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Send Us Your Comments

Oracle Succession Planning Implementation and User Guide, Release 12.1
Part No. E16346-02

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- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
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Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the new Oracle E-Business Suite Release Online Documentation CD available on My Oracle Support and www.oracle.com. It contains the most current Documentation Library plus all documents revised or released recently.

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Please give your name, address, electronic mail address, and telephone number (optional).

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If you require training or instruction in using Oracle software, then please contact your Oracle local office and inquire about our Oracle University offerings. A list of Oracle offices is available on our Web site at www.oracle.com.
Preface

Intended Audience


This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle HRMS.
  If you have never used Oracle HRMS, Oracle suggests you attend one or more of the Oracle HRMS training classes available through Oracle University
- Oracle Self-Service Web Applications.
- The Oracle Applications graphical user interface.
  To learn more about the Oracle Applications graphical user interface, read the Oracle E-Business Suite User’s Guide.

See Related Information Sources on page viii for more Oracle E-Business Suite product information.

Deaf/Hard of Hearing Access to Oracle Support Services

To reach Oracle Support Services, use a telecommunications relay service (TRS) to call Oracle Support at 1.800.223.1711. An Oracle Support Services engineer will handle technical issues and provide customer support according to the Oracle service request process. Information about TRS is available at http://www.fcc.gov/cgb/consumerfacts/trs.html, and a list of phone numbers is available at http://www.fcc.gov/cgb/dro/trsphonebk.html.
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Screen readers may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, some screen readers may not always read a line of text that consists solely of a bracket or brace.

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Structure

1 Oracle Succession Planning
2 Implementing Oracle Succession Planning
3 Using Oracle Succession Planning

Related Information Sources

Oracle HRMS shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other user guides when you set up and use Oracle HRMS.

You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle store at http://oraclestore.oracle.com.

Guides Related to All Products
Oracle E-Business Suite User’s Guide

This guide explains how to navigate, enter data, query, and run reports using the user interface (UI) of Oracle E-Business Suite. This guide also includes information on setting user profiles, as well as running and reviewing concurrent requests.

Guides Related to This Product

Oracle Daily Business Intelligence for HRMS User Guide

This guide describes the dashboards and reports available for HR Line Managers, Chief HR Officer, Budget Managers, and Benefits Managers using Daily Business Intelligence for HRMS. It includes information on using parameters, how DBI for HRMS derives values, and how to troubleshoot dashboards and reports.

Oracle Daily Business Intelligence for HRMS Implementation Guide

This guide provides basic setup procedures for implementing and maintaining HRMS-related dashboards.

Oracle Daily Business Intelligence Implementation Guide

This guide describes the common concepts for Daily Business Intelligence. It describes the product architecture and provides information on the common dimensions, security considerations, and data summarization flow. It includes a consolidated setup checklist by page and provides detailed information on how to set up, maintain, and troubleshoot Daily Business Intelligence pages and reports for the following functional areas: Financials, Interaction Center, iStore, Marketing, Product Lifecycle Management, Projects, Procurement, Sales, Service, Service Contracts, and Supply Chain.

Oracle Daily Business Intelligence User Guide

This guide describes the common concepts for Daily Business Intelligence. It describes the product architecture and provides information on the common dimensions, security considerations, and data summarization flow. It includes a consolidated setup checklist by page and provides detailed information on how to set up, maintain, and troubleshoot Daily Business Intelligence pages and reports for the following functional areas: Financials, Interaction Center, iStore, Marketing, Product Lifecycle Management, Projects, Procurement, Sales, Service, Service Contracts, and Supply Chain.

Oracle Application Framework Personalization Guide

Learn about the capabilities of the OA Framework technologies.

Oracle Human Resources Management Systems Enterprise and Workforce Management Guide

Learn how to use Oracle HRMS to represent your enterprise. This includes setting up your organization hierarchy, recording details about jobs and positions within your enterprise, defining person types to represent your workforce, and also how to manage your budgets and costs.

Oracle Human Resources Management Systems Workforce Sourcing, Deployment, and Talent Management Guide
Learn how to use Oracle HRMS to represent your workforce. This includes recruiting new workers, developing their careers, managing contingent workers, and reporting on your workforce.

Oracle Human Resources Management Systems Payroll Processing Management Guide

Learn about wage attachments, taxes and social insurance, the payroll run, and other processes.

Oracle Human Resources Management Systems Compensation and Benefits Management Guide

Learn how to use Oracle HRMS to manage your total compensation package. For example, read how to administer salaries and benefits, set up automated grade/step progression, and allocate salary budgets. You can also learn about setting up earnings and deductions for payroll processing, managing leave and absences, and reporting on compensation across your enterprise.

Oracle Human Resources Management Systems Configuring, Reporting, and System Administration Guide

Learn about extending and configuring Oracle HRMS, managing security, auditing, information access, and letter generation.

Oracle Human Resources Management Systems Implementation Guide

Learn about the setup procedures you need to carry out in order to implement Oracle HRMS successfully in your enterprise.

Oracle Human Resources Management Systems FastFormula User Guide

Learn about the different uses of Oracle FastFormula, and understand the rules and techniques you should employ when defining and amending formulas for use with Oracle applications.

Oracle Self-Service Human Resources Deploy Self-Service Capability Guide

Set up and use self-service human resources (SSHR) functions for managers, HR Professionals, and employees.

Oracle Performance Management Implementation and User Guide

Learn how to set up and use performance management functions. This includes setting objectives, defining performance management plans, managing appraisals, and administering questionnaires.

Oracle Succession Planning Implementation and User Guide

Learn how to set up and use Succession Planning functions. This includes identifying succession-planning requirements, using talent profile, suitability analyzer, and performance matrices.

Oracle Human Resources Management Systems Deploy Strategic Reporting (HRMSi)

Implement and administer Oracle Human Resources Management Systems Intelligence (HRMSi) in your environment.
Oracle Human Resources Management Systems Strategic Reporting (HRMSi) User Guide

Learn about the workforce intelligence reports included in the HRMSi product, including Daily Business Intelligence reports, Discoverer workbooks, and Performance Management Framework reports.

Oracle Human Resources Management Systems Approvals Management Implementation Guide

Use Oracle Approvals Management (AME) to define the approval rules that determine the approval processes for Oracle applications.

Oracle Human Resources Management Systems Window Navigation and Reports Guide

This guide lists the default navigation paths for all windows and the default reports and processes as they are supplied in Oracle HRMS.

Oracle iRecruitment Implementation and User Guide

Set up and use Oracle iRecruitment to manage all of your enterprise's recruitment needs.

Oracle Learning Management User Guide

Use Oracle Learning Management to accomplish your online and offline learning goals.

Oracle Learning Management Implementation Guide

Implement Oracle Learning Management to accommodate your specific business practices.

Oracle Time and Labor Implementation and User Guide

Learn how to capture work patterns, such as shift hours, so that this information can be used by other applications, such as General Ledger.

Oracle Labor Distribution User Guide

Learn how to maintain employee labor distribution schedules, distribute pay amounts, encumber (commit) labor expenses, distribute labor costs, adjust posted labor distribution, route distribution adjustment for approval, and manage error recovery processes. You also learn how to set up effort reporting for Office of Management and Budget (OMB) compliance.

Other Implementation Documentation

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any product that includes workflow-enabled processes. It also describes how to manage workflow processes and business events using Oracle Applications Manager, how to monitor the progress of runtime workflow processes, and how to administer notifications sent to workflow users.

Oracle Workflow Developer's Guide
This guide explains how to define new workflow business processes and customize existing Oracle E-Business Suite-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User’s Guide

This guide describes how users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

Oracle E-Business Suite Flexfields Guide

This guide provides flexfields planning, setup, and reference information for the Oracle E-Business Suite implementation team, as well as for users responsible for the ongoing maintenance of Oracle E-Business Suite product data. This guide also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on My Oracle Support.

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite’s business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

Do Not Use Database Tools to Modify Oracle E-Business Suite Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle E-Business Suite data, you risk destroying the integrity of
your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite automatically checks that your changes are valid. Oracle E-Business Suite also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.
Introduction to Oracle Succession Planning

Succession planning and management is critical to the growth of an enterprise. Enterprises have key questions such as:

- What are the critical roles in the enterprise?
- How can we identify high performers with high potential to fill key leadership roles?
- Who are the workers who are the best fit for critical roles?
- Which workers have specialized skills and experience; process and product knowledge that would be difficult or impossible to replace?
- How do we proactively train and prepare high performers with high potential for key roles?
- How do we increase employee engagement and retain our key talent?

Oracle Succession Planning is a comprehensive and integrated product that helps enterprises to:

- Identify succession-planning requirements.
- Identify available and qualified talent pool.
- Assess types of talent required to meet business goals.
- Search talent pool for potential successors using various tools such as 9-Box analysis, Suitability Matching, and Suitability Analyzer and compare workers’ talent profiles.
• Create and maintain succession plans to ensure that critical roles are covered at all times.

• Identify training and other development activities to close the gap between a worker's competencies and those required by the enterprise.

Using the relevant data that Oracle Succession Planning presents, managers can take informed decisions to staff key roles with competent workers to maintain and grow business. A professionally executed succession planning process helps enterprises to focus on the future, including the identification of the most qualified candidates for growth and the development of emerging talent.

Identify Succession Planning Requirements

The first step in the succession planning process is to understand the succession planning requirements. An effective succession plan identifies vital executive and management positions, forecasts future vacancies in those positions, and identifies potential managers who would fill these vacancies. Using Oracle Succession Planning, enterprises can identify:

• People in the enterprise who are critical to business.

• Roles (jobs and positions) that must always be staffed with competent and well-trained workers to sustain business.

• Competent workers who may leave the enterprise due to reasons, such as retirement, turnover, competitor offers, or other causes.

Identify Talent

Managers must identify the talent pool that is available in their enterprise to carry out their business strategy. They require information about their workers such as education, experience, current assignment, learning, and mobility to ensure continuity of coverage in important positions. Oracle Succession Planning provides the Talent Profile feature that helps enterprises to obtain a complete picture of the talent profile of their workforce. Talent Profile captures and displays complete worker talent details on a single-interface. Talent Profile obtains relevant data from talent management products and presents the information in the following regions:

• Competencies

• Qualifications

• Other Professional Qualifications

• Previous Employment
• Learning Certifications
• Training
• Appraisals
• Performance Objectives
• Succession Plans
• Job History
• Career Path
• Work Preferences
• Salary
• Benefits
• Monetary Compensation
• Compensation Statement
• Other Information
• Performance Ratings

Assess Workforce Talent

Oracle Succession Planning provides various tools such as Compare Profile report, 9-Box analysis, Suitability Matching, and Suitability Analyzer to assess workforce talent.

Compare Talent Profiles

Enterprises can compare talent profiles of their workforce and use this information in succession planning. The application displays the comparison report in a printable format. When managers compare the talent profiles of workers, if they find a suitable successor, then they can select the worker as a successor and create a succession plan from the Talent Profile page. While creating a succession plan, managers can use the Show Suitable Successors feature that uses the competency-based search to display a list of workers who meet the competency requirements.

View Performance Matrices (9-Box)

Oracle Succession Planning’s performance matrices: Performance Matrix (Potential) and Performance Matrix (Retention), provide insight into the depth and breadth of the talent
pool. Managers can use these matrices to assess the workforce:

- Performance
- Potential for growth
- Readiness level for promotion
- Retention prospects

The Performance Matrix (Potential) enables managers to evaluate workers' skill fit and potential. Using this matrix, enterprises can identify both their highest potential performers and the strength of their talent pool.

The Performance Matrix (Retention) enables managers to evaluate workers on skill fit and retention prospects. It helps managers to recognize high performers who will continue with the organization and assign them critical roles. They can also identify high performers with low retention prospects and analyze the reasons for low retention prospects. Enterprises can use the matrix information to develop retention strategies for sustained growth.

Managers can view performance matrices of individual workers and also of workers in their supervisor hierarchy.

**Suitability Matching**

Managers can use the Suitability Matching function to find a person for a work opportunity or a work opportunity for a person. This process uses factors such as a person's current role, a person's competency levels (as defined in their competency profile), and succession plans to identify workers and opportunities.

**Suitability Analyzer**

Suitability Analyzer displays competency ratings of workers in a graphical format. Managers can use the Suitability Analyzer to compare competencies of workers for succession planning. After comparing the competencies of the workers, they can identify suitable workers as successors.

**Create and Maintain Succession Plans**

Using the Succession Plans feature, managers can:

- Identify key jobs and positions in their organization to ensure that succession plans are in place.
- Identify workers who are likely to vacate their current positions because of promotion, retirement, or voluntary termination.
- Define additional information for succession plans to meet business needs.
• Create and update succession plans for jobs, positions, and workers.

Identify Developmental Activities
Availability of succession planning data enables enterprises to develop organization-wide training programs to address competency gaps. After assessing competencies and evaluating talent profiles, managers can enroll workers in appropriate training. Oracle Succession Planning’s integration with Oracle Learning Management enables managers to identify training courses and enroll workers in relevant courses.

Reporting in Oracle Succession Planning
Oracle Succession Planning provides the following reports in Adobe Acrobat PDF format:

• Compare Profile
  Using this report, managers can compare the talent profiles of their workers.

• Printable Profile
  Using this feature, managers can print worker talent profiles.

Integration with Other E-Business Products
Oracle Succession Planning is an integrated talent management solution that enables managers to plan and implement integrated succession management processes. Oracle Succession Planning and Oracle HRMS talent management products such as Oracle Learning Management, Oracle Performance Management, and the Oracle Compensation suite of products (Compensation Workbench, Total Compensation Statement, and Salary Administration) use a single data repository to enable you to share and view common information for succession planning purposes. Oracle Succession Planning retrieves relevant data from Oracle HRMS, Oracle SSHR, Learning Management, Performance Management, and the Compensation suite of products.

Key Concepts
For information on Oracle Succession Planning, see:

• Succession Plans
  • The Succession Plans Feature, page 3-2

  • Creating and Maintaining Succession Plans Using Oracle Succession Planning, page 3-59
• **Talent Profile**
  - Overview of Talent Profile, page 3-5
  - Using Talent Profile as Managers, page 3-8
  - Using Talent Profile as Workers, page 3-24
  - Succession Planning Using Talent Profile, page 3-55
  - Using Performance Matrix (Potential) and Performance Matrix (Retention), page 3-39
  - Comparing Talent Profiles, page 3-47
  - Generating Printable Profiles, page 3-36

• **Suitability Matching**
  
  Using Suitability Matching in Oracle Succession Planning, page 3-50
Implementing Oracle Succession Planning
Implementing Oracle Succession Planning

Oracle Succession Planning Licenses

Before implementing Oracle Succession Planning, you must install Oracle Self-Service HR, which is a prerequisite.

You must purchase Oracle Succession Planning license to use the following features:

- **Succession Plans**
  Use this feature for effective succession planning in your enterprise. Enterprises can identify succession planning requirements to create and manage succession plans for their workforce.

- **Talent Profile**
  Use the Talent Profile feature of Oracle Succession Planning to obtain a complete picture of the talent profile of your workforce to manage the talent processes.

  **Note**
  Oracle Self-Service HR provides you with a minimal Talent Profile function to only view the talent profiles of your workforce. You require Oracle Succession Planning license to:
  
  - Compare Talent Profiles
  - Use performance matrices (9-box): Performance Matrix (Potential), Performance Matrix (Retention)
  - Use Suitability Analyzer

- **Suitability Matching**
  Managers can use the Suitability Matching function to find a person for a work opportunity or a work opportunity for a person. Suitability Matching uses factors such as a person’s current role, a person’s competency levels (as defined in their competency profile), and succession plans in identifying candidates and opportunities.

  Oracle Self-Service HR provides you with the Suitability Matching feature. However, you require Oracle Succession Planning license to use the Suitability Analyzer to perform competency-based search for succession planning. Users can launch Suitability Analyzer only from the Suitability Matching function.

- **Employee Succession Information**
  Use the Employee Succession Information page to record tracking information.
required for succession plans. You can:

- Identify the succession potential of a worker
- Determine whether a worker is a key person in the enterprise
- Determine the retention prospects of a worker

Integration with Other E-Business Products

Oracle Succession Planning is an integrated talent management solution that enables managers to plan and implement integrated succession management processes. Oracle Succession Planning and Oracle HRMS talent management products such as Oracle Learning Management, Oracle Performance Management, and the Oracle Compensation suite of products (Compensation Workbench, Total Compensation Statement, and Salary Administration) use a single data repository to enable you to share and view common information for succession planning purposes. Oracle Succession Planning retrieves relevant data from Oracle HRMS, Oracle SSHR, Oracle Learning Management, Oracle Performance Management, and the Compensation suite of products.

To enable your managers to view talent profile information of workers such as monetary compensation, training, learning certification, benefits, compensation statement, performance objectives, and appraisal details, you must install the following products. For information on licenses, contact your Oracle sales representative.

Oracle Performance Management

Oracle Performance Management is a self-service product that enables enterprises to implement an effective performance management system. It enables managers and workers to manage performance management functions including objectives setting and appraisals process. Enterprises can create and administer questionnaires for the various potential participants in the appraisal process.

Oracle Performance Management is a separately licensed product.

See: Oracle Performance Management Overview, Oracle Performance Management Implementation and User Guide

Oracle Learning Management

Oracle Learning Management is an enterprise learning management system (LMS) that enables you to train your workforce effectively and at lower cost. Oracle Learning Management enables you to manage, deliver, and monitor your online and classroom-based training: you can efficiently assemble and deliver learning content; you can provide the most appropriate combination of classroom and online training; and you can measure the effectiveness of your training initiatives.

Oracle Learning Management is a separately licensed product.
Oracle Advanced Benefits (OAB)

Oracle Advanced Benefits (OAB) is a benefits application that enables you to define and manage benefits programs in support of your enterprise's missions and objectives, while addressing the diverse and complex requirements of evolving benefits practices and governmental regulations.

Oracle Advanced Benefits is a separately licensed product. Your Oracle Human Resources license includes Standard Benefits, a more limited set of benefits administration features.

See: Standard and Advanced Benefits Administration, Oracle HRMS Compensation and Benefits Management Guide

Oracle Succession Planning Predefined Components

This topic lists the predefined responsibility, menus, and functions supplied with Oracle Succession Planning.

Predefined Responsibility

Oracle Succession Planning supplies the predefined Succession Planning responsibility with the corresponding Succession Planning (HR_SUCCESSION_MGMT) menu.

The following table lists the functions available with the Succession Planning menu.

<table>
<thead>
<tr>
<th>Prompt</th>
<th>Function Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Talent Profile</td>
<td>HR_TALENTPROFILE_SS</td>
</tr>
<tr>
<td>Suitability Matching</td>
<td>HR_SUITABILITY_MATCH_SS</td>
</tr>
<tr>
<td>Succession Plans</td>
<td>PER_SUCCESSION_MGMT_SEARCH</td>
</tr>
<tr>
<td>Employee Succession Information</td>
<td>PER_SUCCESSION_PLAN_DETAILS</td>
</tr>
</tbody>
</table>

This responsibility is provided as a starting point only. If you need to change the responsibility or menu you must create your own using the predefined responsibility and menu as examples. Otherwise, your changes may be lost during an upgrade.

Talent Profile Menus

Talent Profile helps enterprises to obtain a complete picture of the talent profile of their
workforce on a single-interface.

**Talent Profile Based on Role Requirements**

As managers and workers have different business requirements, Talent Profile delivers views based on their roles. For example, only managers can view the Succession Plans region, compare talent profiles, and use performance matrices.

To meet the different talent requirements, Oracle Succession Planning delivers the following Talent Profile Menus:

<table>
<thead>
<tr>
<th>Menu</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Talent Profile Manager Access Menu (HR_TP_MGR_MENU)</td>
<td>Enables managers to access Talent Profile functions that include Compare Profiles and view Performance Matrix (Potential) and Performance Matrix (Retention). Managers can view talent profiles of workers in their supervisor hierarchy.</td>
</tr>
<tr>
<td>Talent Profile Employee Access Menu (HR_TP_EMP_MENU)</td>
<td>Enables workers to view their talent profiles.</td>
</tr>
<tr>
<td>Suitability Matching Spider Menu (HR_SUIT_MATCH_SPIDER_MENU)</td>
<td>Launches the Suitability Analyzer tool and enables competency-based search.</td>
</tr>
<tr>
<td>Menu For All Seeded Report Template Functions (HR_TP_TEMPLATES_MENU)</td>
<td>Enables managers to generate the compare profile reports of a single worker, two workers, or three workers. Managers can also print the talent profile of a worker. The reports are generated in the Adobe Acrobat PDF format.</td>
</tr>
<tr>
<td>Talent Profile Launch Menu (HR_TP_LAUNCH_MENU)</td>
<td>Launches the Talent Profile page.</td>
</tr>
</tbody>
</table>

**Implementing Oracle Succession Planning**

This topic discusses the steps that you must complete to use Oracle Succession Planning.

**Prerequisites**

Before implementing Oracle Succession Planning, you must install Oracle Self-Service HR, which is a prerequisite.
Required Implementation Steps

1. **Set the HR: Succession Planning Licensed Profile Option**
   Controls whether Oracle Succession Planning is available. If your enterprise obtains a license, then you must set this profile option to Yes at the site level to work with Oracle Succession Planning.

2. **Create and Assign the Responsibility to use Oracle Succession Planning**
   Based on your business requirements, create and assign the required Succession Planning responsibility to managers and HR professionals. To create your own responsibilities, use the supplied Succession Planning responsibility as a sample.
   
   See: Responsibilities, Oracle HRMS Configuring, Reporting, and System Administration Guide

3. **Define the HR: Enable Talent Profile Option**
   If you have licensed Oracle Succession Planning, then set the HR: Enable Talent profile option value to Yes. This profile option determines whether managers can access the Suitability Analyzer tool from the Suitability Matching function. If you set the profile option value to No, then managers cannot use the Suitability Analyzer tool.

4. **Set up Action Menu for Self-Service Actions**
   The Talent Profile page has an Action drop down list. This list includes Self-Service or SSHR actions. Depending on your business needs, you must add the SSHR Personal Actions Menu and Manager Actions Menu to the supplied Succession Planning (HR_SUCCESSION_MGMT) menu or your own configured menu. This enables users to perform self-service functions from the Talent Profile page.
   
   See: Setting up Self-Service Actions on the Talent Profile Page, page 2-29

5. **Set up the Succession Plans Functionality**
   The Succession Plans functionality enables managers to plan for future vacant positions by identifying possible successors for workers, jobs, and positions.
   
   For information on setting up Succession Planning, see: Setting up the Succession Plans Functionality, page 2-38

6. **Configure Suitability Matching**
   Managers can use the Suitability Matching function to find a person for a work opportunity or a work opportunity for a person. The process uses factors such as a person’s current role, a person’s competency levels (as defined in their competency
profile), and succession plans in identifying candidates and opportunities.

You can configure the Suitability Matching according to your business needs. For more information, see: Configuring Suitability Matching, page 2-42

**Steps to Setup a Custom Version of the Talent Profile Feature**

If you do not want to use the supplied Talent Profile feature, then you can customize the supplied menus and functions to implement the Talent Profile feature based on your business needs. Custom implementation process involves set up steps such as setting up the Talent Profile form function and regions.

See: Setup Steps to Implement a Custom Version of Talent Profile Feature, page 2-8

**Additional Implementation Steps**

After you complete the required steps, you can customize the following features on the Talent Profile page:

- Talent Profile regions
  See: Personalizing Talent Profile, page 2-35

- Region icons
  See: Configuring the Region Icons, page 2-35

- Hierarchy list and quick search
  See: Configuring the Quick Search and Hierarchy Regions, page 2-34

**Configuration Steps**

After completing the required and additional implementation steps, you carry out the configuration steps, such as configuring the XML template for the Compare Profile report, defining lookups and EITs required for succession planning, and defining user ratings for Performance Matrix (Potential) and Performance Matrix (Retention).

See: Completing the Configuration Steps for Oracle Succession Planning, page 2-30
Setup Steps to Implement a Custom Version of Talent Profile Feature

Setup Steps to Implement a Custom Version of the Talent Profile Feature

This topic describes the implementation steps to set up a custom version of the Talent Profile feature:

1. Create Copies of the Supplied Talent Profile Menus
   Using the Functional Administrator responsibility, create copies of the following supplied menus for Talent Profile.
   - Talent Profile Manager Access Menu (HR_TP_MGR_MENU)
   - Talent Profile Employee Access Menu (HR_TP_EMP_MENU)
   - Suitability Matching Spider Menu (HR_SUIT_MATCH_SPIDER_MENU)
   - Menu For All Seeded Report Template Functions (HR_TP_TEMPLATES_MENU)

   For more information on supplied menus, see: Oracle Succession Planning Predefined Components, page 2-4

   The predefined Succession Planning responsibility is linked to a menu that contains a number of functions. You can create menus based on the predefined menus and, if necessary, add or remove functions so that the menus accurately reflect your enterprise's business processes.

   You can base your configuration on the sample menus provided although you should not change the predefined menus directly. You must create your own menus using the predefined menus as examples. Otherwise, your changes may be lost during an upgrade.

2. Create a form function to set up the custom Talent Profile functionality.
   See: Setting up the Talent Profile Form Function, page 2-9

3. Set up the required Talent Profile regions for workers and managers. You can exclude the functions that you do not want your workforce to use from the copied menus.
   See: Setting up the Talent Profile Regions, page 2-10

4. If required, configure the More links on the Talent Profile regions that enable managers and workers to navigate to the relevant Oracle HRMS talent product
pages, such as Oracle SSHR, Oracle Performance Management, and Oracle Learning Management.

Configuring the More Links in the Talent Profile Regions, page 2-17

5. Configure the Talent Profile custom actions.
   See: Setting up the Action Menus for Talent Profile, page 2-29

6. Configure the SSHR actions on the Talent Profile page.
   See: Setting up Self-Service Actions on the Talent Profile Page, page 2-29

7. Configure the Suitability Analyzer and Performance Matrix (Potential) and Performance Matrix (Retention) functions.
   You can also determine the print and compare profile actions that you want managers to use.
   See: Configuring Talent Profile Functions, Suitability Analyzer, and Compare Profile Templates, page 2-24

8. Grant Menus or Add Menus to the Responsibility
   To enable managers and workers to use the Talent Profile features, in addition to assigning the Oracle Succession Planning responsibility, you must grant the custom Talent Profile menus to the Succession Planning responsibility assigned to the users. You can grant the custom menus using the Functional Administrator responsibility. Grants enable managers and workers to access the Talent Profile functions.

   For information on creating grants and using permission sets, see: Grants and Permissions Sets in Oracle E-Business Suite System Administrator’s Guide - Security

   You can also add the custom menus to the Succession Planning responsibility assigned to the users using the System Administrator responsibility

**Setting up the Talent Profile Form Function**

To set up a custom version of the supplied Talent Profile feature, you must first create your Talent Profile form function using the Form Functions window of the System Administrator responsibility.

Provide the following values:

**Description Tab Region**

Function Name: <User Defined function name>, for example: HR_TALENTPROFILE_SS
User Function Name: <User Defined user function name, for example: Talent Profile

**Properties Tab Region**
Type: SSWA jsp function

Form Tab Region

Parameters: MoreLinkMapMgr=<user defined sub-function name>&MoreLinkMapEmp=<user defined sub-function name>, for example:
MoreLinkMapMgr=HR_TP_MGR_MORE_LINK&MoreLinkMapEmp=HR_TP_EMP_MORE_LINK

Note: The parameters provided while creating the functions are used to configure the More links on the individual regions of the Talent Profile page. See: Configuring the More Links in the Talent Profile Regions, page 2-17

Web HTML Tab Region

HTML Call: OA.jsp?page=/oracle/apps/per/talentprofile/webui/TMEmployeePG

Setting up the Talent Profile Regions

Talent Profile displays talent information in individual regions. As managers and workers have different business requirements, Talent Profile delivers views based on their roles. For example, only managers can view the Succession Plans region and Performance Matrix (Potential) and Performance Matrix (Retention) details. For more information: see:

• Using Talent Profile as Managers, page 3-8
• Using Talent Profile as Workers, page 3-24

By default, Talent Profile displays a set of regions for workers and managers, called Employee View and Manager View. Each of the regions is assigned a region code and a sub-function with the same name as the region code.

The sub-functions for each of the regions control the security of the region. These sub-functions determine whether the application can display that region in the particular profile view or not.

The following section describes how information is secured for employee view and manager view:

When a user logs in to Talent Profile, the application determines whether the user is a worker or manager. Then, the application checks whether the corresponding worker or manager sub-function for the view is granted. If the function is granted, then the application will display the region for the worker or manager.

The following tables list the functions granted with the supplied menus: Talent Profile Manager Access Menu - HR_TP_MGR_MENU and Talent Profile Employee Access Menu - HR_TP_EMP_MENU. You can exclude the functions that you do not want managers or workers to use from the copied menus using the Functional Administrator.
Responsibility.

**Supplied Talent Profile Manager Access Menu - HR_TP_MGR_MENU**

<table>
<thead>
<tr>
<th>Name</th>
<th>Function</th>
<th>Type</th>
<th>Functionality</th>
</tr>
</thead>
<tbody>
<tr>
<td>Talent Profile Career Path Manager</td>
<td>HR_TP_MGR_CAREER_PATH_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Talent Profile Cash Compensation Manager</td>
<td>HR_TP_MGR_CASH_COMP_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Talent Profile Certifications Manager</td>
<td>HR_TP_MGR_CERTIFI_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Compare Profile</td>
<td>HR_TP_MGR_COMPARE_WITH_ACTION</td>
<td>SUBFUNCTION</td>
<td>Action</td>
</tr>
<tr>
<td>Talent Profile Competency Manager</td>
<td>HR_TP_MGR_COMPETENCY_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Talent Profile Compensation Statement Manager</td>
<td>HR_TP_MGR_COMP_STAT_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Talent Profile Lookup Data AM</td>
<td>HR_TP_LKUP_DATA_A_AM</td>
<td>REST</td>
<td>Rest Service</td>
</tr>
<tr>
<td>Name</td>
<td>Function</td>
<td>Type</td>
<td>Functionality</td>
</tr>
<tr>
<td>---------------------------</td>
<td>--------------------------</td>
<td>--------------</td>
<td>---------------</td>
</tr>
<tr>
<td>Talent Profile Lookup</td>
<td>HR_TP_LKUP_INIT_AM</td>
<td>REST</td>
<td>Rest Service</td>
</tr>
<tr>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Printable Profile</td>
<td>HR_TP_MGR_EXPO_RT_CUSTOM_ACT N</td>
<td>SUBFUNCTION</td>
<td>Action</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Compare Profile</td>
<td>HR_TP_EMP_COMPARE_WITH_ACT N</td>
<td>SUBFUNCTION</td>
<td>Action</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Talent Profile Perf</td>
<td>HR_TP_PERFMATRIX_DIRECTS_SS</td>
<td>JSP</td>
<td>Action</td>
</tr>
<tr>
<td>Matrix Directs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Talent Profile Job History</td>
<td>HR_TP_MGR_JOB_HIST_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Manager</td>
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<tr>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Performance Matrix (</td>
<td>HR_TP_MGR_PERFMATRIX_ACTN</td>
<td>SUBFUNCTION</td>
<td>Action</td>
</tr>
<tr>
<td>Potential</td>
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<tr>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Talent Profile Performance</td>
<td>HR_TP_MGR_PERFMATRIX_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Matrix Manager</td>
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<tr>
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<td></td>
</tr>
<tr>
<td>Talent Profile Performance</td>
<td>HR_TP_MGR_PERF_OBJ_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Performance Objectives</td>
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<td></td>
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</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td>Function</td>
<td>Type</td>
<td>Functionality</td>
</tr>
<tr>
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<td>---------------</td>
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<tr>
<td>Talent Profile</td>
<td>HR_TP_MGR_PREV_EMP_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Previous Employment Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Talent Profile</td>
<td>HR_TP_MGR_QUALIFI_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Qualifications Manager</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Talent Profile</td>
<td>HR_TP_MGR_SALARY_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Salary Overview Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Talent Profile</td>
<td>HR_TP_MGR_SUCCESSION_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Succession Plan Manager</td>
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<td>Talent Profile</td>
<td>HR_TP_MGR_ADDITIONALINFO_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
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<tr>
<td>Additional Information Manager</td>
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<td>Talent Profile</td>
<td>HR_TP_MGR_APPR_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
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<td>Appraisal Manager</td>
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<tr>
<td>Talent Profile</td>
<td>HR_TP_MGR_AWARDS_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Awards Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td>Function</td>
<td>Type</td>
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<td>------------------------------------</td>
</tr>
<tr>
<td>Talent Profile</td>
<td>HR_TP_MGR_WORK_K_PREF_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Work Preferences Manager</td>
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<tr>
<td>Talent Profile</td>
<td>HR_TP_MGR_TRAINING_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
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<tr>
<td>Training Manager</td>
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<td>Talent Profile</td>
<td>HR_TP_VIEW_GBL_SEARCH_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
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<td>Global Search Enabled</td>
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<td>Talent Profile</td>
<td>HR_TP_VIEW_PER_HIERARCHY_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Show Person Hierarchy Enabled</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Download Compare XML Button</td>
<td>HR_TP_OWNLOAD_COMPARE_XML</td>
<td>SUBFUNCTION</td>
<td>Reporting Action</td>
</tr>
<tr>
<td>Security Renderer</td>
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</tr>
<tr>
<td>Download Export XML Button</td>
<td>HR_TP_DOWNLOADED_EXPORT_XML</td>
<td>SUBFUNCTION</td>
<td>Reporting Action</td>
</tr>
<tr>
<td>Security Renderer</td>
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<tr>
<td>Talent Profile</td>
<td>HR_TP_MGR_MERGE_LINK</td>
<td>SUBFUNCTION</td>
<td>More link configuration option for Manager</td>
</tr>
<tr>
<td>Name</td>
<td>Function</td>
<td>Type</td>
<td>Functionality</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-------------------------</td>
<td>---------------</td>
<td>---------------</td>
</tr>
<tr>
<td>Printable Profile (Full)</td>
<td>HR_TP_MGR_EXPOTRT_FULL_ACTN</td>
<td>SUBFUNCTION</td>
<td>Action</td>
</tr>
<tr>
<td>Talent Profile Performance Matrix Flash</td>
<td>HR_TP_PERF_MATRIX_SWF</td>
<td>WIDGET</td>
<td>Action</td>
</tr>
<tr>
<td>Talent Profile Performance Matrix Succession Plan GRD</td>
<td>HR_TP_PERFMTRX_SUCCPLAN_GRD_AM</td>
<td>REST</td>
<td>Rest Function</td>
</tr>
<tr>
<td>Talent Profile Performance Matrix Directs AM</td>
<td>HR_TP_PERFMTRX_GRD_AM</td>
<td>REST</td>
<td>Rest Service</td>
</tr>
<tr>
<td>Talent Profile Benefits Manager</td>
<td>HR_TP_MGR_BENFTS_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Talent Profile Performance Ratings Managers</td>
<td>HR_TP_MGR_PERFATING_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Performance Matrix (Retention)</td>
<td>HR_TP_MGR_RET.PERF_MTRX_ACTN</td>
<td>SUBFUNCTION</td>
<td>Action</td>
</tr>
</tbody>
</table>
### Supplied Talent Profile Employee Access Menu - HR_TP_EMP_MENU

<table>
<thead>
<tr>
<th>Name</th>
<th>Function</th>
<th>Type</th>
<th>Functionality</th>
</tr>
</thead>
<tbody>
<tr>
<td>Talent Profile Additional Information Employee</td>
<td>HR_TP_EMP_ADDITIONALINFO_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Talent Profile Appraisal Employee</td>
<td>HR_TP_EMP_APPR_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Talent Profile Awards Employee</td>
<td>HR_TP_EMP_AWARDS_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Talent Profile Career Path Employee</td>
<td>HR_TP_EMP_CAREER_PATH_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Talent Profile Competency Employee</td>
<td>HR_TP_EMP_COMPETENCY_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Talent Profile Job History Employee</td>
<td>HR_TP_EMP_JOB_HIST_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Talent Profile Performance Objectives Employee</td>
<td>HR_TP_EMP_PERF_OBJECTS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Talent Profile Previous Employment Employee</td>
<td>HR_TP_EMP_PREV_EMP_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Talent Profile Qualifications Employee</td>
<td>HR_TP_EMP_QUALIFICATIONS_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Talent Profile Training Employee</td>
<td>HR_TP_EMP_TRAINING_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Name</td>
<td>Function</td>
<td>Type</td>
<td>Functionality</td>
</tr>
<tr>
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<td>---------------</td>
</tr>
<tr>
<td>Talent Profile Work Preferences Employee</td>
<td>HR_TP_EMP_WORK_PREF_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Talent Profile More Link Employee</td>
<td>HR_TP_EMP_MORE_LINK</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Talent Profile Cash Compensation Employee</td>
<td>HR_TP_EMP_CASH_COMP_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Talent Profile Salary Overview Employee</td>
<td>HR_TP_EMP_SALARY_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Talent Profile Compensation Statement Employee</td>
<td>R_TP_EMP_COMP_STMT_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Printable Profile</td>
<td>HR_TP_MGR_EXPORT Custom Actn</td>
<td>SUBFUNCTION</td>
<td>Action</td>
</tr>
<tr>
<td>Compare Profile</td>
<td>HR_TP_EMPCOMPARE With Actn</td>
<td>SUBFUNCTION</td>
<td>Action</td>
</tr>
<tr>
<td>Printable Profile ( Full )</td>
<td>HR_TP_MGR_EXPORT Full Actn</td>
<td>SUBFUNCTION</td>
<td>Action</td>
</tr>
<tr>
<td>Talent Profile Benefits Employee</td>
<td>HR_TP_EMP_BENFTS_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
<tr>
<td>Talent Profile Performance Ratings Employee</td>
<td>HR_TP_EMP_PERFRATING_SS</td>
<td>SUBFUNCTION</td>
<td>Region</td>
</tr>
</tbody>
</table>

Configuring the More Links in the Talent Profile Regions

Configuring the More Links in the Talent Profile Regions

The Talent Profile page regions provide a More link that managers can use to navigate to the relevant self-service pages of workers. For example, when a manager clicks the More in the Qualifications region, the application displays the worker's Qualifications page. Similarly, when workers view their own Talent Profile page, they can navigate to
the self-service pages using the More link.

Talent Profile delivers predefined More links for manager and employee views using the following sub-functions:

- **Manager View**
  
  Function Name: Talent Profile More Link Manager (HR_TP_MGR_MORE_LINK).
  
  This sub-function is included in the Talent Profile Manager Access Menu (HR_TP_MGR_MENU)

- **Employee View**
  
  Function Name: Talent Profile More Link Employee (HR_TP_EMP_MORE_LINK).
  
  This sub-function is included in the Talent Profile Employee Access Menu (HR_TP_EMP_MENU).

You can configure the More links to display different application pages instead of the default configured pages.

Each region has a predefined unique code defined for More links. This code is different from the region codes. The region codes are used for security of the regions. The More link code is used to specify the destination page when the More link is clicked.

**Important:** If you do not want users to navigate to any application page from the More link, then you must leave the parameter value blank.

To map the More link code to the destination function, navigate to the Form Functions window. Query the Talent Profile form function that you have set up. Click the Form Tab region and configure the Parameter as follows:

```
MoreLinkMapMgr=<user defined sub-function name>&MoreLinkMapEmp=<user defined sub-function name>, for example: MoreLinkMapMgr=HR_TP_MGR_MORE_LINK&MoreLinkMapEmp=HR_TP_EMP_MORE_LINK
```

The two parameters: MoreLinkMapMgr and MoreLinkMapEmp derive the destination for the More links. The value for both these parameters is a user defined sub-function. These sub-functions contain the mapping of region More link code to the destination function.

The following sections provide information about the predefined parameters supplied with the HR_TP_EMP_MORE_LINK and HR_TP_MGR_MORE_LINK sub-functions.

### Talent Profile More Link Manager (HR_TP_MGR_MORE_LINK)

**Predefined Form Parameters**

```
```
More Links on the Talent Profile Manager View

<table>
<thead>
<tr>
<th>Region Display Name</th>
<th>Region Code (Manager)</th>
<th>Parameter in the More Link Code</th>
<th>Default Parameter Value</th>
<th>Page that the More Link Displays</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other Information</td>
<td>HR_TP_MGR_ADDITIONALINFO_SS</td>
<td>pTPMADDITIONALINFO</td>
<td>Blank</td>
<td>Add Attachment page.</td>
</tr>
<tr>
<td>Appraisal</td>
<td>HR_TP_MGR_APPR_SS</td>
<td>pTPMAPPRaisal</td>
<td>HR_VIEW_APPRAISALS_PAGE_SS</td>
<td>View Appraisals page</td>
</tr>
<tr>
<td>Other Professional Qualifications</td>
<td>HR_TP_MGR_AWARDS_SS</td>
<td>pTPMAWARDS</td>
<td>HR_AWARD_SS</td>
<td>Other Professional Qualifications</td>
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<tr>
<td>Benefits</td>
<td>HR_TP_MGR_BENFTS_SS</td>
<td>pTPMBENFTS</td>
<td>BEN_SS_MGR_ENROLLMENT</td>
<td>Self-Service Benefits Enrollment</td>
</tr>
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<td>Career Path</td>
<td>HR_TP_MGR_CARER_PTH_SS</td>
<td>pTPM_CARERPATH</td>
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<td>More link is not available in this region</td>
</tr>
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<td>pTPM_CASHCOMP</td>
<td>Blank</td>
<td>More link is not available in this region</td>
</tr>
<tr>
<td>Region Display Name</td>
<td>Region Code (Manager)</td>
<td>Parameter in the More Link Code</td>
<td>Default Parameter Value</td>
<td>Page that the More Link Displays</td>
</tr>
<tr>
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<td>-------------------------</td>
<td>----------------------------------</td>
</tr>
<tr>
<td>Learning Certifications</td>
<td>HR_TP_MGR_CERTIFI_SS</td>
<td>pTPMCERT</td>
<td>OTA_LEARNER_HOME_SS</td>
<td>Learner Home</td>
</tr>
<tr>
<td>Competencies</td>
<td>HR_TP_MGR_COMPETENCY_SS</td>
<td>pTPMCOMPETNCY</td>
<td>HR_COMPETENCE_PROFILE_SS</td>
<td>Competency Profile</td>
</tr>
<tr>
<td>Compensation Statement</td>
<td>HR_TP_MGR_COMP_STAT_SS</td>
<td>pTPMCOMPSTMT</td>
<td>Blank</td>
<td>More link is not available in this region</td>
</tr>
<tr>
<td>Job History</td>
<td>HR_TP_MGRJOB_HIST_SS</td>
<td>pTPMJOBHIST</td>
<td>Blank</td>
<td>More link is not available in this region</td>
</tr>
<tr>
<td>Performance Objectives</td>
<td>HR_TP_MGR_PERF_OBJ_SS</td>
<td>pTPMPERFOBJ</td>
<td>HR_MGR_TALMGMT_SS</td>
<td>Performance Management page of the worker.</td>
</tr>
<tr>
<td>Previous Employment</td>
<td>HR_TP_MGR_PREV_EMP_SS</td>
<td>pTPMPREVEMP</td>
<td>Blank</td>
<td>More link is not available in this region</td>
</tr>
<tr>
<td>Qualifications</td>
<td>HR_TP_MGR_QUALIFI_SS</td>
<td>pTPMQUALIFI</td>
<td>HR_QUALIFICATION_SS</td>
<td>Education and Qualifications</td>
</tr>
<tr>
<td>Training</td>
<td>HR_TP_MGR_TRAINING_SS</td>
<td>pTPMTRAINING</td>
<td>OTA_LEARNER_HOME_SS</td>
<td>Learner Home</td>
</tr>
<tr>
<td>Work Preferences</td>
<td>HR_TP_MGR_WORK_PREF_SS</td>
<td>pTPMWORKPREF</td>
<td>HR_WORK_PREFERENCES_SS</td>
<td>Work Preferences</td>
</tr>
</tbody>
</table>
### Talent Profile More Link Employee (HR_TP_EMP_MORE_LINK)

#### Predefined Form Parameters

<table>
<thead>
<tr>
<th>Parameter in the More Link Code</th>
<th>Default Parameter Value</th>
<th>Page that the More Link Displays</th>
</tr>
</thead>
<tbody>
<tr>
<td>&amp;pTPMPERFRATE</td>
<td>HR_MGR_VIEWS_HIST_SS</td>
<td>My Employee Information</td>
</tr>
<tr>
<td>&amp;pTPMADDINFO</td>
<td></td>
<td></td>
</tr>
<tr>
<td>&amp;pTPMBENFTS=BEN_SS_BNFT_ENRT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>&amp;pTPMCARERPATH</td>
<td></td>
<td></td>
</tr>
<tr>
<td>&amp;pTPMCOMPETNCY=HR_COMPETENCE_PROFILE_SS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>&amp;pTPMPERFMATRIX</td>
<td></td>
<td></td>
</tr>
<tr>
<td>&amp;pTPMJOBHIST</td>
<td></td>
<td></td>
</tr>
<tr>
<td>&amp;pTPMSALARY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>&amp;pTPMCOMPSTMNT=BEN_TCS_EMPSS&gt;Welcome_PG</td>
<td></td>
<td></td>
</tr>
<tr>
<td>&amp;pTPMCASHCOMP=Ben_TCS_EMPSS_WELCOME_PG</td>
<td></td>
<td></td>
</tr>
<tr>
<td>&amp;pTPMRCERT=OTA_LEARNER_HOME_SS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>&amp;pTPMPERFOBJ=HR_EMP_TALMGMNT_SS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>&amp;pTPMAPPRAISAL=HR_EMP_MY_APPR_SS</td>
<td></td>
<td>My Appraisals</td>
</tr>
<tr>
<td>&amp;pTPMPREVEMP</td>
<td></td>
<td></td>
</tr>
<tr>
<td>&amp;pTPMAWARDS=HR_AWARD_SS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>&amp;pTPMCASHCOMP=Ben_TCS_EMPSS_WELCOME_PG &amp;pTPMRCERT=OTA_LEARNER_HOME_SS &amp;pTPMAPPRAISAL=HR_EMP_MY_APPR_SS &amp;pTPMPREVEMP=HR_EMP_VIEWS_SS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>&amp;pTPMCASHCOMP=Ben_TCS_EMPSS_WELCOME_PG &amp;pTPMRCERT=OTA_LEARNER_HOME_SS &amp;pTPMAPPRAISAL=HR_EMP_MY_APPR_SS &amp;pTPMPREVEMP=HR_EMP_VIEWS_SS</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### More Links on the Talent Profile Worker View

#### Region Display Name

<table>
<thead>
<tr>
<th>Region (Employee)</th>
<th>Parameter in the More Link Code</th>
<th>Default Parameter Value</th>
<th>Page that the More Link Displays</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other Information</td>
<td>&amp;pTPMADDINFO</td>
<td></td>
<td>Add Attachments</td>
</tr>
<tr>
<td>Appraisal</td>
<td>&amp;pTPMAPPRAISAL</td>
<td>HR_EMP_MY_APPR_SS</td>
<td>My Appraisals</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Region Display Name</td>
<td>Region Code (Employee)</td>
<td>Parameter in the More Link Code</td>
<td>Default Parameter Value</td>
</tr>
<tr>
<td>---------------------</td>
<td>------------------------</td>
<td>---------------------------------</td>
<td>-------------------------</td>
</tr>
<tr>
<td>Other Professional Qualifications</td>
<td>HR_TP_EMP_AWARDS_SS</td>
<td>pTPMAWARDS</td>
<td>HR_AWARD_SS</td>
</tr>
<tr>
<td>Benefits</td>
<td>HR_TP_EMP_BENFTS_SS</td>
<td>pTPMBENFTS</td>
<td>BEN_SS_BNFT_EN RT</td>
</tr>
<tr>
<td>Career Path</td>
<td>HR_TP_EMP_CARER_PTH_SS</td>
<td>pTPMCARERPATH</td>
<td>Blank</td>
</tr>
<tr>
<td>Monetary Compensation</td>
<td>HR_TP_EMP_CASH_COMP_SS</td>
<td>pTPMCASHCOMP</td>
<td>BEN_TCS_EMPSS_WELCOME_PG</td>
</tr>
<tr>
<td>Certification</td>
<td>HR_TP_EMP_CERTIFI_SS</td>
<td>pTPMCERT</td>
<td>OTA_LEARNER_HOME_SS</td>
</tr>
<tr>
<td>Competencies</td>
<td>HR_TP_EMP_COMPETENCY_SS</td>
<td>pTPMCOMPETNCY</td>
<td>HR_COMPETENCE_PROFILE_SS</td>
</tr>
<tr>
<td>Compensation Statement</td>
<td>HR_TP_EMP_CCOMP_STAT_SS</td>
<td>pTPMCOMPSTMN</td>
<td>BEN_TCS_EMPSS_WELCOME_PG</td>
</tr>
<tr>
<td>Job History</td>
<td>HR_TP_EMP_JOB_HIST_SS</td>
<td>pTPMJOBHIST</td>
<td>Blank</td>
</tr>
<tr>
<td>Region Display Name</td>
<td>Region Code (Employee)</td>
<td>Parameter in the More Link Code</td>
<td>Default Parameter Value</td>
</tr>
<tr>
<td>---------------------</td>
<td>------------------------</td>
<td>--------------------------------</td>
<td>-------------------------</td>
</tr>
<tr>
<td>Performance Objectives</td>
<td>HR_TP_EMP.PERF_OBJ_SS</td>
<td>pTPMPERFOBJ</td>
<td>HR_EMP_TALMGMT_SS</td>
</tr>
<tr>
<td>Previous Employment</td>
<td>HR_TP_EMP_PREV_EMP_SS</td>
<td>pTPMPREVEMP</td>
<td>Blank</td>
</tr>
<tr>
<td>Qualifications</td>
<td>HR_TP_EMP_QUALIFI_SS</td>
<td>pTPMQUALIFI</td>
<td>HR_QUALIFICATION_SS</td>
</tr>
<tr>
<td>Salary</td>
<td>HR_TP_EMP_SALARY_SS</td>
<td>pTPMSALARY</td>
<td>Blank</td>
</tr>
<tr>
<td>Succession Plan</td>
<td>HR_TP_EMP_SUCCESSION_SS</td>
<td>pTPMSUCCESSION</td>
<td>Blank</td>
</tr>
<tr>
<td>Training</td>
<td>HR_TP_EMP_TRAINING_SS</td>
<td>pTPMTRAINING</td>
<td>OTA_LEARNER_HOME_SS</td>
</tr>
<tr>
<td>Work Preferences</td>
<td>HR_TP_EMP_WORK_PREF_SS</td>
<td>pTPMWORKPREF</td>
<td>HR_WORK_PREFERENCES_SS</td>
</tr>
<tr>
<td>Performance Matrix (Header is not shown)</td>
<td>HR_TP_EMP_PERF_METRICS_SS</td>
<td>pTPMPERFMETRICS</td>
<td>Blank</td>
</tr>
</tbody>
</table>
Configuring Talent Profile Functions, Suitability Analyzer, and Compare Profile Templates

The Talent Profile page has an Action drop down that lists the actions that a logged in user (worker or manager) can perform when viewing the talent profile. This topic explains how to configure the talent profile actions that managers can perform.

Configuring the Talent Profile Actions

Talent Profile actions are specific to the Talent Profile functionality. The following is a list of talent profile actions:

- Performance Matrix (Potential)
- Performance Matrix (Retention)
- Compare Profile
- Printable Profile
- Printable Profile (Full)

Each talent profile action is defined as a sub-function. The sub function name is predefined for the delivered functionality. If you create a custom responsibility, then you must include the sub-function in the responsibility so that the user can access the talent profile actions. Administrators can restrict the access of some of the actions, depending upon the requirement. Some actions have two functions created for them so that the access of the action can be restricted at both the employee and manager view.

The following tables provide details about all the talent action sub-functions.
<table>
<thead>
<tr>
<th>Name</th>
<th>Function</th>
<th>Type</th>
<th>Functionality</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compare Profile</td>
<td>HR_TP_MGR_COMPARE_PROFILE</td>
<td>SUBFUNCTION</td>
<td>Action</td>
</tr>
<tr>
<td></td>
<td>HR_TP_LKUP_DATA_INIT</td>
<td>REST</td>
<td>Rest Service</td>
</tr>
<tr>
<td>Talent Profile Lookup</td>
<td>HR_TP_MGR_EXPORT_PROFILE</td>
<td>SUBFUNCTION</td>
<td>Action</td>
</tr>
<tr>
<td>Talent Profile lookup</td>
<td>HR_TP_MGR_COMPARE_PROFILE</td>
<td>SUBFUNCTION</td>
<td>Action</td>
</tr>
<tr>
<td>Talent Profile Perf Matrix</td>
<td>HR_TP_MGR_PERF_MATRIX</td>
<td>JSP</td>
<td>Action</td>
</tr>
<tr>
<td>Performace Matrix (Potential)</td>
<td>HR_TP_MGR_PERF_MATRIX</td>
<td>SUBFUNCTION</td>
<td>Action</td>
</tr>
<tr>
<td>Printable Profile (Full)</td>
<td>HR_TP_MGR_EXPORT_PROFILE</td>
<td>SUBFUNCTION</td>
<td>Action</td>
</tr>
<tr>
<td>Talent Profile Performace Matrix Flash</td>
<td>HR_TP_MGR_PERF_MATRIX</td>
<td>WIDGET</td>
<td>Action</td>
</tr>
<tr>
<td>Name</td>
<td>Function</td>
<td>Type</td>
<td>Functionality</td>
</tr>
<tr>
<td>-----------------------</td>
<td>---------------------------------------</td>
<td>--------</td>
<td>-----------------</td>
</tr>
<tr>
<td>Talent Profile</td>
<td>HR_TP_PERFMTRX_SUCCEPLAN_GRD_AM</td>
<td>REST</td>
<td>Rest Function</td>
</tr>
<tr>
<td>Performance Matrix</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Succession Plan GRD</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Talent Profile Perf</td>
<td>HR_TP_PERFMTRX_GRD_AM</td>
<td>REST</td>
<td>Rest Service</td>
</tr>
<tr>
<td>Matrix</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Directs AM</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Performance Matrix</td>
<td>HR_TP_MGR_RET_PERF_MTRX_ACTN</td>
<td>SUBFUNCTION</td>
<td>Action</td>
</tr>
<tr>
<td>(Retention)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Talent Actions available in the Talent Profile Employee Access Menu - HR_TP_EMP_MENU**

<table>
<thead>
<tr>
<th>Name</th>
<th>Function</th>
<th>Type</th>
<th>Functionality</th>
</tr>
</thead>
<tbody>
<tr>
<td>Printable Profile</td>
<td>HR_TP_MGR_EXPO_RT_CUSTOM_ACTN</td>
<td>SUBFUNCTION</td>
<td>Action</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Compare Profile</td>
<td>HR_TP_EMP_COMPARE_WITH_ACTN</td>
<td>SUBFUNCTION</td>
<td>Action</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Printable Profile (Full)</td>
<td>HR_TP_MGR_EXPO_RT_FULL_ACTN</td>
<td>SUBFUNCTION</td>
<td>Action</td>
</tr>
</tbody>
</table>

**Enable Managers to Use the Suitability Analyzer**

Managers can use the Suitability Analyzer tool to compare competencies of workers. The tool displays competencies in a graphical format. Managers can access this tool from the Suitability Matching function page.

To enable managers to use the Suitability Analyzer, you can either add the supplied Suitability Matching Spider Menu - (HR_SUIT_MATCH_SPIDER_MENU) or a copy of the supplied menu to the responsibility that managers use to render the Suitability Analyzer.
### Suitability Matching Spider Menu - (HR_SUIT_MATCH_SPIDER_MENU)

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Function</th>
<th>Functionality</th>
</tr>
</thead>
<tbody>
<tr>
<td>Function for Competency Spider Page</td>
<td>HR_SUIT_MATCH_S PIDER_SEC_FUNC</td>
<td>JSP</td>
<td>Page</td>
</tr>
<tr>
<td>Suitability Matching Spider flash</td>
<td>HR_SUIT_MATCH_S PIDER_SWF</td>
<td>WIDGET</td>
<td>Rest Function</td>
</tr>
<tr>
<td>Suitability Matching getRowData</td>
<td>HR_SUIT_MATCH_F LEX_GRD</td>
<td>REST</td>
<td>Rest Service</td>
</tr>
<tr>
<td>Suitability Matching saveRowData</td>
<td>HR_SUIT_MATCH_F LEX_SRD</td>
<td>REST</td>
<td>Rest Service</td>
</tr>
<tr>
<td>Talent Profile Lookup Data AM</td>
<td>HR_TP_LKUP_DAT A_AM</td>
<td>REST</td>
<td>Rest Service</td>
</tr>
<tr>
<td>Talent Profile Lookup init AM</td>
<td>HR_TP_LKUP_INIT_ AM</td>
<td>REST</td>
<td>Rest Service</td>
</tr>
</tbody>
</table>

### Configuring the Predefined Report Templates Menu

The Menu For All Seeded Report Template Functions (HR_TP_TEMPLATES_MENU) determines the functions that are available to users to print and compare talent profiles. The following table lists the contents of the predefined menu:

<table>
<thead>
<tr>
<th>Name</th>
<th>Function</th>
<th>Type</th>
<th>Functionality</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seeded 2 People Comparison Template Function</td>
<td>PERCM2TP</td>
<td>SUBFUNCTION</td>
<td>Reporting Access</td>
</tr>
<tr>
<td>Seeded 3 People Comparison Template Function</td>
<td>PERCM3TP</td>
<td>SUBFUNCTION</td>
<td>Reporting Access</td>
</tr>
<tr>
<td>Seeded Single Person Profile Template Function</td>
<td>PEREMPTP</td>
<td>SUBFUNCTION</td>
<td>Reporting Access</td>
</tr>
</tbody>
</table>
You can exclude the functions that you do want managers to use from the copied menus.
Self-Service Actions on the Talent Profile Page

Setting up Self-Service Actions on the Talent Profile Page

The Talent Profile page has an Action drop down that lists the actions that a logged in user (worker or manager) can perform when viewing the talent profile.

The Action list includes:
- Self-Service or SSHR Actions
- Talent Profile Actions

Add Self-Service or SSHR Actions

SSHR defines the list of self-service actions that a manager or worker can perform.

To enable managers or workers perform self-service actions, you must add the following menus to the Succession Planning (HR_SUCCESSION_MGMT) menu:
- Personal Actions (or your configured copy of this menu). This menu displays a list of available functions for the worker.
- Manager Actions Menu (or your configured copy of this menu). This menu defines the self-service actions that managers can perform.

For information on SSHR functions and menus, see: Predefined Self-Service Responsibilities and User Menus, Oracle SSHR Deploy Self-Service Capability Guide
Configuration Steps for Oracle Succession Planning

Completing the Configuration Steps for Oracle Succession Planning

After you install Oracle Succession Planning, you carry out the following configuration steps:

Configure the Print Profile and Compare Profile Default XML Templates, if Required

Managers can print talent profiles of their workers. They can also generate a comparison report of the talent profiles of their workers.

Oracle Succession Planning delivers the Single Person Profile Template (PEREMPTP) to print the talent profile of a worker.

By default, managers can compare either two or three workers using the following predefined templates:

- Name: Talent Profile Comparison Report of 2 Employees
  Default File: PERCM2TP.rtf
  Code: PERCM2TP

- Name: Talent Profile Comparison Report of 3 Employees
  Default File: PERCM3TP.rtf
  Code: PERCM3TP

Oracle Succession Planning supplies the PERTPDDF data definition source file that contains all the data tags that compare profile templates use. To enable your managers to compare the profiles of more than two or three workers, you must create templates using the predefined data definition source. You must also create a new function with the same name as the template name and grant the function. You can create custom templates using Oracle XML Publisher. This enables managers to select the custom template when they compare profiles.

Define the Extra Information Types (EITs) Required for Succession Plans

You must set up the Lookups and EITs required for succession plans.

See: Setting up the Succession Plans Functionality, page 2-38

Define the Lookups to Assess Performance, Potential, and Retention

Define the following lookup types to assess performance, potential, and retention:
• PERFORMANCE_RATING: Indicates the performance rating.
• READINESS_LEVEL: Indicates the succession potential.
• PER_RETENTION_POTENTIAL: Indicates the retention potential

If these lookups have already been defined, then you must verify that the information meets your business requirements.

Configure the Rating Scale Values for Performance Matrices (9-Box)

Managers can view the performance profiles of workers in their hierarchy using the following performance matrices:
• Performance Matrix (Potential): Provides information on performance and leadership potential of workers on a scale of 1 to 3.
• Performance Matrix (Retention): Provides information on workers performance and retention prospects on a scale of 1 to 3.

To display the performance matrix rating values, you must complete the following steps:

Define the Lookup Types for Performance Matrix (Potential) and Performance Matrix (Retention)

You must add lookup values to the following lookup types that the performance matrices use:

• PER_9_BOX_LEVEL

Indicates the performance level such as low, medium, and high. When adding the lookup values, you must specify the code, so that the application can display the relevant rating values for workers on the performance 9-box. If you do not enter the code, then the 9-box does not display the rating value. Define a maximum of three codes on a scale of 1 to 3.

The following example displays lookup values for PER_9_BOX_LEVEL:

<table>
<thead>
<tr>
<th>Code</th>
<th>Meaning</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Needs</td>
<td>Performance is significantly below the required level.</td>
</tr>
<tr>
<td>2</td>
<td>Meets</td>
<td>Performance is good and in-line with job requirements.</td>
</tr>
</tbody>
</table>
You use the PER_9_BOX_LEVEL lookup type to extend the PERFORMANCE_RATING lookup type.

- **PER_POTENTIAL_9_BOX_LEVEL**

  Indicates the potential level of workers such as limited, growth, and high. You must specify codes for the lookup and define a maximum of three codes on a scale of 1 to 3.

  The following example displays lookup values for PER_POTENTIAL_9_BOX_LEVEL:

<table>
<thead>
<tr>
<th>Code</th>
<th>Meaning</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Limited</td>
<td>Worker shows little or no potential to move to the next work level.</td>
</tr>
<tr>
<td>2</td>
<td>Meets</td>
<td>Worker shows potential to advance to the next or higher work level.</td>
</tr>
<tr>
<td>3</td>
<td>Exceeds</td>
<td>Worker has requisite skills and expertise and exhibits leadership qualities.</td>
</tr>
</tbody>
</table>

You use the PER_POTENTIAL_9_BOX_LEVEL lookup type to extend the READINESS_LEVEL lookup type.

- **PER_RETENTION_9_BOX_LEVEL**

  Indicates the retention prospects of workers such as low, medium, and high. You must specify codes for the lookups and define a maximum of three codes on a scale of 1 to 3.

  The following example displays lookup values for PER_RETENTION_9_BOX_LEVEL:
Implementing Oracle Succession Planning

<table>
<thead>
<tr>
<th>Code</th>
<th>Meaning</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Low</td>
<td>Risk of losing the worker is high.</td>
</tr>
<tr>
<td>2</td>
<td>Medium</td>
<td>Risk of losing the worker is moderate.</td>
</tr>
<tr>
<td>3</td>
<td>High</td>
<td>Risk of losing the worker is minimal.</td>
</tr>
</tbody>
</table>

You use the PER_RETENTION_9_BOX_LEVEL lookup type to extend the PER_RETENTION_POTENTIAL lookup type.

After you define the lookup types for performance matrices, you must create user types and statuses for the following lookups:

- PERFORMANCE_RATING
- READINESS_LEVEL
- PER_RETENTION_POTENTIAL

Create User Statuses for PERFORMANCE_RATING, READINESS_LEVEL, and PER_RETENTION_POTENTIAL Lookup Types

The Performance Matrix (9-Box) does not directly use the lookup codes that you define for the PERFORMANCE_RATING, READINESS_LEVEL, and PER_RETENTION_POTENTIAL lookup types. Performance Matrix (Potential) and Performance Matrix (Retention) display ratings using three levels only. Therefore, you must identify the 9-box level for the PERFORMANCE_RATING, READINESS_LEVEL, and PER_RETENTION_POTENTIAL lookup codes.

You use the User Types and Statuses window to create user types and statuses for the lookups:

1. Navigate to the User Types and Statuses window.
2. Select a lookup type, for example, PERFORMANCE_RATING.
3. In the System Type field, select the lookup value that you want to extend. For example, select the Above Average system type.
4. Enter a description of the new user type or status. For example, enter Exceeds as a description.
5. Enter a code for the new user type or status.

6. Click the Further Info field. The Share Type Information window appears.

7. Select the 9 Box level that the user status applies to.

8. Save your work.

Configuring the Quick Search and Hierarchy Regions

By default, the Talent Profile page displays two regions: Quick Search and Hierarchy that managers can use to navigate between talent profiles of workers. These regions are configurable and can be removed from the Talent Profile page.

The following sections explain the regions and how you can configure them.

Configuring the Quick Search Region

The Quick Search region displays two search options:

- Search Profile
  Displays profiles that logged in user can access. Users can select one of the profiles and click the Show Profile button to view the talent profile details.

- Recently Visited Profile
  This option displays recently viewed profiles. Currently, the visited profiles information is stored only during a transaction and this information is lost once the transaction ends.

To display the region, you must grant the HR_TP_VIEW_GBL_SEARCH_SS function to the user.

Details of the Function

- User Function Name: Talent Profile Global Search Enabled
- Type: SUBFUNCTION

Configuring the Hierarchy Bean

The hierarchy bean appears at the top of the profile below the Quick Search region. The hierarchy bean lists the workers in the supervisor hierarchy of the logged in user.

To display the hierarchy bean, you must grant the HR_TP_VIEW_PER_HIERARCHY_SS function to the user.

Details of the Function
Configuring the Region Icons

This topic explains how you can configure the region icons in the Talent Profile regions.

Configuring the Region Icon in the Talent Profile Regions

All the Talent Profile regions display icons that indicate the regions content in a graphical representation. You can add the required icons using the Personalization function. Each region is shared region and a separate XML document. Place the icons that are going to be used in the Talent Profile Regions in the OA_Media folder.

Locate the region icon item and navigate to the PhotoCellRN page element. The Photo item of PhotoCellRN is an image type item. This item has an Image URI property, which is set to a blank image, by default. To display another image, personalize this property to point to the required image to be used on the region by starting with /OA_Media/ followed by the icon file name of the icon being used for this region.

Personalizing Talent Profile

This topic provides information on personalizing Talent Profile regions and region columns.


Talent Profile Regions

Use the information in the following table to create or rearrange regions on the Talent Profile page (/oracle/apps/per/talentprofile/webui/TMProfileRN):

Note: TMProfileRN represents the entire page. Therefore, you cannot add this region, for example, in the Appraisals region of the Talent Profile page.

<table>
<thead>
<tr>
<th>Region Display Name</th>
<th>Region Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other Information</td>
<td>/oracle/apps/per/talentprofile/additionalinfo/webui/Additio nalInformationRN</td>
</tr>
<tr>
<td>Region Display Name</td>
<td>Region Path</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Appraisal</td>
<td>/oracle/apps/per/talentprofile/performance/webui/AppraisalChartRN</td>
</tr>
<tr>
<td>Other Professional Qualifications</td>
<td>/oracle/apps/per/talentprofile/qualifications/webui/AwardsOverviewRN</td>
</tr>
<tr>
<td>Benefits</td>
<td>/oracle/apps/per/talentprofile/benefit/webui/BenefitsOverviewRN</td>
</tr>
<tr>
<td>Career Path</td>
<td>/oracle/apps/per/talentprofile/careerpath/webui/CareerPathRN</td>
</tr>
<tr>
<td>Cash Compensation</td>
<td>/oracle/apps/per/talentprofile/empsalary/webui/SalaryCashCompGraphRN</td>
</tr>
<tr>
<td>Certification</td>
<td>/oracle/apps/per/talentprofile/learning/webui/CertificationsSummaryRN</td>
</tr>
<tr>
<td>Competencies</td>
<td>/oracle/apps/per/talentprofile/competency/webui/CompetencyOverviewRN</td>
</tr>
<tr>
<td>Compensation Statement</td>
<td>/oracle/apps/per/talentprofile/empsalary/webui/SalaryComponentsRN</td>
</tr>
<tr>
<td>Job History</td>
<td>/oracle/apps/per/talentprofile/employment/webui/CareerHistoryRN</td>
</tr>
<tr>
<td>Performance Objectives</td>
<td>/oracle/apps/per/talentprofile/perfmanagement/webui/PerformanceManagementRN</td>
</tr>
<tr>
<td>Previous Employment</td>
<td>/oracle/apps/per/talentprofile/prevemp/webui/PrevEmploymentOverviewRN</td>
</tr>
<tr>
<td>Qualifications</td>
<td>/oracle/apps/per/talentprofile/qualifications/webui/QualificationsOverviewRN</td>
</tr>
<tr>
<td>Salary</td>
<td>/oracle/apps/per/talentprofile/empsalary/webui/SalaryOverviewRN</td>
</tr>
<tr>
<td>Succession Plan</td>
<td>/oracle/apps/per/talentprofile/successionplan/webui/SuccessionPlanOverviewRN</td>
</tr>
</tbody>
</table>
### Talent Profile Region Columns

You can personalize the supplied Talent Profile region columns to suit your business requirements. For example, by default, the Competencies region displays the following columns:

- Competency Name
- Current Proficiency Level
- Status
- Start Date
- End Date

If required, you can add columns to display different information. Using personalization, you can change labels, hints, tips, and messages.

Setting up Information for Succession Plans

Extra Information Types for Succession Plans

This topic describes the Extra Information Types supplied to provide additional information for succession plans.

Job Career Management Information

Records job tracking information required for succession plans. You can identify whether the job is a key role in your enterprise and the turnover rate of the job.

Position Career Management Information

Records position tracking information required for succession plans. You can identify whether a position is a key role in your enterprise and the turnover rate of the position.

Employee Succession Planning Information

Records employee tracking information required for succession plans. You can:

- Identify the succession potential of an employee.
- Determine whether an employee is a key person in the enterprise.
- Determine the retention prospects of an employee.

Setting up the Succession Plans Functionality

To enable managers use the Succession Plans functionality, you must complete the following setup tasks.

To set up information for the Succession Plans functionality:

1. Link the following succession plan information types to the responsibilities that users access:

   - Employee Succession Planning Information
   - Job Career Management Information
   - Position Career Management Information

   Use the Information Type Security window to link EITs to a responsibility.
See: Setting Up Extra Information Types For a Responsibility, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

2. Define the lookup types required for succession planning:

The following tables list the EITs, EIT segments, and the lookup types that populate the EIT segments:

### Employee Succession Planning Information

<table>
<thead>
<tr>
<th>Segment</th>
<th>Lookup Type</th>
<th>Any Other Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key Person</td>
<td>Yes No</td>
<td>-</td>
</tr>
<tr>
<td>Succession Potential</td>
<td>READINESS_LEVEL</td>
<td>-</td>
</tr>
<tr>
<td>Retention Potential</td>
<td>PER_RETENTION_POTENTIAL</td>
<td>-</td>
</tr>
<tr>
<td>Start Date</td>
<td>Not applicable</td>
<td>The application automatically populates the segment with the latest appraisal start date.</td>
</tr>
<tr>
<td>End Date</td>
<td>Not applicable</td>
<td>The application automatically populates the segment with the latest appraisal end date.</td>
</tr>
<tr>
<td>Appraisal Completion Date</td>
<td>Not applicable</td>
<td>The application automatically populates the segment with the latest appraisal completion date.</td>
</tr>
</tbody>
</table>

### Job Career Management Information

<table>
<thead>
<tr>
<th>Segment</th>
<th>Lookup Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key Role</td>
<td>Yes No</td>
</tr>
<tr>
<td>Turnover Rate</td>
<td>PER_SUCC_PLAN_RISK_LEVEL</td>
</tr>
</tbody>
</table>
Position Career Management Information

<table>
<thead>
<tr>
<th>Segment</th>
<th>Lookup Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key Role</td>
<td>Yes No</td>
</tr>
<tr>
<td>Turnover Rate</td>
<td>PER_SUCC_PLAN_RISK_LEVEL</td>
</tr>
</tbody>
</table>

See: Adding Lookup Types and Values, Oracle HRMS Configuring, Reporting, and System Administration Guide

**Note:** This note applies to customers who are using the Succession Planning functionality available in Oracle SSHR, Release 12.1. If you have licensed Oracle Succession Planning, then you must manually add the lookup codes available in:

- PER_SUCC_PLAN_POTENTIAL lookup type to the READINESS_LEVEL lookup type.
- PER_SUCC_PLAN_RISK_LEVEL to the PER_RETENTION_POTENTIAL lookup type.

The Succession Planning functionality in R12.1 Oracle SSHR uses the PER_SUCC_PLAN_POTENTIAL and PER_SUCC_PLAN_RISK_LEVEL lookup types.

3. Complete the extra information required for succession plans for worker, jobs, and positions using the following windows and pages:
   - For a worker, use the Employee Succession Management Information page in Oracle Succession Planning.
   - For a position, use the Extra Position Information window in Oracle HRMS.
   - For a job, use the Extra Job Information window in Oracle HRMS.

See: Extra Information Types for Succession Plans, page 2-38

4. Add segments to the Add'l Succession Planning Det descriptive flexfield to capture additional information required for succession plans in your enterprise.

5. On the Succession Plans page, managers can search for succession plans created for a worker or role using the Plan Status field. They can select a plan status when creating or updating succession plans. You define plan statuses using the SUCCESSION_PLAN_STATUS lookup type. The predefined values are: Draft,
Active, Inactive, and Completed. You can change the description of the lookup values or add your own lookup values to this lookup type.

See: Adding Lookup Types and Values, Oracle HRMS Configuring, Reporting, and System Administration Guide

6. If required, you can set up approvals for the Employee Succession Information (PER_SUCCESSION_PLANDETAILS) function. When managers add succession information, the application routes the transaction for approvals.

See: Approvals in SSIR, Oracle HRMS Deploy Self-Service Capability Guide

Display Succession Plans for Ex-Employees:
In addition to displaying succession plans of current workers, you can display succession plans of ex-employees.

To enable ex-employee support in the search, you change the value of the &pEnableTerms parameter value to Y for the following function:

Succession Management Search (PER_SUCCESSION_MGMT_SEARCH)

Integration of Oracle Succession Planning and Oracle Performance Management:
This section applies to customers who are using Oracle Performance Management and have licensed Oracle Succession Planning.

On the Give Final Ratings: Main Appraiser page, Advancement Potential region, a manager can select the Readiness Level and Retention level of a worker. If an enterprise has Oracle Succession Planning license, then the Readiness Level field on the Create Succession Plan page derives the value set for readiness level on the Give Final Ratings: Main Appraiser page.
Configuring Suitability Matching

This topic provides details about the Suitability Matching module.

**Suitability Matching Options**

<table>
<thead>
<tr>
<th>Category</th>
<th>Option</th>
<th>Access by Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Find a Person for a Work Opportunity</td>
<td>Find Suitable People by Role</td>
<td>Manager, HR Professional</td>
</tr>
<tr>
<td>Find a Person for a Work Opportunity</td>
<td>Find Suitable People by Competency</td>
<td>Manager, HR Professional</td>
</tr>
<tr>
<td>Find a Person for a Work Opportunity</td>
<td>Compare People by Current Role</td>
<td>Manager, HR Professional</td>
</tr>
<tr>
<td>Find a Person for a Work Opportunity</td>
<td>Compare Named Successors for a Position</td>
<td>HR Professional</td>
</tr>
<tr>
<td>Find a Person for a Work Opportunity</td>
<td>Compare Applicants for a Vacancy</td>
<td>Manager, HR Professional</td>
</tr>
<tr>
<td>Find a Work Opportunity for a Person</td>
<td>Find Work Opportunities by Role</td>
<td>Manager, Employee, HR Professional</td>
</tr>
<tr>
<td>Find a Work Opportunity for a Person</td>
<td>Find Work Opportunities by Competency</td>
<td>Manager, Employee, HR Professional</td>
</tr>
<tr>
<td>Find a Work Opportunity for a Person</td>
<td>Compare Pending Applications</td>
<td>Manager, Employee, HR Professional</td>
</tr>
<tr>
<td>Find a Work Opportunity for a Person</td>
<td>Compare Succession Options</td>
<td>HR Professional</td>
</tr>
</tbody>
</table>
Menu and Function Names

Suitability Matching is accessible through three menus and corresponding functions as described in the following table.

Menu and Function Names

<table>
<thead>
<tr>
<th>Menu and Function Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Menu Name</td>
</tr>
<tr>
<td>Manager Self-Service</td>
</tr>
<tr>
<td>(LINE_MANAGER_ACCESS_V4.0)</td>
</tr>
<tr>
<td>Employee Self-Service</td>
</tr>
<tr>
<td>(EMPLOYEE_DIRECT_ACCESS_V4.0)</td>
</tr>
<tr>
<td>Contingent Worker Self-Service</td>
</tr>
<tr>
<td>(HR_CWK_DIRECT_ACCESS)</td>
</tr>
<tr>
<td>HR Professional</td>
</tr>
<tr>
<td>(HR_PROF_SELF_SERVICE_V4.0)</td>
</tr>
</tbody>
</table>

Workflow

Suitability Matching uses no configurable workflow processes.

Tips and Instructions

You can configure all the following tips and instructions directly from the Suitability Matching pages, using the "Personalize..." links.

The following table describes the tips and instructions.
## Tips and Instructions

<table>
<thead>
<tr>
<th>Region</th>
<th>Attribute Name</th>
<th>Message Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>AddCompetenciesPG</td>
<td>SelectCompInst</td>
<td>HR_INST_ADD_COMP_TO_LIST</td>
</tr>
<tr>
<td>CompGapsPG</td>
<td>SMCompGapsInst</td>
<td>HR_INST_COMP_GAPS_SS</td>
</tr>
<tr>
<td>ComparePeopleListPG</td>
<td>PersonListInst</td>
<td>HR_INST_PERSON_LIST</td>
</tr>
<tr>
<td>CompareSuccessorsListPG</td>
<td>PersonListInst</td>
<td>HR_INST_PERSON_LIST</td>
</tr>
<tr>
<td>CurrentAssignmentsPG</td>
<td>CurrentAssnInst</td>
<td>HR_INST_ASSIGNMENT_LIST</td>
</tr>
<tr>
<td>GraphByCompetencePG</td>
<td>GraphCompInst</td>
<td>HR_INST_GRAPH_COMP</td>
</tr>
<tr>
<td>GraphByPersonPG</td>
<td>GraphPersonInst</td>
<td>HR_INST_GRAPH_PERSON</td>
</tr>
<tr>
<td>GraphByWorkOppPG</td>
<td>GraphWorkOppInst</td>
<td>HR_INST_GRAPH_WORKOPPP</td>
</tr>
<tr>
<td>PersonCompetenciesPG</td>
<td>PersonCompInst</td>
<td>HR_INST_PERSON_SELECT_COMP</td>
</tr>
<tr>
<td>PersonListPG</td>
<td>PersonListInst</td>
<td>HR_INST_PERSON_LIST</td>
</tr>
<tr>
<td>RefineSearchPG</td>
<td>RefineSearchInst</td>
<td>HR_INST_REFINE_SEARCH</td>
</tr>
<tr>
<td>SMManagerOptionsPG</td>
<td>ManagerOppInst</td>
<td>HR_INST_SUITMATCH_LM_DA_OPTIONS</td>
</tr>
<tr>
<td>SMManagerOptionsPG</td>
<td>WorkOppInst</td>
<td>HR_INST_WORK_OPP_OPTIONS</td>
</tr>
<tr>
<td>SMManagerOptionsPG</td>
<td>PersonOppInst</td>
<td>HR_INST_PERSON_OPP_OPTIONS</td>
</tr>
<tr>
<td>SMOptionsPG</td>
<td>HROptionsInst</td>
<td>HR_INST_SUITMATCH_LM_DA_OPTIONS</td>
</tr>
<tr>
<td>Region</td>
<td>Attribute Name</td>
<td>Message Name</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----------------</td>
<td>---------------------------------------------------</td>
</tr>
<tr>
<td>SMOptionsPG</td>
<td>WorkOppInst</td>
<td>HR_INST_WORK_OPP_OPTIONS</td>
</tr>
<tr>
<td>SMOptionsPG</td>
<td>PersonOppInst</td>
<td>HR_INST_PERSON_OPP_OPTIONS</td>
</tr>
<tr>
<td>SMPersonOptionsPG</td>
<td>PersonPageOppInst</td>
<td>HR_INST_SUITMATCH_EDA_OPTIONS</td>
</tr>
<tr>
<td>SMTrainingActivitiesPG</td>
<td>SMTrainActInst</td>
<td>HR_INST_TRAIN_ACT_SS</td>
</tr>
<tr>
<td>SelectCompetenciesPG</td>
<td>SelectCompInst</td>
<td>HR_INST_SELECT_COMP</td>
</tr>
<tr>
<td>SelectMultiRolePG</td>
<td>SelectRoleInst</td>
<td>HR_INST_MULTI_SELECT_ROLE</td>
</tr>
<tr>
<td>SelectRolePG</td>
<td>SelectRoleInst</td>
<td>HR_INST_SELECT_ROLE</td>
</tr>
<tr>
<td>SelectRolePG</td>
<td>CompareByRoleInst</td>
<td>HR_INST_COMPARE_PEOPLE_ROLE</td>
</tr>
<tr>
<td>SelectRolePG</td>
<td>SelectPositionInst</td>
<td>HR_INST_SELECT_POSITION</td>
</tr>
<tr>
<td>SelectRolePG</td>
<td>SelectVacancyInst</td>
<td>HR_INST_SELECT_VACANCY</td>
</tr>
<tr>
<td>SuccessionOptionsPG</td>
<td>SuccOptionsInst</td>
<td>HR_INST_SUCCESSION_OPTIONS</td>
</tr>
<tr>
<td>SuitableWorkOppListPG</td>
<td>WorkOppListInst</td>
<td>HR_INST_SUITABLE_WORKOPP_LIST</td>
</tr>
<tr>
<td>VacancyListPG</td>
<td>VacancyListInst</td>
<td>HR_INST_VACANCIES_LIST</td>
</tr>
<tr>
<td>WorkOppListPG</td>
<td>WorkOppListInst</td>
<td>HR_INST_WORKOPP_LIST</td>
</tr>
<tr>
<td>MultiJobLovPG</td>
<td>SearchInst</td>
<td>FND_LOV_GO</td>
</tr>
<tr>
<td>MultiOrganizationLovPG</td>
<td>SearchInst</td>
<td>FND_LOV_GO</td>
</tr>
</tbody>
</table>
### Configurable Flexfields

Suitability Matching uses no configurable flexfields.

### Profile Options

The three profile options control the matching options available to each category of user: employee, manager, and HR professional. Each of the values is a menu name. If you want to change the options available to a given user (if you want to hide the succession options from everyone, for example), you can clone a menu and replace the profile value with the name of your new menu. Note that these menus differ in kind and structure from the user menus listed above.

The following table describes the profile options.

<table>
<thead>
<tr>
<th>Profile Options</th>
<th>Configurable Level</th>
<th>Values (default value in boldface)</th>
<th>Value Required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR: SM Manager</td>
<td>Responsibility</td>
<td>HR_SM_PERSONAL_FUNCTIONS (at Responsibility:HR Professional) HR_SM_PERSONAL_FUNCTIONS (at Responsibility:Manager Self-Service)</td>
<td>Yes</td>
</tr>
<tr>
<td>Find Work Opp</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Menu</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(HR_SM_PERSONAL__ACTIONS_MENU)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HR: SM Manager</td>
<td>Responsibility</td>
<td>HR_SM_MANAGER_FUNCTIONS (at responsibility:HR Professional) HR_SM_MANAGER_FUNCTIONS (at responsibility:Manager Self-Service)</td>
<td>Yes</td>
</tr>
<tr>
<td>Find Person Menu</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(HR_SM_MANAGER__ACTIONS_MENU)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Profile</td>
<td>Configurable Level</td>
<td>Values (default value in boldface)</td>
<td>Value Required?</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>--------------------</td>
<td>-----------------------------------------------------------------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>HR: SM Employee Find Work Opp Menu (HR_SM_EMP_PERSONAL_ACTIONS_MENU)</td>
<td>Responsibility</td>
<td>HR_SM_EMP_PERSONAL_FUNCTIONS (at responsibility: Employee Self-Service)</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Using Oracle Succession Planning
Succession Planning

The Succession Plans Feature

Using the Succession Plans functionality that Oracle Succession Planning provides, you can:

- Identify key roles (jobs and positions) in your enterprise to ensure that succession plans are in place.
- Identify workers who are likely to vacate their current positions because of promotion, retirement, or voluntary termination.
- Define additional information for succession plans to meet business needs.
- Create and update succession plans for jobs, positions, and workers.

The following sections describe how your enterprise can plan and manage succession processes using Oracle Succession Planning:

Identify Key Roles in the Enterprise

Enterprises must first identify the key roles (jobs and positions) in their enterprise. Enterprises can then identify the available talent pool that suits the requirements to fill these key roles. If there is a deficit of talented workforce within the enterprise to fill these roles, managers can find other suitable talent in their enterprise and create succession plans. Based on the succession planning, managers can implement development plans to prepare the suitable talent for key roles in the enterprise. Enterprises can use the Job Career Management Information and Position Career Management Extra Information Types to:

- Identify whether a job is a key role in the enterprise and the turnover rate of the job.
- Identify whether a position is a key role in the enterprise and the turnover rate of the position.

Identify Key Workers in the Enterprise

Enterprises must identify workers who possess specialized skills and experience and are difficult to replace to ensure continuity of the business growth. Managers require data about the availability of qualified workforce.

Managers can view talent profiles of workers, compare talent profiles, analyze performance based on appraisals, use the 9-box potential and retention information to identify key workers. Enterprises can use the Employee Succession Planning Extra
Information Type to:

- Determine whether a worker is a key person in the enterprise.
- Identify the succession potential of workers.
- Assess the retention prospects of workers.

Find Suitable Talent in the Enterprise

Managers require information about workers such as employment details, competencies, qualifications, work experience, work preferences, learning certifications, training details, compensation, proposed career path to identify suitable talent to fill key roles.

Talent Profile feature of Oracle Succession Planning provides managers with comprehensive talent information that assists managers in finding suitable talent. Managers can compare and print workers profiles. Oracle Succession Planning provides 9-box analytical tool to evaluate the performance, potential, and retention prospects of workers in the enterprise. Managers can assess the performance potential and retention prospects of workers in their hierarchy to find suitable talent in the enterprise. In addition to the performance matrices, managers can use the Suitability Analyzer tool provided within the Suitability Matching function to compare workers based on their competencies. They can identify suitable successors using the Suitability Analyzer tool.

Create and Manage Succession Plans

Managers can use the Succession Plans page to:

- Search for plans for a job, position, or worker.
- Create, update, and delete succession plans.

Using the Create Succession Plan page, managers can create a succession plan for a job, position, or worker, and add successors.

Key Concepts

The following topics explain the succession planning tasks:

- Extra Information Types for Succession Plans, page 2-38
- Creating and Maintaining Succession Plans Using Oracle Succession Planning, page 3-59
- Using Talent Profile as Managers, page 3-8
- Using Talent Profile as Workers, page 3-24
• Succession Planning Using Talent Profile, page 3-55
• Using Performance Matrix (Potential) and Performance Matrix (Retention), page 3-39
• Comparing Talent Profiles, page 3-47
• Generating Printable Profiles, page 3-36
Identifying Workforce Talent Using Talent Profile

An Overview of Talent Profile

Enterprises work with multiple applications and systems to gather talent related information about their workforce to make informed decisions and formalize action plans for succession planning and management. The Talent Profile feature of Oracle Succession Planning helps enterprises to obtain a complete picture of the talent profile of their workforce to manage and execute their talent processes. Talent Profile captures and displays complete worker talent details on a single-interface enabling enterprises to attract, develop, and retain the best talent.

Talent Profile Features

Enterprises can use the following Talent Profile features to develop and manage succession plans for their workforce:

View Complete Talent Information

Talent Profile displays worker information such as personal information, photograph, contact information, and employment details. Talent Profile obtains relevant data from talent management products and presents the information in the following regions:

- Competencies
- Qualifications
- Other Professional Qualifications
- Previous Employment
- Learning Certifications
- Training
- Appraisals
- Performance Objectives
- Succession Plans
- Job History
- Career Path
• Work Preferences
• Salary
• Benefits
• Monetary Compensation
• Compensation Statement
• Other Information
• Performance Ratings

**View 9-Box Matrix for Potential and Retention**

Managers can view the performance profile of a worker in the Performance Matrix (9-Box) that indicates performance and growth potential. This information is crucial to take key talent development, retention, and succession decisions.

Performance Matrix displays information using the following matrices:

• Performance vs. Potential: This matrix provides information on performance and leadership potential.

• Performance vs. Retention: This matrix provides information on performance and risk of loss.

The performance, potential, and retention rating scales on the matrices are configurable and depend on the ratings scales defined by the enterprise.

**Compare Talent Profiles**

Enterprises can compare talent profiles of their workforce. Talent Profile displays the comparison report in a printable format. When managers compare the talent profiles of workers, if they find a suitable successor, then they can select the worker as a successor and create a succession plan from the Talent Profile page. While creating a succession plan, managers can use the Show Suitable Successors feature that uses the competency-based search to display list of workers who meet the competency requirements.

**Print Talent Profiles**

Managers can print a worker’s talent profile. The application provides a default print option with all the configured regions. Managers have the flexibility to select required talent profile regions and print a custom view of the talent profile.
Maintain Notes
Workers and managers can create and update notes to record important information about their talent profile such as notes about appraisals or learning plans.

Create and Use Tags
Workers and managers can create tags that are similar to keywords. Tags help categorize and group talent. Workers can create tags that match their individual profiles. Managers can create tags that match with the talent profiles of their workers.

Perform Self-Service Actions
Managers and workers can perform self-service actions. For example, when a manager views the talent profile of a worker, the manager can change the pay of the worker by selecting the Change Pay self-service action directly from the Talent Profile page.

Use Talent Profile Based on Role Requirements
As managers and workers have different business requirements, Talent Profile delivers views based on their roles. For example, only managers can view the Succession Plan and Performance Matrix (9-box).

Use Flexible Search Options to Search for Talent Profiles
Managers can directly search for the worker whose talent profile they want to view without having to navigate through the entire hierarchy. The search displays the talent profile of the selected worker. Horizontal links display the complete hierarchical relationship of the worker and the manager. A saved view of recently viewed profiles helps managers to return to recent records without having to perform the search again. The application saves the recently viewed profiles only for that specific session.

Key Concepts
The following topics provide conceptual and procedural information about using Talent Profile:

- Using Talent Profile as Managers, page 3-8
- Using Talent Profile as Workers, page 3-24
- Succession Planning Using Talent Profile, page 3-55
- Viewing Performance Matrix (Potential), page 3-39
- Viewing Performance Matrix (Retention), page 3-43
- Comparing Talent Profiles, page 3-47
• Generating Printable Profiles, page 3-36

Using Talent Profile as Managers

When managers navigate to the Talent Profile page, the page displays their own talent information. The Talent Profile page of a worker provides managers with information required for succession planning. To view talent profiles of workers in their hierarchy, managers can select a worker either from the hierarchy list or quick search region.

Note: Currently, Talent Profile supports only supervisor hierarchy.

As a manager, when you navigate to the Talent Profile page of a worker, you can:
• View worker details
• View talent information presented in different regions
• View Performance Matrix (9-Box)
• Perform talent actions
  • View Performance Matrix (Potential)
  • View Performance Matrix (Retention)
• Compare talent profiles
• Print talent profiles
• Perform self-service actions

View Worker Details

You can view employment details such as the organization, job, position, supervisor, and the hire date. The contact details include address, phone numbers, and e-mail address. You can also view a photograph of the worker, if available. You can also view tags.

View Talent Information Presented in Different Regions

This section lists the talent regions that managers can view for their workers.

Note: Your enterprise may display all the regions or hide some of the regions according to the business needs and processes.
• Competencies
• Appraisals
• Performance Objectives
• Qualifications
• Learning Certifications
• Training
• Other Professional Qualifications
• Job History
• Career Path
• Benefits
• Work Preferences
• Previous Employment
• Monetary Compensation
• Succession Plans
• Other Information
• Salary
• Compensation Statement
• Performance Ratings

**Competencies**

The Competencies region displays the current competencies of the selected worker. You can view the level and status of the competencies.
Screenshot of the Competencies Region

<table>
<thead>
<tr>
<th>Competency Name</th>
<th>Current Proficiency Level</th>
<th>Status</th>
<th>Start/End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core.Negotiation</td>
<td>3 - Semi Proficient</td>
<td>Achieved</td>
<td>30-Apr-2009</td>
</tr>
<tr>
<td>Core.Customer Orientation</td>
<td>4 - Proficient</td>
<td>Achieved</td>
<td>30-Apr-2009</td>
</tr>
<tr>
<td>Core.Oral Communication</td>
<td>4 - Proficient</td>
<td>Achieved</td>
<td>30-Apr-2009</td>
</tr>
<tr>
<td>Core.Initiative</td>
<td>4 - Proficient</td>
<td>Achieved</td>
<td>30-Apr-2009</td>
</tr>
</tbody>
</table>

Click the More link to navigate to the Competency Profile page of the worker to view or update the existing competency profile. When you update or add competencies for a worker, the updated information is visible on the Talent Profile page.

For information on competencies, see: Competency Profile, Oracle SSHR Deploy Self-Service Capability Guide

Appraisals

The Appraisals region displays the appraisal information using a bar graph. The bar graph is a column chart where the x-axis shows the appraisal period end date and the y-axis shows the appraisal rating of the worker and the total rating value. You can easily distinguish the rating of the worker and the total rating value as the bar graph uses different color codes. Talent Profile displays information only from appraisals that are given an overall rating, regardless of whether the appraisals are created using the Appraisals function or appraisals are created as part of performance management plans. The bar graph displays information for five appraisals.

**Note:** Talent Profile does not display information from self appraisals.
Screenshot of the Appraisals Region

Click the More link to navigate to the View Appraisals page for more information on the worker’s appraisals. On the View Appraisals page, you can view completed and in progress appraisals.

For more information on appraisals, see: The Appraisal Process, Oracle Performance Management Implementation and User Guide

Performance Objectives

You can view worker objectives for a specific performance management plan. By default, the Plan Name field displays the latest published performance management plan. The Performance Objectives region displays the plan name, plan period, objectives, and objective start and end date. The Complete % field helps you to track the progress of the worker’s objectives.
Click the More link to navigate to the Performance Management page of the worker. For each performance management plan, you can view a list of tasks. The application enables these tasks at appropriate times during the performance-management period.

**View Performance Objectives of an Indirect Report**

When you view the Talent Profile page of an indirect report (a worker reporting to your direct report), and click the More link, the application enables you to view and carry out the performance management tasks as the indirect report’s manager. For example, Dan Bird is Sales Manager, Vision Corporation and Alice Taylor, the manager of Store A reports to Dan. When Dan views the Talent Profile of Alex Smith who reports to Alice, Dan can perform Alice’s performance-management tasks.

For more information on manager performance management tasks, see: Manager Performance-Management Tasks, Oracle Performance Management Implementation and User Guide

**Qualifications**

The Qualifications region displays the education qualifications information such as qualification type, title, and status.
Click the More link to navigate to the Education and Qualifications page of the worker to create or update qualifications. The Talent Profile page displays the updated qualifications information.

For more information, see: Education and Qualifications, Oracle SSHR Deploy Self-Service Capability Guide

**Learning Certifications**

You can view the learning certification details such as the certification name, status, progress, and renew date.

**Screenshot of the Learning Certifications Region**

<table>
<thead>
<tr>
<th>Certification Name</th>
<th>Certification Status</th>
<th>Progress</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safety Certification</td>
<td>Certified</td>
<td>Completed</td>
<td>10-Apr-2009</td>
</tr>
<tr>
<td>Marketing Certification</td>
<td>Certified</td>
<td>Completed</td>
<td>20-Apr-2009</td>
</tr>
<tr>
<td>Customer Interaction</td>
<td>Certified</td>
<td>Completed</td>
<td>01-Jul-2009</td>
</tr>
</tbody>
</table>

Click the More link to navigate to the Learner Home page of the worker. On the Learner Home page of the worker, you can view details such as additional certification details, classes that the worker has currently enrolled in, and learning paths that the worker has subscribed to.

For more information, see: The Learner Home, Oracle Learning Management User Guide

**Training**

This region displays the training information of the selected worker. Details include the
course name, course delivery method, enrollment status, and enrollment dates. You can use the Filter values to view all, completed, or upcoming training.

**Screenshot of the Training Region**

<table>
<thead>
<tr>
<th>Course Name</th>
<th>Delivery Method</th>
<th>Enrollment Status</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fire fighting - for Certification</td>
<td>Online Asynchronous</td>
<td>Attended</td>
<td>01-Mar-2009</td>
<td>01-Apr-2009</td>
</tr>
<tr>
<td>Marketing ethics - for Certification</td>
<td>Online Asynchronous</td>
<td>Attended</td>
<td>01-Mar-2009</td>
<td>01-Apr-2009</td>
</tr>
<tr>
<td>Marketing rules and regulations - for Certification</td>
<td>Online Asynchronous</td>
<td>Attended</td>
<td>01-Mar-2009</td>
<td>31-Mar-2009</td>
</tr>
<tr>
<td>Customer Behaviour</td>
<td>Online Asynchronous</td>
<td>Attended</td>
<td>01-Mar-2009</td>
<td>31-Mar-2009</td>
</tr>
</tbody>
</table>

Click the More link to navigate to the Learner Home page of the worker to view additional training details. You can also enroll the worker in required training. The Talent Profile displays the updated enrollment information.

For more information, see: The Learner Home, *Oracle Learning Management User Guide*

**Other Professional Qualifications**

You can view other professional qualifications of the worker such as an award. This region does not display academic qualifications, which are displayed in the Qualifications region.

**Screenshot of the Other Professional Qualifications Region**

<table>
<thead>
<tr>
<th>Type</th>
<th>Title</th>
<th>Start Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Achievement Award</td>
<td>Excellence in Regional Sales Best Practices</td>
<td>01-Jan-1989</td>
<td>Complete</td>
</tr>
</tbody>
</table>

Click the More link to navigate to the Other Professional Qualifications page to add new professional qualifications or update existing professional qualifications. The
Talent Profile displays the updated professional qualifications information. For more information, see: Other Professional Qualifications, Oracle SSHR Deploy Self-Service Capability Guide

**Job History**

The Job History region displays the details of previous jobs of the selected worker in the same enterprise. You can use this information to analyze what the worker has gained from each role in terms of experience, skills, and professional development. When creating succession plans you can use the job history details to evaluate the work experience summary of the worker.

*Screenshot of the Job History Region*

<table>
<thead>
<tr>
<th>Job Name</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>01. Global Director</td>
<td>20-Apr-2007</td>
<td></td>
</tr>
<tr>
<td>02. Retail Manager</td>
<td>01-Jan-2000</td>
<td>19-Apr-2007</td>
</tr>
</tbody>
</table>

This is a view only region and you cannot perform any transaction as the More link is not available.

**Career Path**

You can view the proposed career path of the selected worker from the current job level. Managers can learn where the worker is in their career. They can analyze the worker's career path and plan for suitable training to meet the future role requirements.

*Screenshot of the Career Path Region*

<table>
<thead>
<tr>
<th>Career Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Career Level</td>
</tr>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
</tbody>
</table>

This is a view only region and you cannot perform any transaction as the More link is not available.

**Benefits**

You can view the benefits enrollments of the worker such as programs, plans, and options. You can also view with the benefits' coverage start date and coverage amounts.
Click the More link to launch the Self-Service Benefits Enrollments function. The subsequent Benefits Enrollments pages that you view depend on the configuration choices that your enterprise makes.

For more information, see: Self-Service Benefits Enrollments, Oracle HRMS Compensation and Benefits Management Guide

### Work Preferences

You can view the work preferences specified by the worker in two regions: Domestic Options and International Relocation Options. You can gather information such as whether the worker is willing to accept international travel or relocate domestically. You can also view preferred work hours and work schedule.
**Screenshot of the Work Preferences Region**

<table>
<thead>
<tr>
<th>Work Preferences</th>
<th>More</th>
<th>Hide</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Domestic Options</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Work in All Locations</td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>- Travel Internationally</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Relocate Domestically</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Relocation Preference</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work Hours</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work Schedule</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>International Relocation Options</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Relocate Internationally</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Relocate to All Countries</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Preferred Country</td>
<td>United States</td>
<td></td>
</tr>
<tr>
<td>Excluded Country</td>
<td>Angola</td>
<td></td>
</tr>
</tbody>
</table>

Click the More link to navigate to the Work Preferences page of the worker to add or update information. The Talent Profile page displays the updated work preferences details.

For information see: Work Preferences, *Oracle S SHR Deploy Self-Service Capability Guide*

**Previous Employment**

This region displays the work history in previous organizations. You can view previous employment details such as the previous employer, previous employment period, and employer location. The previous employment details provide valuable inputs such as the employers that the worker has worked with. You also get an idea of the worker’s experience in each industry if the worker was employed in various industries. You can evaluate how the previous roles are useful for career management and succession plans for the worker.

**Screenshot of the Previous Employment Region**

<table>
<thead>
<tr>
<th>Previous Employment</th>
<th>Hide</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employer Name</strong></td>
<td><strong>Start Date</strong></td>
</tr>
<tr>
<td>Jetta Creations</td>
<td>01-Jan-1990</td>
</tr>
<tr>
<td>Leona Retains</td>
<td>01-Jan-1995</td>
</tr>
</tbody>
</table>

This is a view only region and you cannot perform any transaction as the More link is not available.
Monetary Compensation

You can view a graphical representation of the monetary compensation details of the worker. Monetary compensation can include components such as allowances, bonus, and salary. You can view a list of all compensation related sections (defined with a chart or graph) from the latest Total Compensation Statement (TCS). You can select any one of the values to view a graphical representation of the selected monetary compensation section.

Screenshot of the Monetary Compensation Region

Talent Profiles uses the Total Compensation Statement information to display the monetary compensation graph. If there is no Total Compensation statement available for the worker and a graph for cash compensation has not been included in the statement, then the application does not display any information in the Monetary Compensation region.

This is a view only region and you cannot perform any transaction as the More link is not available.

Succession Plans

In the Succession Plan region, you can view two tables:

- Successor For:
  
  This table lists the workers for whom the selected worker is identified as a successor. Information includes readiness level and the earliest succession date.

- As Successor:
This table lists the workers identified as the successors of the selected worker. Information includes readiness level and the earliest succession date.

_Screenshot of the Succession Plan Region_

<table>
<thead>
<tr>
<th>Successor</th>
<th>Readiness</th>
<th>Earliest Succession Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jensen, Ms. Martha</td>
<td>High</td>
<td>01-Jan-2010</td>
</tr>
<tr>
<td>Taylor, Mr. George</td>
<td>Average</td>
<td>01-Sep-2010</td>
</tr>
</tbody>
</table>

This is a view only region and you cannot perform any transactions as the More link is not available.

_Other Information_

For your workers, you can make notes about their achievements and contributions. Click the More link to navigate to the Attachments page where you can add attachments. You can create attachments in different ways. You can attach a file, provide the location of the directory in which you saved the document, or provide a text description.

_Screenshot of the Other Information Region_

You can add tags for your workers. The tags that you add for a worker appear on that worker’s Talent Profile page. Tags help group and categorize talent.
Salary

You can view details of the current salary. Details include salary rate and annualized salary.

Screenshot of the Salary Region

<table>
<thead>
<tr>
<th>Salary</th>
<th>Hide</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary Rate</td>
<td>6,000.00 USD</td>
</tr>
<tr>
<td>Salary Start Date</td>
<td>01-Jan-2000</td>
</tr>
<tr>
<td>Annualized Salary</td>
<td>72000</td>
</tr>
<tr>
<td>Currency</td>
<td>USD</td>
</tr>
</tbody>
</table>

This is a view only region and you cannot perform any transactions as the More link is not available.

Compensation Statement

This region displays the worker’s total compensation information including compensation awards and benefits. Compensation information can include monetary awards such as salary and bonus awards as well as non-monetary awards such as stock options. Benefits information can include medical and dental benefits (optionally showing the cost to your organization).

Screenshot of the Compensation Statement Region

<table>
<thead>
<tr>
<th>Compensation Statement</th>
<th>Hide</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008 Talent Profile TCS</td>
<td>Next 1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Category Name</th>
<th>Section Name</th>
<th>Section Type</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stock Options</td>
<td>Stock</td>
<td>Non Monetary</td>
<td>350 Shares</td>
</tr>
<tr>
<td>Elective Benefits</td>
<td>Monitory</td>
<td>958.68</td>
<td></td>
</tr>
<tr>
<td>Flex Credits</td>
<td>Cash Compensation</td>
<td>Monetary</td>
<td>1,800.00</td>
</tr>
<tr>
<td>Bonus - Talent Profile</td>
<td>Cash Compensation</td>
<td>Monetary</td>
<td>4,500.00</td>
</tr>
</tbody>
</table>

This is a view only region and you cannot perform any transactions as the More link is not available.
Performance Ratings

The application hides this region by default. Your enterprise can display this region, if you use Oracle HRMS to rate performance. HR Managers can enter performance of their workers using the Performance window in Oracle HRMS. The Performance Ratings region displays the information that HR managers enter in Oracle HRMS. You can view details such as the main appraiser and rating.

**Screenshot of the Performance Ratings Region**

<table>
<thead>
<tr>
<th>Review Date</th>
<th>Last Rating</th>
<th>Main Appraiser</th>
</tr>
</thead>
<tbody>
<tr>
<td>19-May-2009</td>
<td>6 - Very Outstanding</td>
<td>Castillo, Mr. John</td>
</tr>
<tr>
<td>24-Apr-2009</td>
<td>9 - Always Outstanding</td>
<td>Castillo, Mr. John</td>
</tr>
<tr>
<td>23-Apr-2009</td>
<td>4 - Above Average</td>
<td>Castillo, Mr. John</td>
</tr>
</tbody>
</table>

**Note:** If your enterprise uses Oracle Performance Management to evaluate workforce performance, then your enterprise can hide the Performance Ratings region. In this case, use Appraisals region to view performance ratings.

Click the More link to navigate to the My Employee Information page. This page enables managers to view employment, salary, performance, absence, and other related details of people within their security access.

Perform Talent Actions

You can:

**View Performance Matrix (9 - Box)**

On the Talent Profile page of the selected worker, you can view the performance profile using Performance Matrix (9 - Box).

Performance Matrix displays performance profile of the worker using the following matrices:

- Performance vs. Potential: Provides information on the performance and leadership potential of a worker. You can view the Performance rating on the horizontal x-axis on a scale of 1 to 3 and the Potential rating on the vertical y-axis on a scale of 1 to 3.

- Performance vs. Retention: Provides information on a worker’s performance and risk of loss. You can view the Performance rating on the horizontal x-axis on a scale of 1 to 3 and the Retention rating on the vertical y-axis on a scale of 1 to 3.
**Important:** The values that you view on the Performance Matrix are the values that your enterprise defines for performance, potential, and retention rating scales.

For example, your enterprise can define the following rating scales for performance, potential, and retention:

**Performance**
- 1: Needs
  Indicates that the performance is significantly below the required level.
- 2: Meets
  Indicates that the performance is good and in-line with job requirements.
- 3: Exceeds
  Indicates that the worker has exceeded the required level of performance.

**Potential**
- 1: Limited
  Indicates that the worker shows little or no potential to move to the next work level.
- 2: Growth
  Indicates that the worker shows potential to advance to the next or higher work level.
- 3: High
  Indicates that the worker has requisite skills and expertise and exhibits leadership qualities.

**Retention**
- 1: Low
  Indicates that the risk of losing the worker is high.
- 2: Medium
  Indicates that the risk of losing the worker is moderate.
- 3: High
Indicates that the risk of losing the worker is minimal.

You can use performance matrices information for succession planning.

To view the performance profile of workers in your hierarchy, select Performance Matrix (Potential) and Performance Matrix (Retention) in the Select an Action list and click Go.

See: Using Performance Matrix (Potential) and Performance Matrix (Retention), page 3-39

**Note:** Enterprises require Oracle Succession Planning license to view the performance profile of workers in a manager’s hierarchy.

**Compare Profile**

Enterprises require Oracle Succession Planning license to compare talent profiles of workers.

Use this feature to compare talent profiles of workers. Select Compare Profile in the Select an Action list and click Go. The selected worker’s name appears in the Profile Comparison tabbed region. To select another worker to compare profiles, you can either navigate to the hierarchy list on your Talent Profile page or select a worker using the quick search feature. Click the Add to Compare button to add required workers to the compare profile list. Select the workers and then choose the appropriate compare profile template to generate the Compare Profile report.

You can view a profile comparison of the selected workers for multiple criteria such as qualifications, competency profile, appraisal ratings, work preferences, and compensation. The Compare Profile report displays the workers performance and potential and performance and retention matrices using the 9-Box representation.

See: Comparing Talent Profiles, page 3-47

**Print Talent Profile**

Managers can print a worker’s talent profile. Select Printable Profile in the Select an Action list and click Go. Then, click Generate Report to generate the talent report. The printable profile is a PDF document. You can view the profile of the selected worker for multiple criteria such as competency profile, appraisal ratings, and compensation. The profile report displays the worker’s performance and potential matrix that helps evaluate talent. The performance and retention matrix helps to understand correlation between performance and possibility of the worker’s separation from the enterprise. Managers have the flexibility to print required talent profile regions.

See: Generating Talent Profiles, page 3-36
Perform Self-Service Actions

The Select an Action list displays the list of actions that you can perform as a manager for the selected worker. For example, you can perform self-service actions such as transfers, change manager, change worker status, and manage absences.

**Note:** Your enterprise configures the self-service actions that a manager can perform.

Using Talent Profile as Workers

As a worker, when you navigate to the Talent Profile page, the page displays your talent information. On this page, you can:

- View employment details
- View talent information presented in different regions
- Perform self-service actions
- Print your talent profile

View Employment Details

You can view employment details such as the organization, job, position, supervisor, and the hire date. The contact details include address, phone numbers, and e-mail address. You can also view your photograph, if available. You can view tags added to your profile and you can also add tags.

View Talent Information Presented in Different Regions

This section lists the talent regions that you can view on your Talent Profile page:

**Note:** Your enterprise may display all the regions or hide some of the regions according to the business needs and processes.

- Competencies
- Appraisals
- Performance Objectives
- Qualifications
- Learning Certifications
- Training
- Other Professional Qualifications
- Job History
- Career Path
- Benefits
- Work Preferences
- Previous Employment
- Monetary Compensation
- Other Information
- Salary
- Compensation Statement
- Performance Ratings

**Competencies**

The Competencies region displays your current competencies. You can view the level and status of the competencies.
Click the More link to navigate to the Competency Profile page to view or update the existing competency profile. When you update or add competencies, the updated information is visible on the Talent Profile page.

For more information, see: Competency Profile, Oracle SSHR Deploy Self-Service Capability Guide

**Appraisals**

The Appraisals region displays the appraisal information using a bar graph. The bar graph is a column chart where the x-axis shows the appraisal period end date and the y-axis shows your appraisal rating and the total rating value. You can easily distinguish your appraisal and the total rating value as the bar graph uses different color codes. Talent Profile displays information only from appraisals that are given an overall rating, regardless of whether the appraisals are created using the Appraisals function or appraisals are created as part of performance management plans. The bar graph displays information for five appraisals.

**Note:** Talent Profile does not display information from self appraisals.
Click the More link to navigate to the My Appraisals page to view or update your appraisals. The Appraisal Process, Oracle Performance Management Implementation and User Guide

**Performance Objectives**

You can view objectives for a specific performance management plan. By default, the Plan Name field displays the latest published performance management plan. The Performance Objectives region displays the plan name, plan period, objectives, and objective start and end date. The Complete % field helps you to track the progress of your performance objectives.

**Screenshot of the Performance Objectives Region**

<table>
<thead>
<tr>
<th>Objective Name</th>
<th>Start Date</th>
<th>Target Date</th>
<th>Complete (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sarbanes Oxley Compliance - US</td>
<td>29-Apr-2009</td>
<td>31-May-2009</td>
<td></td>
</tr>
<tr>
<td>25 percent increase in sales to repeat customers</td>
<td>29-Apr-2009</td>
<td>31-May-2009</td>
<td></td>
</tr>
<tr>
<td>Become an Employer of Choice</td>
<td>29-Apr-2009</td>
<td>31-May-2009</td>
<td></td>
</tr>
<tr>
<td>Corporate Ethics and Business Ethics Compliance - US</td>
<td>29-Apr-2009</td>
<td>31-May-2009</td>
<td></td>
</tr>
</tbody>
</table>
Click the More link to navigate to the Performance Management page to view your Performance Management Task List. The tasks are those appropriate to the performance management plan (PMP) and can vary from one PMP to another. The application enables these tasks at appropriate times during the performance-management period. For example, you can perform the appraisal-management task during the appraisal-task period only.

For more information, see: Worker Performance-Management Tasks, Oracle Performance Management Implementation and User Guide

Qualifications

The Qualifications region displays your education qualification information such as qualification type, title and status.

Screenshot of the Qualifications Region

<table>
<thead>
<tr>
<th>Type</th>
<th>Title</th>
<th>Start Date</th>
<th>Status</th>
<th>School</th>
</tr>
</thead>
<tbody>
<tr>
<td>Masters Degree</td>
<td>Master of Retail Economics</td>
<td>01-Jan-1985</td>
<td>Complete</td>
<td>Universidad Metropolitana</td>
</tr>
<tr>
<td>Bachelor Degree</td>
<td>Bachelor of Science</td>
<td>01-Jan-1982</td>
<td>Complete</td>
<td>University of Wales Lampeter</td>
</tr>
</tbody>
</table>

Click the More link to navigate to the Education and Qualifications page to create or update qualifications. The Talent Profile page displays the updated qualifications information.

For more information, see: Education and Qualifications, Oracle SSHR Deploy Self-Service Capability Guide

Learning Certifications

You can view the learning certification details such as the certification name, status, progress, and renew date.
Click the More link to navigate to the Learner Home page to view additional certification details. On the Learner Home page, you can view classes that you are currently enrolled in, view learning certifications and learning paths that you have subscribed to, track the status of pending enrollments, and communicate with instructors and other learners using forums and chats.

For more information, see: The Learner Home, Oracle Learning Management User Guide

Training

This region displays your training information. Details include course name, course delivery method, enrollment status and enrollment status, and enrollment dates. You can use the Filter values to see all, completed, or upcoming training.
Click the More link to navigate to the Learner Home page to view additional training details. Use the Catalog page to browse categories, search for and enroll in courses, or request enrollment from an approver.

After you enroll in training, the Talent Profile page displays the updated information. For more information, see: The Learner Home, Oracle Learning Management User Guide

**Other Professional Qualifications**

You can view other professional qualifications such as an award. This region does not display academic qualifications, which are displayed in the Qualifications region.

**Screenshot of the Other Professional Qualifications Region**

<table>
<thead>
<tr>
<th>Type</th>
<th>Title</th>
<th>Start Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Achievement Award</td>
<td>Excellence in Regional Sales Best Practices</td>
<td>01-Jan-1989</td>
<td>Complete</td>
</tr>
</tbody>
</table>

Click the More link to navigate to the Other Professional Qualifications page to add new professional qualifications or update existing professional qualifications. The Talent Profile page displays the updated information.

For more information, see: Other Professional Qualifications, Oracle SSHR Deploy Self-Service Capability Guide

**Job History**

The Job History region displays the details of your previous jobs in the same enterprise. You can use this information to review each role in terms of experience, skills, and professional development.

**Screenshot of the Job History Region**

<table>
<thead>
<tr>
<th>Job Name</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>01.Global Director</td>
<td>20-Apr-2007</td>
<td></td>
</tr>
<tr>
<td>02.Retail Manager</td>
<td>01-Jan-2000</td>
<td>19-Apr-2007</td>
</tr>
</tbody>
</table>

This is a view only region and you cannot perform any transactions as the More link is not available.
Career Path

You can view your proposed career path from the current job level. You can use this information to assess your skills and experience and create an action plan on updating your skills to meet your career goals.

Screenshot of the Career Path Region

<table>
<thead>
<tr>
<th>Career Level</th>
<th>Job Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Global Vice President</td>
</tr>
<tr>
<td>2</td>
<td>Chief Executive Officer</td>
</tr>
</tbody>
</table>

This is a view only region and you cannot perform any transaction as the More link is not available.

Benefits

You can view the benefits programs, plans, and options in which you are enrolled along with the coverage start date and coverage amounts.

Screenshot of the Benefits Region

<table>
<thead>
<tr>
<th>Program Name</th>
<th>Coverage Start Date</th>
<th>Coverage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vision Flex Program</td>
<td>01-Jan-2000</td>
<td></td>
</tr>
</tbody>
</table>

Click the More link to launch the Self-Service Benefits Enrollments function. The subsequent Benefits Enrollments pages that you view depend on the configuration choices that your enterprise makes.

For more information, see: Self-Service Benefits Enrollments, Oracle HRMS Compensation and Benefits Management Guide
Work Preferences

You can view your work preferences in two regions: Domestic Options and International Relocation Options.

Screenshot of the Work Preferences Region

You can view your work preferences in two regions: Domestic Options and International Relocation Options.

For more information, see: Work Preferences, Oracle SSHR Deploy Self-Service Capability Guide

Previous Employment

This region displays previous employment details such as the previous employer, previous employment period, and employer location.

Screenshot of the Previous Employment Region

This is a view only region and you cannot perform any transaction as the More link is not available.
Monetary Compensation

You can view a graphical representation of your monetary compensation details. Monetary compensation can include components such as allowances, bonus, and salary. You can view a list of all compensation related sections (defined with a chart or graph) from the latest Total Compensation Statement (TCS). You can select any one of the values to view a graphical representation of the selected monetary compensation section.

Screenshot of the Monetary Compensation Region

Talent Profiles uses the Total Compensation Statement information to display the monetary compensation graph. If there is no Total Compensation statement available or a graph for cash compensation has not been included in the statement, then the application does not display any information in the Monetary Compensation region.

Click the More link to navigate to the Total Compensation Statement page and view details.

Other Information

Use the Notes feature to add any information about your talent profile, for example, your achievements and contributions. Click the More link to navigate to the Attachments page where you can add attachments. You can attach a file, provide the location of the directory in which you saved the document, or provide a text description.
Salary

You can view details of your current salary. Details include salary rate and annualized salary.

Compensation Statement

This region displays your total compensation information including compensation awards and benefits. Compensation information can include monetary awards such as salary and bonus awards as well as non-monetary awards such as stock options. Benefits information can include medical and dental benefits (optionally showing the cost to your organization).
**Screenshot of the Compensation Statement Region**

<table>
<thead>
<tr>
<th>Category Name</th>
<th>Section Name</th>
<th>Section Type</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stock Options</td>
<td>Stock</td>
<td>Non Monetary Shares</td>
<td>100</td>
</tr>
<tr>
<td>Elective</td>
<td>Benefits</td>
<td>Monetary</td>
<td>958.68</td>
</tr>
<tr>
<td>Flex Credits</td>
<td>Cash</td>
<td>Compensation</td>
<td>1,800.00</td>
</tr>
<tr>
<td>Bonus - Talent Profile</td>
<td>Cash Compensation</td>
<td>Monetary</td>
<td>8,000.00</td>
</tr>
</tbody>
</table>

Click the More link to navigate to the Total Compensation Statement page and view details.

**Performance Ratings**

By default, this region is hidden on the Talent Profile page. If your enterprise uses Oracle HRMS to record performance ratings, then your enterprise can display this region.

Using the Performance window in Oracle HRMS, HR managers can enter the performance ratings of their workers. The Talent Profile's Performance Ratings region displays the information that HR managers enter in Oracle HRMS. You can view details such as the main appraiser and rating.

**Screenshot of the Performance Ratings Region**

<table>
<thead>
<tr>
<th>Review Date</th>
<th>Last Rating</th>
<th>Main Appraiser</th>
</tr>
</thead>
<tbody>
<tr>
<td>19-May-2009</td>
<td>6 - Very Outstanding</td>
<td>Castillo, Mr. John</td>
</tr>
<tr>
<td>24-Apr-2009</td>
<td>9 - Always Outstanding</td>
<td>Castillo, Mr. John</td>
</tr>
<tr>
<td>23-Apr-2009</td>
<td>4 - Above Average</td>
<td>Castillo, Mr. John</td>
</tr>
</tbody>
</table>

**Note:** If your enterprise uses Oracle Performance Management to evaluate workforce performance, then your enterprise can hide the Performance Ratings region. In this case, use Appraisals region to view performance ratings.
Click the More link to navigate to the My Information page that displays details such as salary, performance, and absence.

Perform Self-Service Actions

The Select an Action list displays the list of actions that you can perform. For example, perform self-service actions such as manage payroll payments, create absence, or update your resume.

*Note:* Your enterprise configures the self-service actions that you can perform.

Print Talent Profile

You can print your talent profile, if the Printable Profile option is available in the Select an Action list. Select the option and click Go. On the Talent Profile page, the Include in Report check box is selected by default in all the talent regions. You can choose to print selected talent regions. When you click Generate Report, the application displays a printable profile in the Adobe Acrobat PDF format.

Generating Printable Profiles

Managers can print the talent profile of workers when they view the profile of workers in their hierarchy. Individual workers can also print their own talent profiles. When you select the Printable Profile option as a worker or manager, and click Go, the printable version page appears. On this page, the Include in Report check box is automatically selected for all the talent information regions. You can select only the required regions and click Generate Report. The application generates a printable profile in the Adobe Acrobat PDF format.

Contents of the Printable Profile

The talent profile information that managers and workers view differs. Only managers can view the following information for their workers:

- Succession Plan
- Performance Matrix (Potential)
- Performance Matrix (Retention)

The talent profile PDF displays information for multiple criteria such as competency profile, work preferences, and compensation. You can view a graphical representation of the appraisal ratings and the cash compensation. The report includes certification details, job history and salary information of your employees. You can also view the
compensation statement and training details.

**Note:** The Printable Profile report displays only those regions that have data. For example, if no data is available for Appraisals, then this region does not appear in the report.

**Viewing Performance Matrix (Potential) and Performance Matrix (Retention)**

Managers can view the performance profile of workers using the following matrices:

Enterprises require Oracle Succession Planning license to view the performance profile of workers in a manager's hierarchy.

- **Performance Matrix (Potential):** Provides information on performance and leadership potential of a worker on a rating scale of 1 to 3.

- **Performance Matrix (Retention):** Provides information on a worker's performance and risk of loss on a rating scale of 1 to 3.

**Important:** The values that you view on the Performance Matrix are the values that your enterprise defines for performance, potential, and retention rating scales.

For example, your enterprise can define the following rating scales for performance, potential, and retention:

**Performance**

- **1: Needs**
  
  Indicates that the performance is significantly below the required level.

- **2: Meets**
  
  Indicates that the performance is good and in-line with job requirements.

- **3: Exceeds**
  
  Indicates that the worker has exceeded the required level of performance.

**Potential**

- **1: Limited**
  
  Indicates that the worker shows little or no potential to move to the next work level.
• 2: Growth
  Indicates that the worker shows potential to advance to the next or higher work level.

• 3: High
  Indicates that the worker has requisite skills and expertise and exhibits leadership qualities.

Retention
• 1: Low
  Indicates that the risk of losing the worker is high.

• 2: Medium
  Indicates that the risk of losing the worker is moderate.

• 3: High
  Indicates that the risk of losing the worker is minimal.

The performance matrices enable you to quickly identify both the highest potential performers and the skills sets of the talent pool. You can use this information for career and succession planning.
Assessing Workforce Talent

Using Performance Matrix (Potential) and Performance Matrix (Retention)

Oracle Succession Planning’s performance matrices: Performance Matrix (Potential) and Performance Matrix (Retention), provide insight into the depth and breadth of the talent pool in the enterprise.

- See: Using Performance Matrix (Potential), page 3-39

- See: Using Performance Matrix (Retention), page 3-43

Using Performance Matrix (Potential)

The Performance Matrix (Potential) enables enterprises to assess their workforce talent and evaluate the talent pool. As a manager, you can use this matrix to assess performance and leadership potential for effective succession planning.

The Performance Matrix (Potential) page displays information for all the direct reports of a manager in the supervisor hierarchy. You have the flexibility to view the performance matrix for required workers. You can zoom in and zoom out as required.
What the Performance Matrix (Potential) Represents

**Screenshot of Performance Matrix (Potential)**

Performance Matrix is divided into nine boxes. Each box represents the level or scale of performance and potential.

**Note:** The performance and potential rating scales that you view on the matrix are configurable and depend on the ratings scales defined by the enterprise.

**Assess Performance**

Use the horizontal x-axis to assess the performance of workers. The matrix plots performance on a scale of 1 to 3.

**Assess Potential**

Use the vertical y-axis to assess the potential of workers. The matrix plots potential on a scale of 1 to 3.

A combination of x and y axes makes up the box within the grid that workers are placed on.

Typically, workers in the top right box will be the high performers with the greatest potential, and those in the bottom left box will be the lowest performers with the least potential. The other boxes will display workers who are performing and displaying potential to varying degrees.
Assessing Performance and Potential

Performance Matrix (Potential) uses information from the following products to assess performance and potential:

- **Performance**

  If your enterprise uses Oracle Performance Management, then the application derives the Performance value from the Overall Rating field on the Give Final Ratings: Main Appraiser page of the Appraisals function. Otherwise, the Performance value is derived from the Performance window in Oracle HRMS.

- **Potential**

  If your enterprise uses Oracle Performance Management, then the application derives the Potential value from the Readiness Level field in the Advancement Potential region on the Give Final Ratings: Main Appraiser page of the Appraisals function. Otherwise, the Potential value is derived from the Succession Potential field of the Succession Plans feature.

Understanding Performance Matrix (Potential)

This diagram shows the Performance Matrix (Potential) for workers who report to Steven Bird, starting with Blair Smith who is placed on the Exceeds Performance/High Potential grid.
This examples uses the following rating scales:

**Performance**
- 1: Needs
  Indicates that the performance is significantly below the required level.
- 2: Meets
  Indicates that the performance is good and in-line with job requirements.
- 3: Exceeds
  Indicates that the worker has exceeded the required level of performance.

**Potential**
- 1: Limited
  Indicates that the worker shows little or no potential to move to the next work level.
- 2: Growth
  Indicates that the worker shows potential to advance to the next or higher work level.
- 3: High
  Indicates that the worker has requisite skills and expertise and exhibits leadership
qualities.

The following section describes where some of the workers are placed in the Performance Matrix (Potential):

- **Blair Smith**
  Indicates that Blair exceeds the required performance level and has high potential.

- **Terry Burns**
  Indicates that Terry exceeds the required performance level and has moderate growth potential.

- **Kate Ritz**
  Indicates that Kate exceeds the required performance level and has limited potential.

Based on the analysis of the performance and potential of workers, Steven Bird can plan relevant career and succession planning actions. For example, Steve can allocate critical assignments to Blair Smith who is a high performer and has high potential. Performance improvement action plans can be implemented for average performers.

**Benefits of Performance Matrix (Potential)**

The Performance Matrix (Potential):

- Provides performance and potential details of the workforce in a clear and intuitive manner.

- Helps managers to determine the potential and job fit of workers.

- Helps enterprises identify potential internal top performers for future positions.

- Facilitates managers to make informed decision about career and succession planning for their workers.

**Using Performance Matrix (Retention)**

Employee retention, especially of the best and top performing workers is a key challenge that enterprises face. Turnover costs can significantly affect the financial performance of enterprises. Direct costs include recruitment, selection, and training of new people. High turnover can increase workload and overtime expenses for coworkers. For an enterprise to develop a retention strategy for their talented workforce and use it for succession planning, they must assess the retention prospects of their workforce along with their performance.

Managers require tools to:
• Examine the number of workers who will continue to remain in the enterprise or likely to move out of the enterprise.

• Analyze the connection between performance and retention prospects.

Performance Matrix (Retention) enables enterprises to assess their workforce performance and prospects of retention of workers. This matrix provides managers a visual representation of who their top talent is and who is likely to leave the enterprise. This information is vital for effective succession planning.

Assessing Performance and Retention

**Screenshot of Performance Matrix (Retention)**

Performance Matrix (Retention) uses information from the following products to assess performance and potential:

- **Performance**
  
  If your enterprise uses Oracle Performance Management, then the application derives the Performance value from the Overall Rating field on the Give Final Ratings: Main Appraiser page of the Appraisals function. Otherwise, the Performance value is derived from the Performance window in Oracle HRMS.

- **Retention**
  
  If your enterprise uses Oracle Performance Management, then the application derives the Retention value from the Retention Level field in the Advancement Potential region on the Give Final Ratings: Main Appraiser page of the Appraisals function. Otherwise, the Retention value is derived from the Retention Potential...
field of the Succession Plans feature.

**What Performance Matrix (Retention) Represents?**

Performance Matrix (Retention) is divided into nine boxes. Each box represents the level or scale of performance and retention.

*Note:* The performance and retention rating scales that you view on the matrix are configurable and depend on the ratings scales defined by the enterprise.

**Assess Performance**

Use the horizontal x-axis to assess the performance of workers. The matrix plots performance on a scale of 1 to 3.

**Assess Retention**

Use the vertical y-axis to understand the retention prospect of workers. The matrix plots retention on a scale of 1 to 3.

A combination of x and y axes makes up the box within the grid that workers are placed on.

Typically, workers in the top right box will be the high performers with a high prospect of retention, and those in the bottom left box will be the lowest performers with low retention prospects. The other boxes will display workers who are performing and have retention prospects to varying degrees.

**Understanding Performance Matrix (Retention)**

This diagram shows the Performance Matrix (Retention) for workers who report to Mike Connors starting with Nick Reeve who is placed on the Exceeds Performance/High Retention grid.
This example uses the following rating scales:

**Performance**

- 1: Needs
  Indicates that the performance is significantly below the required level.

- 2: Meets
  Indicates that the performance is good and in-line with job requirements.

- 3: Exceeds
  Indicates that the worker has exceeded the required level of performance.

**Retention**

- 1: Low
  Indicates that the risk of losing the worker is high.

- 2: Medium
  Indicates that the risk of losing the worker is moderate.

- 3: High
  Indicates that the risk of losing the worker is minimal.
The following section describes where some of the workers are placed in the Performance Matrix (Retention):

- Nick Reeve
  Indicates that Nick is a high performer and has high retention prospects.

- Geoff Murray
  Indicates that Terry is a high performer and has moderate retention prospects.

- Ray Bradley
  Indicates that Kate is a high performer and has low retention prospects.

Based on the analysis of the performance and retention prospects of workers in his hierarchy, Mike Connors can plan relevant career and succession planning actions. For example, Mike can allocate critical assignments to Nick Reeve who is a high performer and has high retention potential. Enterprises can implement workforce retention strategies such as plan succession options, create better reward systems, and increase employee engagement to retain good performers with low retention prospects.

**Benefits of Performance Matrix (Retention)**

The Performance Matrix (Retention):

- Provides details of performance and retention prospects of the workforce in a clear and intuitive manner.

- Helps enterprises to identify potential internal top performers who have high retention prospect for future positions.

- Facilitates analysis of retention and turnover strategies of the enterprise. For example, managers can use the matrix information and develop retention strategies and reward systems that increase employee involvement, and promote development, recognition, and advancement of the workforce.

**Comparing Talent Profiles**

Talent Profile enables comparison of talent profiles of your workers. By default, you can compare the talent profiles of two or three workers.

**Note:** Your system administrator can make available templates to compare talent profiles of required number of workers according to your business requirements.
Generating the Compare Profile Report

As a manager, when you select Compare Profile in the Select Actions list and click Go, the selected worker’s name automatically appears in the Profile Comparison tabbed region. To select another worker, you can either search using the Name field and click Show Profile or select a worker in the hierarchy list on the manager’s Talent Profile page. Click the Add to Compare button to add the worker to the compare profile list. You must repeat this process to select the required number of workers to add to the compare list. For each of the regions, the Include in Report is automatically selected. You can choose to compare all the talent profile regions or select only the required regions. Then, select the workers whose profile you want to compare, and click Compare. The Comparison PDF window opens. You can either save the PDF report to your local machine or view the report directly. You can use the compare profile report to analyze and plan succession options for your workers.

Contents of the Compare Profile Report

Note: The Compare Profile report displays only those regions that have data.

You can view the profile comparison data of the selected workers for multiple criteria such as competency profile, appraisal ratings, and compensation. You can view a graphical representation of the appraisal ratings and the cash compensation. The report includes certification details, job history, and salary information of your workers. You can also view the compensation statement and training details.

Viewing Performance Matrix (Potential) and Performance Matrix (Retention)

Managers can view the performance profile of workers using the following matrices:

• Performance Matrix (Potential): Provides information on performance and leadership potential of a worker on a rating scale of 1 to 3.

• Performance Matrix (Retention): Provides information on a worker’s performance and risk of loss on a rating scale of 1 to 3.

Important: The values that you view on the Performance Matrix are the values that your enterprise defines for performance, potential, and retention rating scales.

For example, your enterprise can define the following rating scales for performance, potential, and retention:

Performance
• 1: Needs
  Indicates that the performance is significantly below the required level.

• 2: Meets
  Indicates that the performance is good and in-line with job requirements.

• 3: Exceeds
  Indicates that the worker has exceeded the required level of performance.

Potential
• 1: Limited
  Indicates that the worker shows little or no potential to move to the next work level.

• 2: Growth
  Indicates that the worker shows potential to advance to the next or higher work level.

• 3: High
  Indicates that the worker has requisite skills and expertise and exhibits leadership qualities.

Retention
• 1: Low
  Indicates that the risk of losing the worker is high.

• 2: Medium
  Indicates that the risk of losing the worker is moderate.

• 3: High
  Indicates that the risk of losing the worker is minimal.

The performance matrices enable you to quickly identify both the highest potential performers and risk of loss of your talent pool. You can use this information for career and succession planning.

See: Using Performance Matrix (Potential) and Performance Matrix (Retention), page 3-39
Using Suitability Matching in Oracle Succession Planning

The Suitability Matching function provides a range of competency-based methods for finding the right person for a work opportunity or finding the right work opportunity for a person. Managers and HR professionals can compare employees, applicants, and contingent workers by role, job, and position, and employees can find work opportunities that fit their competencies.

Suitability Matching Options Available to Managers

The Suitability Matching page for managers displays two regions:

- **Find a Person for a Work Opportunity**

  Using the options available in this region, managers can:

  - Find employees, contingent workers, and applicants who fit the competency profile for a job, position, department, vacancy, or some combination of these criteria.

  - Find employees, contingent workers, and applicants who match a list of competencies that the managers specify.

  - Compare the competencies of employees and contingent workers who currently occupy a specified job or position in a department or any department within the business group.

  - Compare anyone who has applied for a vacant job or position in a department or any department within the business group.

  In addition to these options, HR Professionals can use the Compare Named Successors for a Position option.

- **Find a Work Opportunity for a Person**

  Using the options available in this region, managers can:

  - Find work opportunities for an individual who fits the competency profile for one or more jobs, positions, departments, vacancies, or some combination of these criteria.

  - Find work opportunities for an individual employee or contingent worker who matches a list of competencies that the managers specify.

  On the Find suitable successors for Worker: Suitable People page, a pop-up window displays details of workers such as contact and employment, when managers place the mouse over a worker name in the following tables:
• Matches All Essential and Desirable Competencies
• Matches All Essential Competencies
• Matches All Desirable Competencies
• Matches Some or No Essential or Desirable Competencies

• Compare an applicant’s competency profile with the competency profiles of existing vacancies.
• Compare, by competency, an employee’s or contingent worker’s current assignments.

In addition to these options, HR Professionals can use the Compare Succession option.

**Using the Suitability Analyzer**

When managers perform competency-based search while creating succession plans, they can use Suitability Analyzer to compare competencies of workers.

The Suitability Analyzer tool appears when you click the Suitability Analyzer button on the Find suitable successors for Worker: Select Competencies page to compare worker competencies. The competencies that you view on this page are the competencies of the worker for whom you are creating a succession plan.

See: Using the Suitability Analyzer, page 3-51

**Using the Suitability Analyzer**

The Suitability Analyzer displays competency ratings of workers in a graphical format. As a manager, you can use the Suitability Analyzer to compare competencies of workers for succession planning.

The Suitability Analyzer tool appears when you click the Suitability Analyzer button on the Find suitable successors for Worker: Select Competencies page to compare worker competencies. The competencies that you view on this page are the competencies of the worker for whom you want to create a succession plan.
Suitability Analyzer Regions

**Screenshot of Suitability Analyzer**

The Suitability Analyzer presents the following regions:

**Competencies: Essential and Desired**

The list of workers that you view in this region are the workers displayed on the Suitability Matching, Find suitable successors for Worker: Suitable People page. This region identifies workers who:

- Meet all essential and desirable competency requirements
- Meet all essential competency requirements
- Meet all desirable competency requirements
- Meet some or no essential or desirable competency requirements

You can select the required workers to view their competency information.

**Graphical Format**

Suitability Analyzer displays competencies in a graphical format. The graphical format is dynamic and the shape depends on the number of competencies that you select to view data. Suitability Analyzer uses the number of competencies that you select to display a geometric shape such as a triangle, pentagon, hexagon, or heptagon. For example, if you select 5 competencies, then Suitability Analyzer displays the pentagon...
geometric shape. Similarly, if you select 3 competencies, the application displays the triangle geometric shape.

**Graphical Representation of Competency Ratings**

Suitability Analyzer uses the minimum and maximum competency levels defined across all the selected competencies to display the competency levels as lines in the graph. For example, if the minimum rating level is 1 and the maximum rating level is 5, then you can view 5 lines representing the rating levels. Suitability Analyzer uses different colors to display the competency ratings of multiple workers and you can easily distinguish the different competency ratings of workers.

**Criteria and Competencies**

**Criteria Region**

Use the Criteria region to search for suitable successors for workers. Suitability Analyzer searches for workers who meet the competency requirements in:

- Business Groups
- Departments
- Jobs
- Positions
- Vacancies

**Competencies Region**

The Competencies region on the Suitability Analyzer displays the competencies that you select in the Suitability Matching, Find Suitable Successors for Worker: Select Competencies page. Use the Suitability Analyzer to refine your search criteria and select the competencies for which you want to view data.

You can combine the criteria and competencies search to identify successors who match the specific competency requirements.

**How to Use the Suitability Analyzer**

The Suitability Analyzer enables you to view competency ratings for selected workers and competencies. You can select specific workers and compare the competency ratings. The Suitability Analyzer displays the competency ratings of workers using lines of different colors. To clearly view the competency ratings of workers, you can use the Fill feature.

When you hover the mouse on a point on the Suitability Analyzer, you can view the workers who are placed on that rating scale. You can also use the tool’s zoom in and zoom out functionality to view the competency ratings at a particular magnification level.
Use the reload icon to view updated information when you change the search criteria. You can reset the graph to initial view using the reset icon.

**Identifying Successors**

After you compare the competencies of workers, you can use the Identify as Successor icon to designate suitable workers as successors.

**Selecting Successors**

To select workers as successors, you must use the Select as Successor button on the Find suitable successors for Worker: Suitable People page.
Managing Succession Plans

Succession Planning Using Talent Profile

Succession planning is critical to the growth of an enterprise. Typically, succession planning involves:

• Identifying key positions in your organization to ensure that succession plans are in place.

• Identifying workers who are likely to vacate their current positions because of promotion, retirement, or voluntary termination.

• Creating and maintaining succession plans for jobs, positions, and workers.

To implement a succession planning and development process, enterprises must identify their talent pool based on the enterprise’s business goals and strategies. Managers have to evaluate the performance profiles, competencies, potential, and retention prospects of their workers for succession planning.

Succession Planning Using Talent Profile

To identify suitable successors for workers, managers can use the following processes:

• Compare talent profiles

• Use competency-based search to identify successors

The following diagram displays the two processes:
The following sections explain how you can use these processes.

**Comparing Talent Profiles for Succession Planning**

As a manager, you can follow these steps to create succession plans for your workers:

1. On the Talent Profile page of a worker, select the Performance Matrix (Potential) and Performance Matrix (Retention) options to view the performance profile matrix. These matrices provide critical information on performance and potential profile and performance and retention.

   See: Using Performance Matrix (Potential) and Performance Matrix (Retention), page 3-39
2. After you analyze the performance matrices, select the workers whose talent profiles you want to compare and generate a Compare Profile report.
   See: Comparing Talent Profiles, page 3-47

3. Analyze the talent profile information that Performance Matrix and Compare Profile reports provide.

   After evaluating performance profiles, you can create succession plans.
   See: Creating and Maintaining Succession Plans Using Oracle Succession Planning, page 3-59

**Using the Competency-Based Search for Succession Planning**

As a manager, you can follow these steps to create succession plans for your workers using the Competency-Based search:

1. On the Talent Profile page of a worker, select the Compare Profile option. The Talent Profile page appears for the worker where you can view two tabbed regions: Profile Comparison and Succession Planning.

2. In the Succession Planning tabbed region, search and select the worker for whom you would like to create a succession plan. Then, select a successor and click the Create a Succession Plan button.

3. On the Create Succession Plan page, you can search for suitable successors by clicking the Show Suitable Successors button. You use the Competency based search, to search for suitable successors. You can also view the Performance Matrix (9-Box) of workers.
   See: Creating and Maintaining Succession Plans Using Oracle Succession Planning, page 3-59

4. The Find Suitable Successors for Worker: Select Competencies page displays the competencies of the worker for whom you are creating a succession plan. On this page, you can add competencies to find suitable successors based on competencies. You can specify which competencies are essential and which are desirable. You can also define the required proficiency levels.

5. On the Find suitable successors for Worker: Select Competencies page, you can use search for suitable successors among workers, applicants, or contingent workers. However, the application does not search applicants in iRecruitment.

6. The Suitability Matching function identifies workers who possess essential competencies separately from those who possess desirable (nonessential) competencies. When you perform the search for workers who match your competency requirements, the application identifies workers who:
• Meet all essential and desirable competency requirements
• Meet all essential competency requirements
• Meet all desirable competency requirements
• Meet some or no essential or desirable competency requirements

If workers who match the competency requirements are found, then the Find suitable successors for Worker: Suitable People page lists workers.

Click the Suitability Analyzer button to compare competencies of workers.

7. Use the Suitability Analyzer to Find Successors

You use Suitability Analyzer to identify successors for workers for whom you want to create succession plans. You can perform the competency-based search using the business group, department, job, position, and vacancy filter criteria. You can select the competencies for which you want to view information. You can point to the ratings on the chart to view the competency ratings of workers.

You can identify suitable workers who match the search criteria as successors. To select workers as successors, you must use the Select as Successor button on the Find suitable successors for Worker: Select Competencies page.

For more information on suitability matching, see: Suitability Matching, page 3-50

Using the Succession Plans Page

This topic describes how to use the Succession Plans page.

For a general introduction to succession planning see: The Succession Plans Feature, page 3-2

On the Succession Plans page, you can:
• Search for plans for a job, position, or an employee.
• Create, update, and delete succession plans.

Searching for Succession Plans

You can search succession plans for applicants, employees, contingent workers, and ex-employees. You can use search criteria such as job, position, and worker to search for plans. For example, you can search for plans for the Manager job or search for plans for worker John Smith. The application provides additional search criteria, such as key role and turnover rate to search for job and position plans. You can use search criteria such as worker name, number, or key person, to search for a worker’s succession plans.

Use the Plan Status criteria to search for succession plans for a worker or role at a
specific status. For example, you can search for succession plans at the Draft or Active status. If you do not select a status, then the search results display plans at all statuses.

Some workers may have multiple succession plans. To search for multiple succession plans use the Successor search criteria. The successor for a job, position, or person is always a worker.

The search results include successions plans of ex-employees who are identified as successors. You can easily identify ex-employees as the application displays an icon for terminated employees.

Viewing Plan Details

You can view the following information for a succession plan:

- Name of the job, position, or worker.
- Whether the job or position is a key role and the worker is a key person.
- The time frame after which a worker is eligible to move to the new position.
- The turnover rate for the role and the retention potential of a worker.
- Readiness level or the date by which a worker can move to a new position.
- Additional successions plan details and comments.

When you move the mouse over the successor name, you can view the details of a successor such as contact and employment in a pop-up window.

From the search results table, you can update or delete an existing succession plan.

See: Creating and Maintaining Succession Plans Using Oracle Succession Planning, page 3-59

Creating and Maintaining Succession Plans Using Oracle Succession Planning

As an HR Professional or manager, you can create and maintain succession plans for workers (employees and contingent workers).

For a general introduction to succession planning, see: The Succession Plans Feature, page 3-2

The following sections describe how to create and update succession plans.

Creating a Succession Plan

Using the Create Succession Plan page, you can create a succession plan for a job, position, or worker, and you can add successors. You can add multiple successors to a
When creating a succession plan, you can use the following features to find suitable successors:

**Show Suitable Successors Feature**

You can search for successors by clicking the Show Suitable Successors button. This feature uses the Competency based search to search for suitable successors.

*Note:* When you select multiple successors on the Find suitable successors for Worker: Suitable People page and click the Select as Successors button, the Rank field on the Create Succession Plan page displays a value for each of the successors. This ranking is random and is not based on workers’ competencies. You can rank the successors as required. See the *Creating a Succession Plan* section.

See:
- Suitability Matching, page 3-50
- Succession Planning Using Talent Profile, page 3-55

**Performance Matrix**

The Performance Matrix enables you to assess workforce talent and evaluate talent pool. The Performance Matrix displays information for all the direct reports of a manager in the supervisor hierarchy.

Performance Matrix is divided into nine boxes. Each box represents the level or scale of performance and potential. The performance and potential rating scales that you view on the matrix are configurable and depends on the ratings scales that your enterprise defines.

- **Assess Performance:**
  Use the horizontal x-axis to assess the performance of workers. Performance is plotted on three scales.

- **Assess Potential:**
  Use the vertical y-axis to assess the future potential. Potential is plotted on three scales.

A combination of X and Y axes makes up the box within the grid that workers are placed.

Typically, workers in the top right box will be the high performers with the greatest potential, and those in the bottom left box will be the lowest performers with the least potential. The other boxes will display workers who are performing and displaying
potential to varying degrees.

**Talent Profile**

When creating a succession plan for a worker, you can view that worker’s talent profile. You can view the worker’s talent information such as competencies, qualifications, learning certifications, appraisal ratings, and performance objectives. The Talent Profile feature captures and displays complete worker talent details on a single-interface.

For more information on using Talent Profile, see: Using Talent Profile as Managers, page 3-8

**Creating a Succession Plan**

Complete these steps to create a succession plan:

- Select the type of succession plan that you want to create. You can create a succession plan for a job, position, or worker.

- View the talent profile of the worker for whom you want to create a succession plan.

- Select the worker’s successor. The worker’s number automatically appears. You can select an applicant as a successor.

- Select a plan status to specify at what stage the plan is at, for example, Draft or Active.

- Enter a numeric value, for example 80, as the readiness percentage to indicate how ready the potential successor is to move to the identified role.

- Specify the time period after which the worker is eligible to move to a new position, for example, immediately or in one month.

- Enter the succession dates, such as the earliest date on which a worker can move to a new position.

- Select whether the worker is eligible for a promotion.

- Provide additional plan details, if required.

- Add your comments on the succession plan. An Add Attachment window appears when you move the mouse over the plus icon in the Comments column. You can add text, provide a URL to a relevant document, or attach a supporting document. You can also upload attachments using the Add Attachment page that appears when you click the plus icon in the Comments column.

- Rank the successors, if you identify more than one successor for a worker or role.
If your enterprise has set up information for job, position, and worker, then the following information appears automatically on the page:

- Key role and turnover rate for a role (job or position)
- Key person, succession, and retention potential of a person

### Updating a Succession Plan

You update a succession plan to modify details such as succession dates or the readiness level. You can record your comments on the update.

### Enroll Workers in Training

Because a major goal of the succession planning process is the identification of a pool of high potential workers, a focus on leadership development and training is essential. After creating succession plans, managers can enroll workers in appropriate training to meet the succession planning requirements. Oracle Succession Planning’s integration with Oracle Learning Management enables managers to identify training courses and enroll workers in the courses. To enroll a worker in training, you can navigate to that worker’s Talent Profile page and use the Training region. Click the More link in the Training region to display the Learner Home page and create enrollments.
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