software Performance Guide* document for the applicable release.

Revision History

Revision History

Revision History

Date	Modification	Revised Topic
January 27, 2012	Initial Publication	

Reporting User Types

Reporting User Types

Report Developer

This user type, sometimes referred to as a Power User, generally creates reports viewed by other users.

- By default all reporting zones come with a license for one report developer.
- This user type typically logs in to the Reporting environment directly from the Infoview URL using dedicated user credentials.
- This user type can refresh, schedule, export, create, edit, delete, and publish reports.
- This user type is constrained to 8,000 rows and 5 minutes run time per query.
- To gain authoring access, contact taleo support.

Report Viewer

This user type is limited to viewing reports created by authoring users .

This user type typically logs in to the Reporting environment via the standard Taleo Welcome Center.

This user type can only refresh and export reports. No authoring rights exist.

These users are constrained to 8,000 rows and 5 minutes run time per query.

Scheduling User

This user type should be limited to one specific person or a very controlled, centralized set of individuals to schedule resource intensive reports.

This is a detailed description.

- By default all reporting zones come with a license for one scheduling user.
- This user type logs in to the Reporting environment directly from the Infoview URL using dedicated user credentials.
- This user type's **only** function is to schedule reports.
- This user type is constrained to 65,000 rows and 10 minutes run time per query.
- To gain scheduling access, contact Taleo Support.

Web Intelligence Document

Web Intelligence Document

Environment Setup

Before you writing reports, follow these steps to ensure your environment will support the report author.

Modify Browser Security

To ensure all functionality is accessible, add *.taleo.net as a trusted site, and turn off pop-up blockers for *.taleo.net.

Advanced Web Intelligence Author

To use the Advanced - Java Thin Client authoring tool, you must have, installed on your system, a Java Runtime Engine (JRE).

When using the Java Runtime Engine, you may be prompted by your browser that there is a security concern, and to block the component. Select No when prompted, or the report editor will not launch.

To check your system for a Java Runtime Engine:

1. Navigate to your system control panel, and find Java.
2. Click the icon to bring up the Java Control panel.
3. Click the Java tab.
4. Click View to preview the Java Runtime Versions and parameters. It is recommended to use the parameter –Xmx300m.

If you do not have the Java Runtime Engine it is available for free to download online. Contact your Corporate IT with any further questions.

Desktop - Java Rich Client

To use the Desktop - Java Rich Client authoring tool, you must have, installed on your system, Java Rich Client.

To install the Java Rich Client:

1. When you login to the report authoring center, click Preferences and navigate to Web Intelligence > Select a default creation/editing tool.
2. Next to the Desktop (Web Intelligence Rich Client Required) there is an Install Now button.
3. Click the install now button and proceed to the instillation of the Java Rich Client.

Contact your Corporate IT with any further questions.

Web Intelligence Authoring Tools

There are four options for authoring web intelligence documents: advanced, interactive, desktop, web accessibility.

Depending on your need when report writing you may need to modify your web intelligence creation tool.

Advanced – Java Thin Client

The Java Thin Client is the Web Intelligence report panel most report developers use. It does not require a software installatio,n but does require a compatible active Java Runtime Engine.

Interactive - HTML Client

The Interactive version is fully HTML, so there are no java runtime requirements here. This version is optimal for report developers under heavy constraints from their IT department. This version exists

in XIR2 as well, but has been enhanced in XI 3.1, making it a more compelling choice for report development.

Desktop - Java Rich Client

The Java Rich Client is the most powerful version of Web Intelligence. It requires a desktop software installation and has an embedded java runtime engine, which means Java compatibility issues are not a concern with this version. It also contains features not available in other Web Intelligence versions, such as the ability to work in offline mode and import spreadsheets directly into reports.

Web Accessibility - 508 Compliant

This version is 508 compliant. It is not as feature rich as the other clients but offers simplified report development workflows.

Creating a Web Intelligence Document

Prerequisite

You must have the *Report Developer* user type.

Document List > ***New*** > ***Web Intelligence Document***

Steps

1. Select your Universe.
2. Add objects to the query.
3. Add filters to the query.
4. Click ***Run Query***
   You will be taken to the report editor when the query is run.
5. Click the save button.
6. Save your web intelligence document.
   - Click ***Save As*** to save the document to your online repository.

     Reports can not be saved directly under the root directory. "Company - {Your Company Name}" is the parent directory where custom reports, and subdirectories can be saved.
   - Click ***Save to my Computer as*** to save the report to your computer as one of the following:
     - Excel
     - PDF
     - Text
     - CSV

Next Step

For more information on creating a web intelligence document see the *Building Queries with SAP BusinessObjects Web Intelligence Query - HTML* document > Chapter 3 *Returning data using queries*.

Adding Objects to a Report Query

Prerequisite

You must have the *Report Developer* user type.

Document List > ***Folder***

Steps

1. Select the report.
2. From the ***Actions*** menu click ***Modify***.
3. Click ***Edit Query***.
4. Search for objects using the quick search field or by drilling down through the file structure.
5. Drag and drop objects into the Results Objects pane.
6. Click ***Run Query***.
7. Click the save button.

Next Step

For more information on adding objects to a report query see the *Building Queries with SAP BusinessObjects Web Intelligence Query - HTML* document > Chapter 3 *Returning data using queries*.

Adding Filters to a report query

Prerequisite

You must have the *Report Developer* user type.

Document List > ***Folder***

Steps

1. Select the report.
2. From the ***Actions*** menu click ***Modify***.
3. Click ***Edit Query***.
4. Search for objects by using the quick search field, drilling down through the file structure, or using objects from the Result Object pane.
5. Drag and drop objects into the Query Filters pane.
6. Select the operator and values options.
7. Click ***Run Query***.
8. Click the save button.

Result

For more information on creating a web intelligence document see the *Building Queries with SAP BusinessObjects Web Intelligence Query - HTML* document > Chapter 4 *Filtering data using query filters*.

Universes

Universe Name	Description
Administration	This Universe permits users to carry out system administration, monitoring and auditing reports.
Candidate Search Log	This Universe allows for reports to be created with regard to audits via the OFCCP-stored data in the recruiting database.

Universe Name	Description
OnBoarding	This Universe contains elements to report on process flow and task progression of newly hired employees.
Performance Management	This Universe contains elements to create ad-hoc reports around employee career plans, profile metrics, goal plans, performance reviews, development planning and succession planning.
Staffing Reporting	This Universe consists of candidate and requisition data from Recruiting.
Talent Management	This Universe allows for reports to be created via a subset of the Staffing and Performance universes, with metrics for trend analysis included. This Universe is only available if dashboards and analytics are activated.

Universe Objects

Object	Description
	**Dimensions** are objects being tracked in multidimensional analysis. Dimensions can be organized into hierarchies or classes and are essentially text-based, i.e. Recruiter Name and date-based, i.e. Application Completion Date.
	**Details** provide supplemental and descriptive drill-down data about a Dimension, i.e. Recruiter Email Address, and are also text-based and date-based.
	**Measures** convey numeric information by which a Dimension or perhaps a Detail can be measured. They are predefined aggregates, such as totals or averages, i.e. # of Candidates.
	**Filters** are predefined query objects designed to keep only those records that meet the defined criteria that the filter represents.

Reports

Reports

Formatting Reports

The overall legibility and positive reception of a report can be directly tied to the manner in which it is formatted.

In Taleo Reporting & Analytics, there are numerous tools to help you present data in a professional and visually engaging manner as well as to convey information that is easily interpreted and understood.

The Templates tab allows you to change the look and feel of your reports quickly, using drag and drop functionality. You can use the Tables Templates to display the data in a way that enables the end user to quickly understand the information being presented.

To represent the information graphically, you use one of the Chart Templates. Free-standing cells allow you to add such items as page numbers or additional formulas to your report.

When formatting there are considerations when delivering a hard copy via PDF or Excel, instead of on demand; keep in mind that on demand reports may also be exported to Excel and PDF.

PDF or Excel

Both PDF and Excel should be considered based on the content of the report.

If the report needs to be reviewed by someone that is not a user of Taleo Reporting and Analytics, you have ways to get the information to them that they need. Just remember that when saving a report to Excel, none of the calculation or function definitions used to create the report can be exported. It is similar to dumping data into an Excel document and thus may require more work in Excel to make the information visibly pleasing and useful there.

Sections are used to provide headers that can clearly identify data grouped in the cells below them. Sections group information into meaningful units. One point to keep in mind is that while Excel files do not render report headers, PDF files and On Demand, a feature for reviewing and printing information from InfoView whenever desired, do accept them.

Breaks, on the other hand, do not use headers. However, data is still grouped into a table that functions as a meaningful unit. On Demand, PDF files, and Excel files all accept breaks.

Adding a Break

Prerequisite

You must have the *Report Developer* user type.

Document List > ***Folder***

Steps

1. Select the report.
2. From the ***Actions*** menu click ***Modify***.
3. Select the first cell under the heading for the break column.
4. Click the Insert/Remove Break button.

5. Click the save button.

Next Step

For more information on breaks see the *Building Reports with the SAP BusinessObjects Web Intelligence Java Report Panel* document > Chapter 14 *Organizing data with sections, breaks and sorts*. > Using breaks.

Adding a Total

Prerequisite

You must have the *Report Developer* user type.

Document List > ***Folder***

Steps

1. Select the report.
2. From the ***Actions*** menu click ***Modify***.
3. Click the column heading for which you want a total.
4. From the ***Insert Count*** drop-down menu, select Count.
5. Click the save button.

Result

This is the result for this task.

Next Step

For more information on Table Templates see the *Building Reports with the SAP BusinessObjects Web Intelligence Java Report Panel* document > Chapter 20 *Enhancing reports with calculations, formulas and variables*.

Adding a Section to an Existing Table

Prerequisite

You must have the *Report Developer* user type.

Document List > ***Folder***

Steps

1. Select the report.
2. From the ***Actions*** menu click ***Modify***.
3. Select the first cell under the column that will become a section heading.
4. Drag the cell into the white area above the data block until the tooltip reads ***Drop Here to create a section***, and drop it.

   A section can also be created by dragging an object directly from the data channel.
5. Click the save button.

Result

This is the result for this task.

Next Step

For more information on sections see the *Building Reports with the SAP BusinessObjects Web Intelligence Java Report Panel* document > Chapter 14 *Organizing data with sections, breaks and sorts*. > Grouping information with sections.

Adding an Image to a Report

Prerequisite

You must have the *Report Developer* user type.

Document List > ***Folder***

Steps

1. Select the report.
2. From the ***Actions*** menu click ***Modify***.
3. Click the ***Templates*** tab.
4. Click ***Report Elements.***
5. Click ***Free-Standing Cells***.
6. Click ***Formula and Text Cells***.
7. Drag the ***Blank Cell*** object into the report editor.
8. Click the ***Properties*** tab.
9. Click ***Text Format***.
10. Click the ellipsis on the far right side of the ***Background Image*** option.
11. Select ***Image From File***.
12. Click ***Browse***.
13. Select your file.
14. Click ***Open***.
15. Click ***OK***.
16. Click the save button.

    Images will render online and export to PDF files; however, images do not export to Excel files.

Next Step

For more information free standing cells see the *Building Reports with the SAP BusinessObjects Web Intelligence Java Report Panel* document > Chapter 13 *Displaying data in free-standing cells*.

Applying Tables, Charts, and Cells to a Report

Prerequisite

You must have the *Report Developer* user type.

Document List > ***Folder***

Steps

1. Select the report.
2. From the ***Actions*** menu click ***Modify***.

3. Click the ***Templates*** tab.
4. Drag the report element from the templates channel and drop it onto a report to apply the tab.
5. Click the save button.

Next Step

For more information on Table Templates see the *Building Reports with the SAP BusinessObjects Web Intelligence Java Report Panel* document > Chapter 12 *Displaying data in tables*.

For more information free standing cells see the *Building Reports with the SAP BusinessObjects Web Intelligence Java Report Panel* document > Chapter 13 *Displaying data in free-standing cells*.

For more information on Chart Templates see the *Building Reports with the SAP BusinessObjects Web Intelligence Java Report Panel* document > Chapter 15 *Displaying data in charts*.

Report Scheduling

Report Scheduling

Working with Report Scheduling

Scheduling reports allows an individual or a very controlled group of users to run reports for resource intensive data.

Scheduling users log in to the Reporting and Analytics Environment directly via the Infoview URL using dedicated user credentials to schedule the execution of reports. Once the scheduled reports runs, end users can then access the data. The scheduling user's abilities are limited to scheduling reports only.

Other Considerations

- Reports can contain multiple queries. Each query runs consecutively with the time and row restrictions enforced separately.
- Reports can have more than one schedule assigned. Each schedule assigned to a report can have different configuration parameters.
- Scheduled reports saved in the scheduling user's personal folder can be emailed to end users, but cannot be seen by the same user in Infoview.
- Dynamic date ranges can be configured by the report author by using dynamic date objects in the query filter.
- The scheduler shows instances and times according to the user's time zone set in Preferences > General. The default time zone is EDT.
- A “Run Once” schedule can be used to test reports exceed the row and time limits for the report developer.
- Report developer accounts can also schedule reports in the same manner as the special scheduler account but the results are limited to 8000 rows / 5 minutes per query.

Benefits

- This feature prevents partial results in data intensive queries.
- Reporting can send data to all users at once, including users that do not have access to Taleo, via the email distribution feature.
- Users have faster access to the data.
- Users with HTTP proxy timeouts are not impacted.
- Scheduling users can control when reports are refreshed, thus scheduling for off-peak hours.
- User intervention is not required for recurring reports.
- This feature reduces ad-hoc report executions against the database.

Impacts

- Reporting

  To obtain scheduling user access, please contact Taleo Support.

Scheduling a Report

Users can schedule a report using the following procedures.

Prerequisite

You must have the *Scheduling User* user type.

The report to be scheduled must be located in the Corporate documents folder, as this is the only folder to which the scheduling user has access.

Steps

1. Log into Reporting using the scheduling user's credentials.
2. Click on the folder in the left pane in which the report is located.
   The right pane refreshes with the list of available reports.
3. Click Schedule below the desired report.
   The report scheduling configuration window displays.
4. Select the appropriate scheduling configuration.
5. Clear “Use the job server defaults”.

   When scheduling to Email, clear "Use the job server defults". Then, enter the appropriate email parameters.
6. Name the scheduled job.
7. Click Schedule.

Result

The report runs at the scheduled time as configured.

Next Step

End users can view reports with Default Enterprise Location as the destination by clicking one of the following below the report name in the right pane:

- View Latest Instance
- History - then select the desired instance.

Report Scheduling Configuration

The following areas can be configured for a scheduled report:

Configuration Category	Description	Available Selections
When	Select how frequently a report should run.	• Now • Once • Hourly • Daily • Weekly • Monthly • Nth Day of Month • 1st Monday of Month • Last Day of Month • X Day of Nth Week of the Month • Calendar
Destination	Choose the output location of the report. Options “File Location” and “FTP” are not supported.	• Default Enterprise Location • Mail Recipients
Format	Choose the output format of the report.	• Web Intelligence

Configuration Category	Description	Available Selections
		• Microsoft Excel • Adobe Acrobat
Caching Option	Select the formats to pre-load the cache with when scheduling and select formatting locales.	• Microsoft Excel • Standard HTML • Adobe Acrobat
Server Group	This configuration element should be left to the default; use the first available server.	
Events	This configuration element should be left blank.	
Prompts	If appropriate, set report parameters by clicking Modify values.	Selections are dependent on report design.

Report Row Limits

To accommodate larger data volume, scheduled reports have an expanded timeout threshold. Expanded thresholds prevent partial results on a report.

Report User Types	Rows Per Query	Run Time Per Query
Report viewers and report developers	8,000	5 Minutes
Scheduler user	65,000	10 Minutes

Additional Information

Additional Information

Running a First Report

Prerequisite

This is a prerequisite for this task.

[Quick Access]Reporting > ***Document List*** > ***Public Folders*** > ***Standard Reports*** > ***Enterprise {FP}***

Steps

1. Select a report. In this example we will select ***Average time to hire***.
2. Click ***Actions***.
3. Click ***View***
4. If prompts are required enter values.

   Prompt parameters with a red arrow are required, prompts with a green check mark are optional.
5. Click ***Run Query***.
6. User the blue arrows in the top channel to paginate through the results.
7. Click ***Refresh All*** to update the parameters and data, as necessary.
8. If you would like to save the results of the report, click ***Document***>***Save to my Computer as*** to save the report to your computer as one of the following:

   - Excel
   - PDF
   - Text
   - CSV

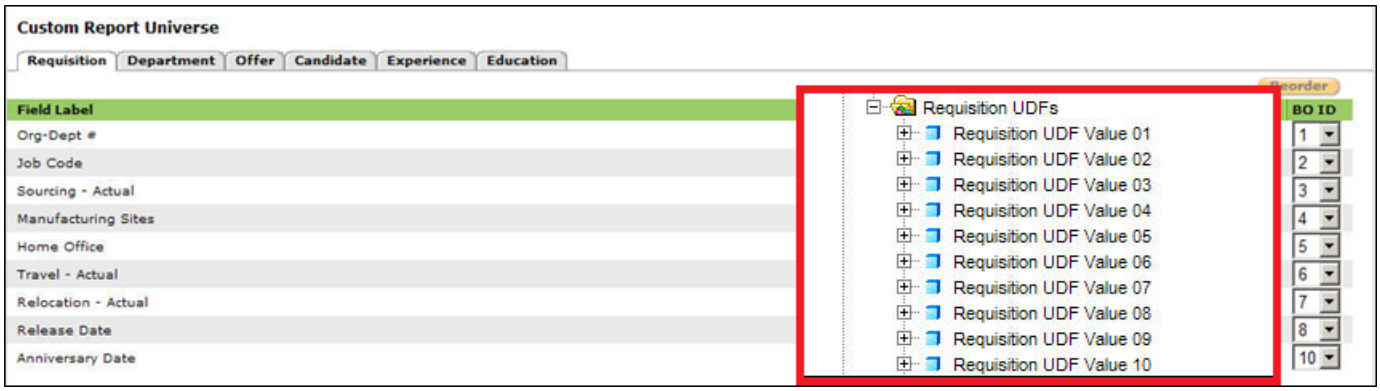
Scoping Reports

Scoping reports is an important step before beginning to create a report.

- Distribution: who receives the report?
- Objects: what data needs to be selected?
- Conditions: what filters are needed?
- Variables: what limits on the filters should come into use?
- Grouping: how is the data arranged?
- Formatting: how is the report to appear?
- Saving and Publishing: where and in what format should the report be stored?

User-Defined Fields in Reporting

Identifying Requisition UDF labels.



When viewing user-defined fields in the folder structure, the name of all udf's are ***{Entity) UDF Value*** # (pictured in red above). The Custom Report Universe option under Global Setup shows one tab for each type of UDF section. The numbers that display in the BO ID column correspond to the UDF Value in the universe.

All UDFs are treated as text, regardless of data type. When the UDF is created in the Configuration Center (Administrator WebTop), it needs to be included in the Custom Report Universe, if it is required that the UDF be reportable. If this check is not present, then the field isn't available for reporting. It can take up to 24 hours for the field data to appear in reporting.

A protocol should be established so all field additions made in the Administrator WebTop by the system administrator will be communicated to the report author. Report authors may need to coordinate with system administrators to make sure that the information is present.

User-Defined fields can be created to collect information according to specific organization requirements. For detailed information about configuring user-defined fields see the Recruiting Configuraiton Guide. For detailed information about configuring UDFs for reporting, see the Reporting & Analytics Configuration Guide. User-Defined fields can be made available in Taleo Recruiting Center, Career Sections, Candidate Search and the History tab, as well as in reports using the Taleo Reporting solution. It is possible to create up to 50 User-Defined fields for each of the following categories of fields:

- Candidate - Personal Information
- Candidate - Work Experience
- Candidate - Education
- Department
- Offer
- Requisition

If additional UDF's are purchased, reporting can support up to a maximum of 100 UDFs per section.

BusinessObjects Documentation Reference

Taleo Reporting utilizes SAP BusinessObjects to bring you reporting. It is recommended to utilize their documentation for reference on developing Web Intelligence reports.

The BusinessObjects reference material is available on the Taleo Knowledge Exchange.

Topics > Enterprise Taleo Reporting & Analytics > Documents

Click on ***Filter by Categories and Tags***, and select ***BusinessObjects XI3.1 Guides***

Standard Reports and Documentation

Standard Reports and additional Documentation is available.

Standard reports can be used as a starting point when beginning to design reports. Standard Reports have been provided in the following location.

Document List > Public Folders > **Company - (Zone Name) > Standard Reports > Enterprise (FP)**

More documentation is available in the following location.

Document List > Public Folders > **Company - (Zone Name) > Documentation**

Report Row Limits

To accommodate larger data volume, scheduled reports have an expanded timeout threshold. Expanded thresholds prevent partial results on a report.

Report User Types	Rows Per Query	Run Time Per Query
Report viewers and report developers	8,000	5 Minutes
Scheduler user	65,000	10 Minutes

Uploading a Report from the Report Exchange

Prerequisite

You must have the *Report Developer* user type.

Topics > ***Enterprise Taleo Reporting and Analytics*** > ***[SPACES] Taleo Report Exchange***

Steps

1. Select a report from the list.
2. Download the report to the desktop.
3. Extract the document from the zip file.
4. Navigate to the reporting environment.
5. Click ***Preferences***.
6. In the ***Web Intelligence*** section, verify ***Desktop (Web Intelligence Rich Client required)*** is selected.
7. If you have not downloaded the Web Intelligence Rich Client click ***Install Now*** and follow the prompts to install the Web Intelligence Rich Client.
8. Click ***OK*** to exit the preferences menu.
9. To launch the Web Intelligence Rich Client, click ***Document List***>***New***>***Web Intelligence Document***.
10. Allow access for the Web Intelligence Rich Client, if prompted.

11. In the ***New Document*** prompt for ***Data source selection*** press ***Cancel*** to bypass the creation of a new report.
12. In the Web Intelligence Rich Client click the icon to ***Open Document***.
13. Click ***Browse for more data sources...***
14. Open the downloaded report.

    Opening the report may take a while.
15. Test the report.
16. Make modifications, or export the report to your reporting environment via ***File***>***Export to CMS***.