



ERP-2317 Report Request (Req 8 & 74) : Calibration Report (Drop 2)

Approved

Please see the [SyWay Analytics Approach](#) document, section 'Documentation' for more information about the context of this document.

Status	Approved
Functional Specification Owner	PRAZERES-ext, ines
Stakeholders	Aurélien Vermeillet, Helena Macieira
Jira Request ID	 ERP-1230 - Jira project doesn't exist or you don't have permission to view it.
Jira Development (Build) ID	 ERP-2317 - Jira project doesn't exist or you don't have permission to view it.
Lean IX App Link	
Business Process Reference (L4)	11.11.01.02. Create & Distribute Custom Reports

High-Level Specification

Parameter	Value
Application System (Delivery Tool)	SuccessFactors – Story Report Module: PMGM - Calibration

Report label:

Calibration Report

Type of report:

Story report

Purpose of the Report

The Calibration Story Report is required to **analyze calibration sessions** and support governance of performance calibration activities across the organization.

This report will help ensure:

1. Ensure fairness, consistency, and credibility in performance outcomes across teams and entities
2. Ensure group calibration guidelines are applied

Business Requirements Addressed

- Ensure **fairness, consistency, and credibility** in performance outcomes
- Ensure **group calibration guidelines** are properly applied
- Provide transparency into calibration execution and coverage

Business Questions Answered

- How many calibration sessions have been executed?
- How are calibration sessions distributed by **GBU, Function, and Group**?
- What are the **average calibration ratings** across organizational dimensions?
- Which managers and populations are covered by calibration sessions?

Business Importance

This report enables HR and Talent stakeholders to monitor and validate calibration practices, identify gaps or inconsistencies, and ensure alignment with groupwide calibration standards.

Note

There is no report in the current catalog that meets these needs so a new report needs to be created.

This report only requires Successfactors (SF) data, so SF reporting tools are the best approach.

SAP standard templates were considered but none meets the requirements, the request is too complex for the existing templates. So a custom report will be created.

Scope

In Scope

- Consolidation of **Report Catalog requests 8 and 74**
- Analysis of calibration session execution
- Calibration ratings and averages
- Organizational breakdown by GBU, Function, Entity, Department, etc.
- Manager hierarchy analysis (direct and indirect reports)

Out of Scope

- Nonactive employees
- Noncadre employees
- Calibration logic definition at datamodel level

Intended Users & Access

- HR
- Managers and their scope

Solution Overview

Content ownership: [PRAZERES-ext, ines](#)

Input from: Aurélien Vermeillet

Scope of Merge

- **Calibration Reports** — includes reports such as *“Calibration Report [Date]”* providing detailed outcomes of calibration sessions.
- **Calibration Execution Status** — summarizes the distribution of calibration sessions by **GBU** and **Function**, as well as the overall distribution for the **Group**.

Deliverables

- A consolidated report that provides:
 - **Detailed calibration session data** by GBU, Function, and Group.
 - **Execution status overview**, including session counts and distribution metrics.
- **Filtering capabilities** for dimensions such as **GBU, Function**, and other relevant organizational attributes to enable targeted analysis.

Notes

This merged report is intended to replace the two separate catalog requests and deliver a consistent, comprehensive view of calibration activities.

Data Source Filters

Only Active users.

Excluded Non-Cadre (i.e., only Cadre should be included) (to exclude the non cadres we can use Workforce Category field or Pay grade)

Dashboards / Charts

1. Summary KPIs: Headcount, Total Nr of Calibration sessions, Nr of Managers, Nr of Direct reports

- Type of chart (bar, line, pie, etc.): Numerical
- Fields to be used: Headcount, Total Nr of Calibration sessions, Nr of Managers, Nr of Direct reports
- Any calculations required (provide details): Headcount, Total Nr of Calibration sessions, Nr of Managers, Nr of Direct reports

2. Nr of Calibration Sessions per several dimensions

- Type of chart (bar, line, pie, etc.): bar chart. Add input control with several dimensions, allows users to select how they want to see the data, e.g., Nr calibration sessions per Division or Nr calibration sessions per Entity, etc..
- Fields to be used : Nr of calibration sessions, location, gender, Talent flags, regions, job function, country, site, department
- Any calculations required (provide details): Nr of calibration sessions

3. Average Rating per several dimensions

- Type of chart (bar, line, pie, etc.): bar chart. Add input control with several dimensions, allows users to select how they want to see the data, e.g., Average Rating per Division or Average Rating per Entity, etc..
- Fields to be used : Average Rating, location, gender, Talent flags, grades, regions, job function, country, site, department
- Any calculations required (provide details): Average Rating

Tables / Lists

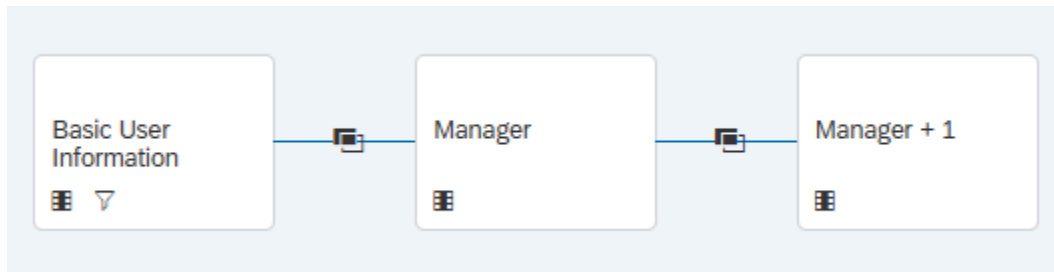
Calibration Session ID, Session Name, Employee User ID, Employee first and last name, Employee Email, Manager user ID, Manager first and last name, Manager Email, location, gender, Talent flags, Entity, grades, regions, job function, country, site, department, calibration session start date, Calibration session end date, Calibration Rating

Page Filters

location, gender, Talent flags, grades, regions, job function, country, site, department, calibration session start date, Calibration session end date, Calibration Session ID, Calibration Session template, Manager, **Entity LT N-1** (Allow to select the indirect reports HR want to be able to see the direct reports and indirect reports of Managers)

Details on the way we can filter to have data on the direct and indirect Reports:

1. On the data source we need to have the Manager and Manager +1 selected. Manager+1 is the Manager of the Manager.



2. Then there are 2 options to have as filter:


a) Add Manager and Manager of the Manager as filters:

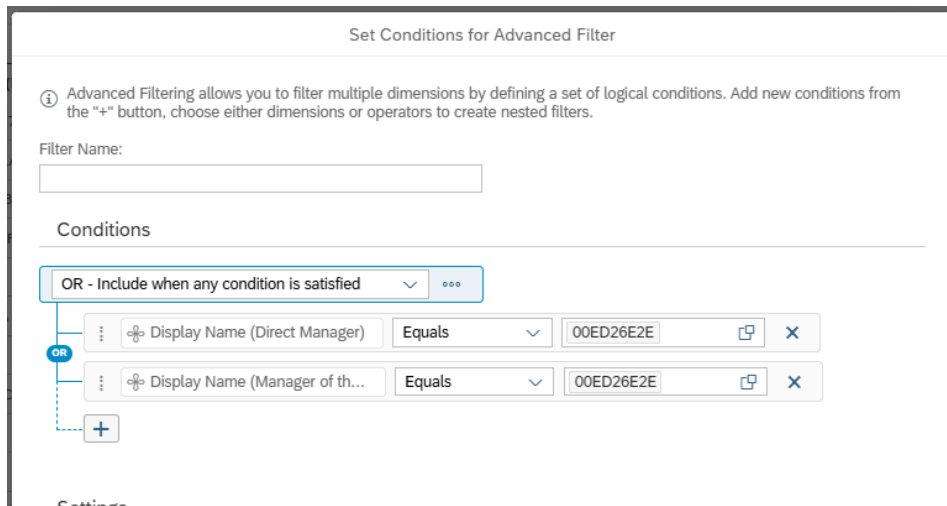
If we have these filters, they will act as an AND relationship, meaning we cannot apply both at the same time, otherwise we will get no data.

What we must do is to either apply the Manager filter (and see the direct reports of these manager), or apply the Manager of the Manager (and see the Indirect Reports of the Manager).

what we will not be able to see, is see simultaneously the direct and indirect reports of a Manager.

b) Add an Advanced filter with and OR condition as follows:

 Display Name (Direct Manager) + Display Name (Manager of the Direct Manager) (2)
Display Name (Direct Manager) + Display Name (Manager of the Direct Manager)



This will allow us to see the direct and indirect reports of a Manager simultaneously.

However, there is no possibility of selecting all users (i.e, not selecting any particular manager), which means that if we apply this filter the HRs will have to know to come to this filter and select a Manager otherwise they will not see any data displaying.

Layout & Distribution

Report Layout

1. Report should be in this format:
 - a. Page filters pinned at the top of the page
 - b. Syensqo Logo top left corner
 - c. Summary KPIs
 - d. Charts
 - e. Table

Report Sharing & Access

- 30-Talent Manager/Talent Management Business Partner
- 40-GBS People Services Specialist

Additional Notes / Attachments

In order to allow HRs to see all data and also to see the Direct Reports and Indirect Reports of Managers, we propose the following:

- Have 1 tab for HRs to see all employees, and here we can add the filter Manager and Manager of the Manager:
 - Here HRs will be able to see all data (all employees), but also see direct and indirect reports of managers separately. AND, managers can also use the Manager and Manager of the Manager to see their own Direct reports and Indirect reports
- Have a another tab for HRs to see data of the direct and indirect reports of a Manager simultaneously

- To note that when the HR first opens the tab they will not see any data, and will only see data after they apply the filter. We can have this filter as a page filter and a note that highlights that the filter needs to be applied.

Story Definition

Story Page 1 – Calibration Overview

Page Objective

Provide a highlevel overview of calibration execution and outcomes across the organization.

Page Filters

Report Field Name	Mandatory / Optional	Prompt Type	Default Value / Restriction
Location	Optional	Selection	All
Department	Optional	Selection	All
GBU	Optional	Selection	All
Function	Optional	Selection	All
Manager	Optional	Hierarchy	Userselected
Manager +1	Optional	Hierarchy	Userselected
Calibration Session Date	Optional	Interval	All

PageLevel Input Controls

- Dimension selector to analyze calibration sessions by organizational attributes
- Advanced filter enabling **Manager OR Manager+1** logic to support direct and indirect report analysis

Calculations

- Headcount
- Total Number of Calibration Sessions
- Number of Managers
- Number of Direct Reports
- Average Calibration Rating

Layout

- Page filters pinned at the top
- Syensqo logo in topleft corner
- Summary KPI tiles
- Charts
- Detailed table below charts

Widgets and Data Models

Widget	Data Model	Field	Filter
Summary KPIs	PMGM Calibration Model	Headcount, Session Count	Active, Cadre only
Sessions by Dimension	PMGM Calibration Model	GBU, Function	Userselected
Average Rating	PMGM Calibration Model	Calibration Rating	Userselected



Diagram attachment access error: cannot display diagram

Story Page 2 – Calibration Detail

Page Objective

Provide detailed, employeelevel and sessionlevel calibration data for audit and analysis.

Tables

Calibration Detail Table – Expected Columns

- Calibration Session ID
- Session Name
- Employee User ID
- Employee Name
- Employee Email
- Manager User ID
- Manager Name
- Manager Email
- Location
- Gender
- Talent Flags
- Entity
- Grades
- Region
- Job Function
- Country
- Site
- Department
- Calibration Session Start Date
- Calibration Session End Date
- Calibration Rating

Story Filters

Report Field Name	Mandatory / Optional	Prompt Type	Default Value / Restriction
Employee Status	Mandatory	Selection	Active only
Cadre Indicator	Mandatory	Selection	Cadre employees only
Manager Hierarchy	Optional	Hierarchy	Userselected

Business Roles

- 30-Talent Manager/Talent Management Business Partner
- 40-GBS People Services Specialist

Design Rationale

Content ownership: [PRAZERES-ext, ines](#)

Input from: Aurélien Vermeillet

A custom story report is required as **no existing standard or catalog report** meets the complexity of calibration analysis needs. The design consolidates two catalog requests into a **single, consistent reporting solution**.

Assumptions

- Calibration data is fully available in SuccessFactors PMGM
- Manager and Manager+1 relationships are correctly maintained
- Only cadre employees are included

Dependencies

- Availability of calibration session data in SF
- Creation of two data sources as required by technical design

- Alignment with HR on hierarchy filtering behavior

Special Requirements

- Advanced filter logic (OR condition) for direct and indirect report visibility
- Rolebased access enforcement
- Exclusion of noncadre employees

Frequency of Analysis/Report Run

- Ad-hoc / On-demand

Testing Considerations / Dependencies

N.B. Unless this is a planning story, the testing should cover layout and user experience NOT data values for metrics created in the data model. Data model values will be tested in conjunction with the data model specification.

How to test

The developer will need to test repeatedly, so where appropriate provide instructions to reverse the actions performed so the test may be run again, or explain how to create new input data to the test. In particular, the developer will need logons for test users representing the various roles within the approval process.

- Validate KPI calculations
- Verify hierarchy filtering behavior
- Confirm exclusion of noncadre and inactive employees
- Validate layout and usability

Test Conditions and Expected Results

ID	Condition	Expected Result
TC01	Apply Manager filter	Direct reports displayed
TC02	Apply Manager+1 filter	Indirect reports displayed
TC03	Apply OR filter	Direct + indirect reports displayed
TC04	No manager selected	HR sees all calibration data

Testing Considerations / Dependencies

Other Requirements

See also

File **Modified**

No files shared here yet.

Change log

Version	Published	Changed By	Comment
CURRENT (v. 2)	Feb 26, 2026 16:34	SKIKDAOUI-ext, Myriam	
v. 1	Feb 26, 2026 12:34	SKIKDAOUI-ext, Myriam	

Workflow history

This view shows the 5 most recent entries. The complete workflow log is available from the 'Document Activity' menu item.

Mar 09, 2026	Actor	Type	Activity	Version
Approved	 GARNIER-ext, Marion	State	changed state to Approved at 8:16 pm	v2
Lead Approval	 GARNIER-ext, Marion	State	gave <i>POD Lead Review</i> approval at 8:16 pm	
Mar 06, 2026				
	 SKIKDAOUI-ext, Myriam	State	assigned approval <i>POD Lead Review</i> to  GARNIER-ext, Marion at 11:47 am	
Mar 04, 2026				
	 PRAZERES-ext, ines	State	changed expiry date to '11 Mar, 2026 03:02 pm' at 3:02 pm	
		State	changed state to Lead Approval at 3:02 pm	v2
Tech Review	 PRAZERES-ext, ines	State	gave <i>Tech Review</i> approval at 3:02 pm	