PeopleSoft 8.00.01 Human Resources PeopleBook

Planning Careers and Successions

PeopleSoft 8.00.01 Human Resources PeopleBook: Planning Careers and Successions

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Planning Careers and Successions

This book, *Planning Careers and Successions,* documents how you use can use the Plan Careers and Plan Successions options in your organization. You can order the online version by requesting SKU HRB8SP1R0, or the hardcopy version by requesting SKU MAHRBr8SP1B 1200.

Planning Careers describes the steps involved in setting up career plans for employees. It also discusses how Executive Committees can use career-related data in succession planning.

Planning Successions explains how to set up succession plans for key positions in your organization, including selecting succession candidates, ensuring that they're ready to take the positions, and preparing information for Executive Committee reviews.

Planning Careers and Successions Reports lists reports associated with careers and successions.

CHAPTER 1

Planning Careers

Retaining and motivating top-notch employees are important aspects of cost-effective human resources management. This section shows how you can use PeopleSoft Human Resources to manage career plans for your employees, enabling you to manage organizational growth and build employee skills. By taking a proactive approach to employee careers, you can keep employees motivated because they'll have a clear idea of where they're going in your organization.

USF - Planning Careers

PeopleSoft Human Resources Planning Careers and Successions for U.S. Federal Government provides the capability to quickly and systematically set up career plans and produce Individual Development Plans (IDPs) for your employees' career development paths, and to track their progress. You can also track job move costs, training, employee appraisals, mentoring, and self-implemented career development activities.

Once you create a career plan, the system:

- Automatically routes the plan for approvals.
- Tracks costs and activities associated with the plan.
- Generates the Individual Development Plan (IDP) output form.

The reporting capability of the IDPs gives you a complete employee profile, planned development activities, and all associated costs of the plan.

An employee or their supervisor can request to work on a career plan during or after an annual performance review, or at any other time throughout the year.

Use of the Planning Careers module is optional, and is intended to work in conjunction with application of merit staffing practices as established by law, regulation, or internal agency policy and procedures.

Overview of Career Planning

Your organization can use career planning to prepare high-potential employees to replace key managers or for all employees, to complement performance reviews and training programs.

Career plans will help you develop trained, motivated personnel who are prepared when you need them to step into open positions.

What's in a Career Plan?

When you create career plans using the Planning Careers business process, you make use of job information and competency data that is set up in the Administer Workforce, Administer Training, and Manage Competencies menus.

A PeopleSoft Human Resources career plan enables you to:

- **Record general information about an employee's personal situation.** On the first page of the career plan, you list the employee's preferred work locations, both nationally and internationally, and their ability and willingness to travel or relocate.
- **Create a career path for the employee.** The Career Plan - Career Path Page lists possible career moves that employees can make from their current job and the expected dates for these moves. You can base the career path on a default path that is set up for the job code, or you can set up a modified path for the employee. You can create up to nine career moves on a career plan; each career move can have multiple job codes.
- **Assign a ranking and assess an employee's potential.** You can rank the employee against other people in the department or organization and assess the employee's potential.
- **Establish career goals.** You can set up short term and long term goals for the employee on the Career Plan - Career Goals Page.
- **Assign a mentor.** If your organization uses a mentor system, record mentor details on the Career Plan - Career Mentoring Page in the employee's career plan.
- **Identify and evaluate an employee's strengths and developmental areas.** Using the competencies information you have set up in the Manage Competencies business process, you can include an assessment of an employee's key strengths and developmental areas. Development areas include competencies that the employee is lacking or needs to develop and improve. Include this competency information on the Career Plan - Career Strength/Develop Areas Page.
- **Devise a training plan for the employee.** Use the Career Plan - Career Training Plan Page to set up a training plan that will enable the employee to develop the skills and knowledge required to improve in his or her current job or move to the next job. If your organization has set up default training programs for your job codes, you can use the default plan or create a customized training plan.
- **Create a development plan.** You can set up an action plan on the Career Plan - Career Development Plan Page to help employees acquire new skills and gain experience in developmental areas.

To ensure that the career plan is based on current job information, you need to create a new career plan whenever an employee changes jobs. Use the old career plans for reference, to see how elements like training, goals, and ratings have changed over time.

Recording Input from Multiple Sources

Often, you will gather feedback on an employee from a number of people or groups and each evaluator can have different recommendations. You don't have to create a new career plan every time someone contributes information. Instead, you identify the contributor by specifying an evaluation type for input such as career paths, strengths, and developmental areas. After weighing all the evaluations, you assign a composite rating for inclusion in an approved career plan.

Integrating Career Planning and Manage Competencies Business Processes

An essential part of career planning is to identify an employee's key strengths and developmental areas. Within your human resources system, you can add or modify employee competency data in the Plan Careers or the Manage Competencies business processes. Whichever way you decide to manage your employee competencies, you need to make sure that employee profiles are consistent.

To keep competencies synchronized between Plan Careers and Manage Competencies business processes, you can transfer the competency data between the two processes. If you have set up employee competencies using Manage Competencies, you can use this as a basis for the strength and developmental areas in an employee's career plan. Alternatively, you can enter the strengths and development areas from Planning Careers and then transfer the information to the employee's profile in Manage Competencies.

Integrating Career Planning and Succession Planning Business Processes

Planning careers also plays an important role in planning successions. You can use the career plans you set up for high potential employees as the basis for their preparation to move into key positions in your organization.

Career plans are not a prerequisite for creating succession plans. However, if you set up career plans, you can automate the process of identifying candidates for any key position. From Plan Successions, when you click the Link button, the system generates a list of people who have the selected key position in their career path. Using succession plans in conjunction with career plans enables you to plan employee training and development in readiness for planned moves.

For more information about setting up succession plans, see Planning Successions.

USF Overview of Career Planning

Goals and plans in a Career Plan may include the following elements:

- Jobs
- Duties/experience
- Grade levels, performance levels
- Skills/competencies

- Training courses

Automatic routing sends the plan along your agency's path of review and approval. To begin creating a plan, an employee and supervisor first establish goals and targets. They assess the requirements for each target and develop the plan, including general timelines for meeting objectives. The supervisor then submits the plan to their manager.

After the manager reviews the plan, it goes to the designated approving official(s) within and outside of the HR office. Upon receiving final approval, the employee, supervisor, and Employee Development Specialist may schedule training, testing, licensing, temporary assignments, rotational assignments, permanent assignments, position duties/grade changes, and other required activities in order to help achieve the employee's career goals.

If necessary, a Career Plan also includes temporary or permanent job changes that may be required for employees hired into developmental positions. The report produced as an end result of the career planning process is called an Individual Development Plan (IDP).

Your agency may use career plans for all employees to complement performance reviews and training programs. Or you may use them to groom top talent to become key managers in your organization. Career plans will help you develop trained, motivated backup personnel who are prepared when you need them to step into open positions.

Here is what you can do in the Planning Careers component of PeopleSoft Human Resources:

- **Set up new Career Plans.** Create new Career Plans periodically, such as every year, to reflect new developments in employee careers. Maintain historical career plans for reference on changes over time.
- **Define Career Paths.** Use the default career path you've set up for job codes in standard employee career plans. Or set up customized career paths for special or key employees. Enter information from several sources, such as supervisors, mentors, and the employees themselves.
- **Assign force ranking and career potential evaluations.** Instantly identify key employees in your organization.
- **Establish career goals.** Prepare employees for their next position by setting short- and long-term goals.
- **Assign mentors.** Tap the experience of other personnel to help employees reach their goals.
- **Evaluate strengths and developmental areas.** Identify areas where employees are accomplished and where they can use additional training or development.
- **Set up training plans.** Establish and track standard or customized training programs for employees to get the training they need for career advancement.
- **Establish career development plans.** Set up an action plan to help employees acquire new skills and gain experience in developmental areas.
- **Track job move costs.** Keep track of costs by entering amounts as changes occur. Track both estimates and actual costs, and use data to help determine future estimates.
- **Record developmental and self-implemented plans and activities.** Maintain a record of

employees' plans, participation, and progress additional to established areas.

- **Track career development activities.** Track training, appraisals, self-development, mentoring, and other activities.

USF Tracking a Career Plan Request, Approval, and Completion

The Career Plan goes through a process that includes a sequence of steps. Your agency can design the path to meet their requirements. For example, a path might include these steps:

- Creating a Career Plan
- Submitting it as a request
- Giving reviews and approvals
- Completing an authorized Career Plan
- Producing an Individual Development Plan

Routing and tracking this process is simple for everyone involved, thanks to PeopleSoft Workflow. Participants simply assign a status, and Workflow automatically tracks and routes the Career Plan through the approval cycle. Each reviewer simply changes the status to either continue the review process or disapprove the plan. The system then automatically shows the **Career Plan Status** on the **Career Plan** page.

To begin a Career Plan, an employee and supervisor work together. They can continue working and keep the plan open in an ***Under Development*** status until they're ready to send it out through the system. When they submit it, the system assigns a status of ***Submitted to Supervisor.***

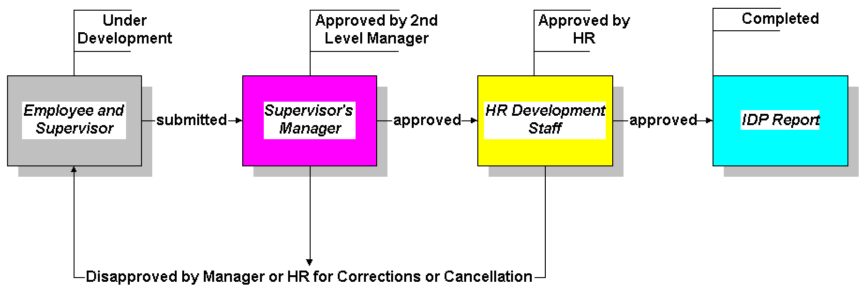
According to your agency's specific review cycle, the Career Plan may then go to the supervisor's manager, or other reviewers, and when they approve the plan, the system assigns ***Approved by Supervisor.*** If they send it back to the originators, the system will assign ***Disapproved by Supervisor.***

When Human Resources gives their final approval, the system assigns ***Approved by HR.*** Or if they send it back to the originators, the system assigns ***Disapproved by HR.***

An Overview of the Career Plan Process

A general example of the review cycle is provided, though your agency will set it up differently as required.

Here is an overview of the career plan process:



The Career Plan Approval Process

The following definitions describe the process of submitting and reviewing Career Plans. Your agency may use these or create their own paths, reviews, and processing routes.

Status	**Career Plan Status Code**	**Definition**
Under Development	*1*	An employee and their supervisor begin creating a Career Plan, assign this status, and work on the plan until they're ready to submit it to the 2nd level supervisor or manager.
Submitted to Supervisor	*2*	The supervisor assigns this status to send the Career Plan to the 2nd level supervisor or manager.
Approved by Manager	*3*	A manager or 2nd level supervisor assigns this status to send the plan forward to Human Resources.
Disapproved by Manager	*4*	If a manager or 2nd level supervisor assigns this status, a Career Plan goes back to the originators for cancellation.
Approved by HR	*5*	An HR official approves a request by assigning this status.
Disapproved by HR	6	An HR official disapproves a request by assigning this status.

Before You Begin

This section describes the prerequisites for Career Planning. Make sure that these tasks are complete before you consider setting up career plans for your employees.

Setting Up Global and Local Country Control Tables

You'll find all the core setup tables, pages and functionality described in this section in the Plan Careers menu (**Develop Workforce, Plan Careers** navigation path).

The system relies on data stored in employee records to create career plans. You have to hire an employee before you create a career plan. Make sure that the general tables have been set up in PeopleSoft Human Resources. Make sure that Plan Careers and Successions organizational and employee data for your employees exist in PeopleSoft Human Resources, Administer Workforce pages, before you start working with the Plan Careers and Successions pages.

For more information about hiring employees and updating employee records, see Hiring Your Workforce and Updating Workforce Information.

The identifying information at the top of the Career Path Table comes from the Job Code Table. Make sure that you created all the job codes, including associated salary plans, grades, and manager level codes, that you'll use in default career paths.

For more information about setting up job codes, see PeopleSoft 8 Application Fundamentals for HRMS PeopleBook.

Most of the plan careers and plan successions tables are effective-dated, which means that you can track the changes you make to data chronologically. You won't lose any data history, it's all there for you to review.

When you create codes in these tables be sure to enter effective dates that *precede* the effective dates of any succession plans you process. If you don't, the system will not display all the valid codes when you select from lists in the Plan Successions pages. You should use a date such as January 1, 1980, to ensure that the effective date accounts for assignment history.

If you've implemented multiple business units and SetIDs in your Human Resources system, the information that you use and create will be determined by how business unit and SetID functionality has been set up for your User ID.

For more information about how Business Unit/SetID functionality impacts your HRMS system and regulates the control table and prompt table values, see Regulating HRMS System Data.

Setting Up Job Codes and Default Training Programs

When you set up training programs in PeopleSoft Human Resources, you can choose to associate them with job codes in the Job Code Table. If you do so, you'll find the standard training programs particularly helpful in career planning. You can use the default training programs to measure employee training experience with the norm for their job codes and to help you set up training plans for the next career plan period. You can also customize them to meet the needs of a particular employee.

To make it easy for you to create training programs and associate them with job codes, the Training Program Table and the Job Code Table is included in the Plan Careers setup menu.

For more information about setting up job codes, see Classifying Jobs. For more information about setting up training programs, see Defining Training Courses and Programs.

Setting Up Default Career Paths

Before you begin creating career plans for employees, you can set up default career paths for job codes. With default career paths, you can create a hierarchy or network of jobs in your organization. This will show you logical career progressions and the relationship between jobs, which saves you time in developing employee career plans, and in succession planning.

Depending on your needs, you can set up default career paths only for key job codes or for all job codes in your organization. For example, you might want to coordinate career paths only for job codes above a certain management level, to make sure that employees in them get the work experience they need to prepare for higher-level management positions.

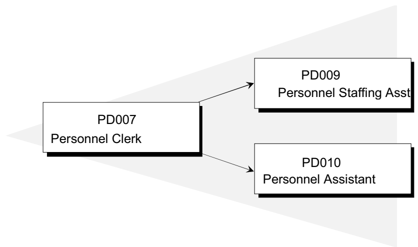
Overview of Career-Move Levels

Career-move levels usually show a hierarchical job progression and build on the job code in the previous career-move level.

Let's look at an example of a default career path for a Job Code, PD007, Personnel Clerk. The first move from the current job is to Personnel Assistant, which leads to Personnel Staffing Specialist as a second level move from the current job. As a third level move, the job leads to Personnel Officer, and so on. You can define up to nine career moves on a career plan.

Career-Move Level		***Job Code***	***3***
	Current	PD007	Personnel Clerk GS-0203
1	First move from current job	PD010	Personnel Assistant GS-0203-06
2	Second move from current job	PD101	Personnel Staffing Specialist GS-0212-09
3	Third move from current job	PD107	Personnel Officer GS-0201-13

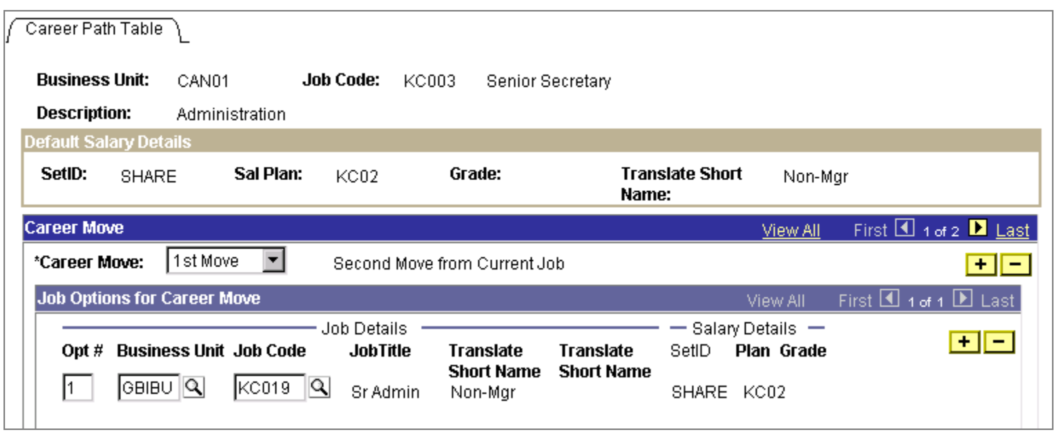
Some job codes have more than one possible job move in a particular career-move level. For example, Job Code PD007, Personnel Clerk, could have two job options as the first move from the current job: Job Code PD010, Personnel Assistant; and an additional option (not shown in the table) could be Job Code PD009, Personnel Staffing Assistant.



If you have more than one job option in a career-move level, use option numbers to sort the job codes in the order you want.

Career Path Table Page

Usage	Use the Career Path Table page to define default career moves from a job code.
Object Name	CAREER_PATH_TBL
Navigation	**Develop Workforce, Plan Careers, Setup, Career Path Table, Career Path Table**
Prerequisites	None
Access Requirements	Business Unit and Job Code



Career Path Table page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Business Unit, Description, SetID.**

Job Code

Sal Plan
(salary plan)

Grade

Translate Short Name

Career Move Select a **Career Move** level from first to ninth. ***First Move from Current Job*** defines the first job that an employee moves to from the selected job code, and ***Ninth Move from Current Job*** is the last move you can define. You can include multiple job codes for any **Career Move,** to reflect moves to jobs that are at the same management level and moves up the management hierarchy.

Opt # (option number) Enter a number in the **Opt #** field if there is more than one job code option for the selected career-move level. Use the option number to sort the job codes in the order you want.

Job Code Select the **Job Code** for the career move level. When you move out of this field, the system completes the remaining **Job Details** (**Job Title**, **Mgr Level** [manager level], and **Function**) and **Salary Details** (**SetID**, **Plan**, and **Grade**).

Job Title

Translate Short Name

Plan Grade

Tracking Employee Competencies and Accomplishments

Successful career planning is based on understanding your employees' strengths or areas of expertise, and areas that they need to develop.

In PeopleSoft Human Resources, you can maintain information on the competencies and accomplishments of your employees. You can use this information to help your workers make decisions on their professional development, or you can determine who in the company possesses particular experiences or specific knowledge that might qualify them for other projects and positions.

From the Plan Careers menu, you can track the following information.

- Competencies. Use the Competencies pages to record and evaluate employees' competencies. You can transfer the information stored on these pages to the employee's career plan on the Career Plan - Career Strength/Develop Areas Page. To access the Competencies pages select **Develop Workforce, Plan Careers, Use, Competencies.**

- Education. Use the Education pages to record an employees' education and training details. To access the Education pages select **Develop Workforce, Plan Careers, Use, Education.**

- Licenses and Certificates. Use the License and Certificates page to record any licenses that employees hold which are pertinent to their jobs. To access the Licenses and Certificates page, select **Develop Workforce, Plan Careers, Use, Licenses and Certificates.**
- Membership of professional organizations. Use the Membership page to record details of any professional organizations that your employees belong to. To access the Membership page, select **Develop Workforce, Plan Careers, Use, Memberships.**
- Languages. Use the Languages page to track your employees' language skills. To access the Language page, select **Develop Workforce, Plan Careers, Use, Languages.**
- Honors and awards. Use the Honors and Awards page to record details of any special awards that your employees have received for outstanding work. To access the Honors page, select **Develop Workforce, Plan Careers, Use, Honors and Awards.**
- Projects. Use the Significant Special Projects page to track important projects employees have completed that benefit your organization or their own professional standing. To access the Significant Special Projects page, select **Develop Workforce, Plan Careers, Use, Significant Special Projects.**

All these competency and accomplishment pages are also accessed from the Manage Competencies menu.

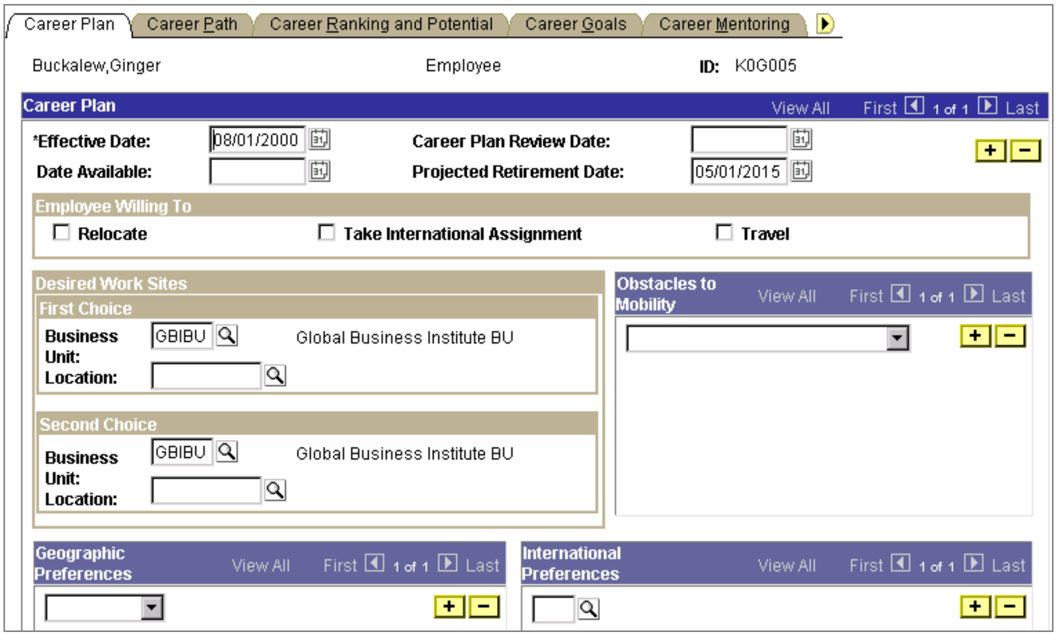
For more information about assigning competencies and accomplishments to your employees, see Tracking Worker Competencies and Accomplishments.

Creating Career Plans

Career plans are composed of eight pages, where you enter information about an employee's current position, abilities, strengths, and career desires for the future. You can use this information to help plan employee careers and maintain an available pool of candidates for key positions.

Career Plan Page

Usage	Use the Career Plan page to enter employees' preferences for jobs and geographic locations and to indicate their availability to move into new positions.
Object Name	CAREER_PLAN1
Navigation	**Develop Workforce, Plan Careers, Use, Career Plan, Career Plan**
Prerequisites	None
Access Requirements	Employee ID or Empl Rcd# (employee record number)



Career Plan page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **ID, Effective Date.**

Career Plan Review Date Enter the date of the review.

Date Available Enter the date when the employee is eligible to move to a new position.

Projected Retirement Date This field defaults to the date on which the employee turns 65. If that is not the employee's actual retirement date, enter the correct date.

Employee Willing To

Relocate Select the **Relocate** check box if the employee is willing to move to a new location.

Take International Assignments Select the **Take International Assignments** check box if the employee is willing to accept international assignments.

Travel Select the **Travel** check box if the employee is willing to travel as part of his or her job.

Desired Work Sites

Business Unit (First Choice) Enter the employee's first choice of **Business Unit.**

Location (First Choice) Enter the employee's first choice of **Location.**

Business Unit (Second Choice)	Enter the employee's second choice of **Business Unit.**
Location (Second Choice)	Enter the employee's second choice of **Location.**

Obstacles to Mobility

If there are reasons that the employee can't travel, define them in the **Obstacles to Mobility** component. Select one of the following values from the **Obstacles to Mobility** drop-down list. To add more than one value, insert additional rows.

Family Member's Education:

Family Member's Health:

Family Member's Job:

Homeowner:

Other:

Prefer Current Location:

Geographic Preferences

Geographic Preferences	In the **Geographic Preferences** component, select a value from the drop-down list. If the employee has more than one preference, insert additional rows.

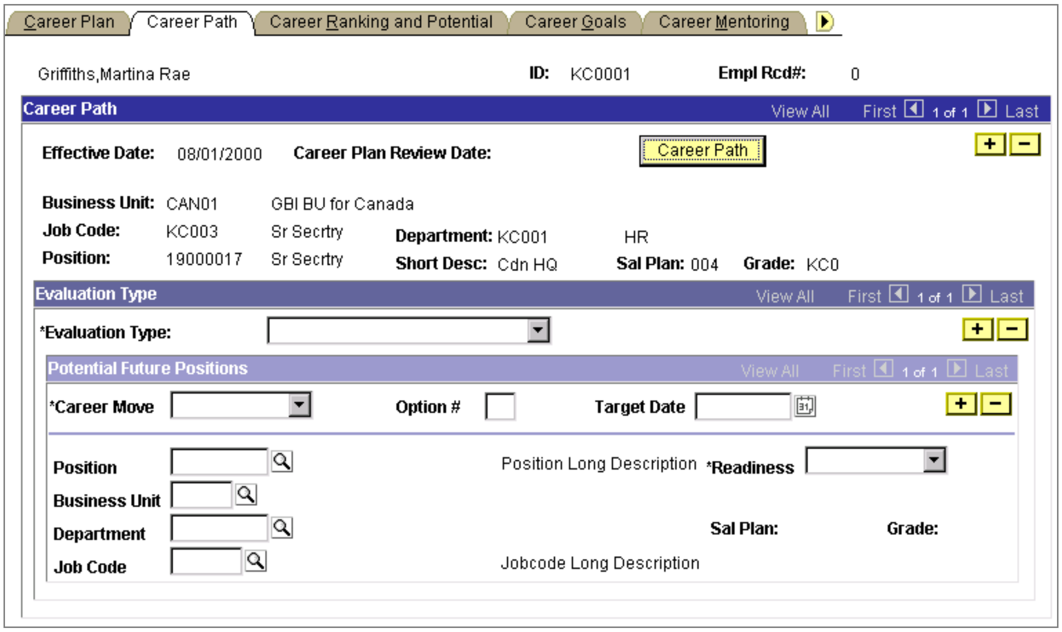
International Preferences

International Preferences	In the **International Preferences** component, select a country code from codes in the Country Table. If the employee has more than one preference, insert additional rows.

Career Plan - Career Path Page

Usage	Use the Career Path page to define an employee's career path. You can modify a default career path or create a customized job progression for the employee. Custom career paths are particularly advantageous when you set up job rotations in succession planning because you will cross-train key employees in different areas of the company, instead of planning standard job progressions for them.
Object Name	CAREER_PLAN2
Navigation	**Develop Workforce, Plan Careers, Use, Career Plan, Career Path**
Prerequisites	This is the second page of an eight-page component. If you are entering a new career plan, you must complete the Career Plan page before

	working on this page.
Access Requirements	Employee ID or Empl Rcd#



Career Plan - Career Path page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date, Business Unit, Short Desc.**

Career Plan Review Date

Career Path

Click the **Career Path** button to create a career path based on the default career path for the employee's job code. If a career path is defined for that job code, when you click the button, the system completes most of the information in **Potential Future Positions.** If the employee's path differs from the default path, modify the fields as required.

Once you have saved the plan, the **Career Path** button is not available. However, each time you create a new career plan for an employee, the system makes the **Career Path** button available, and you can choose to use the default path for the new plan. See Setting Up Default Career Paths for information about creating default career paths.

Note. The system uses the effective date (Career Plan Date) to determine the employee's job code. If the employee has changed jobs since the Career Plan Date, the default career path will be based on the previous job code. To ensure that the Career Plan is based on an employee's current job, create a new Career Plan whenever an employee changes job, and set the effective date to match the effective date on the Job Data page.

Job Code

Department

Sal Plan (salary plan)

Grade

Evaluation Type

Select an **Evaluation Type** to indicate who is evaluating the information on the employee. This is populated with ***Approved/Official,*** if you clicked the **Career Plan** button. To use the evaluation in Plan Successions, you must select ***Approved/Official.***

Within each career plan, there can be multiple **Evaluation Types.** Several people, such as the employee's supervisor or mentor, might have ideas about the next job to which an employee should move. Because their input affects the same timeframe, you won't want to create a new career plan for each type of evaluation. Instead, you create new evaluation type records for each one.

Potential Future Positions

Career Move

Select the **Career Move** that you want to define (***1st Move*** through ***9th Move***) from the drop-down list.

1st Move is the first step in the career path. It defines the job that the employee will move to from the current job and when the employee will be ready for that job. You can define up to nine moves. ***9th Move*** is the final step in the employee's career path. It defines the employee's ninth job move from the current job.

Opt #

If you decide to include more than one job code in a career-move level, insert an option number to sort the job codes in the order you choose.

Target Date

Enter the **Target Date,** the date on which the employee will make this career move.

Position

If you're driving part or all of PeopleSoft Human Resources by position, select a **Position** number from the available options.

When you move out of the **Position** field, the system completes the default **Business Unit**, **Department** and **Job Code** fields. It also displays the **Job Title, Salary Plan, Grade, Manager Level,** and **Function** associated with this position.

If you're using partial position management and change your mind about using a position in this career move; simply delete the **Position** number.

For more information about positions, see Managing Positions, "Setting Up Positions"

Position Long Description

Click to access the Current Career Position Long Description Page, where you can see a description of the selected position. This link is active only after you select a **Position**.

Readiness

Select your estimate of the employee's **Readiness** for such a move from the drop-down list:

1–2 yrs: If the employee will be ready for the move within the next two years.

3–5 yrs: If the employee will be ready for the move in three to five years.

Emergency: If the employee is overdue for a job move and needs to move as soon as possible.

Ready Now: If the employee is ready for the move now.

Retirement: If the employee will not move to another position after this; for example, those who are nearing retirement age.

The system uses this information in Plan Successions to show blockages, any succession candidates who are blocked from advancement from their current positions.

For more information about candidate slates and blockages, see Planning Careers and Successions, "Planning Successions".

Business Unit Select the business unit from the list of valid values.

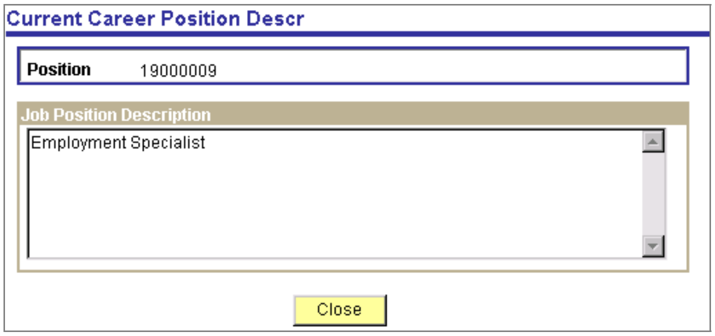
Department If you know it, select a **Department** for the job. This field is optional. You create departments in the Department Table. The SetID you are using determines the departments you see.

Job Code Select the **Job Code** for the Career Move from the available options. When you select a **Job Code** and move out of the field, the system displays the associated **Job Title, Salary Plan, Grade, Manager Level,** and **Function.** You use the Job Code Table to create Job Codes.

Jobcode Long Description Click to access the Jobcode Long Description, where you can see a description of the selected job. This link is active only after you select a **Job Code**.

Current Career Position Long Description Page

Usage	The Career Position Descr page displays a description of the position selected on the Career Path page.
Object Name	CAREER_POSN_SEC
Navigation	To access the page, click the Current Position Data button on the Career Path page.



Current Career Position Descr (current career position description) page

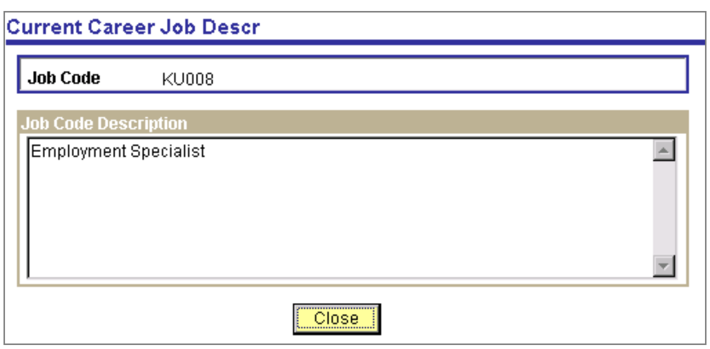
The system displays the Position you selected on the Career Path page. This field is for information only.

Job Position Description

This component contains a description of the responsibilities of the selected position.

Current Career Job Description Page

Usage	The Career Job Descr page displays a description of the job code selected on the Career Path page.
Object Name	CAREER_JOBCD_SEC
Navigation	To access the page, click the Job Code Change button (next to the Job Code field) on the Career Path page.



Current Career Job Descr (current career job description) page

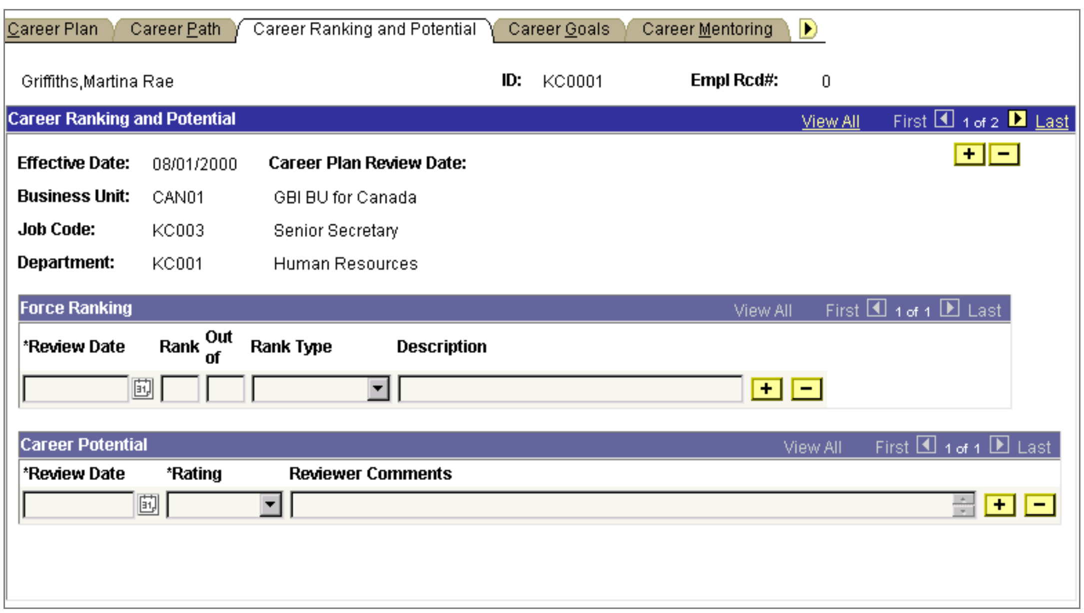
The system displays the Job Code you selected on the Career Path page. This field is for information only.

Job Code Description

This component contains a description of the responsibilities of the selected job code.

Career Plan - Career Ranking and Potential Page

Usage	Use the Career Ranking and Potential page to show how employees compare to their peers and to indicate their potential. You'll find the combination of both ratings helpful in succession planning and when you are looking for candidates to fill open positions in your organization. To illustrate how force ranking and career potential might work together, let's consider John Smith, an engineer. John ranks second out of 200 engineers who have the same job code. On the basis of force ranking alone, an Executive Committee might think he's a great person to move to a critical Kuwaiti project. However, John is about to retire, loves his current position in Bahrain, and does not want to move anywhere. You can explain this by giving him a rating of currently well-placed, *placed,* in his career potential evaluation.
Object Name	CAREER_PLAN3
Navigation	**Develop Workforce, Plan Careers, Use, Career Plan, Career Ranking and Potential**
Prerequisites	This is the third page in an eight-page component. You must first complete the Career Plan and Career Path pages.
Access Requirements	Employee ID or Empl Rcd#



Career Plan - Career Ranking and Potential page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **ID, Empl Rcd#, Effective Date, Business Unit.**

Career Plan Review Date

Job Code

Department

Force Ranking

To get a better cross-section of employee skills and promotability, enter rankings of different types.

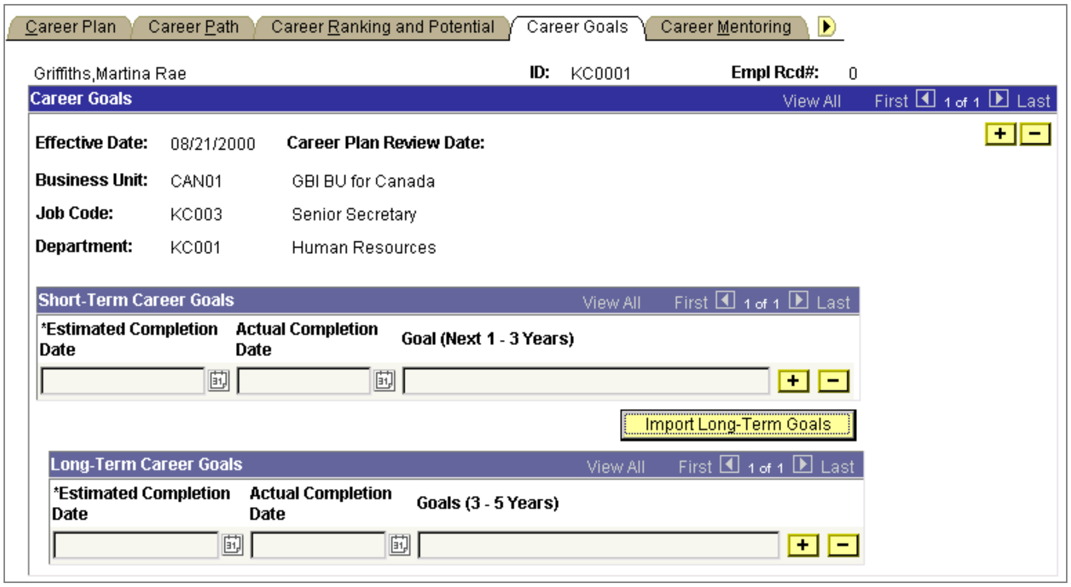
Review Date	Enter the date of the assessment.
Rank	Enter the employee's ranking.
Out of	Enter the total number of people against whom the employee has been ranked.
Rank Type	Select a **Rank Type** from the drop-down list.
Description	Enter a short **Description,** if you want to comment on or explain the ranking.

Career Potential

Review Date	Enter the date of the assessment.
Rating	Select a rating for the employee from the drop-down list.
Reviewer Comments	Enter the reviewer's comments.

Career Plan - Career Goals Page

Usage	Use the Career Goals page to enter short- and long-term goals for employees. The difference between the two types of goals is their range. Short-term goals are for the next three years and are generally related to performance reviews. Long-term goals are for three to five years from now and are often career-related, such as attaining a promotion to a higher level of management.
Object Name	CAREER_PLAN4
Navigation	**Develop Workforce, Plan Careers, Use, Career Plan, Career Goals**
Prerequisites	This is the fourth page in an eight-page component. You must first complete the Career Plan, Career Path, and Career Ranking and Potential pages.
Access Requirements	Employee ID or Empl Rcd#



Career Plan - Career Goals page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **ID, Empl Rcd#, Effective Date, Business Unit.**

Career Plan Review Date

Job Code

Department

Short-Term Career Goals

Estimated Completion Date Enter the **Estimated Completion Date** for the Short-Term Career Goal.

Actual Completion Date Enter the **Actual Completion Date** when the employee has achieved the goal.

In addition, when you change the status of a short-term goal in Reviewing Employee Performance, the system enters the date on which the goal was met, in the **Actual Completion Date** field. Keep in mind that if the information in Employee Review 2 changes a second time (for example, a met goal is changed back to unmet), the system will not update the date in this page again. You'll need to update the **Actual Completion Date** manually.

For more information about employee reviews, see Planning Salaries

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Goal (Next 1 - 3 Years)

If you're tracking employee reviews in PeopleSoft Human Resources, you can use the short-term goals you enter here as the basis for short-term goals and objectives in employee reviews.

Also, when you change the status of a short-term goal in Reviewing Employee Performance, the system enters the date the goal was met, in the **Actual Completion Date** field. Keep in mind, that if the information in Employee Review 2 changes a second time (for example, a met goal is changed back to unmet), the system will not update the date in this page again. You'll need to update the **Actual Completion Date** manually.

For more information about employee reviews, see Planning Salaries

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Import Short-Term Goals

Long-Term Career Goals

Estimated Completion Date

Enter the **Estimated Completion Date** for the Long-Term Career Goal.

Actual Completion Date

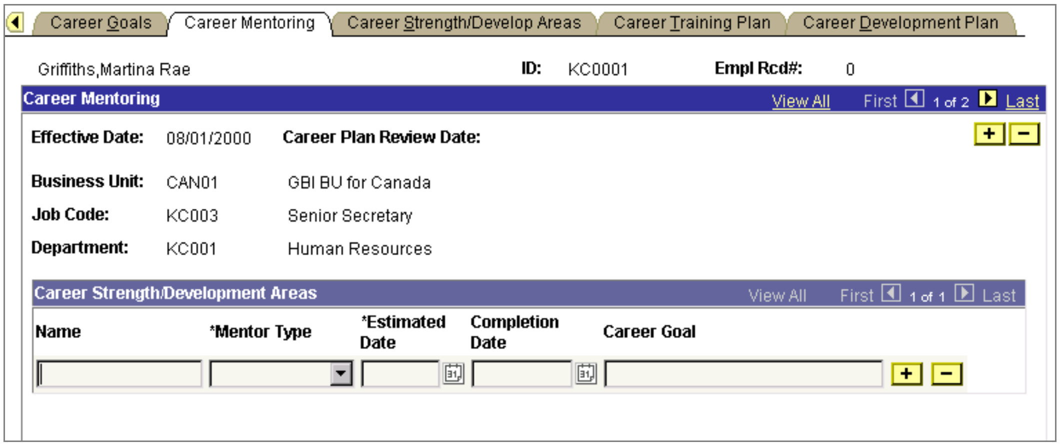
Enter the **Actual Completion Date** when the employee has achieved the goal.

Goals (3 - 5 Years)

Import Long-Term Goals

Career Plan - Career Mentoring Page

Usage	Employees can have more than one mentor to help them reach different goals. For example, an employee could have one mentor for computer-related skills and another for special job function techniques. Use the Career Mentoring page to assign career mentors.
Object Name	CAREER_PLAN5
Navigation	**Develop Workforce, Plan Careers, Use, Career Plan, Career Mentoring**
Prerequisites	This is the fifth page of an eight-page component. If you are entering a new career plan, you must complete the Career Plan, Career Path, Career Ranking and Potential, and Career Goals pages before working on this page.
Access Requirements	Employee ID or Empl Rcd#



Career Plan - Career Mentoring page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **ID, Empl Rcd#, Effective Date, Business Unit, Name.**

Career Plan Review date

Job Code

Department

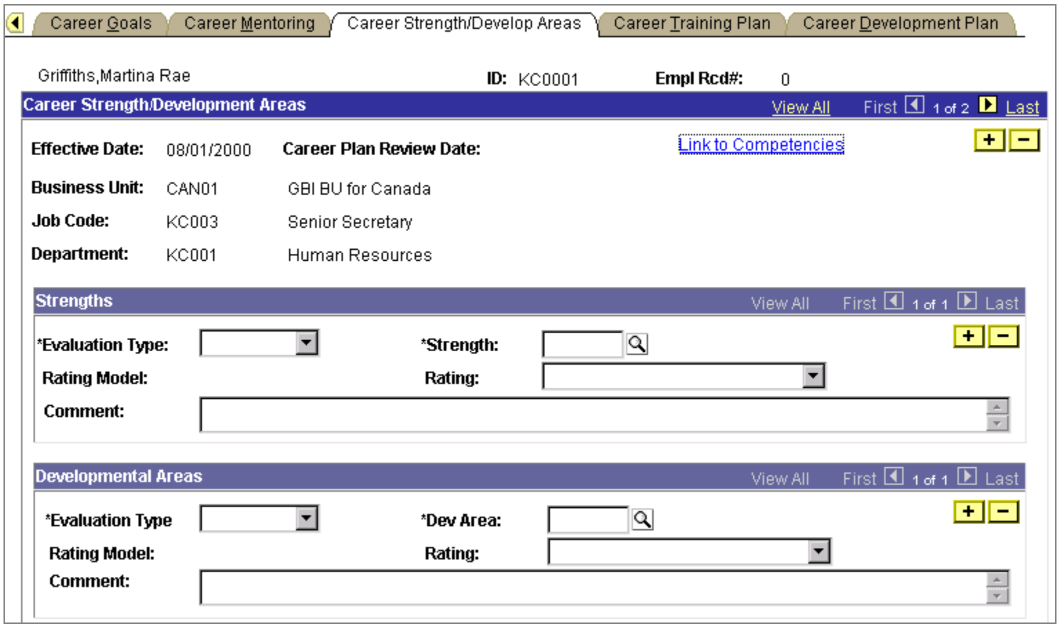
Career Strength/Development Areas

Name	Enter the mentor's **Name.**
Mentor Type	Select the **Mentor Type.** A list of mentor types is in the Translate table.
Estimated Date	Enter the **Estimated Completion Date.**
Completion Date	Enter the actual **Completion Date,** after the employee has achieved the career goal.
Career Goal	Enter the **Career Goal** to be accomplished.

Career Plan - Career Strength/Develop Areas Page

Usage	Use the Career Strength/Develop Areas page to record and evaluate an employee's career strengths and developmental areas.
Object Name	CAREER_PLAN6
Navigation	**Develop Workforce, Plan Careers, Use, Career Plan, Career Strength/Develop Areas**
Prerequisites	This is the sixth page in an eight-page component. You must first complete the Career Plan, Career Path, Career Ranking and Potential,

	Career Goals, and Career Mentoring pages.
Access Requirements	Employee ID or Empl Rcd#



Career Plan - Career Strength/Develop Areas page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **ID, Empl Rcd#, Effective Date, Business Unit, Comment.**

Career Plan Review Date

Job Code

Department

Link to Competencies

Click the **Link to Competencies** button to transfer the employee's competency data between the Plan Careers and Manage Competencies business processes.

If you have already set up employee competencies in Manage Competencies, use this button to display that information and copy it into the employee's career plan. You can also use the Link to Competencies button to transfer the competency information that you enter on the Career Strength/Develop Areas page to Manage Competencies.

Strengths

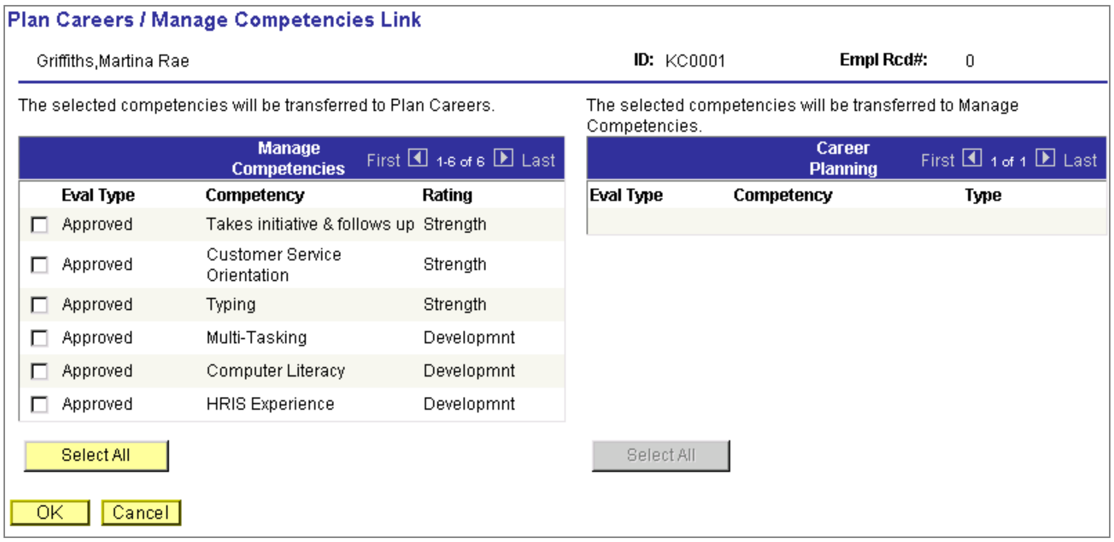
Evaluation Type	Select an **Evaluation Type** from the drop-down list. Values are as follows: ***Approved:*** ***Customer:*** ***Exec Comm*** (executive committee): ***Mentor:*** ***Peer:*** ***Self:*** ***Subordinat*** (subordinate): ***Supervisor:***
Strength	Select the **Strength** you want to evaluate from the list of strengths.
Rating Model	When you move out of this field, the system displays the **Rating Model** used to measure that competency. You set up Rating Model Table Setup Page in Manage Competencies.
Rating	Select the **Rating** that best matches the employee's level of proficiency for the selected competency.
Comment	If you would like to explain your Rating further, type a short **Comment.** This field is scrollable; you can enter comments longer than the space shown.

Developmental Areas

Evaluation Type	Select an **Evaluation Type** from the drop-down list.
Dev Area (developmental area)	Select a competency that is a **Developmental Area** for the employee.
Rating Model	When you tab out of this field, the system displays the **Rating Model** used to measure that competency; if the rating is set up for that model, you can rate the employee on that competency. You set up Rating Model Table Setup Page in Manage Competencies.
Rating	Select the **Rating** that best matches the employee's level of proficiency for the selected competency.
Comments	If you would like to explain the ratings further, type in a short **Comment.** This field is also scrollable.

Plan Careers/Manage Competencies Link Page

Usage	Use the Plan Careers/Manage Competencies Link page to synchronize competency data between the Plan Careers and Manage Competencies business processes.
Object Name	CAREER_STRDVLP_SEC
Navigation	To access the Plan Careers/Manage Competencies Link page click the Link to Competencies button on the Career Strength/Develop Areas page.



Plan Careers/Manage Competencies Link page

Manage Competencies

Eval Type (evaluation type)

Competency

Rating

Career Planning

Eval Type

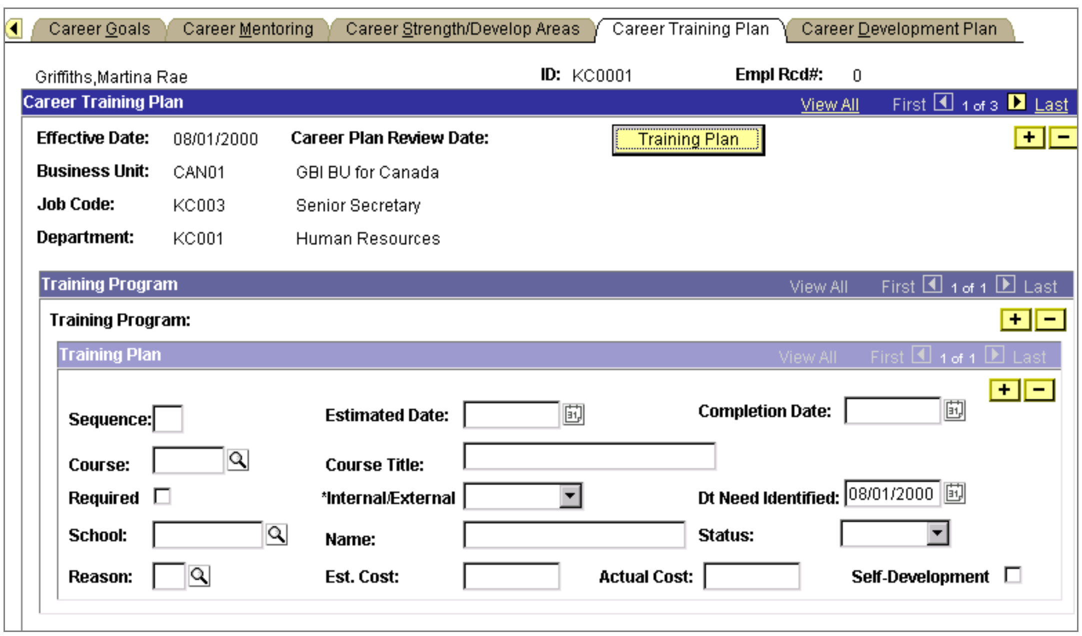
Competency

Type

For more information about managing competencies and defining proficiency-level codes, see Managing Competencies.

Career Plan - Career Training Plan Page

Usage	Use the Career Training Plan page to enter or update a training program for the selected employee. You can use the default training program for the employee job code or create a program tailored for the employee.
Object Name	CAREER_PLAN7
Navigation	**Develop Workforce, Plan Careers, Use, Career Plan, Career Training Plan**
Prerequisites	This is the seventh page in an eight-page component. You must first complete the Career Plan, Career Path, Career Ranking and Potential, Career Goals, Career Mentoring, and Career Strength/Develop Areas pages.
Access Requirements	Employee ID or Empl Rcd#



Career Plan - Career Training Plan page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **ID, Empl Rcd#, Effective Date, Business Unit.**

Career Plan Review Date

Career Plan Review Date

Training Plan

Click the **Training Plan** button to create a training plan based on the default training plan for the employee's job code. If a training plan has been set up for the **Job Code,** when you click the button the system completes most of the fields in **Training Plan** component with information that is related to that plan. If the employee's training plan differs from the default plan, modify the fields as required.

After you save the plan, the system makes the Training Plan button unavailable. However, each time you create a new career plan for an employee, the system makes the Training Plan button available, and you can choose to use the default for the new plan.

For more information about creating training programs, see Administering Training

Note. The system uses the effective date (Career Plan Date) to determine the employee's job code. If the employee has changed jobs since the Career Plan Date, the default training plan is based on the previous job code. To ensure that the Training Plan is based on an employee's current job, create a new Career Plan whenever an employee changes job and set the effective date to match the effective date on the Job Data page.

Job Code

Department

Training Program

Sequence

If you want to order the courses in a certain way, enter a sequence number. If the **Sequence** field is left blank, courses appear in ascending chronological order by estimated completion date. To rearrange the courses already on the list, simply enter sequence numbers for the courses in the order you want them to appear. When you save this information, close the page. When you re-open the page, the courses will appear in the new order.

Estimated Date

Enter the date that you expect the employee to complete the course.

Career Plan Review Date

Completion Date

If the training course has been scheduled in Administer Training, the system will display the End Date of the course in **Completion Date**, when the Status changes to ***Completed.***

If you are tracking a training course that is not handled in Administer Training, enter the actual completion date manually when the employee completes the course or training.

Course

Select a **Course** code from the list of available options. When you move out of the field, the system enters the **Course Title,** the **Internal/External** value, the **School** Code, and the School **Name** for the course. The system makes the fields unavailable for entry, so you can't change this information.

If you've entered a **Course** code, and you decide that you don't want to use it after all, delete your selection. When you move out of **Course** code, the system makes the other fields available for entry, and you are free to enter information in them.

Course Title

Required

Select the **Required** check box if the course is mandatory.

Internal/External

Select ***Internal,*** if the course is held in-house, or ***External,*** if an external vendor administers the course.

Dt Need Identified (date need identified)

The system defaults the **Dt Need Identified** to the Career Plan date, which you can change if necessary.

School

Select a **School** code, which you define in the School Table.

When you move out of this field, the system enters the School **Name** and makes the field unavailable for entry. If you didn't define a school code or name for this course in the Course Table, the system will leave the fields available for entry. If you decide you don't want to use a **School** code after all, delete the entry in the field. When you tab out of the **School** code, the system makes the School **Name** field available, and you are free to enter information in the field.

Name

Status

Career Plan Review Date

Reason Select a reason the course is needed from the drop-down list.

Est. Cost (estimated cost)

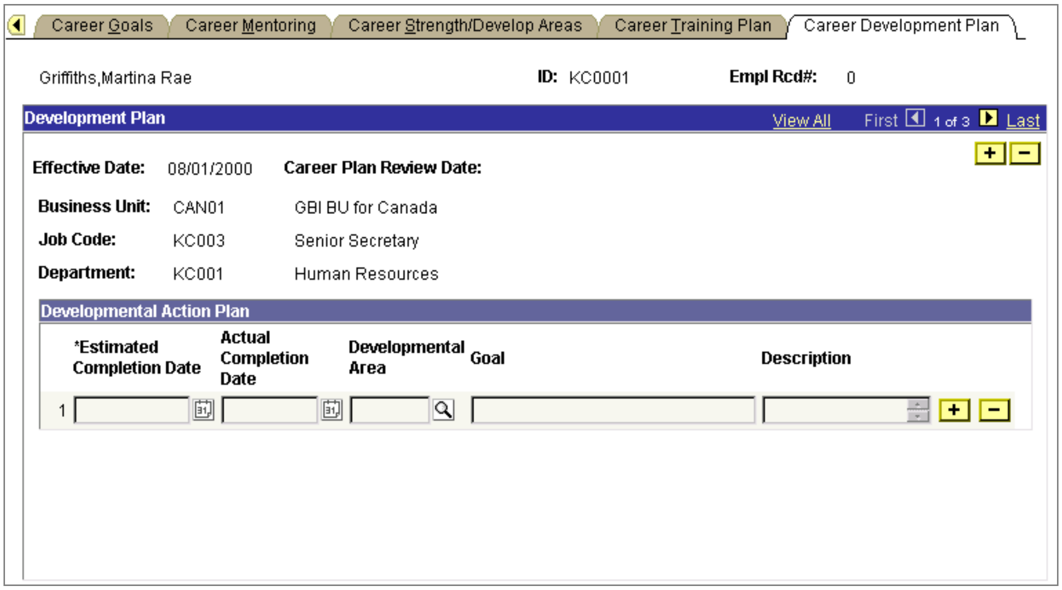
Actual Cost

Self-Development

For more information about the Course Table, see Defining Training Courses and Programs. For more information about Student Training, see Tracking Student Training.

Career Plan - Career Development Plan Page

Usage	Use the Career Development Plan page to help employees improve in developmental areas before their next performance review or career planning session.
Object Name	CAREER_PLAN8
Navigation	**Develop Workforce, Plan Careers, Use, Career Plan, Career Development Plan**
Prerequisites	This is the eighth page in an eight-page component. You must first complete the Career Plan, Career Path, Career Ranking and Potential, Career Goals, Career Mentoring, Career Strength/Develop Areas, and Career Training Plan pages.
Access Requirements	Employee ID or Empl Rcd#



Career Development Plan page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **ID, Empl Rcd#, Effective Date, Business Unit, Description.**

Career Plan Review Date

Job Code

Department

Developmental Action Plan

Estimated Completion Date Enter the **Estimated Completion Date.**

Actual Completion Date Enter the **Actual Completion Date.**

Developmental Area Select a **Developmental Area** from the valid codes in the Translate table.

Goal

Federal

USF Approving a Career Plan

Depending on how your agency sets up the approval process, Workflow routes requested Career Plans to the next level of approval. This may be the manager of the supervisor who worked on the Career Plan with the employee. Based on your agency's requirements, the Career Plan can be routed directly to the necessary HR official.

The reviewer can approve or change the request, and then send it on to other reviewers and to the final HR official. All that the reviewer must do to view the request is open their worklist. The Career Plan will appear. The reviewer then brings it up as a Correction to approve or reject it.

All of the pages that you route through workflow for approval contain a Status field that you use to indicate your approval or disapproval. These pages include **Career Plan 1, Career Path, Career Mentoring,** and **Career Training Plan**.

The process is the same for each page -you open the page either by accessing your Worklist or by selecting **Develop Workforce, Plan Careers (USF), Use, Career Plan.** Either way, you can view the plans that are ready for your approval. Review them, then change the status to indicate your review decision.

To open your **Worklist,** open **View, Navigator Display, Worklist.** Open the Career Plan ready for approval.

Or, to approve a Career Plan request, select **Develop Workforce, Plan Careers (USF), Use, Career Plan, Career Plan 1.** At the bottom of the page, click either **Approve** or **Disapprove**.

To approve a Career Path request, open your Worklist, or select **Develop Workforce, Plan Careers (USF), Use, Career Plan, Career Path.** The system prompts you for an **Employee ID.** Then, open the page and change the **Status** to the one you want to assign, such as ***Approved*** or ***Disapproved,*** by choosing from the available options.

To approve a Career Mentoring request, open your Worklist, or select **Develop Workforce, Plan Careers (USF), Use, Career Plan, Career Mentoring.** The system prompts you for an **Employee ID.** Then, open the page and change the **Status** to the one you want to assign, such as ***Approved*** or ***Disapproved***.

To approve a Career Training Plan request, open your Worklist, or select **Develop Workforce, Plan Careers (USF), Use, Career Plan, Career Training Plan.** The system prompts you for an **Employee ID.** Then, open the page and change the **Activity Status** to the one you want to assign, such as ***Approved*** or ***Disapproved***.

For a complete description of setting up the **Plan Careers** pages, see Creating Career Plans.

Conducting Employee Reviews

In addition to reviewing career plans, you can conduct salary reviews or performance reviews for your employees. You can set up groups of employees and define the review criteria and method of calculating review results for the group. From the Plan Careers menu, you can access these pages:

- Employee Review. Use the Employee Review pages to enter detailed information on employees' salary reviews, performance reviews, or both. To access the Employee Review pages, select **Go, Develop Workforce, Plan Careers, Use, Employee Review.**

- Employee Review by Group. Use the Employee Review by Group page to view a list of all employees in the review groups that you have created. To access the Employee Review by Group page, select **Go, Develop Workforce, Plan Careers, Use, Employee Review by Group.**

You can also access the Employee Review and Employee Review by Group components through the Planning Salaries menu.

For more information about setting up and carrying out employee reviews, see Reviewing Employee Performance.

USF Tracking Employee Appraisals

Use the Employee Appraisal pages to enter information on employee appraisals. These pages are optional-use them if you want to track online, detailed appraisal information.

You can enter comments from multiple reviewers, choose from multiple rating scales, rate employees according to performance plans, and give them a final rating.

The pages in the Employee Appraisal component provide organization for your review data. On the first page, enter rating data, evaluations, and comments. Review elements and standards on the second page, review goals and objectives on the third page.

You can also find the Employee Appraisal pages in the Manage Performance (USF) and the Plan Salaries (USF) menu. To enter or review information, you can use the pages in any of the menus-they are the same pages.

For more information on setting up and using employee appraisals, see Setting Up Performance Management Tables.

Reviewing Career-Related Employee Data

When you work with employees to prepare them for career advancements, in addition to reviewing their career plans, you'll want to look at the candidates' personal and job histories.

With PeopleSoft Human Resources, along with candidate career planning information you have all the information you need online in the Plan Careers menu. You can access a variety of background information, such as prior work experience, employee reviews, education, career assignments, and several summary pages.

In the Plan Careers menu, you can access career-related employee data only for employees who have career plans.

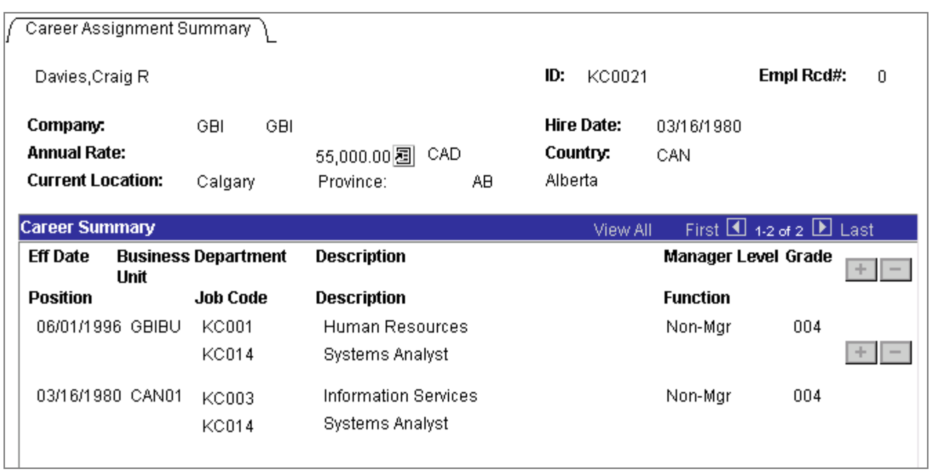
You'll find all the career-related employee data pages on the Inquire and Use menus.

You'll probably first want to look at what employees have done in your organization up to now. Begin by looking at the Inquire summary pages: Career Assignment Summary, Employee Summary, Compensation Summary, Training Summary, and Immediate Family Summary. There you'll see what jobs employees have held in your organization and get a snapshot of their current status.

The information in the summary pages is display-only; you cannot make changes to the information on these pages.

Career Assignment Summary Inquiry Page

Usage	Use the Career Assignment Summary page to see the actual job path the employee has followed in the organization up to now. By tracking employee movements through salary structures and manager levels, you'll get a feel for where the employee has been so far. This information will save you time and aid in succession planning, particularly when you set up functional rotations.
Object Name	CAREER_SUMMARY
Navigation	• **Develop Workforce, Plan Careers, Inquire, Career Assignment Summary, Career Assignment Summary** • **Develop Workforce, Plan Successions (GBL), Inquire, Career Summary, Career Assignment Summary** • **Develop Workforce, Plan Successions (USF), Inquire, Career Summary, Career Assignment Summary**
Prerequisites	
Access Requirements	Employee ID



Career Assignment Summary page

The Career Assignment Summary shows you a history of previous jobs that an employee has held in the company. It does not list every personnel action, such as leaves of absence or salary increases; instead, it shows only job movements. Each job code, salary grade, or department change will appear.

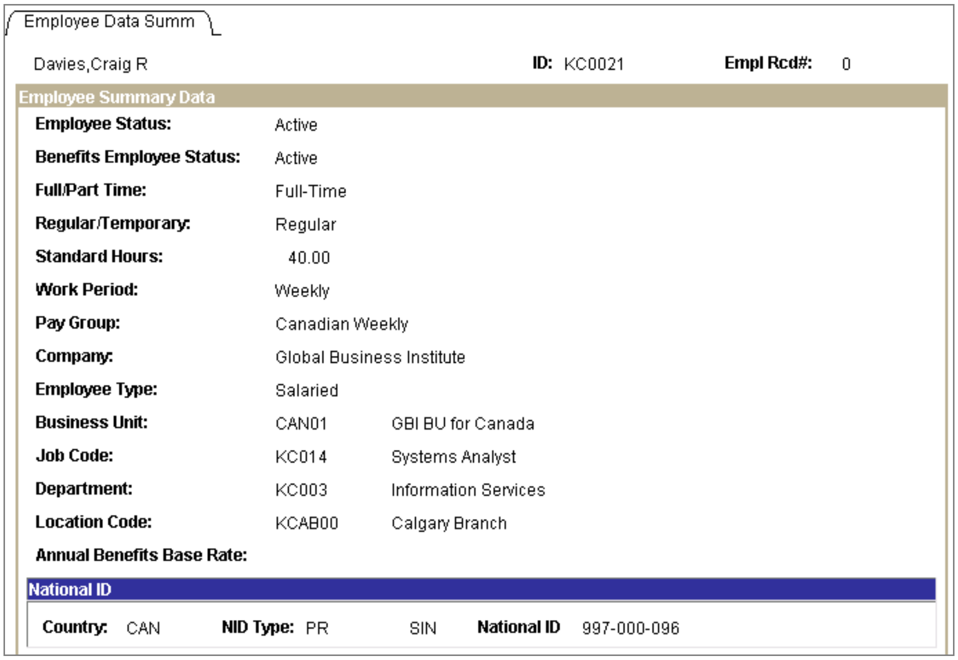
You'll also see the current status of the employee, including hire date, current annual rate, and current location.

Viewing Employee Summary Information

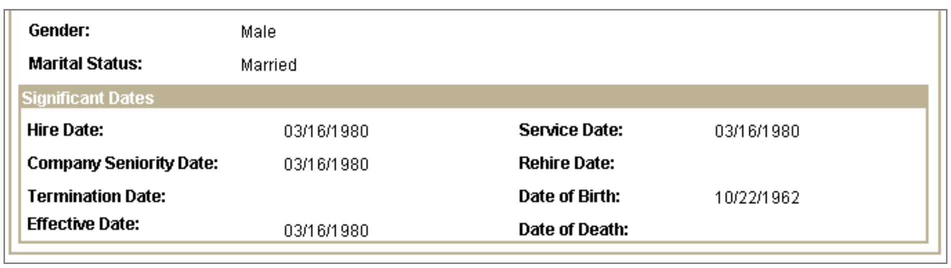
Use the Employee Data Summary pages to get information about employee current status, hire date, birth date, marital status, standard work hours, pay group, job code, and other job- and salary-related information.

Employee Data Summary Page

Usage	Use the Employee Data Summary page to view current job, employment data and current employee personal information.
Object Name	EMPLOYEE_SUMMARY1
Navigation	• **Compensate Employees, Administer Automated Benefits, Inquire, Employee Data Summary, Employee Data Summary** • **Compensate Employees, Administer Base Benefits, Inquire, Employee Data Summary, Employee Data Summary** • **Define Business Rules, Define General Data (NLD), Inquire, Employee Data Summary, Employee Data Summary** • **Develop Workforce, Plan Careers, Inquire, Employee Summary, Employee Data Summary**
Prerequisites	None
Access Requirements	Employee ID



Employee Data Summary page (1 of 2)



Employee Data Summary page (2 of 2)

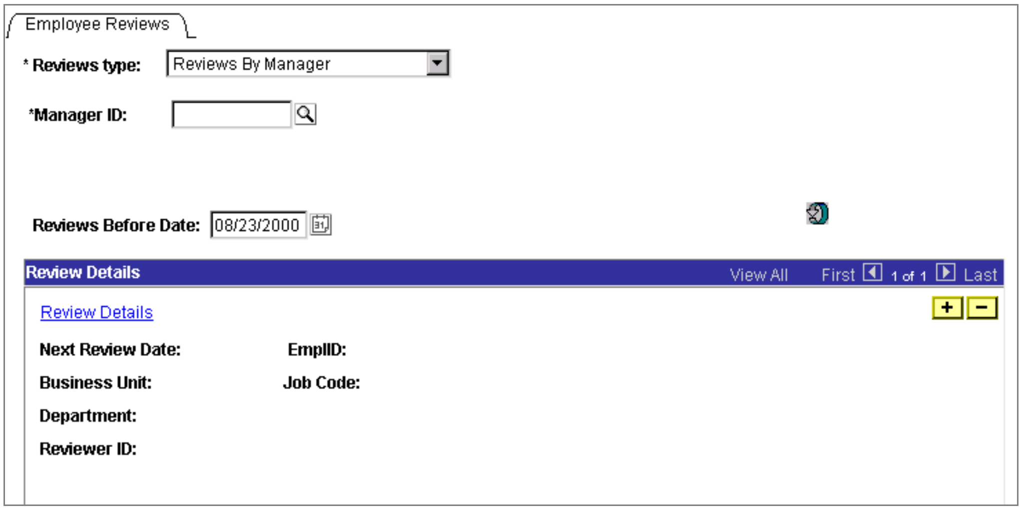
Here, you can review information on the employee’s current job and employment status, such as full- or part-time, employee type, job code, department, and location.

Here, you’ll also see the employee’s Social Security number, marital status, and several dates pertaining to the employee or the employee’s career with your company.

Employee Review Inquiry Page

Usage	Use the Employee Review page to display a list of employees whose reviews are due before a given date. You can search for employees within a selected business unit, company, department, or location. Alternatively, you can search the records of employees managed by a selected manager.
Object Name	ALL_EE_REVIEWS
Navigation	**Develop Workforce, Plan Careers, Inquire, Employee Reviews, Employee Reviews**

Prerequisites	None
Access Requirements	None



Employee Reviews page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **EmplID, Business Unit.**

Reviews type

Select one of the following **Reviews type** values from the drop-down list:

Reviews by Business Unit: Used to search for employees within a selected business unit.

Reviews by Company: Used to search for employees within a selected company.

Reviews by Department: Used to search for employees within a selected department.

Reviews by Location: Used to search for employees at a particular location.

Reviews By Manager: Used to search the employees managed by a selected manager.

Depending on the **Reviews type** you select the system displays certain fields on the Employee Reviews page and hides others. The following table shows which fields are displayed.

Reviews Type	***Fields Displayed***
Reviews by Business Unit	Business Unit Reviews Before Date

Reviews Type	***Fields Displayed***
Reviews by Company	Company Reviews Before Date
Reviews by Department	Business Unit Department, Reviews Before Date
Reviews by Location	Business Unit Location, Reviews Before Date
Reviews by Manager	Manager ID Reviews Before Date

Manager ID Select the **Manager ID** from the list of available options.

Reviews Before Date Enter a review date in this field. When you click the **Employee Review Refresh** button, the system searches for employees whose reviews are due before this date.

Review Details Click the **Review Details** button to access the Employee Review component, where you can view and update the employee's review details.

Next Review Date Enter the **Next Review Date.**

Business Unit Select the **Business Unit** from the list of available options.

Job Code

Department

Reviewer ID Type the **Reviewer ID.**

 Click the **Employee Review Refresh** button to run the inquiry. The system displays a list of employees who match the criteria you entered.

For more information about the Employee Review pages, see Planning Salaries.

Viewing Other Summary Information

You may also want to review other employee summary information, such as compensation history, training history, and information about the employee's immediate family. If you've set up this information in PeopleSoft Human Resources, you can view the information in summary form in the Plan Careers menu.

You can view summary information for employees on the following pages:

Job Summary - Compensation: Components Page

Student Training Summary Page

Personal Data - Personal Profile Page

These pages also appear in other menus: Track Global Assignments, Plan Salaries, and Administer Training. You can access the pages in any menu in which they appear they are the same pages.

Storing Employee Photos

Use the Employee Photo page to store images of your employees for identification purposes. You can also access this page from the Administer Workforce menu.

To access the Employee Photo page select **Develop Workforce, Plan Careers, Use, Employee Photo.**

For more information about entering identification information, see Entering Identification Data.

CHAPTER 2

Planning Successions

This section explains how you can use Planning Successions to:

- Identify who will take over key positions in your organization when vacancies occur.
- Anticipate gaps in your organization.
- Develop alternate career paths for individuals who are ready for promotion but are blocked by employees currently holding key positions.

Use of the Planning Successions module is optional for users of PeopleSoft 8.0 Human Resources for U.S. Federal Government and is intended to work in conjunction with application of merit staffing practices as established by law, regulation, or internal agency policy and procedures.

Overview of Succession Planning

Succession Planning Process

In PeopleSoft Human Resources, you create succession plans based on your organization's position data. Using the Position Management feature, you identify key positions and the employees currently in these positions (known as incumbents). With the position data set up, you create a succession plan for each key position as follows:

- **Set up a list of possible succession candidates.** If you use the Plan Careers feature in PeopleSoft Human Resources, you can start your candidate list effortlessly. The system provides candidate data on employees for whom the job code or position has been identified as a potential career move. You can easily add to the list any other employees or non-employees (including external candidates) that you want to consider.
- **Finalize the successor list.** Once you have a rough idea of potential successors, trim and rank the candidates to form a successor list. If you need additional information to help you make decisions on particular employees, you can access several pages that provide you with succession-related information.
- **Review succession plans, and implement training and development plans.** When you've finalized succession plans, you can easily identify any succession trouble spots. For example, you may discover employees blocked from moving to a new position by incumbents who will continue to hold positions for some time longer. You can then implement training and

development programs to provide the employees who are caught behind incumbents with alternative career paths in your organization.

For more information about using the Tree Manager for Succession Planning, see Building a Graphical Succession Hierarchy for Key Positions.

Searching for Candidates

If you're creating a succession plan for a position that requires an unusual combination of skills, you may not readily find qualified candidates. With PeopleSoft Human Resources, you can specify the criteria for the position (using Manage Competencies) and perform ad hoc searches for employees, non-employees, and applicants. Candidates are matched to the position by comparing their competencies and accomplishments against those required for the position.

For more information about these inquiries, see Searching for Additional Internal and External Candidates.

Before You Begin

This section describes the prerequisites for Planning Successions. Make sure that these tasks are complete before you start creating succession plans for your key positions.

Setting Up Global and Local Country Control Tables

You'll find all the core and local country setup tables, pages and functionality described in this section in the Plan Successions menu (**Plan Successions (GBL) navigation**). You'll also find the core and local country functionality in the appropriate local country menus.

Use the Plan Successions menu that's appropriate for your implementation of PeopleSoft Human Resources. If you're not sure which of these menus you should use, ask your human resources project leader.

This discussion uses the system pages in the Global menus as examples. If there is a page that is located in one of the local country menus whose functionality is not covered in the global menu page discussions, we'll discuss the local country page separately and in its entirety.

Most of the plan careers and plan successions tables are effective-dated, which means that you can track the changes that you make to data chronologically. You won't lose any data history, it's all there for you to review.

When you create codes in these tables, be sure to enter effective dates that precede the effective dates of any succession plans you process, if you don't, the system will not display all the valid codes when you select from prompt lists in the Plan Successions pages. You should use a date such as January 1, 1980, to ensure that the effective date accounts for assignment history.

For more information about the purpose and use of control tables, and about effective dating, in PeopleSoft HRMS, see Setting Up Control Tables.

Setting Up and Assigning Key Positions

Succession planning is based on positions, so you must create your position hierarchy before you can set up succession plans. Once you've created the position hierarchy, identify the employee currently filling each key position, the incumbent. You can also view this incumbent information from succession plans.

Use the Key Position Data pages to enter details of the positions in your organization. To access the Key Position Data pages, select **Develop Workforce, Plan Successions, Use, Key Position Data.**

You can also access these pages from the Manage Positions menu.

For more information about setting up and assigning positions, see Managing Positions.

Setting Up Career Plans for High-Potential Employees

Establishing career plans for high-potential employees is an effective way of beginning the Plan Successions process. The system will use career path data to help you identify potential succession candidates quickly. And you can use other portions of career plans to create training and development plans for key employees, ensuring that they are adequately prepared to step into key positions.

For more information about setting up career plans, see Planning Careers.

Adding External Candidates

When you create candidate lists for key positions, you can consider candidates who do not currently work for your organization. For example, to replace the CEO of your company, you might want to consider top management from other organizations, whose talents and achievements complement your corporate objectives.

Before you can include external candidates in a succession plan, you must add them to your PeopleSoft Human Resources system as non-employees. Non-employees are added and maintained from Administer Workforce.

For more information about adding non-employees, see Hiring Your Workforce.

Also, make sure that employee job data exists in the Administer Workforce tables before you start working with the Plan Careers and Successions pages.

If you've implemented multiple business units and SetIDs in your Human Resources system, the information that you use and create will be determined by how business unit and SetID functionality has been set up for your User ID.

Assigning and Tracking Competencies and Accomplishments

In PeopleSoft Human Resources you can maintain information on the competencies and accomplishments of your employees. You can use this information in planning successions to determine who in the company possesses particular experiences or specific knowledge that might qualify them for positions.

Setting Up Position Requirements

Before you can decide who are the most suitable candidates for any key positions, you must first specify the competencies and accomplishments required for the position. Competencies are skills, abilities or knowledge, such as problem solving or the ability to work under pressure. Accomplishments are achievements such as educational qualifications or licenses that may be useful or essential for a position.

From the Plan Successions menu, you can access the following pages for assigning competencies and accomplishments:

- Position Cluster. Use the Position Cluster pages to assign clusters to a position. A cluster is a set of competencies and accomplishments. Typically you use clusters for positions that share common requirements. For instance, all the middle level management positions in the accounting and finance department in your organization might require a group of the same competencies, such as leadership, motivation, planning, and communication. To access the Position Cluster pages, select **Develop Workforce, Plan Successions, Use, Position Cluster.**

- Position Competency. Use the Position Competency pages to assign individual competencies to a position and define the proficiency levels required for each competency. To access the Position Competency pages, select **Develop Workforce, Plan Successions, Use, Position Competency.**

- Position Accomplishment. Use the Position Accomplishment pages to assign individual accomplishments to a position. To access the Position Accomplishment pages, select **Develop Workforce, Plan Successions, Use, Position Accomplishment.**

These pages are also accessed from the Manage Competencies menu.

For more information about assigning competencies and accomplishments, see Assigning Competencies and Accomplishments to Roles.

Tracking Employee Competencies and Accomplishments

Once you have set up the competencies and accomplishments for positions, you need to be able to compare candidates with the position requirements.

From the Plan Successions menu you can track the following information for candidates on your succession plans.

- Competencies. Use the Competencies pages to record and evaluate employees' competencies. You can transfer the information stored on these pages to the employee's career plan on the Career Plan - Career Strength/Develop Areas Page. To access the Competencies pages select **Develop Workforce, Plan Successions, Use, Competencies.**
- Education. Use the Education pages to record an employees' education and training details. To access the Education pages select **Develop Workforce, Plan Successions, Use, Education.**
- Licenses and Certificates. Use the License and Certificates page to record any licenses that employees hold which are pertinent to their jobs. To access the Licenses and Certificates page, select **Develop Workforce, Plan Successions, Use, Licenses and Certificates.**
- Membership of professional organizations. Use the Membership page to record details of any professional organizations that your employees belong to. To access the Membership page, select **Develop Workforce, Plan Successions, Use, Memberships.**
- Languages. Use the Languages page to track your employees' language skills. To access the Language page, select **Develop Workforce, Plan Successions, Use, Languages.**
- Honors and awards. Use the Honors and Awards page to record details of any special awards that your employees have received for outstanding work. To access the Honors and Awards page, select **Develop Workforce, Plan Successions, Use, Honors and Awards.**
- Test Results. Use the Test Results page to track the results of tests you administer to employees applying for positions within your organization. To access **Develop Workforce, Plan Successions, Use, Test Results**

All these competency and accomplishment pages are also accessed from the Manage Competencies menu.

For more information about assigning competencies and accomplishments to your employees, see Tracking Employee Competencies and Accomplishments.

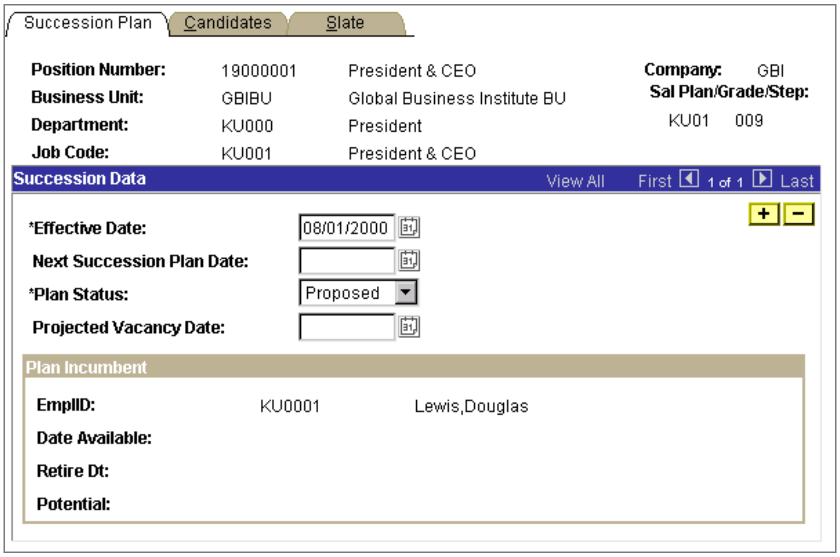
Creating Succession Plans

Create succession plans for each key position in your organization. You can identify potential replacements for incumbents, or vacant, key positions. And once you have created a candidate list and ranked candidates, use this as the official succession plan for the position.

You can create succession plans for individuals in the context of your organizational hierarchy, using the Tree Manager. You can also create or update succession plans in the Plan Successions menu, by selecting **Develop Workforce, Plan Succession, Use, Succession Plan, Succession Plan.** The system prompts you for a key Position Number.

Succession Plan Page

Usage	Use the Succession Plan page to enter plan dates and select succession candidates. Here is where you identify and follow up on high potential employees and develop plans for management succession and continuity in your organization. You can change back to the Key Position Data component at any time by opening the Node menu and selecting Key Position Data, Position Location, Description, Payroll, and Information. The next time you double-click a number, the system will bring up the Key Position Data pages.
Object Name	SUCCESSION_PLAN1
Navigation	• **Develop Workforce, Plan Successions (GBL), Use, Succession Plan, Succession Plan** • **Develop Workforce, Plan Successions (USF), Use, Succession Plan, Succession Plan**
Prerequisites	None
Access Requirements	Position Number



Succession Plan page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Business Unit, Effective Date, EmplID.**

Position Number

Company

Sal Plan/Grade/Step (salary plan/grade/step)

Department

Job Code

Next Succession Plan Date

Plan Status

Projected Vacancy Date — If the incumbent has a career plan in PeopleSoft Human Resources, the **Projected Vacancy Date** will default to the retirement date indicated in their career plan. Otherwise, enter a date in this field.

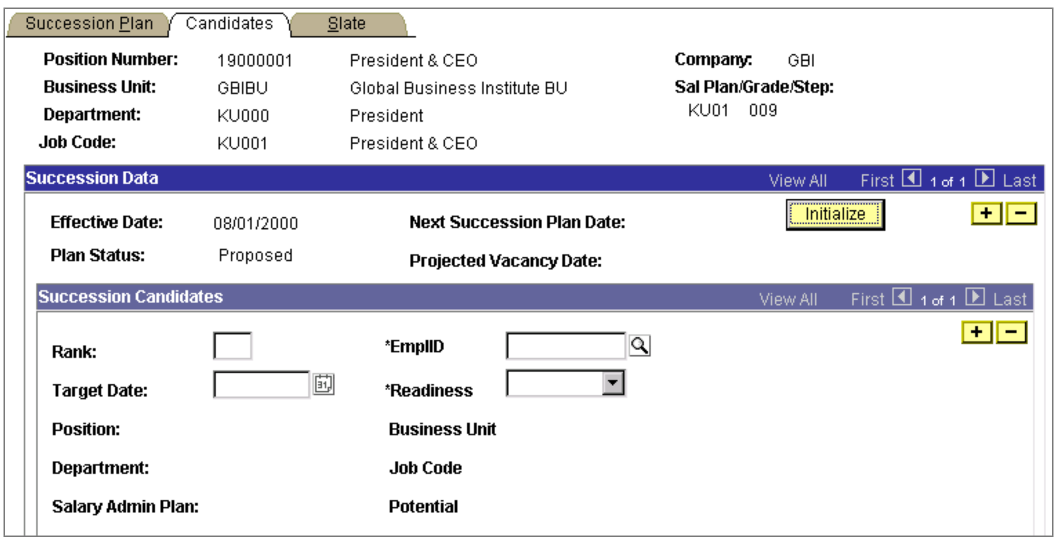
Date Available

Retire Dt (retirement date)

Potential

Succession Plan - Candidates Page

Usage	Use the Candidates page to use career path information to plan successions and indicate the candidate's readiness to move into a new position.
Object Name	SUCCESSION_PLAN2
Navigation	• **Develop Workforce, Plan Successions (GBL), Use, Succession Plan, Candidates** • **Develop Workforce, Plan Successions (USF), Use, Succession Plan, Candidates**
Prerequisites	This is the second page of a three-page component.
Access Requirements	Position Number



Succession Plan - Candidates page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Business Unit, Effective Date, EmplID.**

Position Number

Company

Sal/Plan/Grade/Step

Department

Job Code

Next Succession Plan Date

Initialize

Plan Status

Projected Vacancy Date

Rank

Target Date

Readiness

Position

Department

Job Code

Salary Admin Plan (salary administration plan)

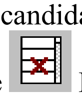
Potential

To give yourself a head start on identifying succession candidates, click the **Initialize** button. The system will enter all employees with the job code or position in their career paths.

The system will default the candidate Readiness status from their career plans, which you can override, if you choose. Valid values are stored in the Translate Table. If you change the Readiness status, you'll need to update it in employee career plans also so that they match.

If you haven't created any career plans or you want to add additional candidates, you can do so by entering new data rows and selecting their **EmplID** (employee Id).

You can also incorporate external candidates to the succession candidate list by selecting their Applicant ID. Before you can add them though, you'll need to create applicant data for them, which are described in the next section.

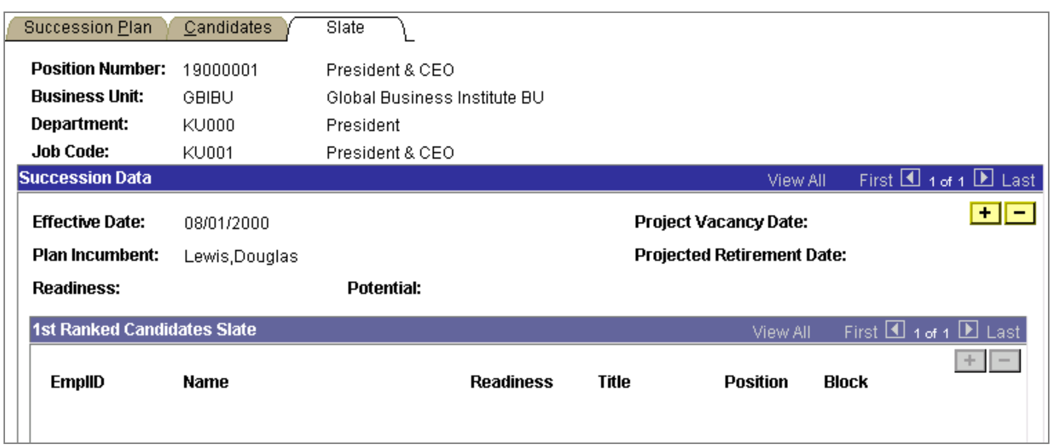
To remove any succession candidates from the list, simply delete the data row containing their information by clicking the  **Delete Row** button.

In order of readiness or any other reasoning you choose, enter a **Rank** number for each remaining candidate. Assign the number 1 to indicate that a candidate is the first choice in the list, and so on, in descending order. When you save the succession plan, the candidates will appear in the correct order.

You must have ranked the candidates and saved the information before you can view them in the Succession Slate page, where you view the hierarchy of successors to a position.

Succession Plan - Slate Page

Usage	Use the Slate page to view the candidates that are slated to replace successors in their current positions. With the Succession Slate page, you can view up to three tiers of succession candidates for positions, to help you ensure that no gaps exist in replacements. You can also see which candidates are blocked in their current position so that you can groom them for other positions or change their rotations, thereby preventing the loss of any high- potential employees. In the Succession Plan menu, open the Succession Slate page to view the hierarchy of replacement candidates for successors to this position. This page is particularly useful after you've created succession plans for several key positions, because you can see successors for positions three layers down. The system also indicates whether any candidates are blocked from advancement from their current positions, which helps you identify and prevent any organizational bottlenecks.
Object Name	SUCCESSION_SLATE
Navigation	• **Develop Workforce, Plan Successions (GBL), Use, Succession Plan, Slate** • **Develop Workforce, Plan Successions (USF), Use, Succession Plan, Slate**
Prerequisites	This is the third page of a three-page component.
Access Requirements	Position Number



Succession Plan - Slate page

In each component, you'll see the candidates you've selected in succession plans, in the order you've ranked them.

The second and third levels show the people that are ranked first to succeed the candidates in their current positions.

The system determines the readiness status for incumbents as any position in the organization that they are most ready to assume.

The adjustments you make to Readiness status for incumbents and successors will probably be your last step toward finalizing succession plans. Then you can focus on preparing any employees who are still blocked from moving into other positions.

Conducting Employee Reviews

In conjunction with planning successions you can conduct salary reviews or performance reviews for your employees.

Use the Employee Review pages to enter detailed information on employees' salary reviews, performance reviews, or both. To access the Employee Review pages, select **Develop Workforce, Plan Successions, Use, Employee Review.**

You can also access the Employee Review pages from the Planning Salaries menu.

For more information about setting up and carrying out employee reviews, see Reviewing Employee Performance.

Setting Up Key Employee Training and Development Plans

Use training and development plans to prepare key employees for the positions that they are slated to assume in the future. You can use the developmental areas identified in employee career plans as the basis from which to build comprehensive plans.

You'll also find training and development plans helpful for reducing the loss of high potential employees whom are blocked in their current positions. By cross-training employees, you can move them into other positions in the company and keep them motivated.

You'll find the training and development plan pages in the Plan Careers menu, Career Plan component. You can also access them in your succession tree in the Tree Manager.

You can choose to use the default training plan for an employee's job code as the basis from which to create a training plan for this employee. The system enters the standard training courses for the job code, which you can leave as is or modify.

For more information about setting up training plans, see Career Plan - Career Training Plan Page.

The system populates the Career Training Plan page with the standard training plan that you've associated with this job code. You create training programs in the Training Program Table and tie them to job codes in the Job Code Table.

Searching for Additional Internal and External Candidates

The Succession Plan pages enable you to create a plan with employees or non-employees that you know are qualified to fill a key position. However, you may be unaware of all the employees and non-employees in your organization who have the skills for key positions. Similarly, you may want to search recruitment information for people who have applied for positions in your organization.

With PeopleSoft Human Resources, you can create ad hoc searches for employees, non-employees, and external applicants. However, the search will be meaningful only if you've entered competencies and accomplishments for your workforce and applicants.

For employees and non-employees, assign competencies and accomplishments from the Manage Competencies, Plan Careers or Plan Successions menus. For applicants, enter competency information from the Recruit Workforce menu.

For more information about assigning competencies and accomplishments to your workforce, see Tracking Employee Competencies and Accomplishments. For more information about recording applicant details, see Managing Applicants.

If you are satisfied that your workforce competency data is accurate, initiate a search by selecting one of the following from the Inquire menu:

- Competency Search - All searches both the workforce and applicant tables for people who match the requirements.
- Competency Search - Employee searches the employee records.
- Competency Search - Applicants searches the applicant records.
- Competency Search - Contractors searches the non-employee records.

For more information about the Competency Search inquiries, see Performing Gap and Match Analyses on Your Workforce.

If you find suitable candidates from a Competency Search inquiry, add them to a Succession Plan in the normal way. Remember that applicants must be added as non-employees before you can include them on a succession plan.

For more information, see Creating Succession Plans.

Viewing Summary Information for Candidates

To get a quick look at a candidate's training, career, and compensation history, use the Training Summary, Career Summary, and Compensation Summary pages. These pages are for viewing purposes only; if you want to update training, career, or compensation information for a candidate, you must use the appropriate pages in the Administer Training, Plan Careers, and Administer Workforce menus.

For more information about compensation, see Planning Salaries. For more information about training, see Administering Training. For more information about career plans, see Planning Careers.

Storing Candidate Photos

Use the Candidate Photo page to store images of candidates that are listed in your succession plans, for identification purposes. You can also access this page from the Administer Workforce and the Plan Careers menus.

To access the Candidate Photo page select **Develop Workforce, Plan Successions, Use, Candidate Photo.**

For more information about entering identification information, see Entering Identification Data.

Building a Graphical Succession Hierarchy for Key Positions

Important! You should review your PeopleTools Tree Manager documentation for a full, detailed discussion about using the PeopleSoft Tree Manager before you attempt to modify or create your own Succession Trees. This section discusses using the Tree Manager to define and maintain Succession Trees in PeopleSoft Human Resources. The discussion focuses only on the Tree Manager as it relates to the Planning Successions Business Processes. For an in-depth discussion about the use of the Tree Manager, see your PeopleTools documentation.

With PeopleSoft Human Resources, you can view and update information about positions, incumbents, and candidate lists in a graphical format, which helps you plan successions in an organizational context. You'll find it helpful for making decisions that affect other areas of your organization and for creating *what-if* scenarios to evaluate their organizational impact, you'll immediately see the *ripple-down* effect of successions; that is, how a succession in one position affects successions in the key positions below it.

You represent positions as a hierarchy by identifying the reporting relationships among key positions and building an organizational chart, called a *succession tree*, using the Tree Manager. You can create multiple organizational charts, saving them with different effective dates or names so that you retain history on your succession plans, your organizational structure, or the alternative scenarios you've created.

From within the Tree Manager, you can view and update key position data and succession plan information in the context of the organization. To do so, you just click a position number, to bring up the key Position Data and Succession Plan pages.

Using the Detail feature of the Tree Manager, you can also view and update complete career plans for succession candidates, as well as several other pages containing pertinent employee data, such as compensation history, skill and languages, and prior work experience.

You can access the Plan Successions pages either by opening the Plan Successions menu or by opening Tree Manager.

Notes on Security Access

In PeopleSoft Human Resources, you can pick and choose the type of access you permit users to have to trees. These security capabilities are particularly useful when you work with succession trees, because many levels of access exist: to the tree itself, to key position and succession plans, and to career plans.

For example, you might allow many operators to update key position, succession plan, and career plan data from within succession trees, yet permit only a few operators to make changes to the succession trees themselves. You might want other operators to view key position, succession plan, and career plan data as display-only, so that they can't update any information.

You can subset the maintenance of different levels in trees by specifying the level of access or update authority you want a user or a set of users to have. In short, in PeopleSoft Human Resources, you can secure portions of trees.

You use Object Security to specify which users can access trees and to control whether the trees users access are display-only. Operator Security determines whether users can access pages from nodes and details and controls whether they are display-only pages. And you use employee data security to specify whether users can access the data in pages tied to specific nodes and details.

For more information about Object and Operator Security, see Security. For more information about employee data security in PeopleSoft HRMS, see Setting Up Control Tables

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Tree Terminology

Before you begin creating a succession tree, you should familiarize yourself with the terms used with Tree Manager:

Term	***Definition***
Level	A logical division in the tree hierarchy. Examples include department, branch, region, and company. You can create as many levels on a tree as you need to define your hierarchy.
Node	An individual branch representing a key position or group of positions in a tree.
Parent	A node that has other nodes reporting to it. Parent nodes are divided into child nodes.
Sibling	Nodes at the same level that are subsets of the same parent node.
Child	A node that is a subset of a parent node.

Building Succession Trees

To build a succession tree:

1. Define the tree structure, identify the page definitions, record definitions, and fields for the underlying database tables where tree data will be stored.

2. Define the tree.

3. Specify organizational levels, if they apply.

4. Add key positions.

5. Add details.

Defining Your Tree Structure

You set up your tree structure on the Tree Structure Table page. PeopleSoft delivers this table with the tree structure for succession hierarchies that have already been defined. You use this structure for any additional succession trees you create. Unless you are extensively modifying the system, you will rarely change this information.

The **Structure ID** is a unique ID assigned to the structure. **Page, Record, Field, Menus,** and **Menu Bar** are the objects that comprise the underlying structure or definitions of the levels and nodes in your tree. If you are familiar with PeopleTools, you may recognize the names of the pages, records, and fields.

Defining Your Succession Tree

Before you can insert the levels and nodes that represent key position hierarchies in your organization, you must define a number of important characteristics for your tree.

Don't use a **SetID** for a succession tree.

Use a **Tree Name** to identify the tree in tables, list boxes, and reports.

Indicate the **Effective Date** and **Status** of the tree. You can create a number of versions of the tree with different effective dates, whether past, present, or future.

Select the Succession **Structure ID.**

In the **Description** field, specify a name or caption for the tree. Since you can specify many trees with similar names, the description field is useful for distinguishing among them. This description will appear in the list box when you press F4 to select a tree, along with the name and effective date. You can change a tree description at any time by selecting **File, Definition.**

Indicate a **Category** for the tree. The category you indicate points to the category that the new tree should be grouped with in the Tree Manager.

Don't select either of the **Detail Values** check boxes for succession trees.

Select the appropriate **Use of Levels** for your particular tree. With succession trees, you should use **Strictly Enforced** levels so that you can name organizational levels in your tree.

For more information about identifying tree levels, see Tree Manager.

Inserting and Editing Levels

Once you define your tree, you can enter the levels and nodes that represent a key position hierarchy. You don't have to use levels in your succession tree, but you'll find that they are useful for representing the managerial levels you'll review in the Plan Successions menus.

Levels help determine how the nodes (key positions) on a tree are organized.

Once you have specified a name, click **OK.** When the level name differs from previous usage in other trees, you will be prompted for a level **Description** and **Short Name.** This page displays data that is related to the level as it appears in the Tree Level Table.

The description will not appear in your tree, but it will appear in various prompt lists, such as when you insert nodes, to help you identify that level.

Level descriptions are stored in the Tree Level table. If your level name has been used in other trees, the Description field will default to the description already specified for that level name. Changing the description will affect all trees using this level.

Type a **Description** for the level, or accept the default, and click Save.

In trees with Strictly Enforced levels, the name of the level will appear on the status bar, in the lower-left corner of the menu. Unlike trees with Loosely Enforced levels, you must insert a level before assigning a node to it.

Once you have added your first level you can either insert the root (first) node at that level or insert additional levels. To add the root node, select **Edit, Insert, Node.** This brings you to the Key Position Data pages.

To insert additional levels, again select **Edit, Level,** and specify level names and descriptions at the appropriate prompts. Each level is added after the currently highlighted level. You can insert levels between other levels by highlighting the higher-level name and clicking the **Add** button in the Edit Level Information dialog box.

To delete levels, select **Edit, Clear.** You will not be able to delete levels that have nodes attached to them until you delete or move those nodes.

Inserting and Editing Nodes

In a succession tree, each node represents a key position. The first node is known as the *root node* and is the highest level in the hierarchy or reporting structure. You can only insert the root node by using the Edit menu. Once the root has been planted, there are two ways to enter additional nodes:

- Using the Edit menu
- Using the Tools buttons

To enter the root node, select **Edit, Insert Node.** In trees with Loosely Enforced levels, you are prompted to enter both the Tree Node and the Level Name. If you want to select from a list of levels that exist in other trees, press F4.

In succession trees, tree nodes are key position numbers.

If you're driving the system by position, you'll most likely add existing positions to a succession tree. In the Node menu, be sure to select **Key Position** in Position Data - Description so that you can create a succession plan for the position. You can use either the Position Data pages in the Tree Manager or in the Manage Positions menu.

It is critical to identify key positions in order to have the Succession Plans check box selected. You identify key positions in **Plan Successions, Use, Key Position Data, Description.**

In a tree with Strictly Enforced levels, the Tree Manager automatically assigns the node its appropriate level name and prompts you to enter the Tree Node.

If you created a key position earlier (it already exists in PeopleSoft Human Resources), and you want to add it to the tree, type the number, including all the zeroes that precede the number. For example, to add Position ***1,*** type ***00000001.*** When you press **OK,** the system will add the node to the tree, without first bringing up the Position Data component.

If you're driving the system by position, after you've added positions to the tree, double-click the node, to bring up the Position Data pages. Select the **Key Position** check box, and save your changes. You'll need to do this so that you can also access and update positions from within the Plan Successions menu, using the **Use, Key Position Data** component.

Accessing Position and Succession Plan Information

You can bring up the Position Data pages at any time, by selecting **Edit, Data** or by double clicking on a key position number in the succession tree. Move among the pages in the component the same way that you do with components in other menus.

You can also choose to bring up the Succession Plan and Succession Slate pages instead, which we'll discuss in more detail later in this section. To change the component from Key Position Data to Succession Plan, open the Node menu, and then select **Succession Plan, Candidates, Slate.**

When you double-click the position number, the system will bring up the Succession pages. To change back to bringing up the Key Position Data component, select **Node, Key Position Data.**

You can also press F6 to move from one component to the other.

Each time you add a new position to the tree, the system will automatically change the component back to Position Data.

If you prefer to access information other than the Key Position Data and Succession Plan pages from within the Tree Manager, you can change the link between the Tree Manager and those pages.

For more information about changing the pages accessed from the succession tree, see Tree Manager.

Once the root node is placed on your tree, you can add branches. Each branch is made up of nodes that report to or are summarized by nodes higher up in the hierarchy. All branches report to the root node. In Strictly Enforced trees, you must add a level to the level bar before placing nodes at that level.

If you want to add more levels, you must first select the Level Bar by highlighting a level name. Insert Level will then appear in the Edit menu.

To add nodes off the root node, select **Edit, Insert, Child.** Then, the process is the same as for the root node.

Once you insert the first node, Insert command on the Edit menu becomes context sensitive, in that it changes according to what you are doing in the Tree. Every node is defined according to its relation to other nodes. To insert nodes, you must highlight an existing node and specify whether the new node should share the same parent (as a sibling) or be inserted at a lower level (as a child).

To select a node, you must click the node's *name,* not the box that precedes it or the description that follows it.

Keep in mind that you cannot specify a sibling for the root node. To add a node, select **Edit, Insert, Sibling** (or **Child).** The new node is then placed on the tree in its proper position, either as a sibling of the same parent or as a child on that branch of the tree. You can remove nodes by selecting **Edit, Clear.**

For more information about creating, modifying and maintaining Trees, see Tree Manager.

Once you've added all the key positions, be sure to save your tree.

Adding Details to a Succession Tree

In succession trees, you can view career plans and related employee data for candidates. However, before you can use details in a succession tree, you must have already created succession plans and formed candidate lists.

For information about adding details to a tree, see Accessing Career Plans and Related Employee Data.

Accessing Career Plans and Related Employee Data

Once you've created succession plans with candidate lists, you can view career plans and related employee data for succession candidates. You'll find this information useful for making decisions about particular candidates, such as re-ranking candidates in succession plans or even removing some candidates from the candidate list.

Using Details in Succession Trees

To access candidate career plans and related employee data, you'll add Details to your succession tree. Then, when you double-click the detail, the system displays a list of candidates in the succession plan for that key position. You can select the candidate for whom you want to view career plans or related employee data.

Before you can view career plan and other employee data, you must have created succession plans for key positions and included succession candidates in them. These pages are available in the Tree Manager only for succession candidates.

In the Tree Manager, open the succession tree and highlight the key position for which you want to add a Detail. To add a detail, select **Edit, Insert, Detail.** In the dialog box that appears, select the **Dynamic Value Range** check box, and click **Save.**

The detail is placed on the tree in what appears to be a lower level in the plan. For example, a detail for Position 1 in the CEO level appears under the EVP level.

You can choose to view or hide details in a tree. To hide the details, select View, and click the Node Descriptions check box to clear it (remove the check mark).

When you highlight a Detail and press ENTER, or right-click (Detail) and select Edit Data from the pop-up menu, the system displays a list of candidates in the succession plan for the key position. The candidates are sorted first by succession plan date, then by ranking, and then by readiness. If a candidate is in more than one succession plan, they will appear in this list only for the most current succession plan.

Select the candidate for which you want to view additional information. The first page in the group, Career Plan, will appear.

If you prefer to access other pages from within the Tree Manager, you can change the link between the Tree Manager and the pages.

For more information about changing the pages that you access from details in the succession tree, see Tree Manager.

You can specify which page you'll see when you select to see details on a tree object, by checking a page on the Details menu.

CHAPTER 3

Planning Careers and Successions Reports

Running Plan Careers Reports

To help you process career planning for employees; we've included reports that track career plans and training plans for your employees.

In this section, we list the reports by ID number and provide you with a description and a sample of each.

For more information about generating these reports, see PeopleSoft Reporting Tools.

Report Name	*Report ID*	*Location*	*Global or Local*
Employee Career Plan	CARPLAN	Develop Workforce, Plan Careers, Report, Career Plan	GBL
Employee Career Training Plan	CARTRAIN	Develop Workforce, Plan Careers, Report, Career Training	GBL
Individual Development Plan Report (USF)	FGHR022	Develop Workforce, Plan Careers, Report, IDP	USF

Employee Career Plan

Description	This report lists an employee's Career Plan as entered by different evaluators.

Report ID	CARPLAN
Type of Report	Crystal
Parameters	Employee ID
Source	RUNCTL_CAR001
Source Records	CAREER_RPT, PERS_SRCH_GBL
Sorted By	Plan Date

Employee Career Training Plan

Description	This report lists an employee's Training Plan to meet career goals.
Report ID	CARTRAIN
Type of Report	Crystal
Parameters	Employee ID
Source	RUNCTL_CAR002
Source Records	CAREER_TRAINING, PERSONAL_DATA, PERS_SRCH_GBL
Sorted By	Plan Date

Individual Development Plan Report USF

Description	This produces an Individual Development Plan for an employee. Included are an employee profile, employee competencies, employee training history, potential job moves, mentoring, training, other specific developmental areas, summary of estimated costs, summary of actual costs, and a section for signatures.
Report ID	FGHR022
Type of Report	SQR
Parameters	Employee ID, IDP Date
Source	RUN_FGHR022
Source	PERSONAL_DATA, JOB, EMPLOYMENT, CAREERPLAN,

Records	GVT_CAR_DEV_ELG, GEOG_PREF_US, OBSTACLES_MOBIL, SHRT_TERM_GOALS, LONG_TERM_GOALS, EMPLOYEE_REVIEW, REVW_RATING_TBL
Sorted By	Employee

Running Plan Successions Reports

To help you plan employee successions; we've included the Internal Resume report in the Plan Successions menu.

For more information about generating this report, see PeopleSoft Reporting Tools**.**

Report Name	***Report ID***	***Location***	***Global or Local***
Internal Resume	PER034	Develop Workforce, Plan Successions (GBL), Report, Internal Resume	GBL
Internal Resume	PER034	Develop Workforce, Plan Successions (USF), Report, Internal Resume	USF

Internal Resume Report

Description	This report creates a resume-like document from the data contained in PeopleSoft tables. Sections of the report include: employee name and address, prior work history, education, salary history, job performance, training, special projects, competencies, languages, citizenship, visa/work permits, licenses and certificates, professional memberships, and honors and awards.
Report ID	PER034
Type of Report	SQR
Parameters	Employee ID

Source	RUNCTL_PER034
Source Records	PERSONAL_DATA, COMP_SUMM_VW, CAREER_SUMM_VW, PRIORWORK_EXPER, CM_EVALUATIONS, COMPETENCIES, COMPETENCY_TBL, ACCOMPLISHMENTS, ACCOMP_TBL, STATE_NAMES_TBL, SPECL_PROJECT, CITIZENSHIP, TRAINING, VISA_PMT_DATA, PERS_NID, EMPLOYEE_REVIEW, VISA_PERMIT_TBL, REVW_RATING_TBL, ACTN_REASON_TBL, COUNTRY_TBL
Sorted By	None

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