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PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Plan Careers and Successions

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PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Plan Careers and Successions
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Contents

Chapter 3

PeopleSoft Enterprise Human Resources Plan Careers and Successions Preface

This preface discusses:

- PeopleSoft applications.
- PeopleSoft Enterprise HRMS Application Fundamentals.
- PeopleBook structure.

PeopleSoft Applications

This PeopleBook refers to the following PeopleSoft application: PeopleSoft Enterprise Human Resources Plan Careers and Successions.

PeopleSoft Enterprise HRMS Application Fundamentals

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise HRMS Application Fundamentals PeopleBook.* Each PeopleSoft line of applications has its own version of this documentation.

Note. One or more pages in Plan Careers and Successions operate in deferred processing mode. Deferred processing is described in the preface in the *PeopleSoft Enterprise HRMS Application Fundamentals PeopleBook.*

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS Application Fundamentals Preface"

PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online Library* contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.

- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

Chapter 1

Getting Started with Plan Careers and Successions

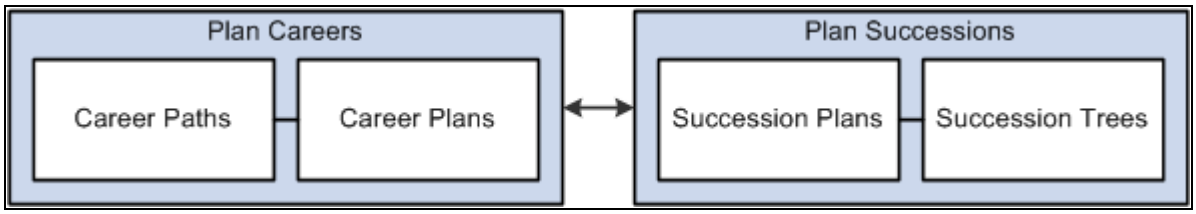
This chapter provides an overview of the Plan Careers and Successions processes and discusses:

- Plan Careers and Successions business processes.
- Plan Careers and Successions integrations.
- Plan Careers and Successions implementation.

Plan Careers and Successions Overview

Plan Careers and Successions are two separate, but integrated, business processes in Human Resources. The Career Planning business process enables you to create default career paths and to design individual career plans for workers in an organization. The Succession Planning business process enables you to build graphical succession trees by using PeopleSoft Tree Manager and to create successions plans that identify key positions and target key candidates.

This diagram illustrates the Plan Careers and Plan Successions business processes in Human Resources:



Plan Careers and Plan Successions business processes

Note. The Plan Careers and the Plan Successions business processes can be implemented separately.

Plan Careers and Plan Successions Business Processes

Plan Careers and Successions provides these business processes:

- Manage career plans.
- Manage succession plans.

This documentation covers these business processes in the business process chapters in this PeopleBook.

Plan Careers and Successions Integrations

Plan Careers and Successions integrates with these PeopleSoft applications:

- HRMS applications.
- Other PeopleSoft applications.
- Third-party applications.

This documentation discusses integration considerations in the implementation chapters in this PeopleBook.

Supplemental information about third-party application integrations is located on the My Oracle Support website.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Working with Integration Points in Enterprise HRMS"

Plan Careers and Successions Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation documentation, table-loading sequences, data models, and business process maps.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook

Enterprise PeopleTools PeopleBook: PeopleSoft Setup Manager

Chapter 2

Planning Careers

This chapter provides an overview of plan careers, lists prerequisites, and discusses how to:

- Create career paths.
- Create career plans.
- Review employee career data.
- Review career progression.
- Run career reports.
- (FRA) Rate employees.
- Manage Career Planning self-service

Understanding Plan Careers

This section discusses:

- Plan careers
- (USF) Plan careers

Plan Careers

Retaining and motivating employees are important aspects of an organization's success. Use the Plan Careers business process in Human Resources to ensure the organization uses employee talents to their fullest. Career planning enables you to assess and rank workers, record job preferences, create career paths, develop long-term goals, assign mentors, identify competencies, devise training plans, and create development plans.

To implement the Plan Careers business process:

1. Perform the prerequisite tasks.
2. Create the career paths.
3. Create the career plans.

Once everything is set up, review employee data and run the career reports on a regular basis to manage organizational growth and to adjust career paths and career plans as requirements change over time.

Integrations

The Plan Careers business process integrates with:

- The Manage Profiles business process in Human Resources.

  See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles*, "Managing Profiles."

- The Administer Training business process in Human Resources.

  See Chapter 2, "Planning Careers," Setting Up Training Programs, page 7.

(USF) Plan Careers

The Plan Careers business process for U.S. Federal Government users enables you to set up career plans and produce Individual Development Plans (IDPs) for employees' career development paths. You can track IDP progress, job move costs, training, employee appraisals, mentoring, and self-implemented career development activities. An employee or supervisor can request to work on a career plan at any time.

Once you create a career plan, the system:

1. Routes the plan along the agency's path of review and approval.
2. Tracks costs and activities associated with the plan.
3. Generates the IDP output form.

Use career plans to complement performance reviews and training programs or to prepare employees to become key managers. Career plans help you develop backup personnel for open positions.

Note. Using the Plan Careers business process is optional, and is intended to work with merit staffing practices as established by law, regulation, or internal policy.

Career Plan Tracking

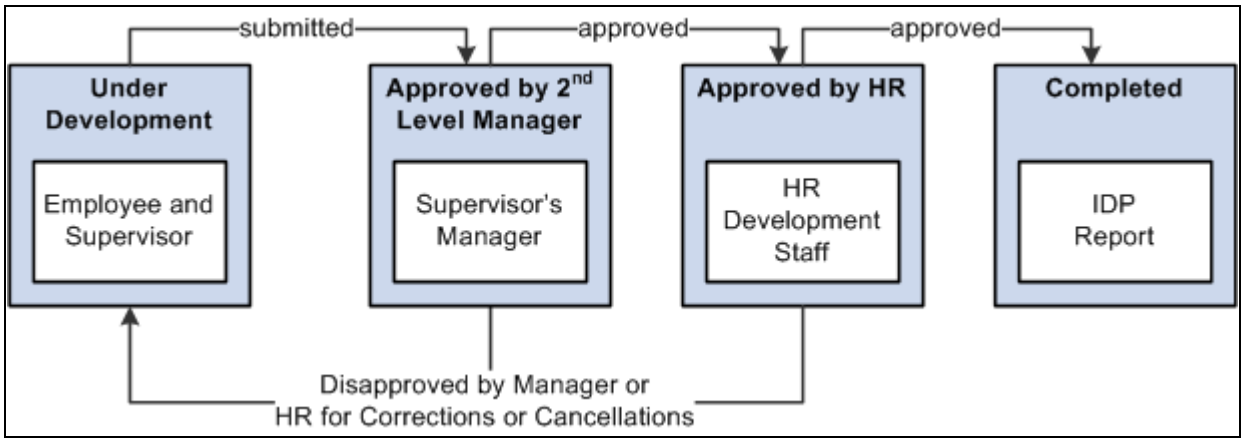
The Plan Careers business process includes a sequence of steps that enable you to track the request, approval, and completion of career plans. For example, a path might include:

- Creating a career plan.
- Submitting it as a request.
- Giving reviews and approvals.
- Completing an authorized career plan.
- Producing an IDP.

PeopleSoft workflow manages routing and tracking. You assign a status, and workflow tracks and routes the career plan through the approval cycle. Reviewers change the status to either continue the review process or disapprove the plan. The system then shows the career plan status on the Career Plan page.

Career Plan Approval Process

This graphic presents an overview of the career plan approval process:



Career plan approval process

The following definitions describe the process of submitting and reviewing career plans. You can use these or adapt them to meet specific requirements.

Status	*Career Plan Status Code*	*Definition*
Under Development	1	Employee and supervisor create a career plan, assign this status, and work on the plan until submitting it to the second-level supervisor or manager.
Submitted to Supervisor	2	Supervisor assigns this status to send the career plan to the second-level supervisor or manager.
Approved by Manager	3	Manager or second-level supervisor assigns this status to send the plan to the human resources department.
Disapproved by Manager	4	Manager or second-level supervisor assigns this status to send career plan back to originators for cancellation.
Approved by HR	5	Human resources official approves request by assigning this status.
Disapproved by HR	6	Human resources official disapproves request by assigning this status.

Prerequisites

Perform the following tasks before setting up the Plan Careers business process in Human Resources:

1. Set up HRMS basic data, such as department codes, business units and geographic locations.

2. Set up Human Resources job data for employees.
3. (optional) Set up job and employee profiles.
4. (optional) Set up training programs for employees.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Installing PeopleSoft HRMS"

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up Jobs"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Increasing the Workforce"

Setting Up Human Resources Job Data

Employee job data must exist in the Workforce Administration tables before you work with the Plan Careers pages. If you've implemented multiple business units and setIDs, the information that you use and create is determined by how business unit and setID functionality is set up for your user ID. You must define the job codes that you use in default career paths to populate identifying information from the Job Code table into the Career Path table.

To enable you to easily view employee's prior work experience, the Prior Work Experience page is accessible from the Plan Careers business process.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Understanding HRMS."

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Setting Up the Administer Workforce Business Process."

Setting Up Profiles

Use the Manage Profiles business process to create profiles for your organization's jobs and employees. A significant part of planning careers is identifying worker strengths and developmental areas and establishing goals to help workers improve in their developmental areas. You can copy competencies from employees' profiles to their career plans or from the career plan to their profiles.

Use the Manage Profiles business process to specify a person's current location, location preferences, geographic preferences, international preferences, and travel

Profiles are discussed in *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles.*

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles*, "Managing Profiles."

See Chapter 2, "Planning Careers," Evaluating Employee Strengths and Developmental Areas, page 23.

Setting Up Training Programs

Use the Administer Training business process to help workers develop the skills they need for their current position, to acquire the knowledge they need for their next position, and to develop alternate career paths. Training programs are discussed in *PeopleSoft Enterprise Human Resources PeopleBook: Administer Training.*

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Training*, "Defining Training Courses and Programs."

You can link one or more training programs to a job code to establish default training programs for employees who have this job code. Courses can also be defaulted into employee career plans, enabling you to tailor training to the individual needs of each worker.

See Chapter 2, "Planning Careers," Entering and Updating Training Programs, page 25.

Creating Career Paths

To create career paths, use the Geographic Preference (GEOG_PREF_TBL) and Career Path Table (CAREER_PATH_TBL) components.

This section provides an overview of career paths and discusses how to define career paths for job codes.

Understanding Career Paths

Set up default career paths for key job codes or for all job codes. Default career paths enable you to:

- Create a hierarchy or network of jobs.
- Identify logical career progressions and relationships between jobs.
- Save time when developing employee career plans.
- Save time when planning employee successions.

For example, you might want to coordinate career paths only for job codes above a certain management level, to make sure that employees in them get the necessary work experience to prepare for higher-level management positions.

Career Move Levels

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

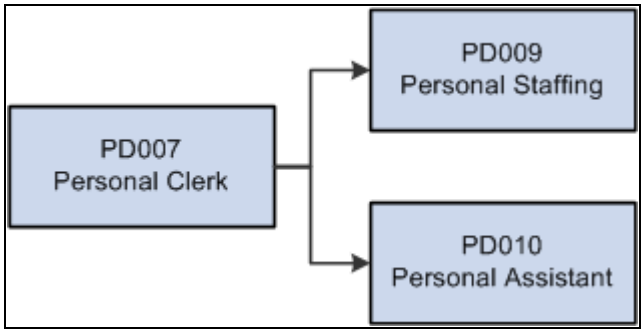
Let's look at an example of a default career path for Job Code, PD007, Personnel Clerk. The first move from the current job is to Personnel Assistant, which leads to Personnel Staffing Specialist as a second level move from the current job. As a third level move, the job leads to Personnel Officer, and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

This table lists three career moves:

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

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

This diagram illustrates that a job code can have more than one job move:



Career path options

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

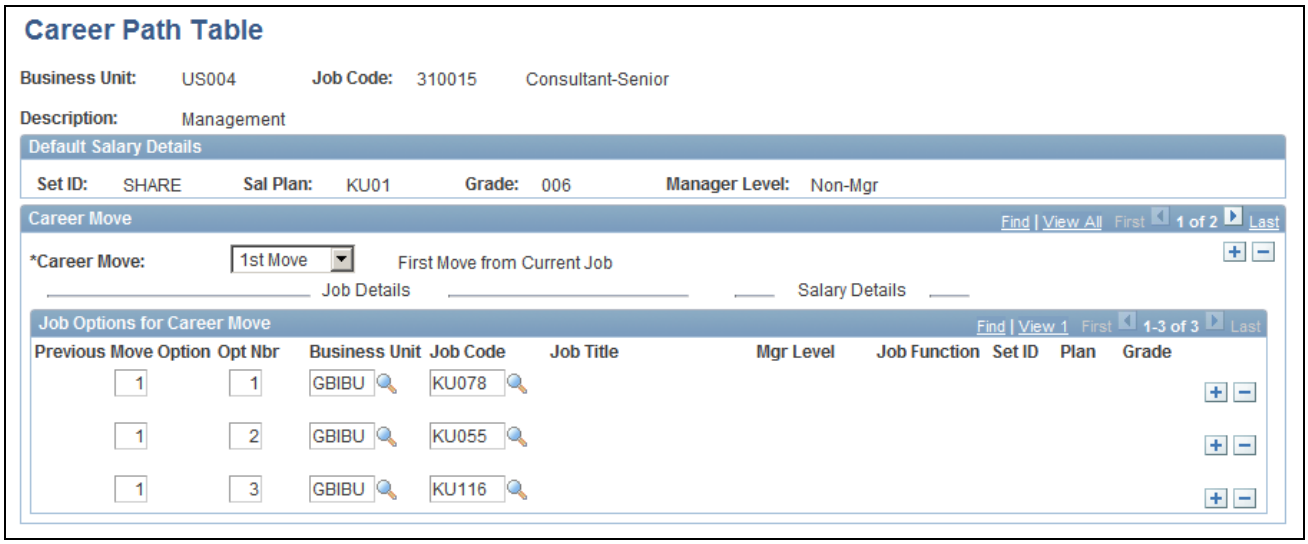
Page Used to Create Career Paths

Page Name	Definition Name	Navigation	Usage
Geographic Preference	GEOG_PREF_TBL	Set Up HRMS, Product Related, Workforce Development, Career Planning, Geographic Preference, Geographic Preference	Define geographic areas for job relocation in career planning components.

Page Name	*Definition Name*	*Navigation*	*Usage*
Career Path Table	CAREER_PATH_TBL	Set Up HRMS, Product Related, Workforce Development, Career Planning, Career Path Table, Career Path Table	Define default career paths for job codes.

Defining Career Paths for Job Codes

Access the Career Path Table page (Set Up HRMS, Product Related, Workforce Development, Career Planning, Career Path Table, Career Path Table).



Career Path Table page

Default Salary Details

The setID, salary plan, grade, and manager level that are associated with the selected job code appear in the Default Salary Details group box. These fields are for information only.

Career Move

Career Move Select a career move level. *1st Move* defines the first move from the selected job code, and *9th Move* is the last move. You can include multiple job codes for any career move to reflect moves at the same management level and moves up the management hierarchy.

Previous Move Option Identifies the previous move option number for the current movement, only when the previous movement has more than one option.

Opt Nbr(option number) Enter a number if there is more than one job code option for the selected career-move level. Use the option number to sort the job codes.

Job Code Select the job code for the career move level.

When you exit the Job Code field, the system completes the job details [Job Title, Mgr Level (manager level), and Function fields] and salary details (SetID, Plan, and Grade fields). The system makes these fields unavailable.

Creating Career Plans

To create career plans, use the Create Career Plan (CAREER_PLAN) component.

This section provides an overview of career plans and discusses how to:

- Enter employee job, location, and availability preferences.
- Define an employee career path.
- (USF) Submit and print the career plan.
- (USF) Add career path information.
- Rank employee potential.
- Enter career goals.
- Enter career mentoring data.
- (USF) Add career goal information.
- Evaluate employee strengths and developmental areas.
- Synchronize competency data.
- Enter and update training programs.
- (USF) Add information about a career developmental goal.
- (USF) Approve the career plan.

Understanding Career Plans

Use the Create Career Plan component to enter information about an employee's current position, abilities, strengths, and career desires for the future. You can use this information to help plan employee careers and maintain an available pool of candidates for key positions.

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

Recording Input From Multiple Sources

If you gather feedback on an employee from many people or groups and each evaluator has different recommendations, don't create a new career plan every time someone contributes information. Instead, identify the contributor by specifying an input evaluation type. After weighing the evaluations, assign a composite rating for inclusion in an approved career plan.

Pages Used to Create Career Plans

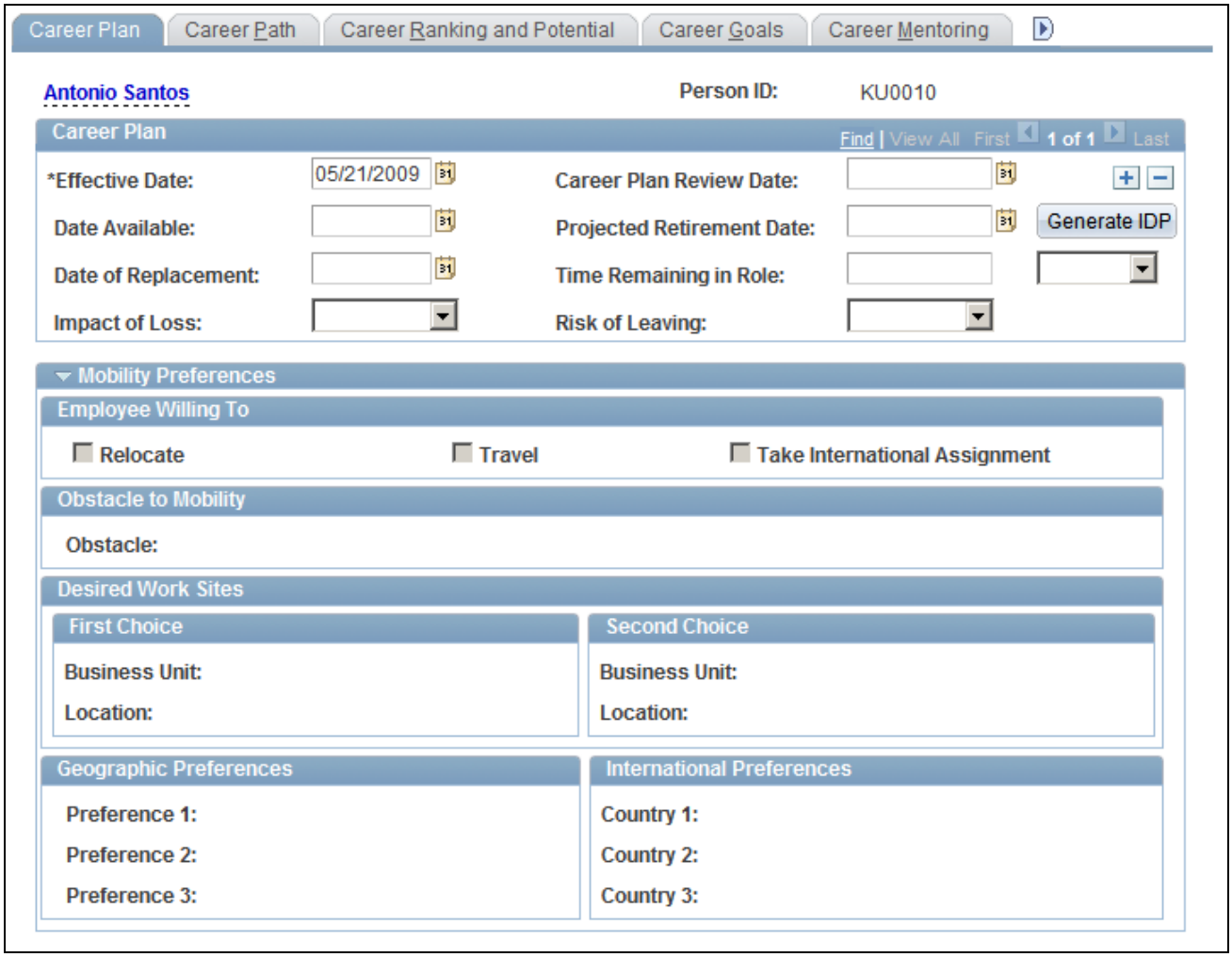
Page Name	*Definition Name*	*Navigation*	*Usage*
Career Plan	CAREER_PLAN1	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Manage Career Plan, Career Plan	Enter employee preferences for jobs and geographic locations; indicate availability to move into new positions.
Career Path	CAREER_PLAN2	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Manage Career Plan, Career Path	Define an employee's career path; modify a default career path; configure a job progression.
Current Career Position Descr (current career position description)	CAREER_POSN_SEC	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Manage Career Plan, Career Path Click the Position Long Description link.	View a description of the position selected on the Create Career Plan - Career Path page.
Current Career Job Descr (current career job description)	CAREER_JOBCD_SEC	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Manage Career Plan, Career Path Click the Jobcode Long Description link.	View a description of the job code selected on the Create Career Plan - Career Path page.
(USF) Print Individual Development Plan (IDP) Actions	GVT_CAR_PIDP_SEC	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Manage Career Plan, Career Plan Click the Federal Data/Print IDP link.	Submit the career plan for approval; print the completed plan.

Page Name	*Definition Name*	*Navigation*	*Usage*
(USF) Federal Potential Future Positions	GVT_CAR_PLN2_SEC	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Manage Career Plan, Career Path Click the Federal Data link.	Add further information about the career path specified on the Career Plan - Career Path page.
Career Ranking and Potential	CAREER_PLAN3	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Manage Career Plan, Career Ranking and Potential	Show how employees compare to their peers and indicate their potential.
Career Goals	CAREER_PLAN4	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Manage Career Plan, Career Goals	Enter short and long-term goals for employees.
Career Mentoring	CAREER_PLAN5	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Manage Career Plan, Career Mentoring	Assign career mentors.
Federal Coaching/Mentor Information	GVT_CAR_PLN5_SEC	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Manage Career Plan, Career Mentoring Click the Federal Data button.	Add further information about the career goal specified on the employee's Career Mentoring page.
Career Strength/Develop Areas	CAREER_PLAN6	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Manage Career Plan, Career Strength/Develop Areas	Record and evaluate an employee's career strengths and developmental areas.
Career Training Plan	CAREER_PLAN7	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Manage Career Plan, Career Training Plan	Enter or update a training program for the selected employee; use or modify the default training program for the employee job code.
Career Development Plan	CAREER_PLAN8	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Manage Career Plan, Career Development Plan	Help employees improve in developmental areas before their next performance review or career planning session.

Page Name	*Definition Name*	*Navigation*	*Usage*
(USF) Federal Career Plan Information	GVT_CAR_PLN8_SEC	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Manage Career Plan, Career Development Plan Click the Federal button.	Add further information about the career developmental goal specified on the Career Development Plan page.

Entering Employee Job, Location, and Availability Preferences

Access the Career Plan page (Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Manage Career Plan, Career Plan).



Career Plan page

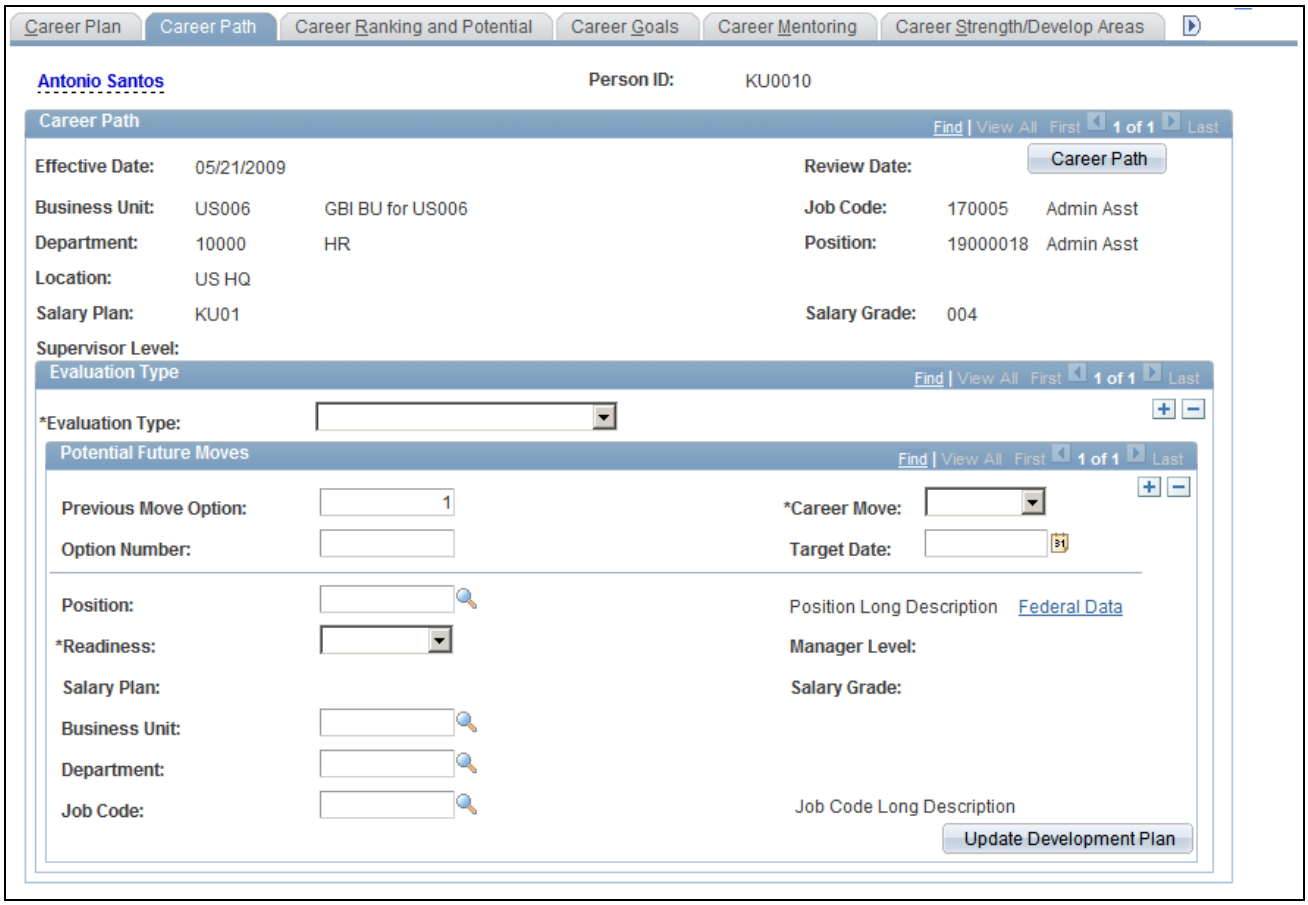
Projected Retirement Date This field automatically populates with the date on which the employee turns 65. If that is not the employee's actual retirement date, enter the correct date.

Date of Replacement	Enter the scheduled date of arrival for the person replacing the current employee.
Time Remaining in Role and **[time period]**	Enter the amount of time remaining in the employee's current position, and select the unit of measure, months or years.
Impact of Loss	Select the impact to the organization if this employee leaves their current position. Values are: *High*,*Medium*, and *Low*.
Risk of Leaving	Select the overall risk of this employee leaving his or her current position. Values are: *High*,*Medium*, and *Low*.
Generate IDP	This button appears for U.S. Federal users only. Click to display the Print Individual Development Plan (IDP) Actions page, where you submit the career plan for approval and print the completed plan.

The fields in the Mobility Preferences region of the Career Plan page display the preferences indicated on the Person Profile page for the specified Person ID.

Defining an Employee Career Path

Access the Career Path page (Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Manage Career Plan, Career Path).



Career Path page

Career Path

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

Once you save the plan, the Career Path button is unavailable. However, each time you create a new career plan for an employee, the system makes the button available, and you can use the default path for the new plan. See Setting Up Default Career Paths for information about creating default career paths.

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

Evaluation Type

Within each career plan, there can be multiple evaluation types. Several people, such as the employee's supervisor or mentor, might have ideas about the next job to which an employee should move. Because their input affects the same time frame, create new evaluation type records, not a new career plan.

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

Potential Future Moves

Previous Move Option Enter the previous move option number for the current movement, when the previous movement has more than one option. This field is not visible for the first move of any career path, or for any movement for which the previous move has only one option.

Career Move Select the career move to define.

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

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

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

When you move out of this field, the system completes the Business Unit, Department and Job Code fields. It also displays the job title, salary plan, grade, manager level, and function associated with this position.

If you use partial position management and decide not to use a position in this career move, delete the position number.

Readiness Select an estimate of the employee's readiness for such a move from these options:

1−2 Yrs: (1−2 years) The employee will be ready for the move within the next two years.

3−5 Yrs: (3−5 years) The employee will be ready for the move in three to five years.

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

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

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

The system uses this information in Plan Successions to show blockages (succession candidates who are blocked from advancement).

Federal Data

This link only appears if you are a U.S. Federal user.

Click to display the Federal Potential Positions page, where you enter further information about the potential career move.

Department

If you know it, select a department for the job. This field is optional. You create departments in the Department table. The setID determines the departments that you see.

Job Code

Select the job code for the career move from the available options. When you select a job code and move out of the field, the system displays the associated job title, salary plan, grade, manager level, and function. You use the Job Code table to create job codes.

Update Development Plan

Click to have the system compare the employee's current person profile against the job code or position profile associated with the focus movement. The system identifies competency deltas and other profile sections for insertion on the Career Development Plan page as follows:

- Competencies and other rated items with a lower rate than required by the job profile are inserted.
- Required job profile items for which there is no rating in the employee profile are inserted.
- Person profile items that have multiple ratings where any of those ratings are lower than required in the job profile are inserted.

After the identified competencies and other items are inserted into the career development plan, the system opens the Career Development Plan page. This enables the user to update any related information, such as the estimated completion date, and so on.

(USF) Submitting and Printing the Career Plan

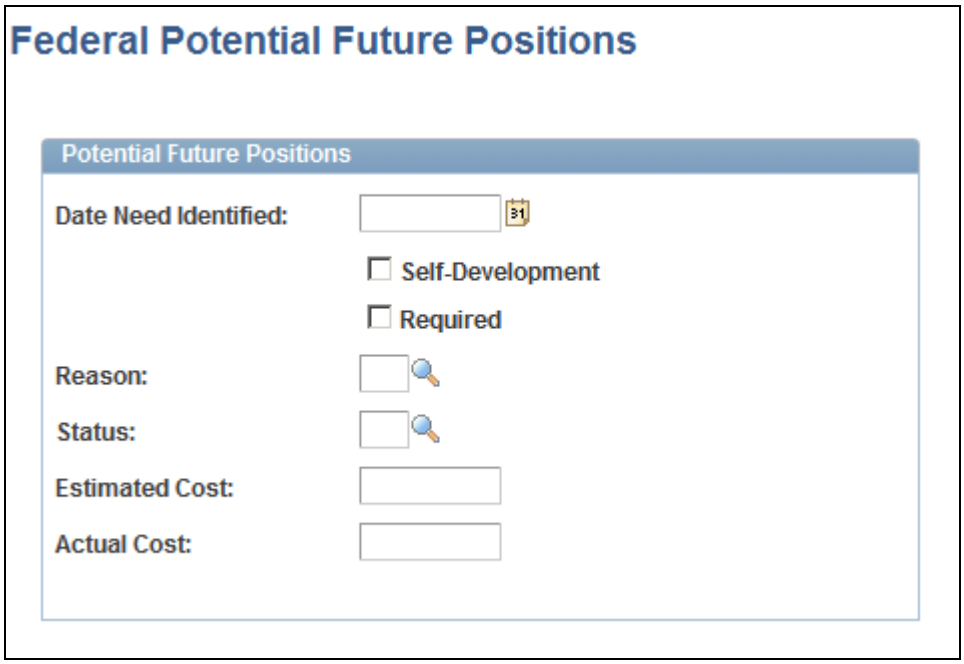
Access the Print Individual Development Plan (IDP) Actions page (click the Generate IDP button on the Career Plan page).

Print Individual Development Plan (IDP) Actions page

Reason Career Plan Initiated	Select a reason for the career plan. Valid values are *Bargaining Unit Agreement, Career Ladder,Career Program,Developmental Program, Employee Requested, Periodic Review,* and *Supervisor Requested.*
Currently Participating	Select if the employee is participating in a developmental program and select the program from the list of available options.
Developmental Program	Select a developmental program. Values are: *Administrative Intern Program, Career Enhancement Program,Career Program,Computer Programmer Trainee, None,* and *WAO Intern Program.*
Create IDP	Click to create a PDF version of the Individual Development Plan for this person.

(USF) Adding Career Path Information

Access the Federal Potential Future Positions page (click the Federal Data link on the Career Path page).

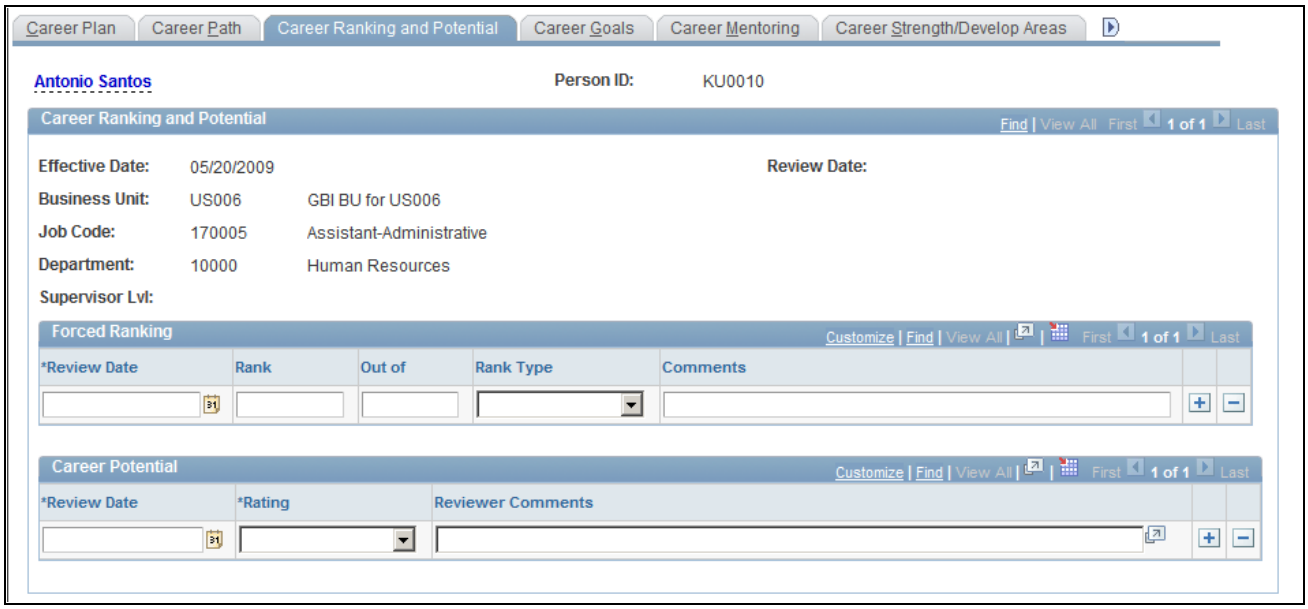


Federal Potential Future Positions page

Date Need Identified	Enter the date that the career move was agreed to.
Self-Development	Select if this is part of the employee's self-development activities.
Required	Select if the move is required.

Ranking Employee Potential

Access the Career Ranking and Potential page (Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Manage Career Plan, Career Ranking and Potential).



Career Ranking and Potential page

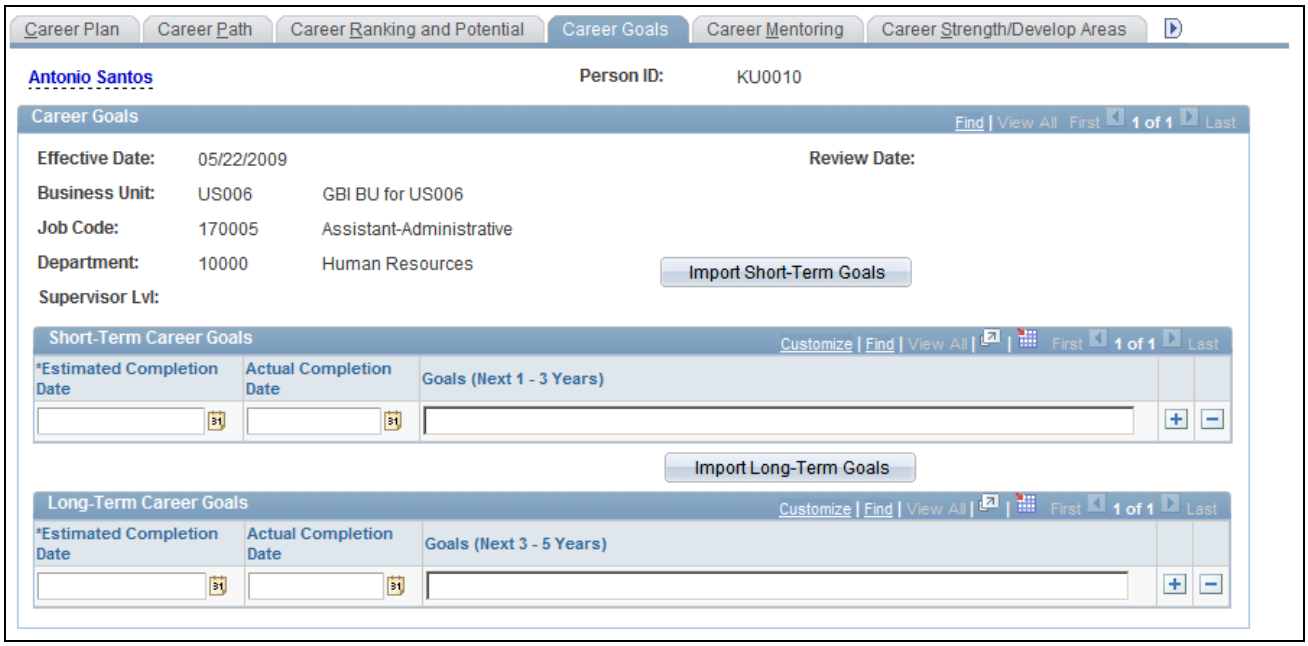
To get a better cross-section of employee skills and promotability, enter rankings of different types.

Out of Enter the total number of people against whom the employee has been ranked.

To illustrate how force ranking and career potential might work together, consider John Smith, an engineer. John ranks second out of 200 engineers who have the same job code. On the basis of force ranking alone, an executive committee might think he's a candidate to move to a critical Kuwaiti project. However, John is about to retire, loves his current position in Bahrain, and does not want to move anywhere. You can indicate this by giving him a rating of currently well-placed, *placed*, in his career potential evaluation.

Entering Career Goals

Access the Career Goals page (Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Manage Career Plan, Career Goals).



Career Goals page

Import Short-Term Goals

This button is for U.S. Federal users only.

Click this button to import goals from the employee's most recent appraisal.

Actual Completion Date

Enter the actual completion date when the employee achieves the goal.

Goals (Next 1 - 3 Years)

Enter short-term goals in this field. If you are tracking employee reviews in Human Resources, use the short-term goals entered here as the basis for short-term goals and objectives in employee reviews.

Import Long-Term Goals

This button is for U.S. Federal users only.

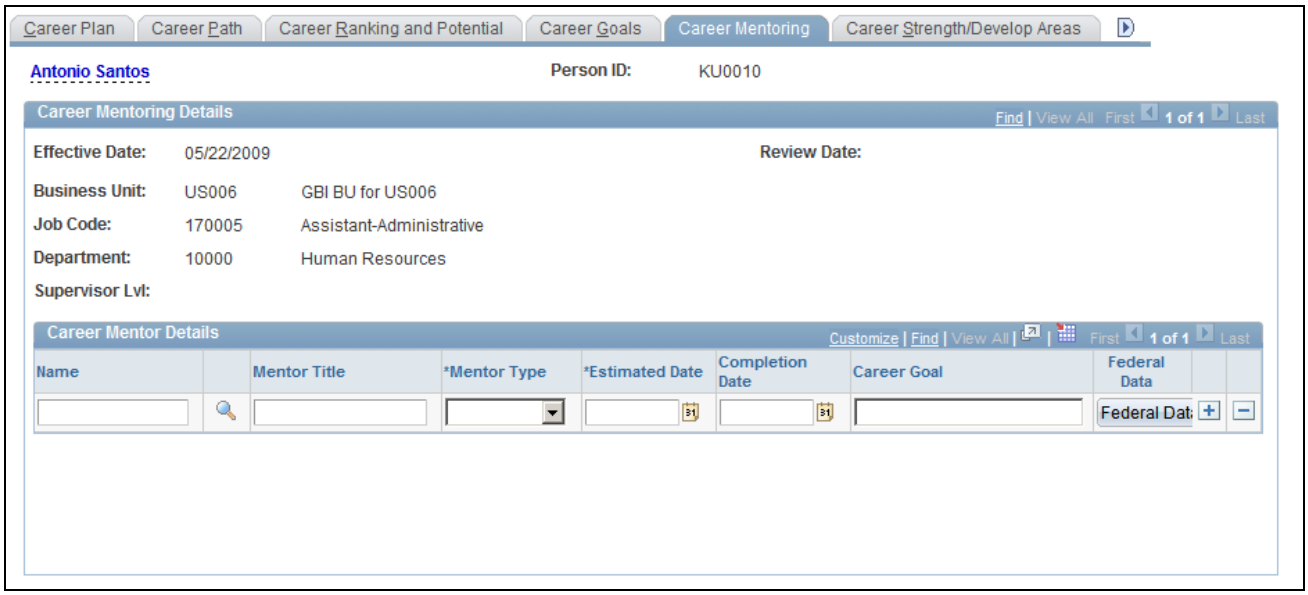
Click this button to import goals from the employee's most recent appraisal.

Goals (3 - 5 Years)

Enter long-term goals in this field. If you are tracking employee reviews in Human Resources, use the long-term goals entered here as the basis for long-term goals and objectives in employee reviews.

Entering Career Mentoring Data

Access the Career Mentoring page (Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Manage Career Plan, Career Mentoring).



Career Mentoring page

An employee can have multiple mentors of different types working towards different career goals.

Name Enter the name of the employee's mentor.

Mentor Type Select the type of mentor from the list.

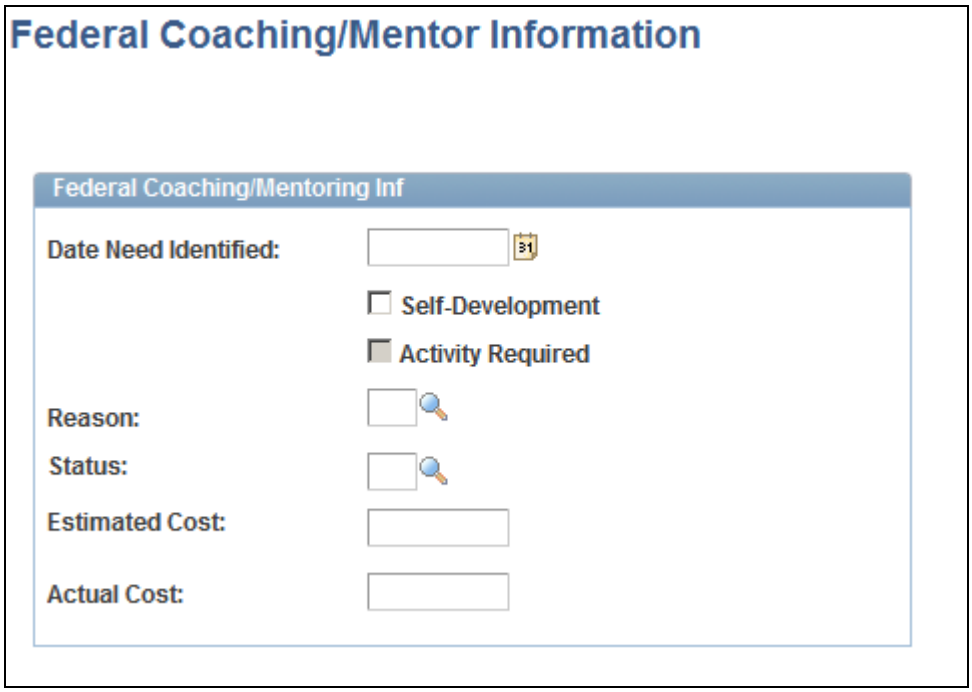
Estimated Date Enter the expected date of completion for this mentoring activity.

Completion Date When complete, enter the completion date.

Career Goal Enter the career goal for the employee to achieve through this mentor.

(USF) Adding Career Goal Information

Access the Federal Coaching/Mentor Information page (click the Federal Data button on the Career Mentoring page).



Federal Coaching/Mentor Information page

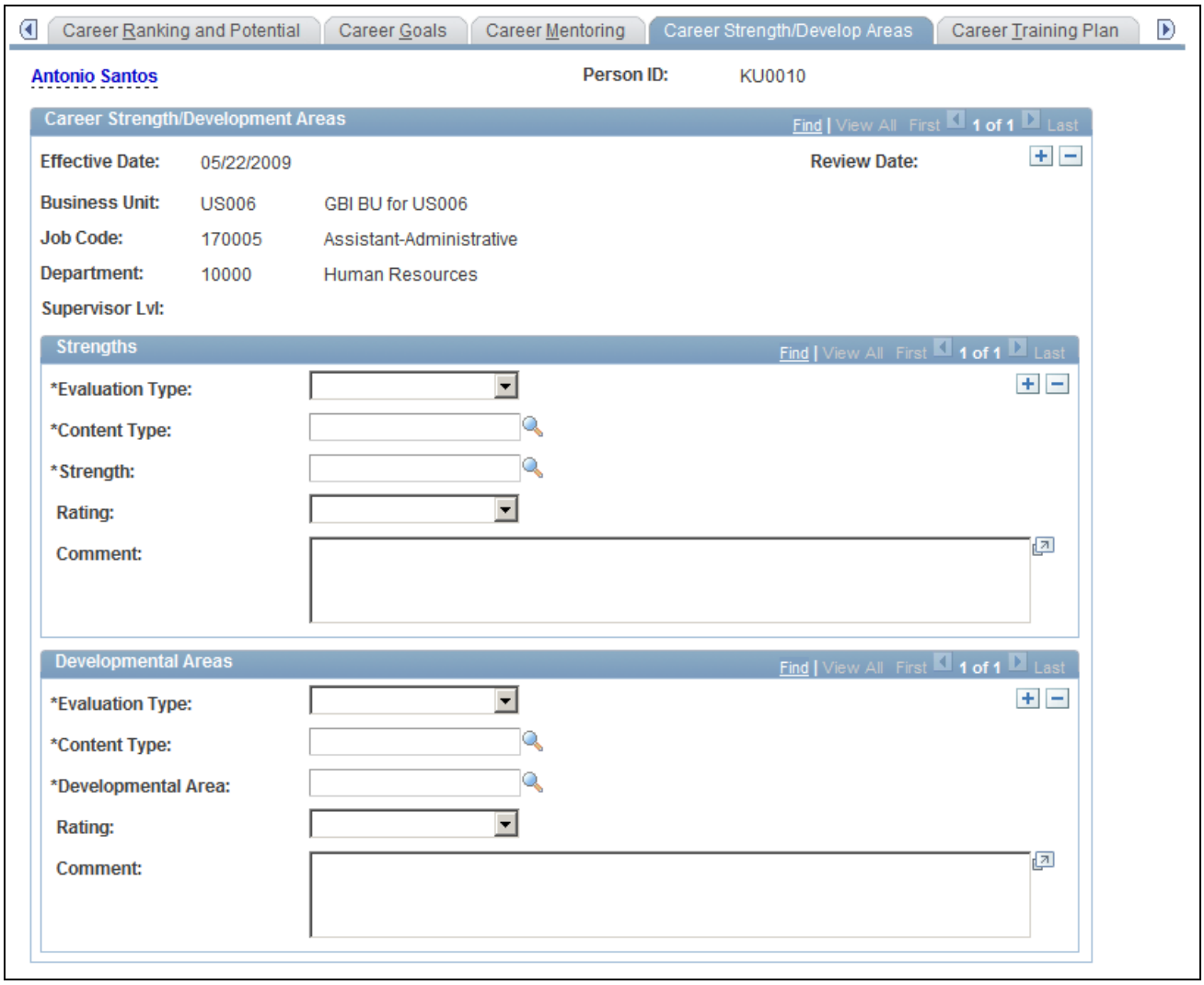
Date Need Identified Enter the date that the goal was agreed to.

Self-Development Select if this is part of the employee's self-development. This indicates that the employee is paying the costs for this activity.

Activity Required Select if the activity is mandatory.

Evaluating Employee Strengths and Developmental Areas

Access the Career Strength/Develop Areas page (Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Manage Career Plan, Career Strength/Develop Areas).



Career Strength/Develop Areas page

Strengths

Content Type Select a content type related with the Strengths/Developmental Areas according with the content types available from Profile Management. The available content types are limited by the content types indicated on the Career Planning - Profile Set Up page.

Strength Select the strength to evaluate from the list of competencies. Competencies are defined in the content catalog that is part of the Manage Profiles business process.

Rating Select the rating that best matches the employee's level of proficiency for the selected competency.

Developmental Areas

Developmental Area Select a competency that is a developmental area for the employee.

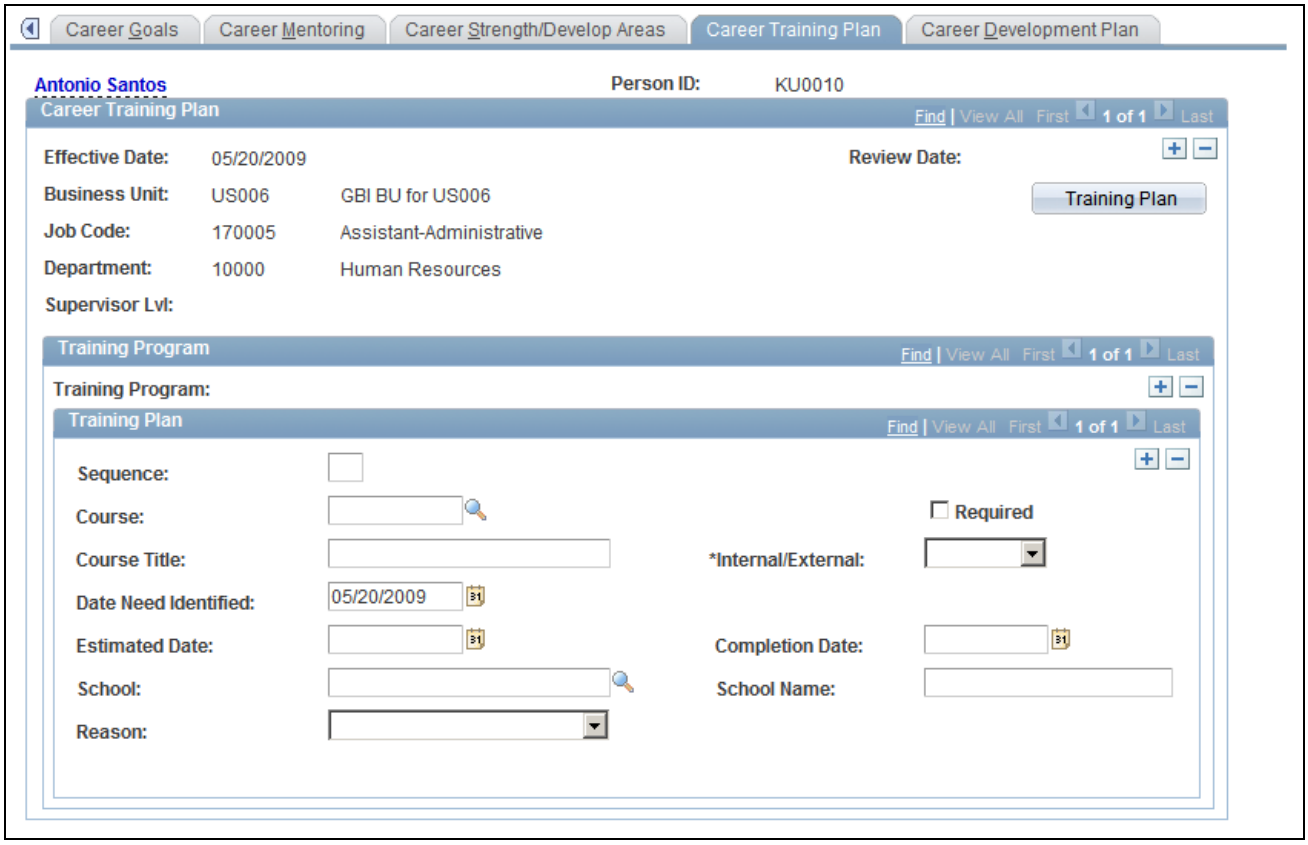
Rating Select the rating that best matches the employee's level of proficiency for the selected competency.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles, "Setting Up the Content Catalog"

Entering and Updating Training Programs

Access the Career Training Plan page (Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Manage Career Plan, Career Training Plan).



Career Training Plan page

Training Plan

You create default training programs in the Training Program table and tie them to job codes in the Job Code table. If a training plan has been established for the job code displayed on this page, when you click the Training Plan button, the system populates the fields in the Training Plan scroll area with the information from the training program. If the employee's training plan differs from the default plan, modify the fields as required.

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

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

Training Program

Training Program

Displays the training program name, if the employee's training plan is based on a predefined training program.

Training Plan

Sequence

To set the course order, enter a sequence number. If this field is left cleared, courses appear in ascending chronological order by estimated completion date. To rearrange the courses on the list, enter sequence numbers for the courses in the order that they should appear. Save this information, close, and reopen the page. The courses will appear in the new order.

Completion Date

If the training course has been scheduled in Administer Training, the system will display the end date of the course in this field when the status changes to *Completed.*

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

Course

Select a course code from the list of available options. When you exit this field, the system enters the course title, the internal and external value, the school code, and the school name for the course. The system makes the fields unavailable; you can't change this information.

If you've entered a course code and decide that you don't want to use it after all, delete the selection. When you exit this field, the system makes the other fields available.

Course Title

If you selected a course code, the system supplies the course title and makes this field unavailable. If the course is not in the course table, enter the course title.

Required Select this check box if the course is mandatory.

Internal/External If you selected a course code, the system completes this field and makes it unavailable. If you left the Course field cleared, select one of these options:

Internal: If the course is held in-house.

External: If an external vendor administers the course.

Date Need Identified The system automatically populates this field with the career plan date, which you can change if necessary.

School If the course is *External*, select a school code, which you define in the school table. If the school isn't in the school table, leave this field cleared and complete the school Name field. When you select a course that is *Internal*, the system makes the School field unavailable.

Name If you selected a school code, the system enters the school name and makes this field unavailable. If the school isn't in the school table, enter the school name.

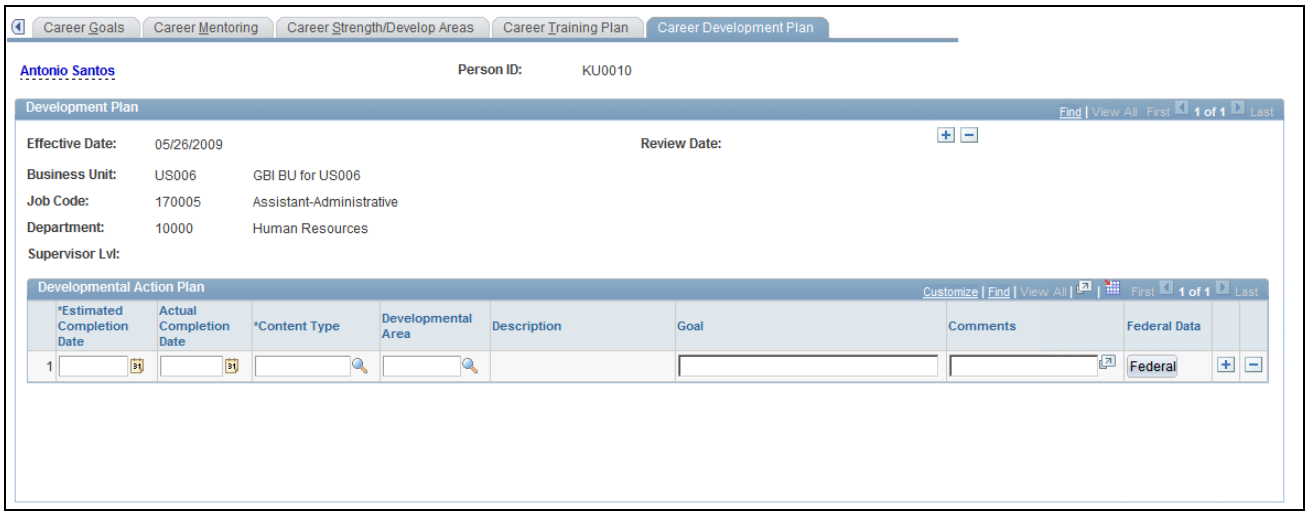
USF fields

The following elements are for U.S. Federal users only.

Self-Development If this is part of the employee's self-development activities, select this check box. This indicates that the employee is paying the costs for this activity.

Adding Career Development Plans

Access the Career Development Plan page (Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Manage Career Plan, Career Development Plan).



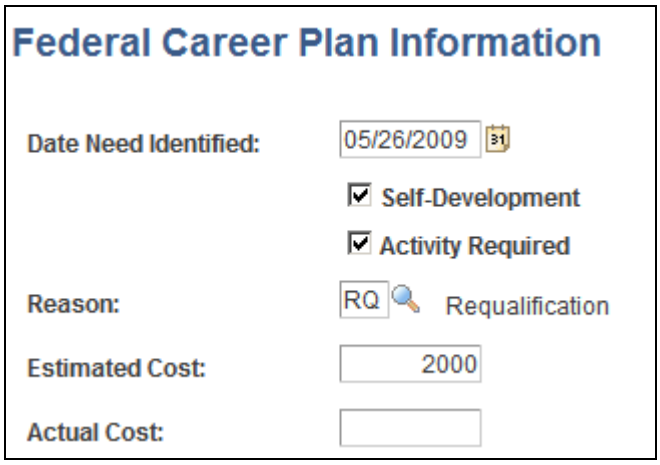
Career Development Plan page

Content Type Select the content type related to the developmental area. The available content types are limited by the content types specified on the Career Planning - Profile Set Up page.

Developmental Area Select a developmental area based on the selected content type. You cannot select a value for the developmental area until you select a content type.

(USF) Adding Information About a Career Developmental Goal

Access the Federal Career Plan Information page (click the Federal button on the Career Development Plan page).



Federal Career Plan Information page

Date Need Identified Enter the date that the goal was agreed to.

Self-Development If this is part of the employee's self-development activities, select this check box. This indicates that the employee is paying the costs for this activity.

(USF) Approving the Career Plan

Access the Career Plan, Career Path, Career Mentoring, and Career Training Plan pages.

Depending on how the approval process is set up, PeopleSoft workflow routes requested career plans to the appropriate person for approval. The reviewer can approve or change the request and send it to other reviewers and, ultimately, to a human resources person. To view the request, the reviewers open their worklist and the career plan appears. The reviewer then brings it up as a correction to approve or reject it. All of the pages routed through workflow for approval contain a Status field to indicate approval or disapproval.

To begin the approval process:

1. Access the worklist and open the appropriate page (Career Plan, Career Path, etc.).
2. View the plans that are ready for approval.
3. Review them, then change the status to indicate the review decision.

To open the worklist:

1. Select View, Navigator Display, Worklist.
2. Open the career plan ready for approval.

To approve a career plan request:

1. Access the page by accessing the worklist.
2. At the bottom of the page, click either Approve or Disapprove.

To approve a career path request:

1. Open the worklist.

   The system prompts for an employee ID.
2. Open the page and change the status to *Approved* or *Disapproved.*

To approve a career mentoring request:

1. Open the worklist.

   The system prompts you for an employee ID.
2. Open the page and change the status to *Approved* or *Disapproved.*

To approve a career training plan request:

1. Open the worklist.

   The system prompts for an employee ID.

2. Open the page and change the activity status to such as *Approved* or *Disapproved.*

Reviewing Employee Career Data

To review career-related employee data, use the Employment (EMPLOYEE_SUMMARY), Career Assignments (CAREER_SUMMARY), Immediate Family Summary (CAREER_DEPEND_SUMM), Compensation Summary (COMP_SUMMARY), and Training (TRN_STUDNT_CRS_SU1) components.

This section provides an overview of employee career data and discusses how to:

- View employee job paths.
- View summary information.

Understanding Employee Career Data

When you prepare employees for career advancements, look at the candidates' personal and job histories and review their career plans. All the information is on the Plan Careers menu. You can access prior work experience, education, career assignments, and several summary pages. The information on the summary pages is display-only.

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

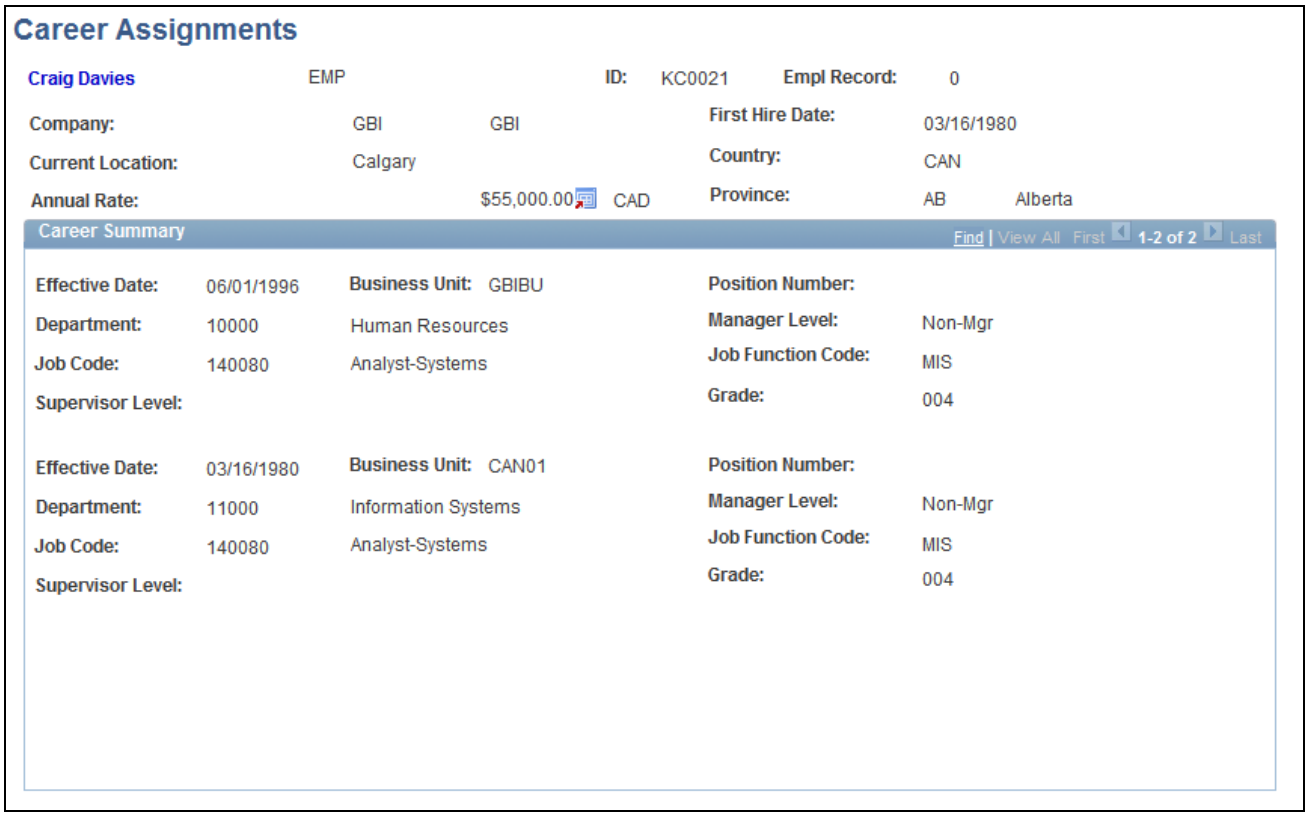
Pages Used to Review Employee Career Data

Page Name	***Definition Name***	***Navigation***	***Usage***
Employment	EMPLOYEE_SUMMARY1	Workforce Development, Career Planning, Review Career Summaries, Employment, Employment	View employee current job, employment, and personal data.
Career Assignments	CAREER_SUMMARY	Workforce Development, Career Planning, Review Career Summaries, Career Assignments, Career Assignments	View employee job paths through an organization.
Immediate Family	IMMEDIATE_FAMILY	Workforce Development, Career Planning, Review Career Summaries, Immediate Family, Immediate Family	View employee dependent and beneficiary information.

Page Name	Definition Name	Navigation	Usage
Compensation	COMP_SUMMARY	Workforce Development, Career Planning, Review Career Summaries, Compensation, Compensation	View summary compensation information.
Training	TRN_STUDNT_CRS_SUM	Workforce Development, Career Planning, Review Career Summaries, Training, Training	View summary training information.

Viewing Employee Job Paths

Access the Career Assignment Summary page (Workforce Development, Career Planning, Review Career Summaries, Career Assignments, Career Assignments).



Career Assignments page

The Career Assignments page shows a history of previous jobs that an employee has held in the company. It does not list every personnel action; it shows only job movements. Each position, job code, salary grade, department or business unit change appears.

Viewing Summary Information

If additional employee information exists in Human Resources, such as compensation history, training history, and information about the employee's immediate family, you can review it on the Career Assignments, Immediate Family, Compensation, and Training pages.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Compensation and Budgeting, "Viewing and Reporting Summary Salary Data," Understanding Compensation History

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Viewing Summary Workforce Information," Viewing Worker Job History

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Increasing the Workforce"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Training, "Tracking Student Training," Reviewing Training-Related Employee Data

Reviewing Career Progression

This section provides an overview of the career progression chart and describes how to view the career progression chart.

Understanding the Career Progression Chart

The career progression chart page enables users to see a graphical representation of an employee's career path and perform a profile comparison between the employee and any role selected in the career path. The Career Progression Chart is available to employees and managers through their respective self service menus, as well as HR administrators through the Workforce Development menu.

An employee, manager or administrator can perform the following actions:

- Search for career paths.
- View a graphical representation of career paths.
- View role profile summaries for a position or job code.
- View a gap/fit analysis of an employee's competency for any job in his or her career path.
- View and compare competency list for a job code with that of any job in the same career path.

Complete the following prerequisites to perform the actions listed above:

- Define a career path on the Career Path page.

  A personal career path or an Approved/Official path enables an employee to see a graphical representation of career paths.

- Define a person profile for the employee that includes a competency section with ratings.

  This enables employees and managers, through their respective self service options, to view profile summaries.

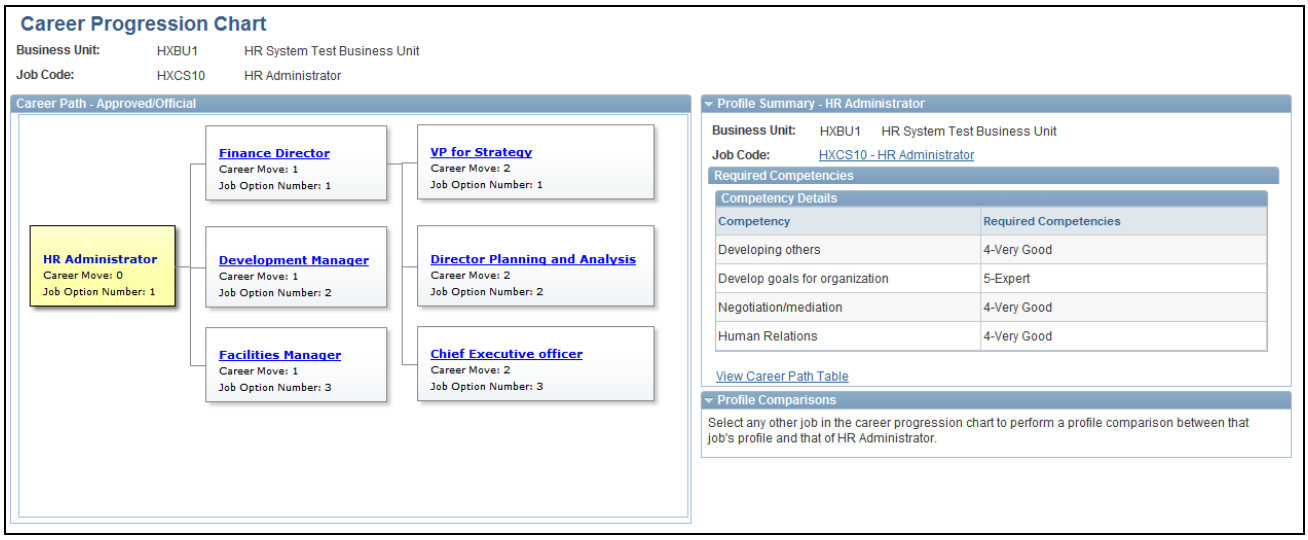
- The job has a defined non-person profile that includes a competency section with required ratings.

Page Used to View the Career Progression Chart

Page Name	*Definition Name*	*Navigation*	*Usage*
Career Progression Chart	HR_CP_ADM_CHART	• Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Career Progression Chart • Manager Self Service, Career Planning, Career Progression Chart • Self Service, Career Planning, Career Progression Chart • Click the Career Progression Chart link on various career planning pages.	View career paths and non-person profile summaries in order to perform a competency gap/fit analysis.

Viewing Career Progression

Access the Career Progression Chart page (Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Career Progression Chart).



Career Progression Chart page

Career Path - Approved/Official

This region displays up to three career path evaluation types defined on the Self-Service Career Planning page or the Career Planning page:

- The approved and official career path as defined on the Career Planning page.
- A manager-agreed career path as defined on the Self-Service Career Planning page for Manager and Employee Self-Service.
- A personal career path as defined on the Self-Service Career Planning page for Employee Self-Service.

Each job code in the chart is referred to as a node. Selecting a node makes that node the current node, which affects the content in the Profile Summary region.

Profile Summary

Displays a summary of data for a job code. The contents of this region are associated with a focus node in the Career Path region.

Compare Role to Role or **Compare Myself to Role** or **Compare Employe to Role**

Click to initiate a Profile Manager-based competency gap/fit comparison process, using the job code that is the Focus of the chart, displayed in the Profile Summary region, as the source for basing the comparison. The system displays the comparison results in a Match Results window.

When accessing the Career Progression Chart page from the Self–Service pages, the Compare Myself to Role button initiates a comparison process. When accessing the Career Progression Chart page from the Manager Self–Service pages, the Compare Employe to Role button initiates a comparison process. The Profile system initiates the Management Person to Role Match process for the current employee and the job associated with the focus node in the Career Path region.

When an HR administrator accesses the Career Progression Chart page from the Prepare Evaluation/Career Plan pages, the Compare Role to Role button initiates a side-by-side competency comparison between the selected job code or position and any job code selected in the career path. The displayed competencies are taken from the non-person profile for each job code.

Note. If the selected employee or the selected job code do not have defined profiles, the system will not initiate the comparison process.

Running Career Reports

This section lists the pages used to run career reports and discusses how to create career details by population reports.

Pages Used to Run Career Reports

Page Name	*Definition Name*	*Navigation*	*Usage*
Career Details by Population	HR_SUCC_METRICS1	Workforce Development, Career Planning, Reports, Career Details by Population	Create reports that display various career planning employee metrics.
Available Career Plans	HR_SUCC_METRICS3	Select *Available Career Plans* on the Career Details by Population page and click the Run Report button	View the status of career plans for employees.
Career Potential	HR_SUCC_METRICS3	Select *Career Potential* on the Career Details by Population page and click the Run Report button	Identify employees based on their defined potential, when those employees will retire, and how long they have been in their current role.

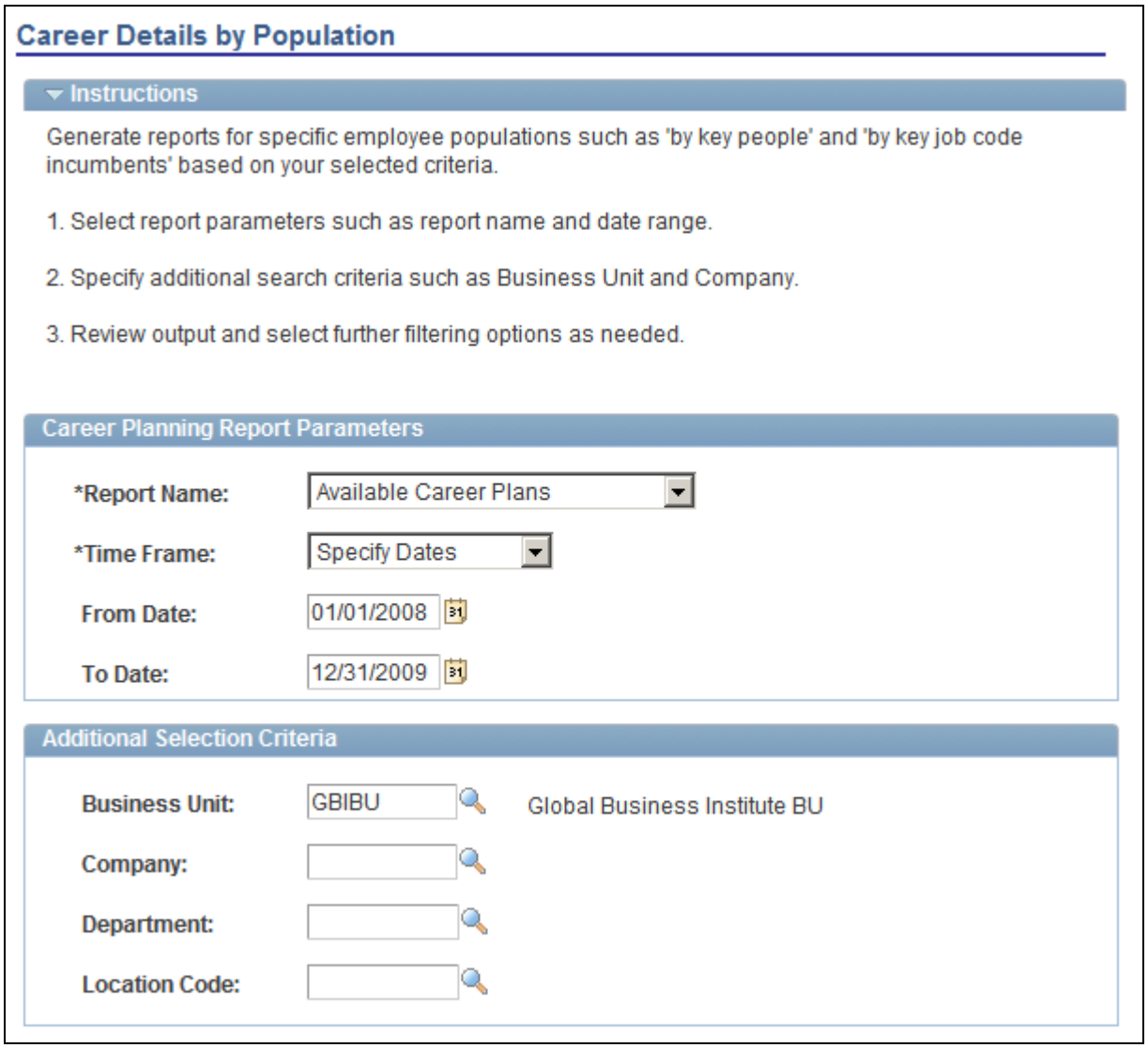
Page Name	*Definition Name*	*Navigation*	*Usage*
Key Job Code - Incumbents	HR_SUCC_METRICS3	Select *Key Job Code - Incumbents* on the Career Details by Population page and click the Run Report button	Identify key job codes and the career plan of any incumbents for those job codes.
Individual Career Plan	RUNCTL_CAR001	Workforce Development, Career Planning, Reports, Individual Career Plan	Run the Career Planning Report (CARPLAN) report.
Individual Career Training	RUNCTL_CAR002	Workforce Development, Career Planning, Reports, Individual Career Training	Run the Career Plan Training Path (CARTRAIN) report.
Individual Development Plan	RUN_FGHR022	Workforce Development, Career Planning, Reports, Individual Development Plan	Run the Individual Development Plan (FGHR022) report.

Creating Career Details by Population Reports

You can create report pages that you can view online that display various career planning employee metrics. Using the Career Details by Population page, you can view the following information:

- Employees with or without a defined career plan.
- The career potential for employees, including the amount of time in their current role and their retirement date.
- Incumbents with or without career plans for key job codes.

Access the Career Details by Population page (Workforce Development, Career Planning, Reports, Career Details by Population).



Career Details by Population page

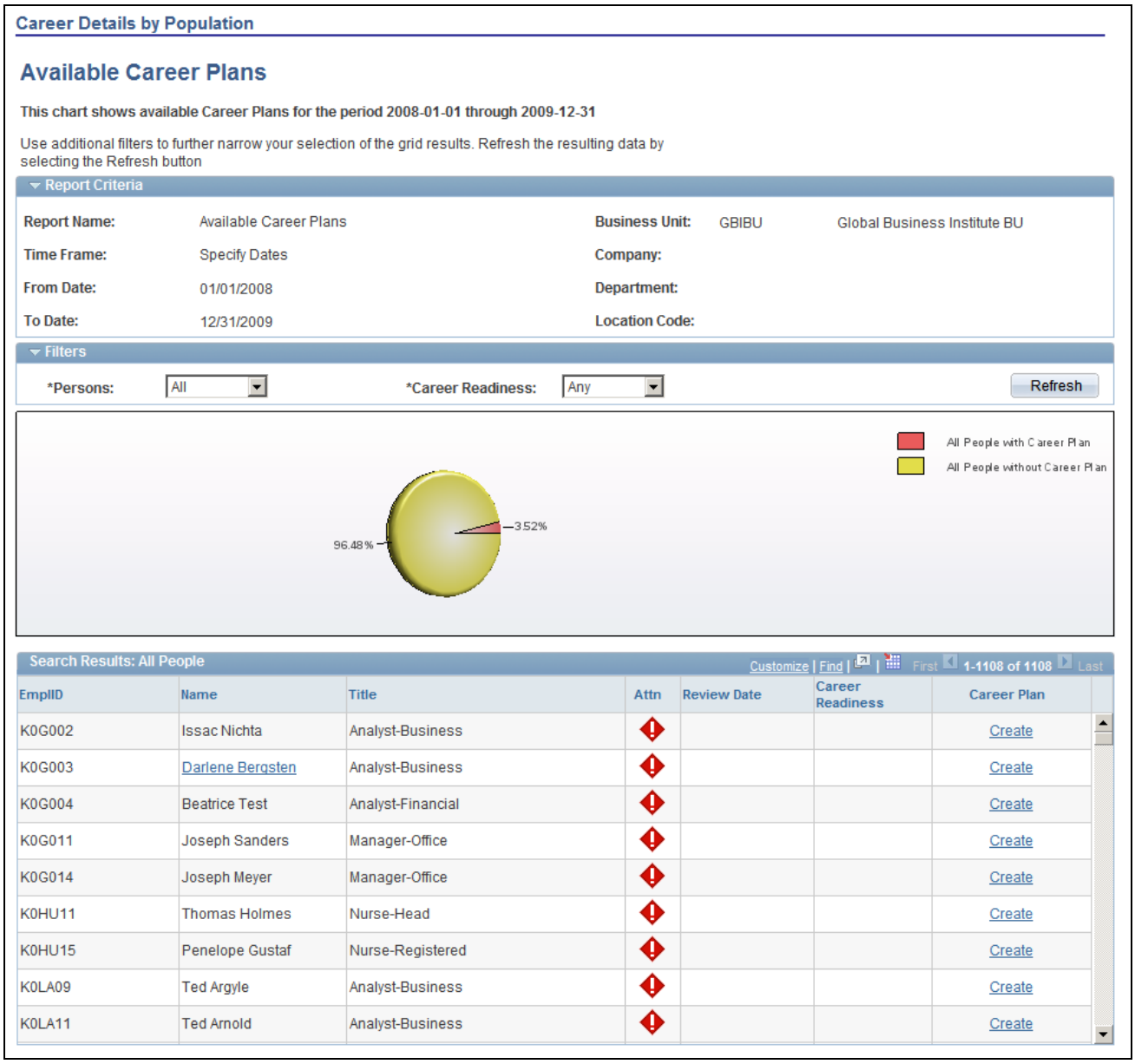
Report Name Select the type of report to display. Values are: *Available Career Plans*,*Career Potential*, and *Key Job Codes - Incumbents*

Time Frame Specify the time span that the report includes. Values are: *Full History*,*Last 1 Month*,*Last 12 Months*,*Last 3 Months*,*Last 6 Months*,*Specify Dates.* You must select *Specify Dates* in the Time Frame field in order to display From Date and To Datefields.

Viewing the Status of Career Plans

Use the Available Career Plans page to view the status of career plans for employees. This enables the organization to define activities and strategies based on the career plan readiness for employees.

Access the Available Career Plans page (Select *Available Career Plans* on the Career Details by Population page and click the Run Report button).



Available Career Plans page

Review Date Displays the last review date from the employee's current career plan. If the person does not have a career plan, this field is empty.

Career Readiness Displays the readiness value indicated for the employee's current career plan. If the person does not have a career plan, this field is empty.

Note. The readiness value is from the first move, 1st option. It is possible to have multiple options, but for these metrics, the system uses the most probable move.

Career Plan Click on a link in this column to view or create the career plan for a specific EmplID.

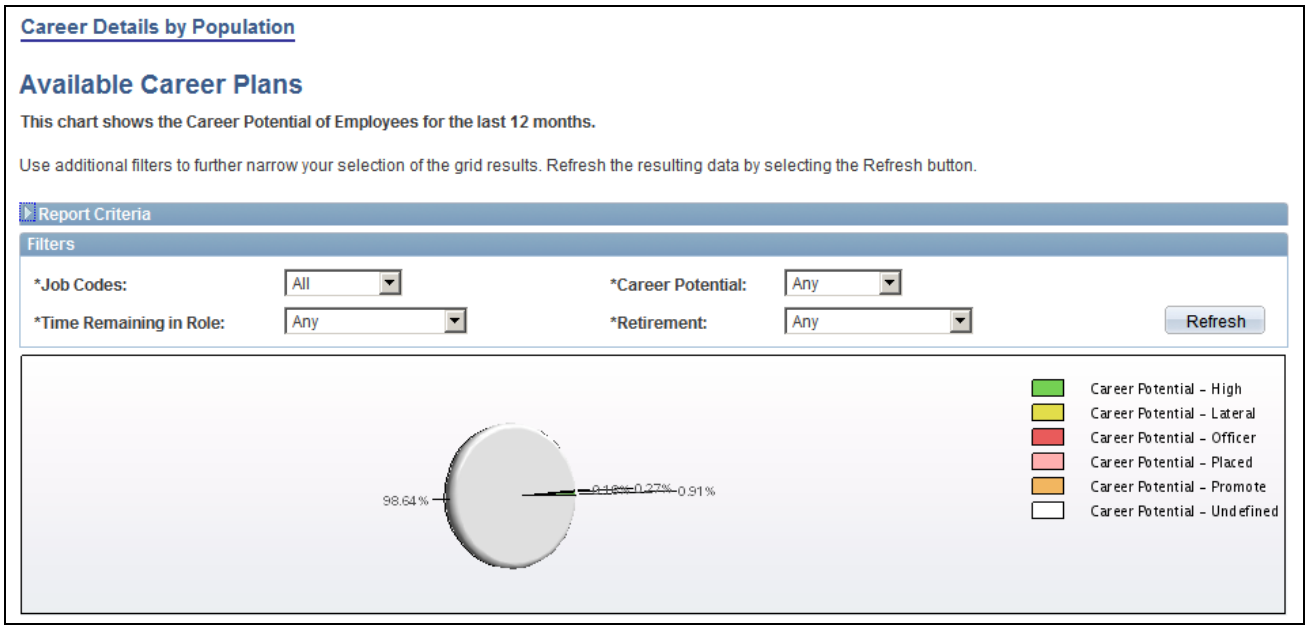
The *View* option applies to people with existing career plans.

The *Create* option applies to people without existing career plans.

Identifying Career Potential

Use the Career Potential page to identify high potential employees, when those employees will retire, and how long they have been in their current role. This information can help you to identify the career potential within an employee group and define activities and strategies to retain high potential employees or improve employee proficiency

Access the Career Potential page (Select *Career Potential* on the Career Details by Population page and click the Run Report button).



Career Potential page (1 of 2)

Only the first 300 results of a possible 1103 can be displayed. Enter more selection criteria and run the report again to reduce the report population.

All People Customize | Find | View 100 | First 1-100 of 300 Last

Employee ID	Name	Title	Career Potential	Review Date	Time Remaining in Role	Retirement Date	Career Plan
0047	test test	Director Financial Services					Create
B-89BB-PB01	Jerry Sienfeld	Analyst-Budget					Create
C10001	Richard Stankowski	Clerk-Accounts Payable Sr					Create
C10002	Nicole Cage	Non-Employee					Create
FE00001	Jimmy Crowe	Specialist-HRIS					Create
FGCWR01	Melissa Moore	Consultant-Senior					Create
GA0515	Lauren General	Administrator					Create
HXERNDEL02	Harsha Bhogle	Accountant					Create
HXERNDEL02	Harsha Bhogle	Accountant					Create
HXERNDEL09	PAT SMITH	Analyst-Budget					Create

Career Potential page (2 of 2)

Career Potential Displays the career potential value from the person's current career plan. If the person does not have a career plan, this field is empty.

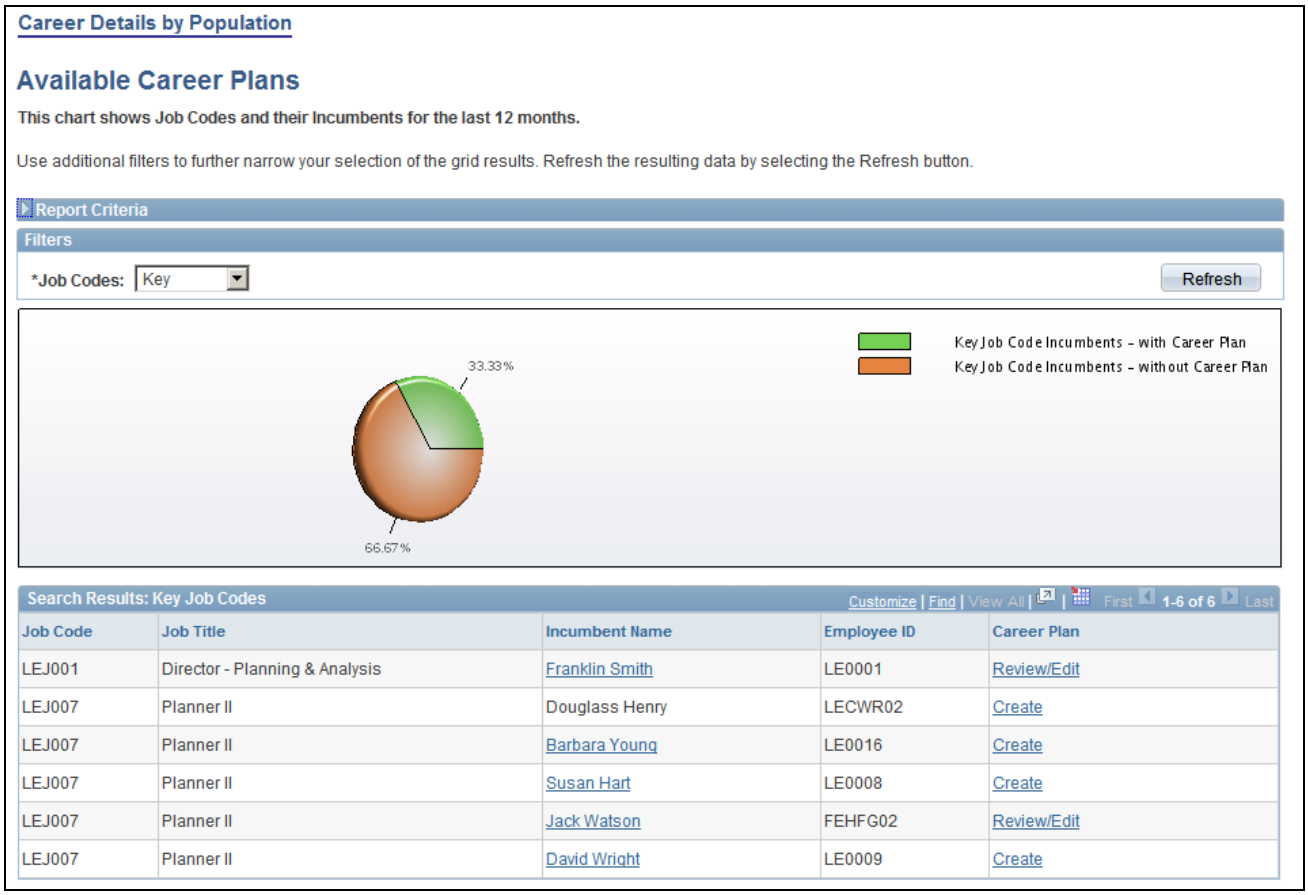
Time Remaining in Role Displays the amount of time remaining in the employee's current role, or job, from the Career Plan page.

Retirement Date Displays the retirement date from the person's current career plan. If the person does not have a career plan, this field is empty.

Identifying Key Job Code Incumbents

Use the Key Job Code - Incumbents page to identify key job codes for your organization and the career plan of any incumbents for those job codes. This enables you to identify key job codes and then define and prioritize activities and strategies to update or create career plans for the incumbent employees for the job codes.

Access the Key Job Code - Incumbents page (Select *Key Job Code - Incumbents* on the Career Details by Population page and click the Run Report button).



Key Job Code - Incumbents page

Job Title Displays the job title from the Job Data table.

Incumbent Name Displays the name of the person in the corresponding job code.

(FRA) Rating Employees

Within the French Public Sector, ratings are used as criteria for determining job eligibility.

Rating employees is discussed in *PeopleSoft Enterprise Human Resources PeopleBook: Manage French Public Sector*.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage French Public Sector, "Rating Employees"

Managing Career Planning Self-Service

This section provides an overview of career planning self service transactions, and discusses how to:

- Define employee self service profiles.
- Enter manager self service career plan data.
- Define career paths.
- Enter career goals.
- Enter career mentoring data.
- Manage strengths and developmental areas.
- Enter and update career training programs.

Understanding Career Planning Self Service

Using the Career Planning self service pages, employees can identify their current job profile, view the requirements of profiles in various paths, and compare their current skills, competencies, and qualifications with those in targeted profiles. Individuals can pull a profile into their development plan in order to quickly implement the creation of goals and actions based on gaps. Users can also target specific areas identified in the comparison and import those into their development plan. Individuals can gain insight into opportunities. For a particular job profile, employees can identify open positions and apply, nominate themselves, or send an email regarding the position.

Self Service Pages Used to Manage Career Plans

Page Name	*Definition Name*	*Navigation*	*Usage*
My Profile	JPM_JP_PROFL2_EMP	Self Service, Career Planning, My Profile	Enables employees to view and update their own profile data.
Career Path	HR_CP_PATH	Self Service, Career Planning, Career Path	Define an employee's career path; modify a default career path; configure a job progression.
Career Goals	HR_CP_GOALS	Self Service, Career Planning, Career Goals	Enter short and long-term goals for employees.
Career Mentoring	HR_CP_MENTOR	Self Service, Career Planning, Career Mentoring	Assign career mentors.

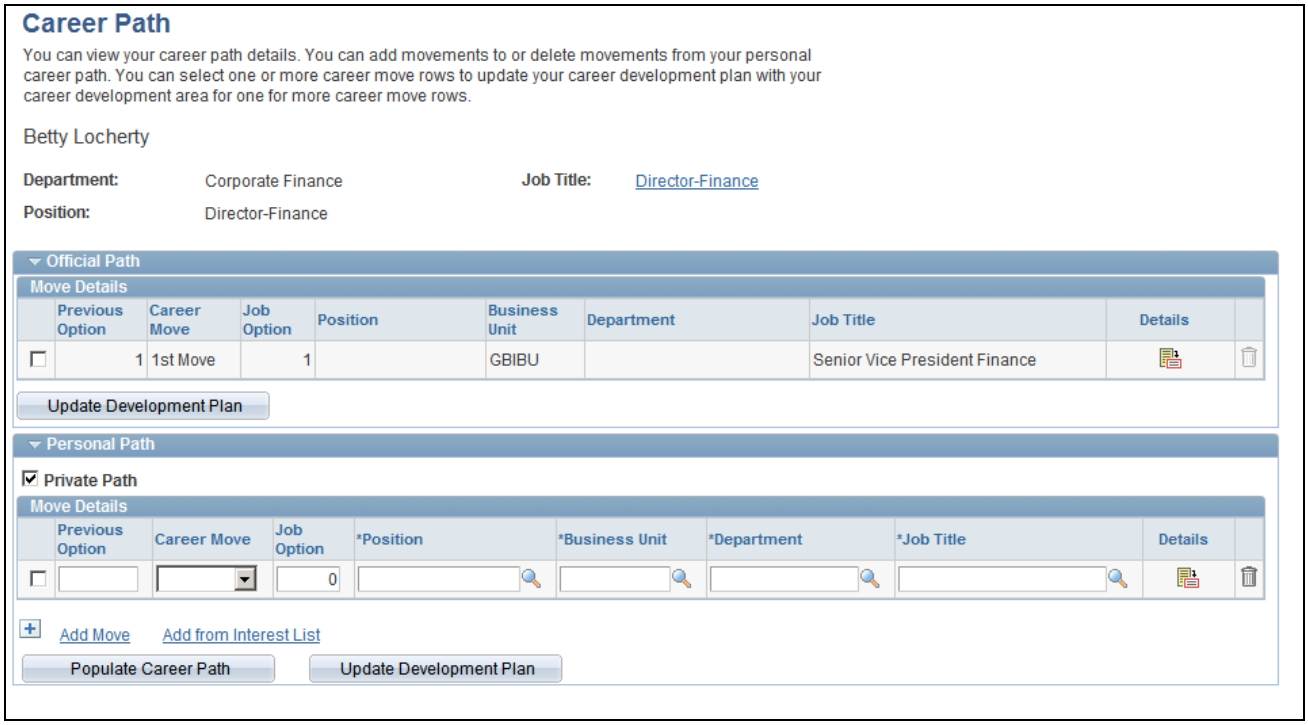
Page Name	*Definition Name*	*Navigation*	*Usage*
Career Strength/Developmental Areas	HR_CP_DVLP_AREA	Self Service, Career Planning, Career Developmental Areas	Record and evaluate an employee's career strengths and developmental areas.
Career Training Plan	HR_CP_TRAINING	Self Service, Career Planning, Career Training Plan	Enter or update a training program for the selected employee; use or modify the default training program for the employee job code.
Career Development Plan	HR_CP_DEVELOP	Self Service, Career Planning, Career Development Plan	Help employees improve in developmental areas before their next performance review or career planning session.
My Internal Resume	HR_CP_RESUME	Self Service, Career Planning, My Internal Resume	Enables employees to select specific items to be included in an internal resume and create a personal resume for internal use.
Career Progression Chart	HR_CP_PRO_CHART	• Manager Self Service, Career Planning, Career Progression Chart • Self Service, Career Planning, Career Progression Chart • Click the Career Progression Chart link on various career planning pages.	View career paths and non-person profile summaries in order to perform a competency gap/fit analysis.
Manage Career Plans	HR_CP_MANAGER	Manager Self Service, Career Planning, Manage Career Plans	Enables managers to perform career planning activities for their direct reports.

Defining Career Paths

You can view and update your career path by selecting the desired positions or roles. When one or more roles are placed on your career path, you can see the required job skills, competencies, and experiences for each position or role, and the gap between your current profile and the profile requirements for the desired position.

You can define multiple career paths, operational or personal, and identify the single path that the organization uses in evaluating your potential and creating a performance and development plan based on this path.

Access the Career Path page (Self Service, Career Planning, Career Path).



Career Path page

Update Development Plan

Click to insert developmental areas into the your Career Development Plan based on the selected movement rows. The system inserts deltas for competencies and other profile sections as follows:

- Employee competencies and other rated items with a lower rate than required by the job profile.
- Required items on the job profile that are not in the employee's profile.
- Items in the person profile that have more than one rating, and any of the ratings for that item are lower than required in the job profile. For example, ratings for language items such as Understanding, Reading, and Speaking.

Once the identified competencies and other items are inserted into the Career Development Plan, the system opens the Career Development Plan page so that you can update related information about the inserted items, such as the Estimated Completion Date, and so on.

Populate Career Path

When only one row exists in the career path for your next interested job, click the Populate Career Path button to select the interested job row as a basis for inserting the position's career path from the Career Path table into your career path.

Private Path

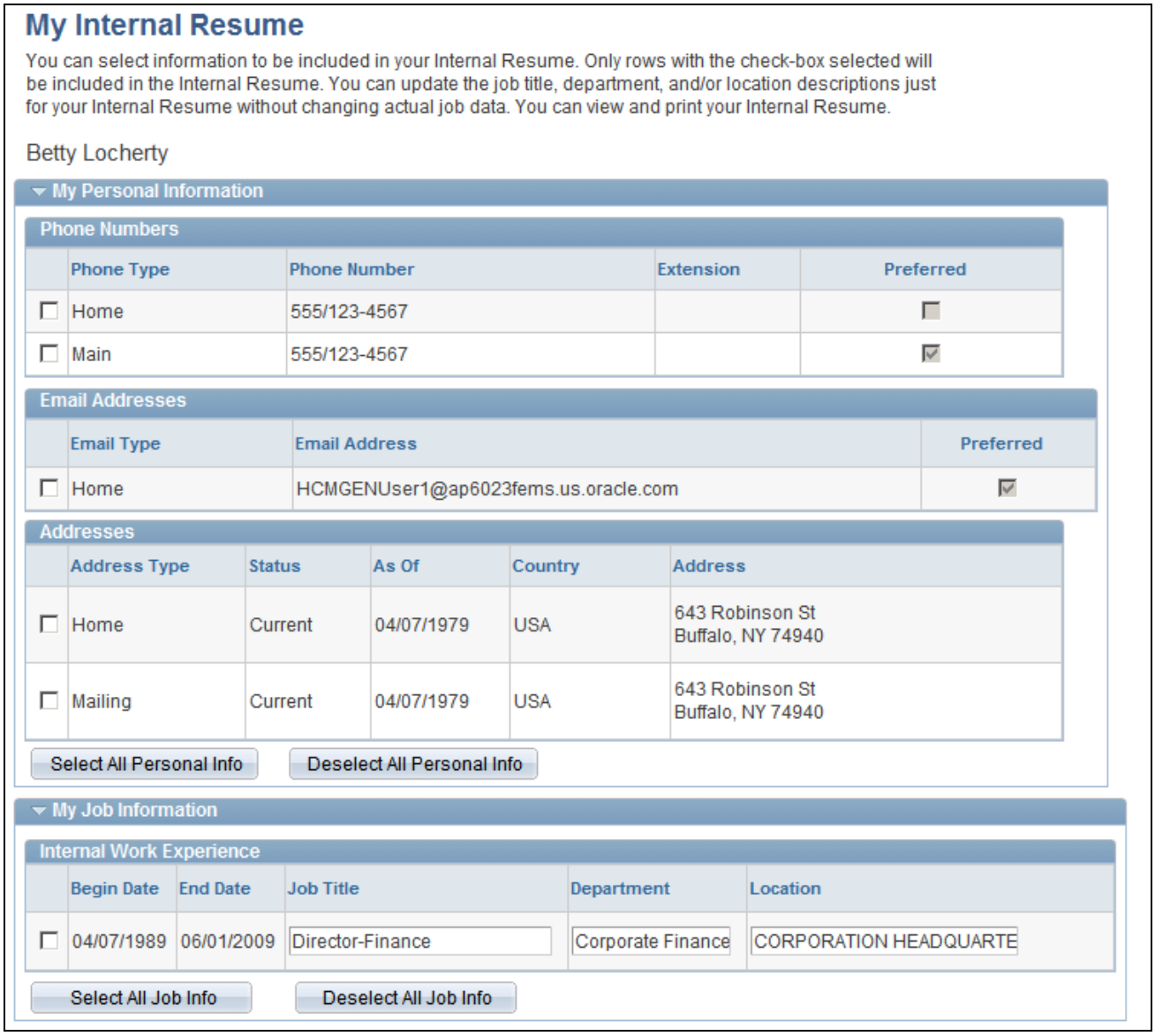
Select to prevent managers from viewing the personal career path.

Details Click an icon in this column to open the Career Move Details page. The Career Move Details page provides more information about the career move, specially for Military and federal data users.

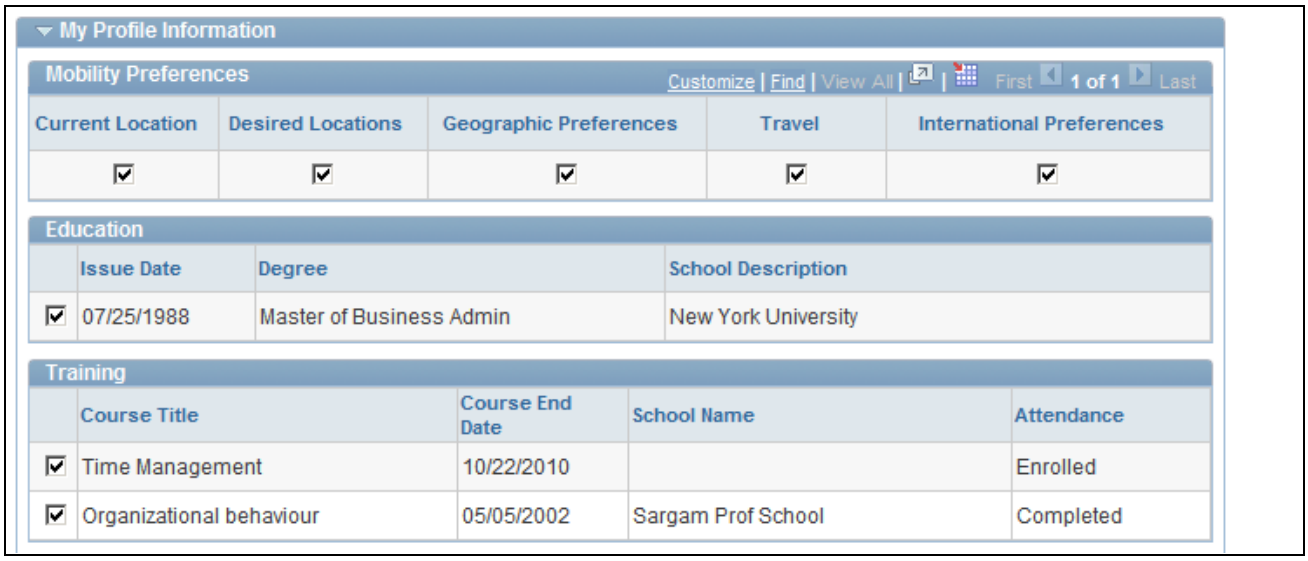
Reviewing Internal Resumes

To consolidate all work-related information, you can generate a personalized resume. Use this internal resume to apply for an open job or position within the organization.

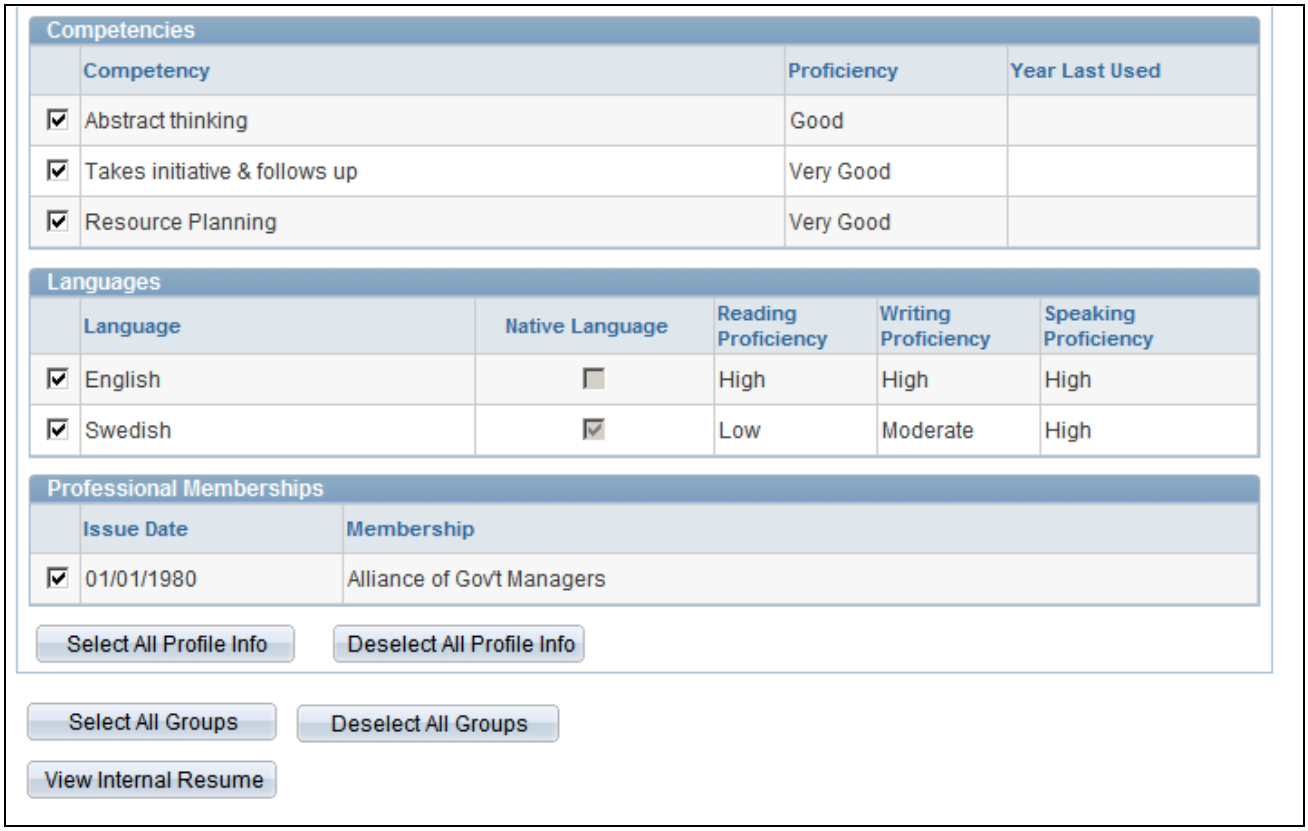
Access the My Internal Resume page (Self Service, Career Planning, My Internal Resume).



My Internal Resume page (1 of 3)



My Internal Resume page (2 of 3)



My Internal Resume page (3 of 3)

Select the information to include on an internal resume by selecting the check boxes associated with the desired data.

Note. To update data on this page, use the My Profile and Personal Information self service pages.

View Internal Resume Click to view or download the internal resume created from the selections made on this page. The system saves the internal resume using the Rich Text Format file format.

Chapter 3

Planning Successions

This chapter provides an overview of plan successions, lists prerequisites, and discusses how to:

- Set up Succession Planning.
- Create succession plans.
- Manage talent pools.
- Build succession trees.
- Manage succession plans.
- Use Succession 360°.
- Review career summaries.
- Run Succession reports
- Succession Planning self-service

Understanding Plan Successions

This section discusses:

- Plan successions
- (USF) Plan successions

Plan Successions

To ensure an organization's continued success, you need to determine who will eventually replace employees currently in key positions. The Plan Successions business process in Human Resources enables you to identify candidates for key positions, anticipate organizational bottlenecks, and develop multiple career paths for individuals who are ready for promotion.

To implement the Plan Successions business process:

1. Perform the prerequisite tasks.
2. Create the succession plans.
3. (Optional) Build the succession trees.

Once the succession trees are in place, you can review career summaries, monitor the progress of key employees, track changes to key positions, and make adjustments to successions plans as the requirements of the organization change over time.

Integrations

The Plan Successions business process integrates with:

- The Manage Profiles business process in Human Resources.

  See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles*, "Managing Profiles."

- The Plan Careers business process in Human Resources.

  See Chapter 3, "Planning Successions," Setting Up Career Plans, page 52.

- The Manage Positions business process in Human Resources.

  See Chapter 3, "Planning Successions," Defining Key Positions, page 51 and Chapter 3, "Planning Successions," Identifying Potential Candidates, page 53.

- PeopleSoft Enterprise Talent Acquisition Manager.

  See Chapter 3, "Planning Successions," Identifying Potential Candidates, page 53.

(USF) Plan Successions

The Plan Successions business process for U.S. Federal Government users enables you to set up and manage succession plans and succession trees for government workers.

The Succession Planning USF menu contains the same pages as the Succession Planning menu. The Key Positions (POSITION_DATA) component under the Succession Planning, Define Key Positions menu is the same as the Identify Key Positions component (POSITION_DATA) under the Succession Planning (USF) menu.

The Succession Planning USF components are discussed in this chapter as well as *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles* and *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Positions.*

Prerequisites

Perform these tasks before setting up the Plan Successions business process in Human Resources:

1. Set up HRMS core data.
2. Set up Human Resources job data.
3. Define key positions.
4. Define key job codes.
5. Identify key employees.

6. (optional) Set up profiles.
7. (optional) Set up career plans.
8. Identify potential candidates.

Setting Up HRMS Core Data

The HRMS core data required for the Plan Successions business process is discussed in *PeopleSoft Enterprise HRMS Application Fundamentals PeopleBook.*

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Installing PeopleSoft HRMS."

Setting Up Job Data

The Human Resources job data required for the Plan Successions business process is discussed in *PeopleSoft Enterprise Human Resources PeopleBook: Administer Workforce.*

Note. Employee job data must exist in the Workforce Administration tables before you work with the Plan Successions pages. If you've implemented multiple business units and SetIDs, the information that you use and create will be determined by how business unit and setID functionality is set up for your user ID.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Increasing the Workforce."

Defining Key Positions

Use the Manage Positions business process to identify key positions in the organization and to create position hierarchies (which are required for successions plans). Once the position hierarchy exists, identify the incumbent in each key position. Key positions are discussed in *PeopleSoft Enterprise Human Resources PeopleBook: Manage Positions.*

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Positions*, "Setting Up Positions."

Note. USF users should access the Key Positions pages using the Organizational Development, Successions Planning USF, Identify Key Positions navigation path.

Defining Key Job Codes

Use the Job Code Table component to identify key jobs in the organization. This is only required if you want to create job code-based succession plans.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up Jobs," Classifying Jobs.

Identifying Key Employees

Use the Workforce Job Summary component to identify key employees. Identifying key employees is only required if you want to create people-based succession plans.

Key employees must be active members of a talent pool associated with a talent pool category specifically defined to source employee succession plan types. There is no limit to the number of talent pools that can source employee succession plan types.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Viewing Summary Workforce Information," Viewing Worker Job History.

Setting Up Profiles

Use the Manage Profiles business process to create profiles for key employees and roles. Roles are positions and job codes. Profiles for roles define specific job-related competencies and accomplishments. The succession planning process matches the employee competencies with competencies in position and job code profiles to identify and rank potential candidates for key roles using the Search and Compare Profiles component. Profiles are discussed in *PeopleSoft Enterprise Human Resources PeopleBook: Manage Profiles.*

To enable you to easily view employee profiles, the Person Profiles component is accessible from the Plan Successions business process.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles*, "Managing Profiles."

Setting Up Career Plans

Use the Plan Careers business process to prepare potential candidates for succession plans. The career plans you develop for high-potential employees will prepare them to move into key positions. Career plans are not a prerequisite for creating succession plans. Using succession plans in conjunction with career plans enables you to plan employee training and development in readiness for planned moves.

See Chapter 2, "Planning Careers," Creating Career Plans, page 10.

You can automate the process of identifying candidates for key positions. Use the Create Succession Plan (SUCCESSION_PLAN) component to generate a list of people who have the selected key roles in their career path

See Chapter 3, "Planning Successions," Selecting Candidates, page 61.

Reviewing Career Summaries

To review career summaries, use the Career Assignments (CAREER_SUMMARY), Compensation (COMP_SUMMARY2), and Training (TRN_STUDNT_CRS_SU2) components.

To enable you to easily review candidate career information, certain data from the Plan Careers, Administer Workforce business process is displayed in the Plan Successions business process.

Note. These pages are view-only. If you want to update career, compensation, or training data, use the appropriate pages from the Plan Careers, Administer Workforce, or Administer Training business processes.

See Chapter 2, "Planning Careers," Creating Career Paths, page 7.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Updating Person and Job Information."

Identifying Potential Candidates

After you have identified the key positions and defined profiles for these positions, you can search and compare employee profiles to identify potential candidates.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles*, "Managing Profiles," Searching and Comparing Profiles.

Recruiting External Candidates

When creating candidate lists for succession plans, consider candidates outside the organization. Before you can include external candidates in a succession plan, you must add them to the Human Resources system and associate an applicant ID.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Increasing the Workforce."

You can increase the chances of identifying and recruiting candidates for key roles if the competencies listed in the job requisitions match the competencies required for the key roles.

Setting Up Succession Planning

This section describes how to:

- Define Succession Planning default values.
- Define ratings boxes.

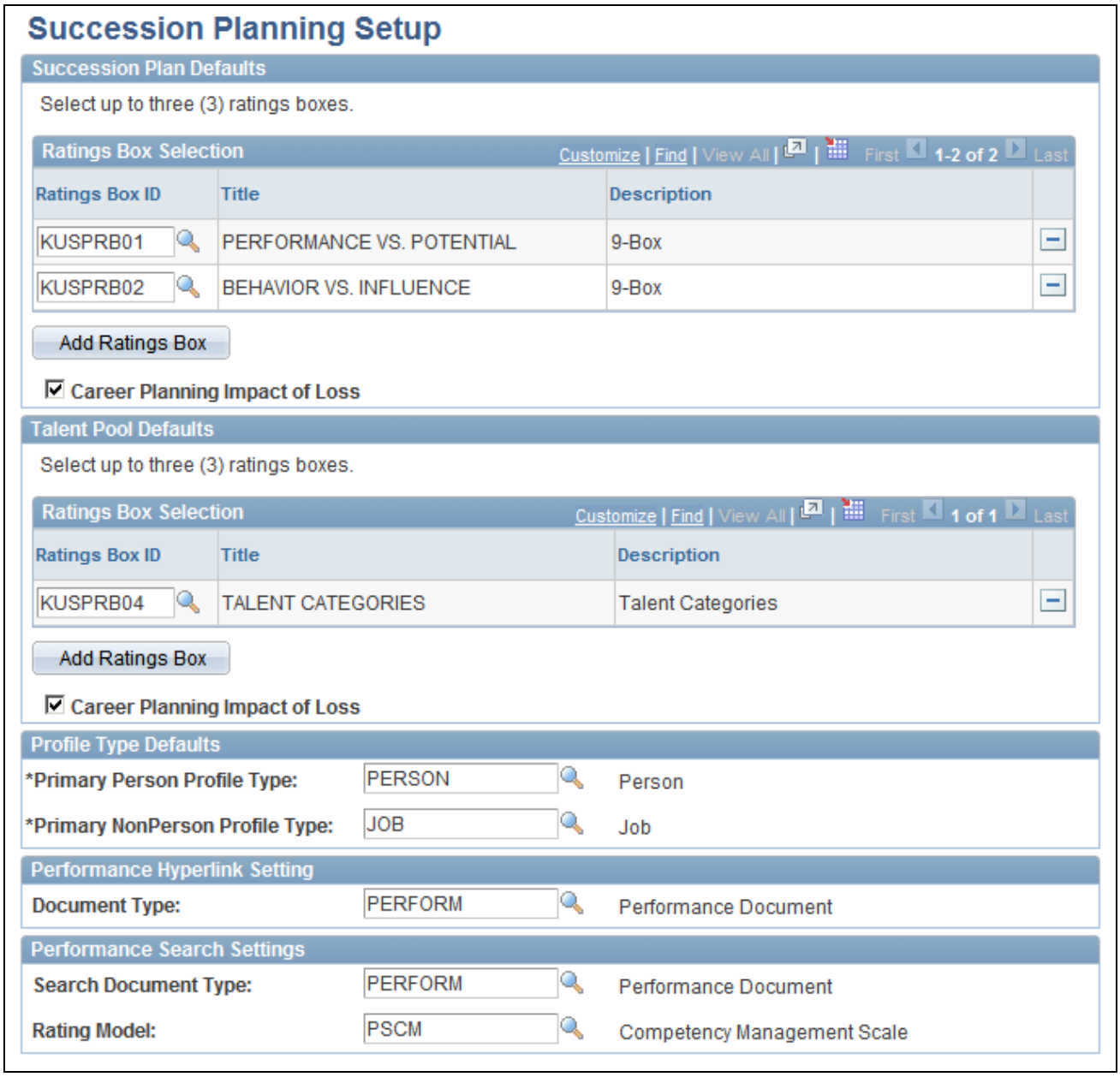
Pages Used to Setup Succession Planning

Page Name	*Definition Name*	*Navigation*	*Usage*
Succession Planning Setup	HR_SP_DEFAULT	Set Up HRMS, Product Related, Organizational Development, Succession Planning Setup	Define Succession Planning setup and default information, such as the use of Profile Manager profile types, and rating box associations.

Page Name	Definition Name	Navigation	Usage
Define Ratings Box	HR_RATINGS_BOX_CFG	Set Up HRMS, Common Definitions, Ratings Box Configuration, Define Ratings Box , Define Ratings Box	Define ratings boxes, or matrices, to graphically represent employee rating assignments, such as a 9-Box for *performance versus potential*, which you can use in succession plans or talent pools to assess employees in relation to other employees.

Defining Succession Planning Default Values

Access the Succession Planning Setup Page (Set Up HRMS, Product Related, Organizational Development, Succession Planning Setup).



Succession Planning Setup page

Ratings Box ID Select up to three ratings boxes to use for all succession plan and talent pool records. Any ratings box specified in the Succession Plan or Talent Pool region can be edited through the Ratings Box page in the Succession Plan or Talent Pool components. You can select from any Rating Box IDs defined on the Configure Rating Box page.

Career Planning Impact of Loss Select to indicate that a Career Planning-based Impact of Loss value defined for an employee will default in the Impact of Loss field on the succession plan record or talent pool record if the employee is selected as a succession candidate or talent pool member.

Document Type Define the PeopleSoft ePerformance document type to link to from all Performance document links in the succession planning application, including the Succession 360° page and the Talent Pool page. Select from the defined document types used for appraisal processing through PeopleSoft ePerformance.

Search Document Type Define the PeopleSoft ePerformance document type and rating model the system uses when searching for succession candidates or talent pool members by the Overall Performance Rating search option. Select from the defined document types used for appraisal processing through PeopleSoft ePerformance.

Rating Model Select from the defined rating models associated with the document type specified in the Document Type field.

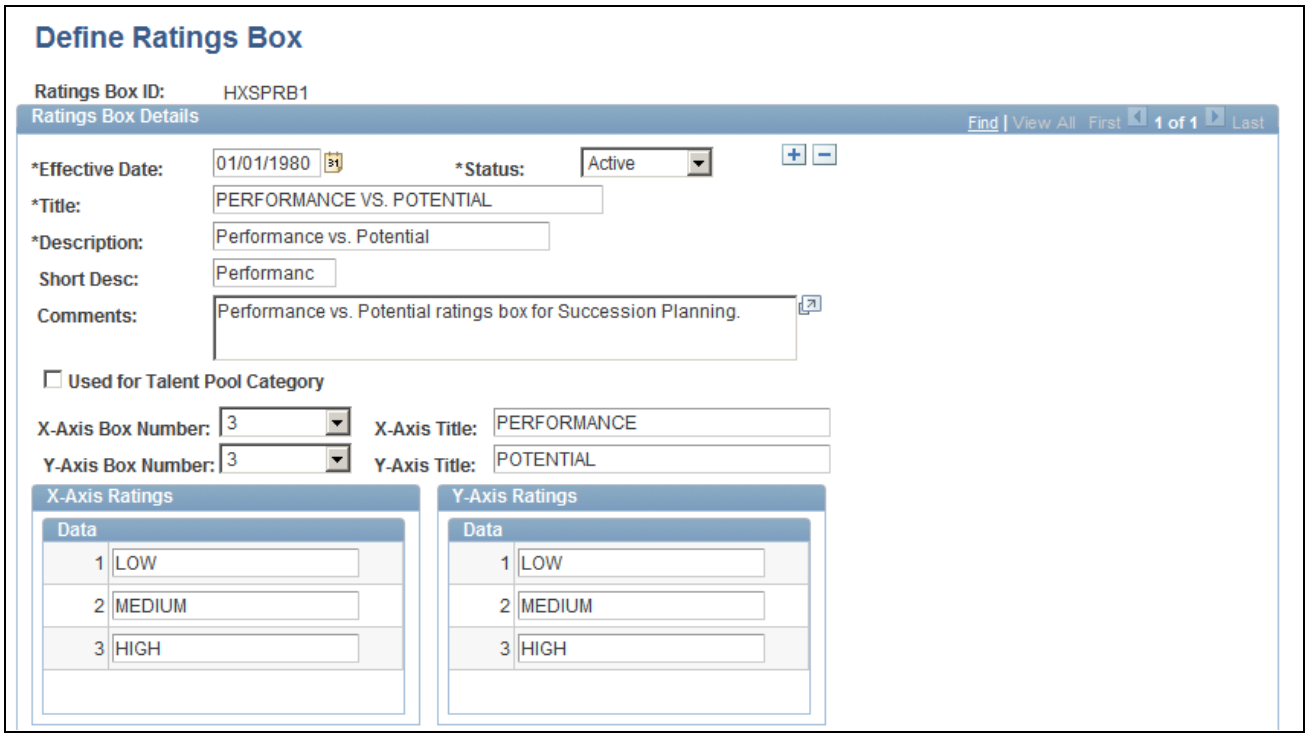
Defining Ratings Boxes

Use the Define Ratings Box page to define matrices that graphically represent employee rating assignments, such as a 9-Box for *performance versus potential.* You can use ratings boxes in succession plans or talent pools to assess employees in relation to other employees.

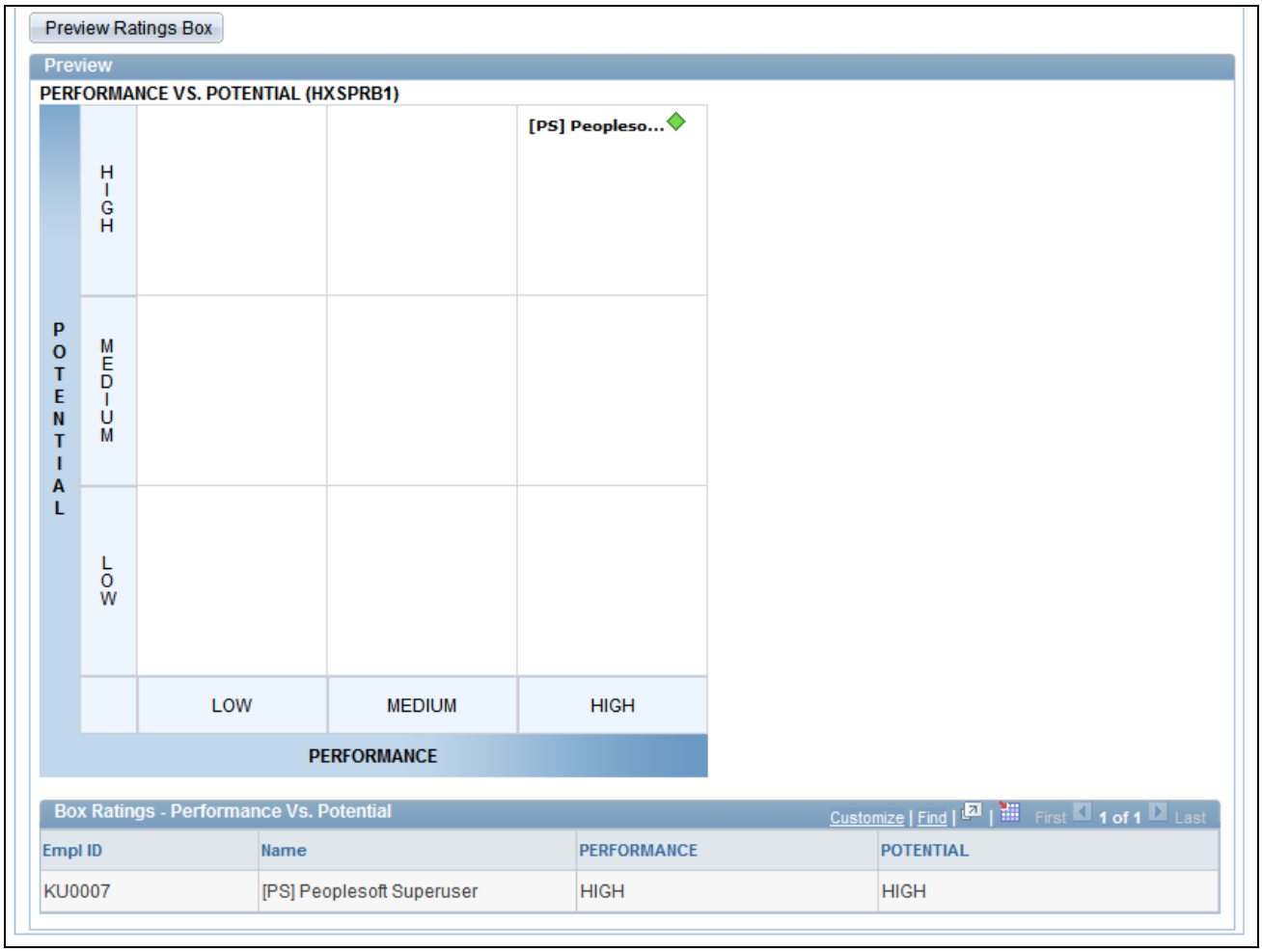
A conventional ratings box matrix is usually a 9-box, which is three boxes across and three boxes vertically. However, you can define ratings boxes as large as five boxes by five boxes. There is no limit to the number of ratings boxes you can define.

You can also use this page to define talent categories and then assign employees into the categories.

Access the Define Ratings Box page (Set Up HRMS, Common Definitions, Ratings Box Configuration, Define Ratings Box , Define Ratings Box).



Define Ratings Box page (1 of 2)



Define Ratings Box page (2 of 2)

Used for Talent Pool Category Select to indicate that the values in the X-Axis Ratings region are used to define talent categories.

X–Axis Box Number and **Y–Axis Box Number** Select the number of boxes to display along each axis of the ratings box grid. Values are: *2,3,4,* and *5.*

The Y–Axis Box Number field is not available if you select the Used for Talent Pool Category check box.

Creating Succession Plans

Succession Planning is the process of identifying long-range needs and cultivating a supply of internal talent to meet those future needs. The process anticipates the future needs of the organization and assists in finding, assessing, and developing the human capital necessary to successfully execute the strategy of the organization.

To create succession plans, use the Create Succession Plan (SUCCESSION_PLAN) component.

This section discusses how to:

- Enter succession plan data.
- Select candidates.
- View candidates for specific positions.

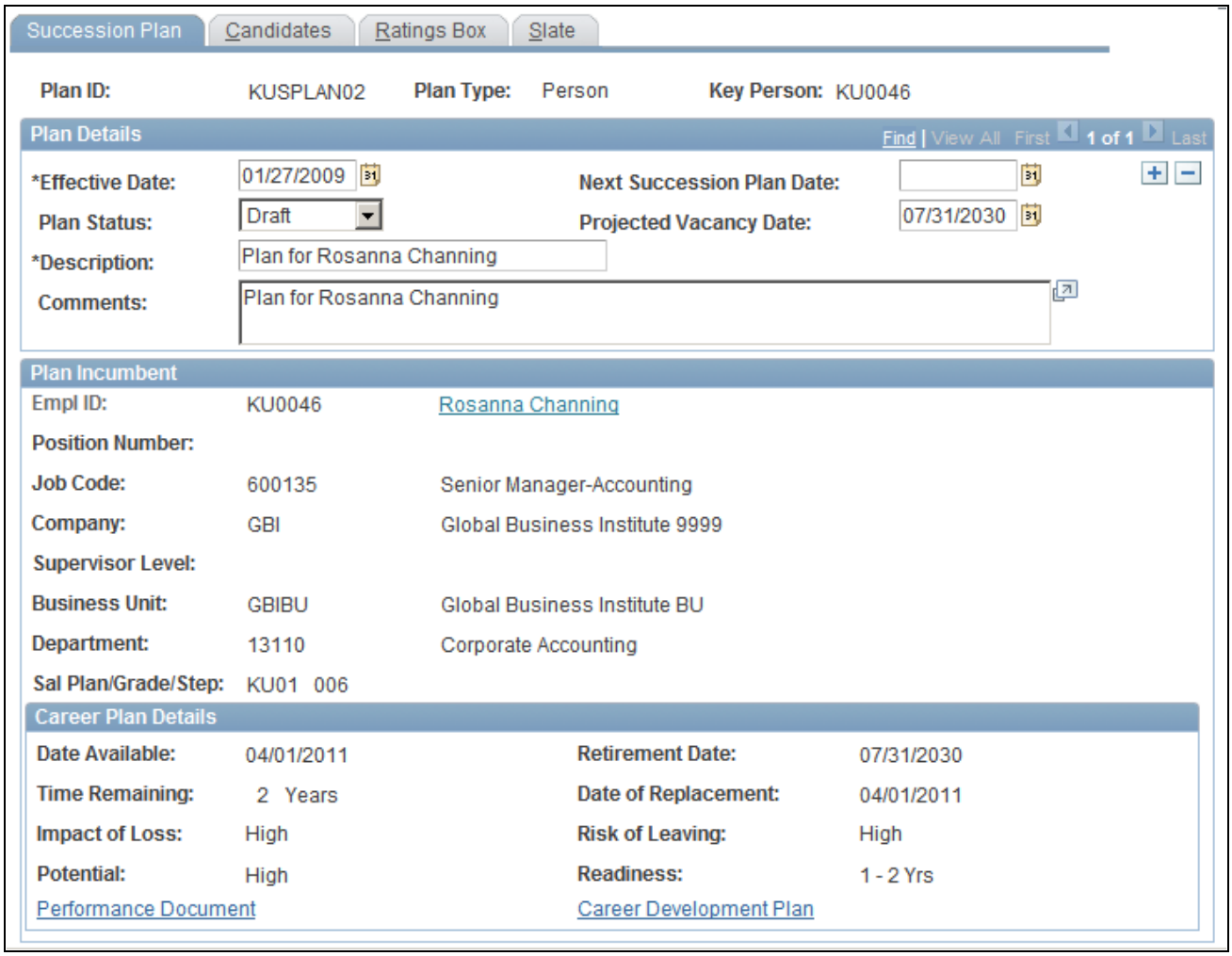
Pages Used to Create Succession Plans

Page Name	*Definition Name*	*Navigation*	*Usage*
Succession Plan	SUCCESSION_PLAN1	• Organizational Development, Succession Planning, Create Succession Plan, Succession Plan • Organizational Development, Succession Planning USF, Create Succession Plan, Succession Plan • Organizational Development, Succession Planning, Maintain Succession Plans, Succession Plan	Enter plan details such as effective date, plan status, and projected vacancy date. Review incumbent job and career plan details.
Candidates	SUCCESSION_PLAN2	• Organizational Development, Succession Planning, Create Succession Plan, Candidates • Organizational Development, Succession Planning USF, Create Succession Plan, Candidates • Organizational Development, Succession Planning, Maintain Succession Plans, Candidates	Search and compare employee profiles to identify potential candidates.

Page Name	*Definition Name*	*Navigation*	*Usage*
Ratings Box	SUCCESSION_RATINGS	• Organizational Development, Succession Planning, Create Succession Plan, Ratings Box • Organizational Development, Succession Planning USF, Create Succession Plan, Ratings Box • Organizational Development, Succession Planning, Maintain Succession Plans, Ratings Box	Rate successors using configurable X-Y matrices, or 9-boxes. Use ratings boxes to track custom-defined criteria such as performance, potential, readiness, and so on.
Slate	SUCCESSION_SLATE	• Organizational Development, Succession Planning, Create Succession Plan, Slate • Organizational Development, Succession Planning USF, Create Succession Plan, Slate • Organizational Development, Succession Planning, Maintain Succession Plans, Slate	View the finalized list of candidates slated to replace the incumbent in a succession plan. Link to defined succession plan records for any of the candidates to help determine any blocked scenarios.

Entering Succession Plan Data

Access the Succession Plan page (Organizational Development, Succession Planning, Maintain Succession Plans, Succession Plan).



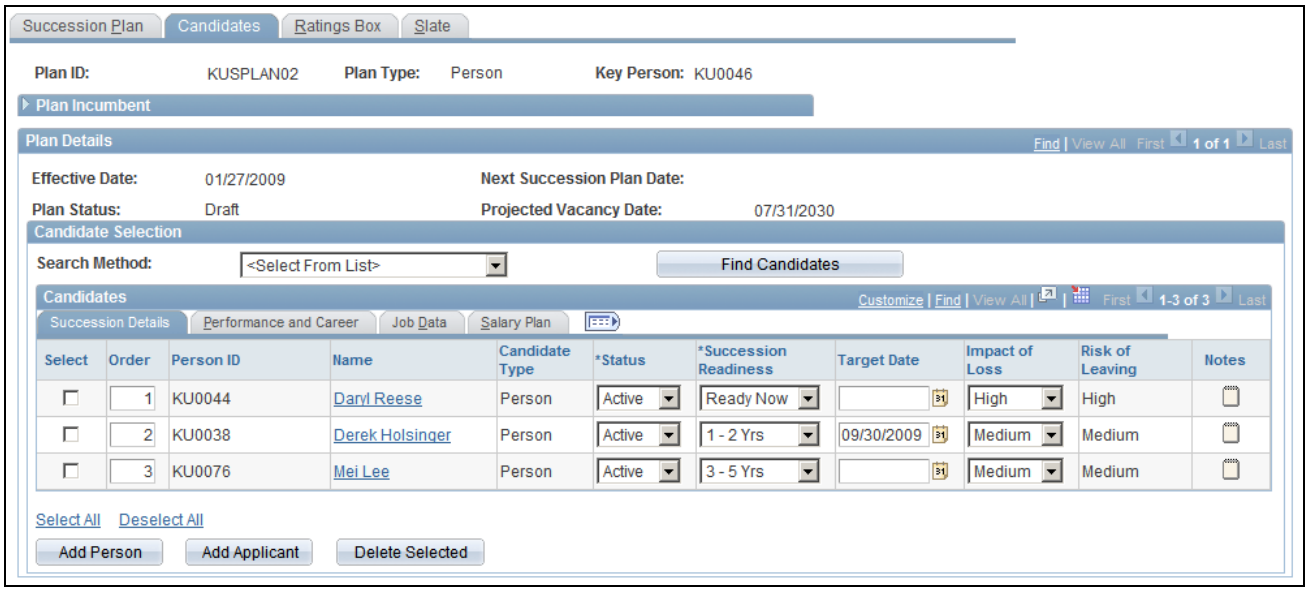
Succession Plan - Succession Plan page

Projected Vacancy Date If the incumbent has a career plan in Human Resources, the projected vacancy date is the retirement date indicated in their career plan. Otherwise, enter a date in this field.

Selecting Candidates

From the Succession Plan - Candidates page, you can create a list of potential successors, using PeopleSoft Profile Manager and ad-hoc SQL based search methods. The search results pages enable you to select employees and include them in the succession plan candidate list.

Access the Succession Plan - Candidates page (Organizational Development, Succession Planning, Maintain Succession Plans, Candidates).



Succession Plan - Candidates page

Search Method

Select the search method the system uses to search for candidates for this succession plan. The search method options differ depending on the Plan Type: Position, Job Code or Person. Different search methods change the appearance of the Candidates region of the page to enable you to locate succession plan candidates based on specific criteria.

Find Candidates

Click to search for succession candidates based on the search method selected.

If you want to add additional candidates manually, enter new data rows and select the candidate's employee ID.

Candidates

The Candidates scroll area lists potential successors for the selected position. The succession planning process maintains static data and must be updated by creating new succession plans for each key entity as needed. Creating new succession plans prevents data from becoming outdated.

Order

Enter a succession order for each candidate. Assign the number 1 to indicate that a candidate is the first choice in the list. Proceed in descending order. When you save the succession plan, the candidates appear in order of rank.

Note. You rank the candidates and save the information before viewing candidates on the Succession Plan - Slate page, where you view the hierarchy of successors to a candidate, job code or position..

Name

Click to open the Profile Manager-based Person Profile page, if available, for the selected individual.

Candidate Type Indicates whether the candidate is an applicant for the succession plan. The field displays *Applicant* when you add the candidate manually using the Add Applicant button. The field displays *Person*when you add the candidate manually using the Add Person button, or if the candidate was retrieved using any of the search methods.

Status Select the status of the individual within the succession plan. Select *Active* or *Inactive.*

Succession Readiness Select the readiness level for an individual in the succession plan. Select from the following values:

- *1−2 Yrs* (1−2 years)

  The employee will be ready for the position change within the next two years.

- *3−5 Yrs* (3−5 years)

  The employee will be ready for the position change in three to five years.

- *Emergency*

  The employee is overdue for a job move and needs to move as soon as possible.

- *Ready Now*

  The employee is ready for the move now.

Target Date Enter the date when you expect the candidate to move into the selected position.

Impact of Loss Specify the impact losing this employee would have on the organizations goals. Values are *Low,Medium,* or *High.*

Notes Click to open the Notepad page in order to document notes for any successor or talent pool candidate.

Performance and Career

Click the Performance and Career tab in the Candidates region.

Compare Profiles Click to access the Compare Profiles - Match Results page.

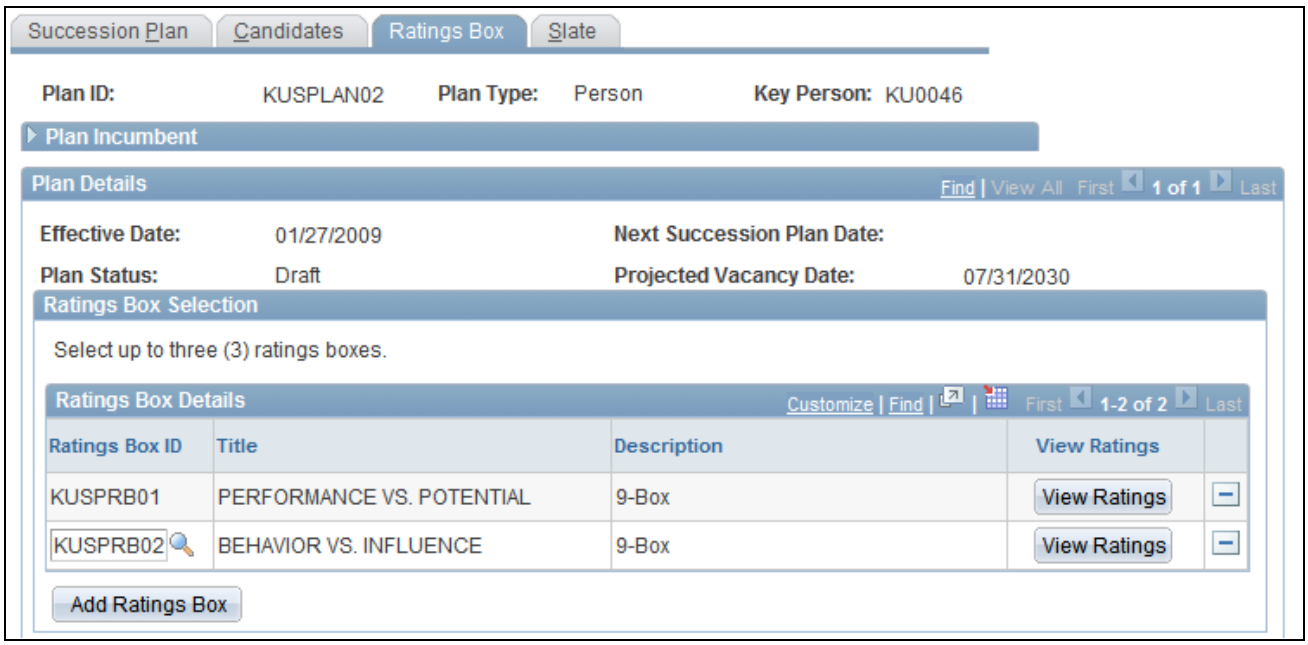
Career Development Plan Click to open the Career Development plan page for the selected individual.

On the Job Data and Salary Plan tabs, the system displays the candidates' current position, and salary details from the Career Ranking and Potential page.

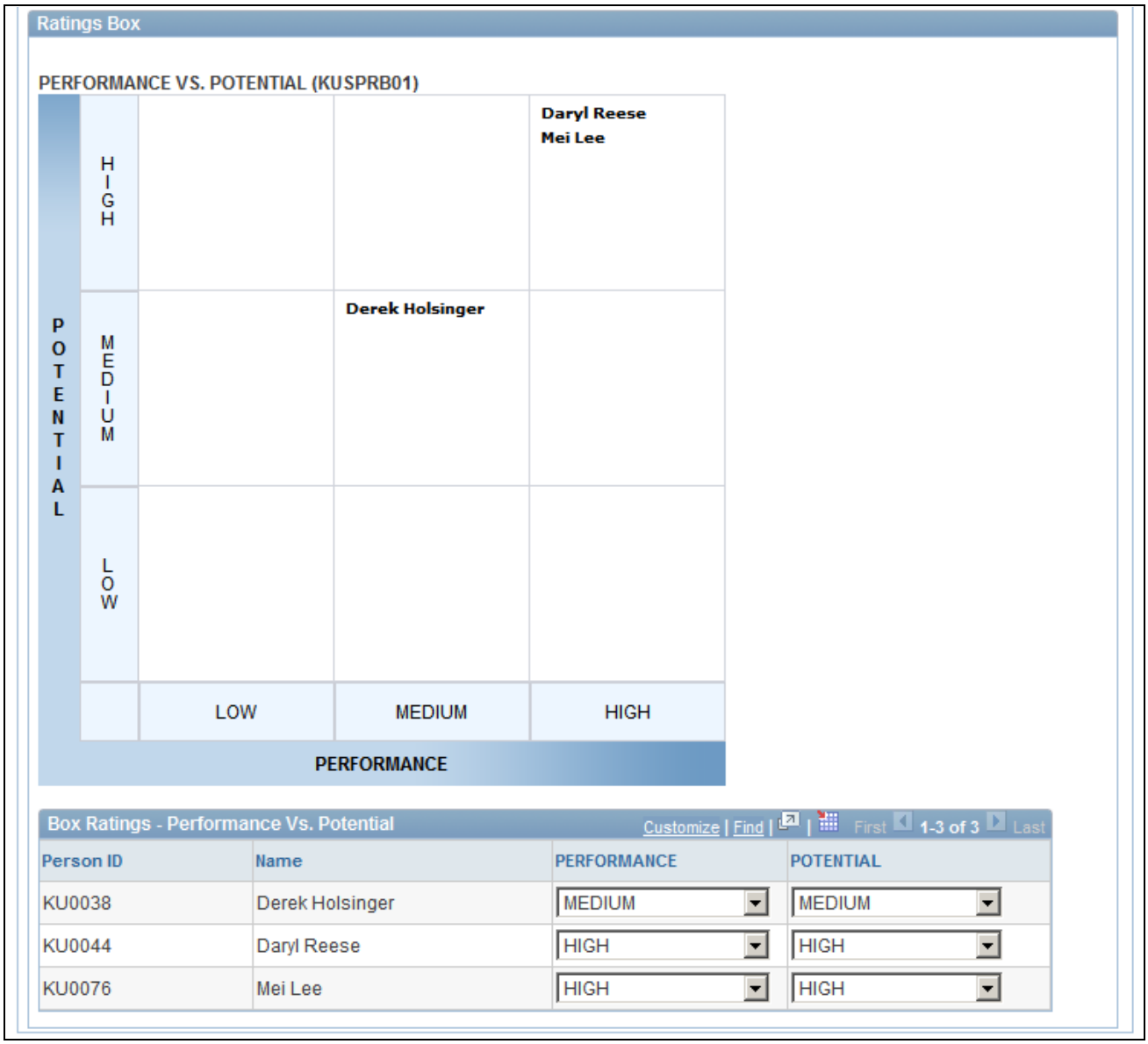
Comparing Succession Criteria

You can rate successors using configurable X-Y grids for ratings boxes, or 9-boxes. Use ratings boxes to track custom-defined criteria such as performance, potential, readiness, and so on.

Access the Succession Plan - Ratings Box page (Organizational Development, Succession Planning, Maintain Succession Plans, Ratings Box).



Succession Plan - Ratings Box page (1 of 2)



Succession Plan - Ratings Box page (2 of 2)

View Ratings Click to view the Ratings Box chart on this page using the candidates and ratings specified in Box Ratings region of this page.

Add Ratings Box Click to add additional ratings box charts to this succession plan.

If the status of any succession candidate or talent pool member is changed from active to inactive and the employee has been rated in a ratings box, then the employee or applicant is automatically removed from all rating boxes.

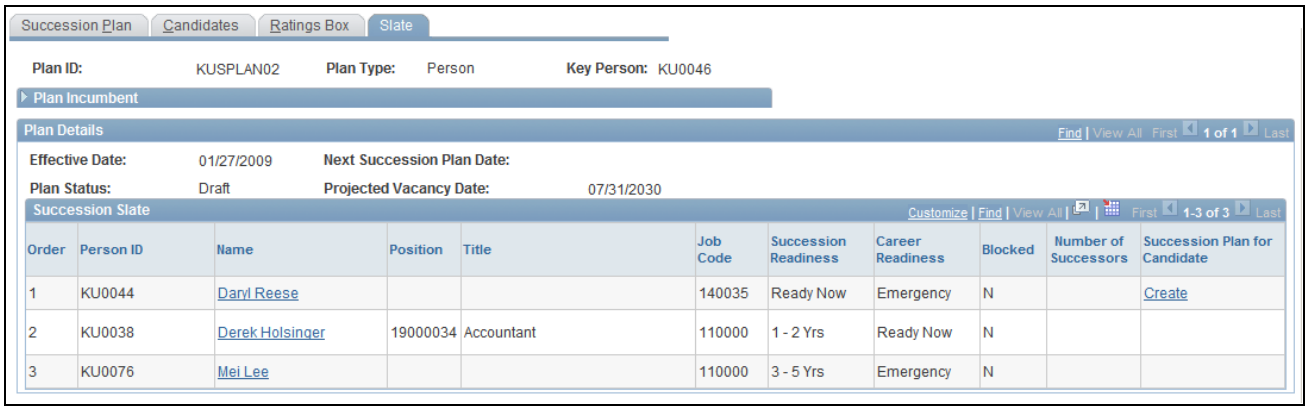
Box Ratings

The Box Ratings region enables you to select ratings for each candidate specified on the Candidates page. Based on your selections, the names of the candidates appear in the Ratings Box chart on this page. The column titles correspond to the X-Axis Title and the Y-Axis Title specified on the Define Ratings Box page. Select from the values specified on the Define Ratings Box page for the X-Axis Ratings and the Y-Axis Ratings.

Viewing Candidates for Specific Positions

The Succession Planning business process enables you to manage the slate of candidates. Create successor order, successor plan status (active or inactive), and successor rating box assignments. The Slate page enables you to view the roster of candidates that you manage on the other pages in the Succession Plan component. The Slate page updates as you add or delete candidates on the Candidates page.

Access the Succession Plan - Slate page (Organizational Development, Succession Planning, Maintain Succession Plans, Slate).



Succession Plan - Slate page

Succession Slate

Use the options in the Succession Slate region to view plan incumbents for a key role or replacements for a key person, depending on the plan type.

The Succession Slate region enables you to view the selected candidates from the Candidates page, in the succession order.

All names in the grid are candidates for the succession plan. The title of the far right column is dynamic based on the Plan Type. Click the links in this column to access succession plans based on the plan type. For position plans, where the person is a candidate, click the link to access a position succession plan. For job code plans, click the link to access the succession plan for the job code. For person plans, clicking the link accesses the succession plan for the person.

The system sorts the succession plan rows in ascending succession order.

The adjustments to the readiness status for successors is probably the last step toward finalizing succession plans.

This page is particularly useful after you've created succession plans for several key positions, because you can see if succession plans are in place for other key positions and key job codes for which the successors may be incumbents. This helps to ensure that no gaps exist in replacements and to identify and prevent any organizational bottlenecks. See which candidates are blocked in their current position so that you can prepare them for other roles or change their rotations, thereby preventing the loss of high- potential employees.

The system checks the employee's readiness. If this is set at *3–5 Yrs* (ready in three to five years), *Emergency* (ready in an emergency) or *Retirement* (retire in current position), then Blocked is set to *N* designating that this employee is not ready.

If the employee's readiness is *Ready Now* or *1–2 Yrs* (ready in one to two years), the system checks the incumbent's readiness. If there is an incumbent but the incumbent has no row on the succession plan table for this or any other position, Blocked is set to *Y*.

If the incumbent has one or more rows on the succession plan table (any position) then the system checks the lowest readiness in all positions.

If the incumbent's minimum readiness is set to *Ready Now* or *1–2 Yrs,*Blocked is set to *N;* otherwise, if readiness is set to *3–5 Yrs,Emergency* or *Retirement,*Blocked is set to *Y*.

Managing Talent Pools

A talent pool is a group of individuals that is generally identified as the top talent within an organization. In order to prevent attrition and provide motivation, individuals that have met certain criteria for success are placed in a pool based upon their role, job code, or position.

Understanding Talent Pools

Talent pools provide flexibility in the selection process for a leadership team. Creating a talent pool rather than choosing one employee with key competencies is more effective and efficient for an organization.

For example, a championship athletic team usually finds the best available athletes based on a predetermined talent pool, and then determines where to fit those athletes into the team lineup. This is in sharp contrast to the traditional business approach, in which companies begin by assigning employees to more limited career paths.

An integrated approach identifies and grooms candidates for increasingly demanding leadership positions and prepares the organization for demographic trends that sharply decrease leadership ranks. The majority of high-potential development programs encourage cross-functional rotations to develop breadth of knowledge in future company leaders. Many companies focus on identifying and promoting talent within the organization as a whole, often seeking to deploy this talent across business units. Making cross-functional development training part of the job prevents disruption in the flow of business.

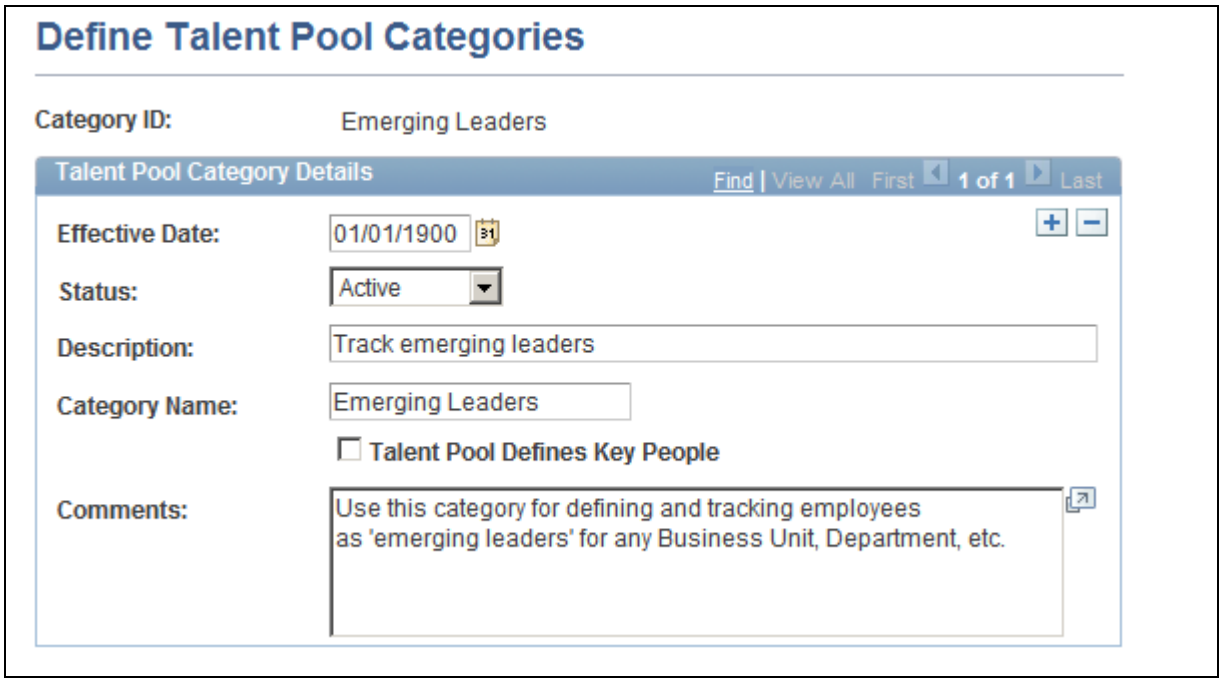
Pages Used to Create Talent Pools

Page Name	*Definition Name*	*Navigation*	*Usage*
Define Talent Pool Categories	HR_TPOOL_CATEGORY	Set Up HRMS, Product Related, Organizational Development, Define Talent Pool Categories	Define talent pool categories.
Manage Talent Pools - Talent Pool	HR_TPOOL_DEF	Organizational Development, Succession Planning, Manage Talent Pools, Talent Pool	Search for and edit existing talent pools.
Manage Talent Pools - Ratings Box	HR_TPOOL_RATINGS	Organizational Development, Succession Planning, Manage Talent Pools, Ratings Box	Rate successors using configurable X-Y matrices, or 9-boxes. Use ratings boxes to track custom-defined criteria such as performance, potential, readiness, and so on.
Manage Talent Pools - Learning	HR_TP_LRN_PRG	Organizational Development, Succession Planning, Manage Talent Pools, Learning	Associate learning programs or a list of coursework for a specific talent pool through integration with Enterprise Learning Management.

Setting Up Talent Pool Categories

Talent pool categories enable you to refine the definition of a Talent Pool. Defining a talent pool specifically for defining Key People allows you to create person-based succession plans for the talent pool members, and creates a search base for person-based succession plan definitions.

Access the Define Talent Pool Categories page (Set Up HRMS, Product Related, Organizational Development, Define Talent Pool Categories).



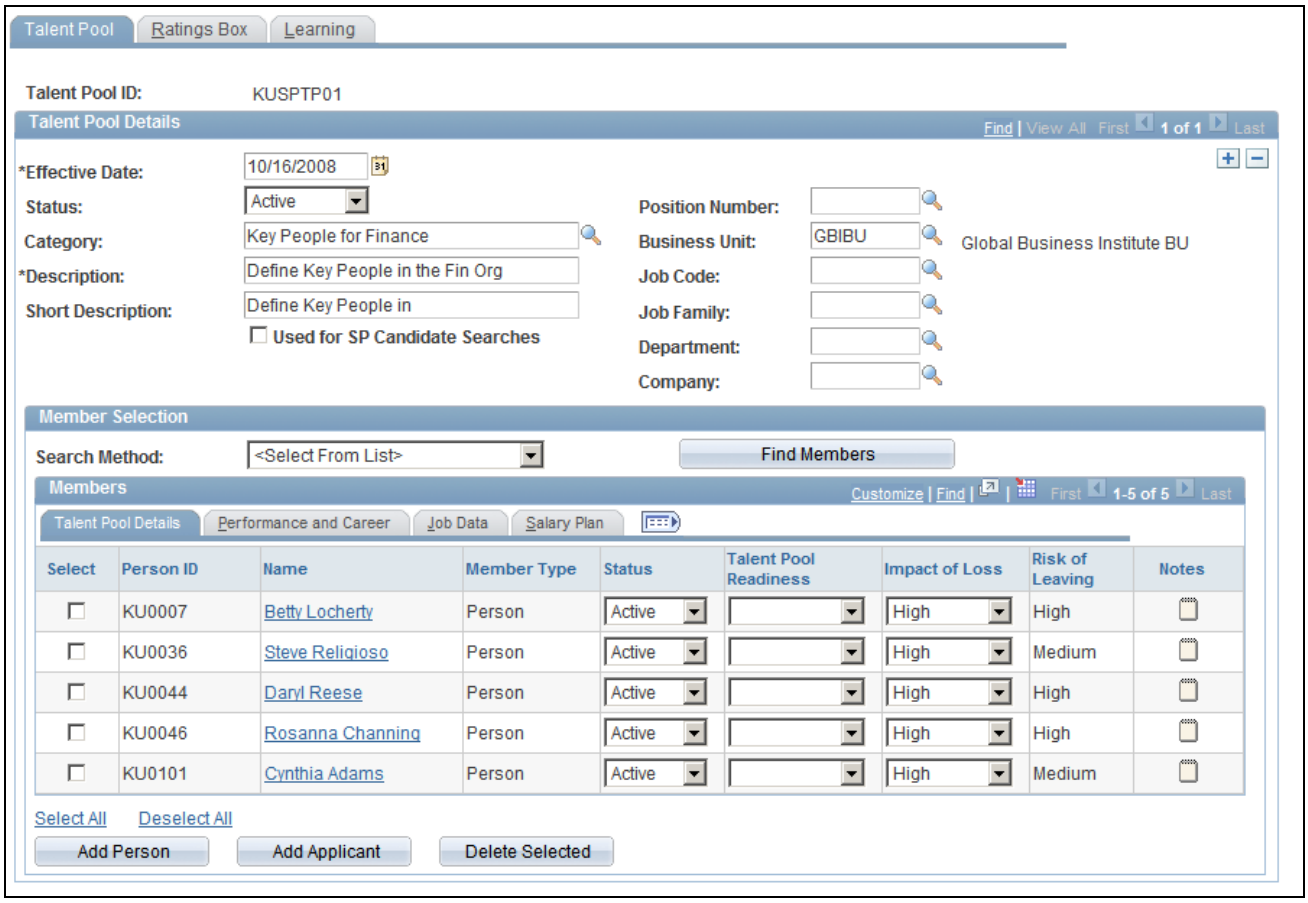
Define Talent Pool Categories page

Talent Pool Defines Key People Select to indicate that any talent pool associated with this talent pool category is used to source person-based succession plans.

Managing Talent Pools

You can manually add internal and external individuals to talent pools based on performance and potential analysis. Add internal individuals automatically using Profile Manager's search and match feature. Depending on your organization's practices, readiness is a key monitor factor for talent pools. You can manually specify each employee's readiness based on criteria established by your organization.

Access the Manage Talent Pools - Talent Pool page (Organizational Development, Succession Planning, Manage Talent Pools, Talent Pool).



Manage Talent Pools - Talent Pool page

Category Select the talent pool category for this talent pool. Select from the values defined on the Talent Pool Categories page.

Used for SP Candidate Searches (used for succession planning candidate searches) Select to specify that this talent pool can be used for succession plan searches. You must associate the talent pool with a rating box defined for use with succession candidate search filters in order to search the talent pool through the Talent Pool ID field for Talent Category-based searches.

Search Method Select the search method the system uses to search for members to include in the talent pool. Different search methods change the appearance of the Member Selection region of the page to enable you to locate potential talent pool members based on specific criteria.

Talent Pool Details Tab

Name Click to open the Person Profile page for the selected individual.

Status Select the status of the individual within the talent pool. Select *Active* or *Inactive.*

Talent Pool Readiness Select the readiness level for an individual in the talent pool. Select from the following values:

- *1−2 Yrs* (1−2 years)

  The employee will be ready for the position change within the next two years.

- *3−5 Yrs* (3−5 years)

  The employee will be ready for the position change in three to five years.

- *Emergency*

  The employee is overdue for a job move and needs to move as soon as possible.

- *Ready Now*

  The employee is ready for the move now.

- *Retirement*

  The employee will not move to another position after his or her current position. For example, because an employee is nearing retirement age.

Impact of Loss Specify the impact losing this employee would have on the organizations goals. The Plan Careers business process provides this value if you select the Career Planning Impact of Loss field on the Succession Planning Setup page. You can override the value on this page. Values are: *Low,Medium,* or *High.*

Notes Click to open the Notepad page in order to document notes for any talent pool member.

Performance and Career Tab

Compare Profiles Click to access the Compare Profiles - Match Results page.

Career Development Plan Click to open the Career Development plan page for the selected individual, if available.

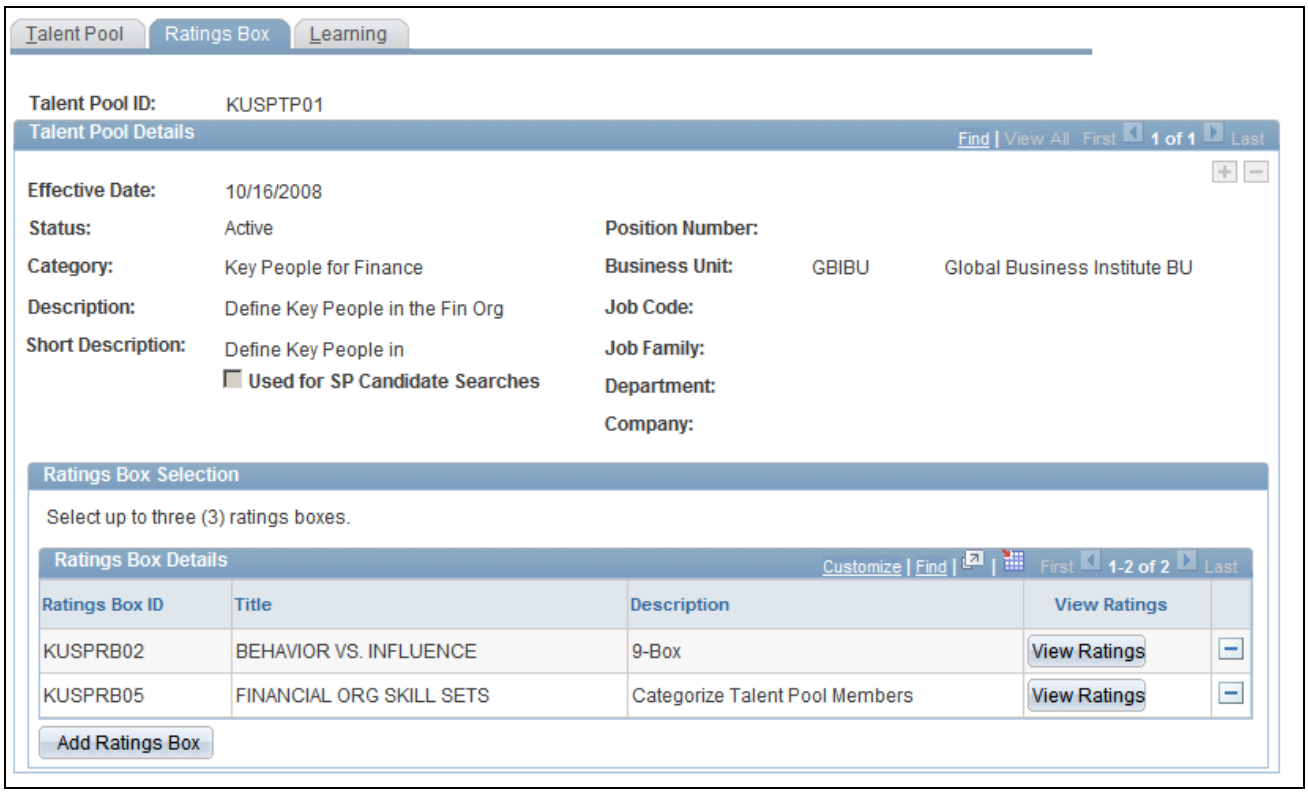
Job Data Tab

Job Summary Click to open the Workforce Job Summary page.

Evaluating Talent Rating Assignments

Your organization's administrators can use a ratings box, configurable X-Y grids, to place individuals into different quadrants of the ratings box in order to track user-defined criteria such as the performance, potential, and readiness, of the talent pool members.

Access the Manage Talent Pools - Ratings Box page (Organizational Development, Succession Planning, Manage Talent Pools, Ratings Box).



Manage Talent Pools - Ratings Box page

View Ratings Click to view the selected ratings box for this talent pool.

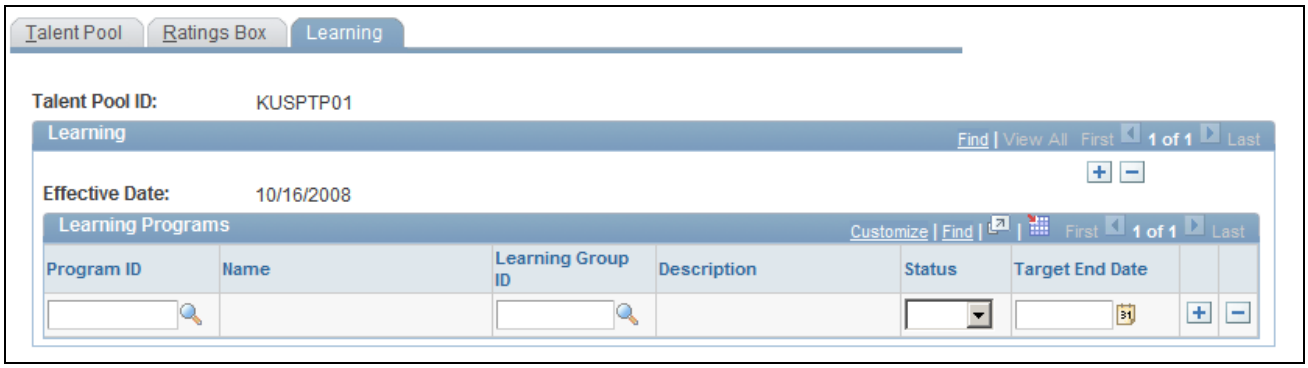
Add Ratings Box Click to add additional ratings box charts for this talent pool.

Associating Learning Programs with Talent Pools

You can associate learning programs or a list of coursework for a specific talent pool through integration with Enterprise Learning Management. If a talent pool member has an active pool status, the system adds the learning program to the talent pool members' Learning Plan page (LM_LEARNING_HM) in Enterprise Learning Management. The learning definitions are initiated on the Learning tab of the Create Talent Pool page.

Note. Enterprise Learning Management must be installed in order to display the Manage Talent Pools - Learning page.

Access the Manage Talent Pools - Learning page (Organizational Development, Succession Planning, Manage Talent Pools, Learning).



Manage Talent Pools - Learning page

Program ID Select the learning program to associate with the talent pool

Learning Group ID Select the learning group for the specified Program ID.

Managing Succession Trees

Succession trees provide a graphical view of an organization's succession plan. Succession trees show which workers currently hold key positions and which candidates are slated to move into this position.

Building Succession Trees

To build succession trees, use the Tree Manager (PSTREEMGR), Tree Structure (PSTREESTRCT), Tree Auditor (RUN_TREE_AUDITS) , and Tree Viewer (PSTREEVIEWER) components.

Note. You must create successions plans and identify succession candidates before creating the succession tree.

Use the PeopleSoft Tree Manager to build, view, modify, and control access to succession trees. To represent positions as a hierarchy, identify the reporting relationships among the key positions and then build the succession tree.

Succession trees are effective-dated; you can build multiple trees to maintain a history of the organization's succession planning and to track planned and actual changes. You can also build alternative scenarios using the Save As feature to clone a tree and then changing hierarchy properties to create different scenarios.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Tree Manager*

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Building Organization Charts."

Determining Security Access

You can determine the type of access that users have to succession trees. Many levels of access exist: to the tree itself, to key position and succession plans, and to career plans.

For example, you might allow many users to update key position, succession plan, and career plan data from within succession trees yet permit only a few users to make changes to the succession trees themselves. You might want other users to view key position, succession plan, and career plan data as display-only. You can delegate the maintenance of different levels in trees by specifying the level of access or update authority that a user or a set of users has.

Use object security to specify which users can access trees and to control whether the trees that users access are display-only. User security determines whether users can access pages from nodes and details and controls whether they are display-only pages. Use employee data security to specify whether users can access the data in pages tied to specific nodes and details.

See *Enterprise PeopleTools PeopleBook: Security Administration*

Adding and Viewing Details in Succession Trees

Once you've created succession plans with candidate lists, you can view career plans and related employee data for succession candidates. Use this information to make decisions about particular candidates, to re-rank candidates in succession plans, or to remove candidates from the candidate list.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Tree Manager*

Viewing Details in Succession Trees

Use the Detail feature of Tree Manager to view and update career plans for succession candidates and to view and update several other pages containing pertinent employee data, such as compensation history, skills, languages, and prior work experience.

This diagram illustrates a succession tree:

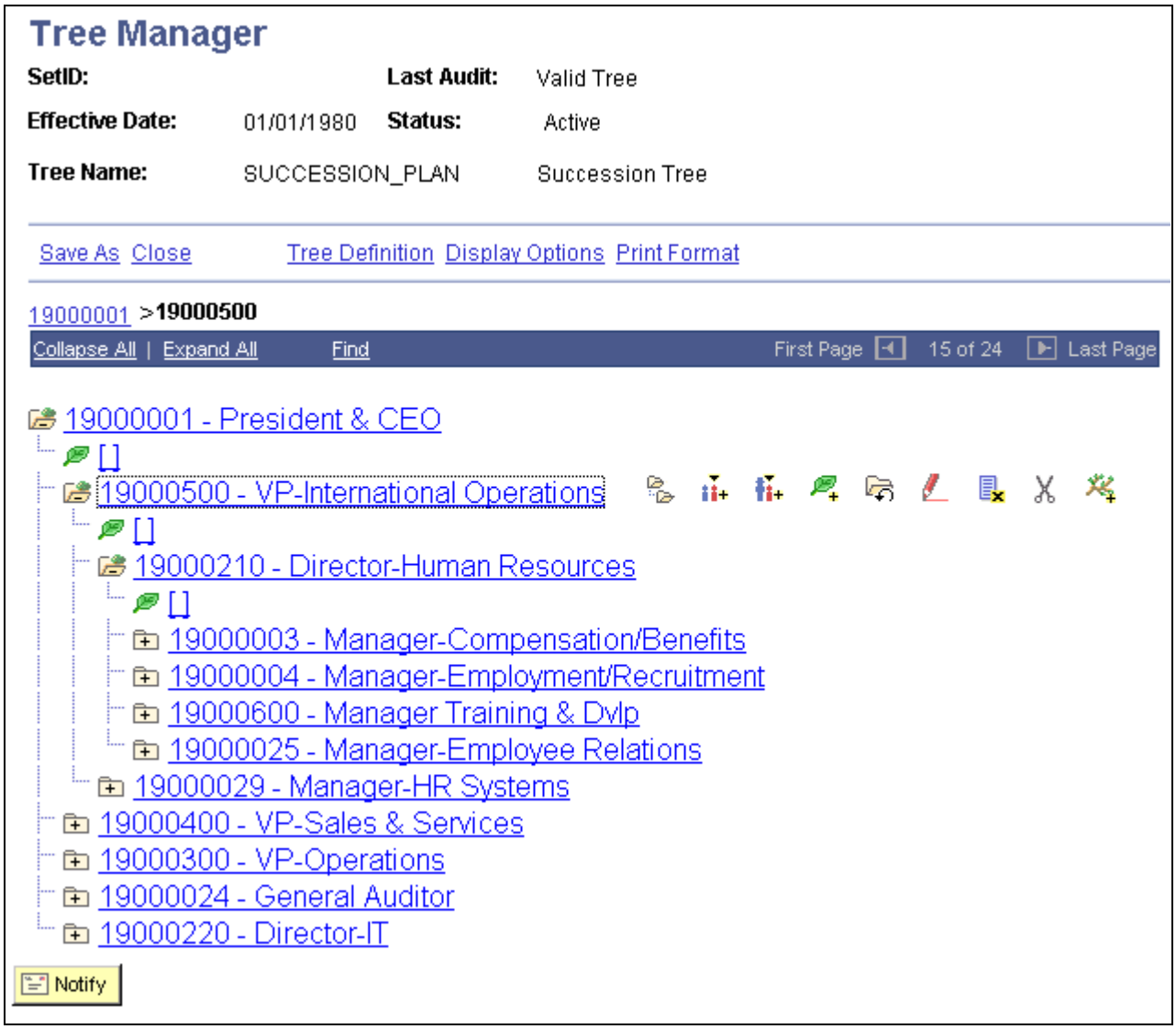


Illustration of a succession tree

Adding Details in Succession Trees

To add details to the succession tree, click the Insert Detail button. When you double-click the button, a list of candidates in the succession plan for that position appears. Select the candidate for whom to view career plans or related employee data.

Note. Before you can view career plans and other employee data, create succession plans for key positions and include succession candidates in them. These pages are available in Tree Manager only for succession candidates.

To add a detail to succession tree:

1. In Tree Manager, open the succession tree and select the key position for which you want to add a detail.
2. Click Insert Detail.
3. Select the Dynamic Flag check box on the Detail Value Range page and click Add.

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

To hide the details in a succession tree:

1. Click Display Options.

2. Deselect the Display Node Description check box on the Configure User Options page.

When you highlight a detail and click Edit Data, the system displays a list of candidates in the succession plan for the key position. The candidates are sorted first by succession plan date, then by ranking, and then by readiness. If a candidate is in more than one succession plan, they appear in this list only for the most current succession plan. Click the Update button on the line for the candidate for which you want to view additional information. The first page in the group, Career Plan, appears. If you prefer to access other pages from within Tree Manager, you can change the link between Tree Manager and the pages.

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

Managing Succession Plans

This section provides an overview of Succession 360° and discusses how to:

- Configure Succession 360° default search criteria.
- Configure Succession 360° organizational chart hierarchies.
- Configure Succession 360° profile content.
- Configure Succession 360° succession readiness legend.
- Access Succession 360°.

Understanding Succession 360°

You may want to use a talent review process centered on a person or role when you initiate succession planning. The Succession 360° page enables you to visually review and manage succession planning- related processing for a person or role within the context of the organization.

Use the Succession 360° page as planning tool or reviewing tool. The page highlights the completed portions of the succession planning process or any unfinished business in the succession planning process.

The Succession 360° feature gathers and displays a variety of pertinent data from PeopleSoft HRMS. You can perform the following functions:

- Search for people, succession plans, and positions or job codes.
- View graphical representations of reporting hierarchies.
- View profile summaries for people, positions, or job codes.
- View succession plans for people, positions, or job codes.

- Edit succession plans.

The Succession 360° component exchanges succession plan data from the underlying succession plan record. For example, in the Successor Details region of the Succession 360° component, the system retrieves the Ratings Box information and the candidate list from the Succession Plan ID specified on the Successors tab.

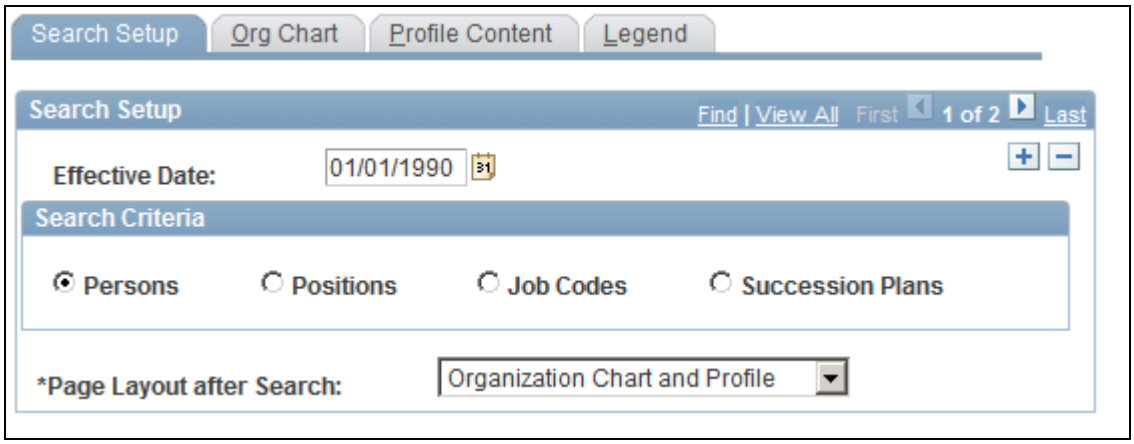
The system updates the information in the plan record as you make changes in either the Succession 360° component or the Succession Plan pages.

Pages Used to Manage Succession 360°

Page Name	*Definition Name*	*Navigation*	*Usage*
Succession 360° Setup - Search Setup	HR_VT_SETUP1_SRCH	Set Up HRMS, Product Related, Organizational Development, Succession 360° Setup, Search Setup	Define the default search criteria and page layout for the Succession 360° page.
Succession 360° Setup - Org Chart	HR_VT_SETUP1	Set Up HRMS, Product Related, Organizational Development, Succession 360° Setup, Org Chart	Define organizational chart hierarchies for the Succession 360° page.
Succession 360° Setup - Profile Content	HR_VT_SETUP2	Set Up HRMS, Product Related, Organizational Development, Succession 360° Setup, Profile Content	Define profile content for the Succession 360° page.
Succession 360° Setup - Legend	HR_VT_SETUP3	Set Up HRMS, Product Related, Organizational Development, Succession 360° Setup, Legend	Configure icons and color values for the Succession Readiness Legend used on the Succession 360° page.
Succession 360°	HR_VT_DASHBOARD	• Organizational Development, Succession Planning, Succession 360° • Manager Self Service, Succession Planning, Succession 360°	Visually review and manage a person or role within the context of the organization.

Configuring Succession 360° Default Search Criteria

Access the Succession 360° Setup - Search Setup page (Set Up HRMS, Product Related, Organizational Development, Succession 360° Setup, Search Setup).



Succession 360° Setup - Search Setup page

Persons

Select to specify a person search as the default search method on the Succession 360° page. This enables users to perform a search for persons in the system that may or may not be associated with a succession plan. The search returns any person to whom the user has security access. When you select this option, the system uses the person-based hierarchy setup information, defined on the Org Chart page, for rendering the chart on the Succession 360° page

Positions

Select to specify a position search as the default search method on the Succession 360° page. This enables users to perform a search for positions in the system that may or may not be associated with a succession plan. The search returns any position to which the user has security access. When you select this option, the system uses the position-based hierarchy setup information for rendering the chart on the Succession 360° page. If full or partial position management is not installed, then this search option is not displayed.

Job Codes

Select to specify a job code search as the default search method on the Succession 360° page. This enables users to perform a search for job codes in the system that may or may not be associated with a succession plan. The search returns any job code to which the user has security access. When you select this option, the system uses the job code-based hierarchy setup information for rendering the chart on the Succession 360° page.

Succession Plans

Select to specify a succession plan search as the default search method on the Succession 360° page. This enables users to perform a search for existing succession plans in the system. The search returns any succession plan to which the user has security access.

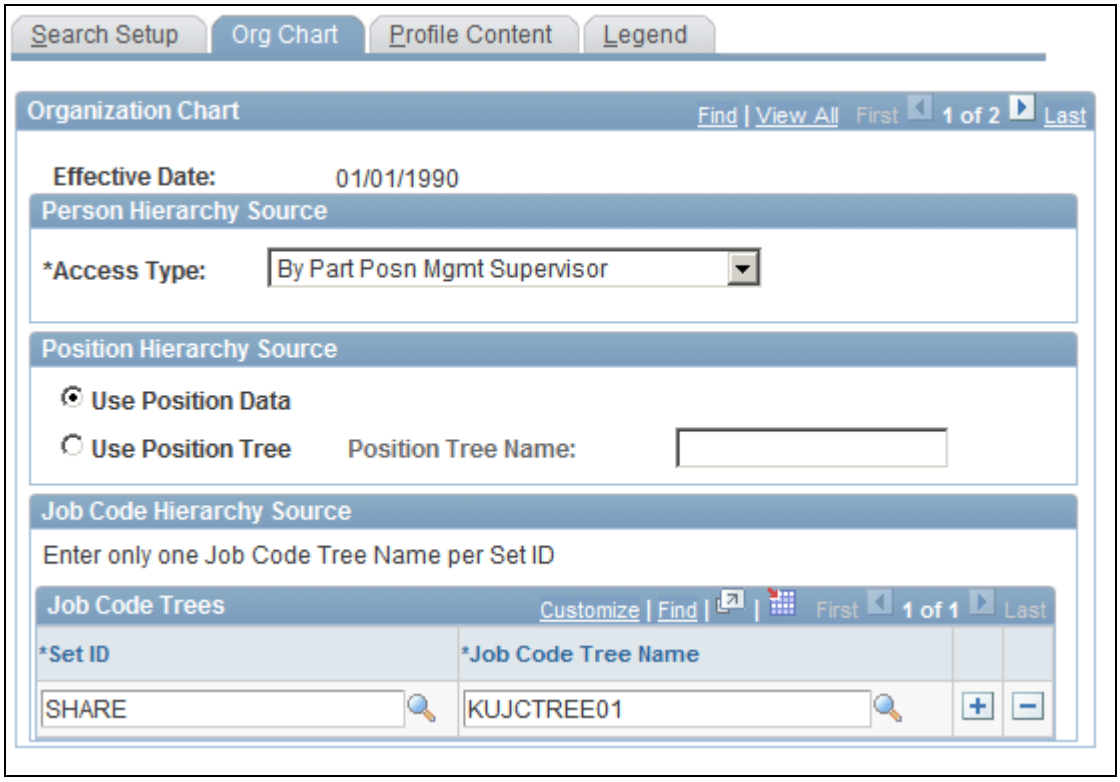
Page Layout after Search

Select the default layout of the Succession 360° page after the user performs a search.

Values are: *Organization Chart and Profile*,*Organization Chart Maximized*, or *Profile Only*.

Configure Succession 360° Organizational Chart Hierarchies

Access the Succession 360° Setup - Org Chart page (Set Up HRMS, Product Related, Organizational Development, Succession 360° Setup, Org Chart).



Succession 360° Setup - Org Chart page

Person Hierarchy Source

Access Type

Select the reporting access type from which the person-based chart hierarchy on the Succession 360° page is derived.

Values are:

- *By Department Manager ID*

  Select this value to display the hierarchy based on information in the Manager ID field on the Department Profile page.

- *By Dept Security Tree*

  Select to display the hierarchy using information from the department security tree.

- *By Part Posn Mgmt Supervisor* (by partial position management supervisor)

  Select to display the hierarchy by both the Reports To and the Supervisor ID fields on the Work Location page. This is designed for the organizations that use partial position management. The system searches for reporting relationships based on Report To first, and then Supervisor ID.

- *By Reports to Position,*

  Select to display the hierarchy based on information in the Reports To field on the Work Location page.

- *By Supervisor ID*

  Select to define the reporting relationship based on information in the Supervisor ID field on the Work Location page in Job Data.

Position Hierarchy Source

Use Position Data and Use Position Tree

Select one of these options to indicate that the position-based chart hierarchy on the Succession 360° page is derived from either position data or a position tree. Selecting the Use Position Tree option requires the selection of a valid position tree in the Position Tree Name field.

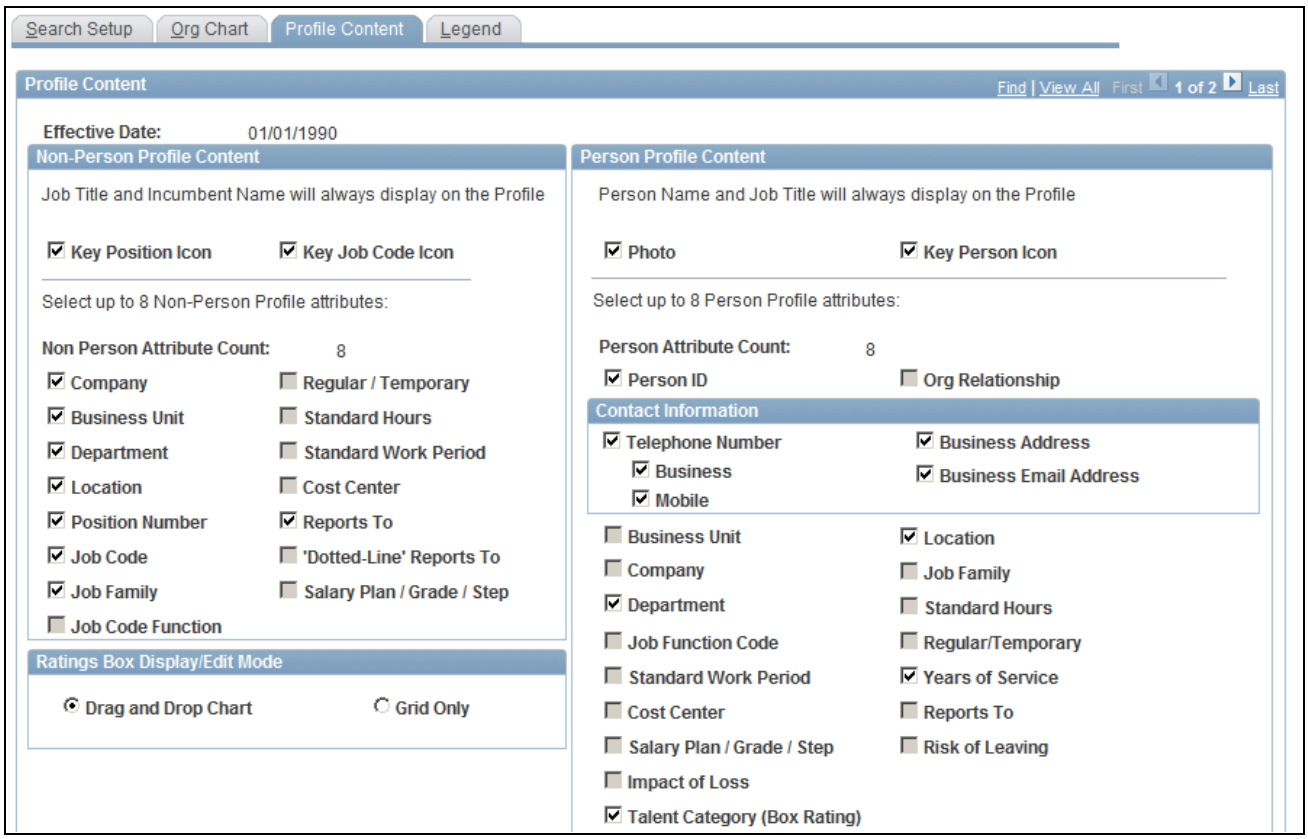
Job Code Hierarchy Source

Use the fields in this region of the page to select the SetID and Job code Tree Name of each tree you want to use for job code-based organizational chart hierarchies on the Succession 360° page. The valid values in the Job code Tree Name field are any job code-based hierarchies created using Tree Manager, or any tree with a tree structure that uses the JOBCODE_TBL record as the Tree Node Record Name.

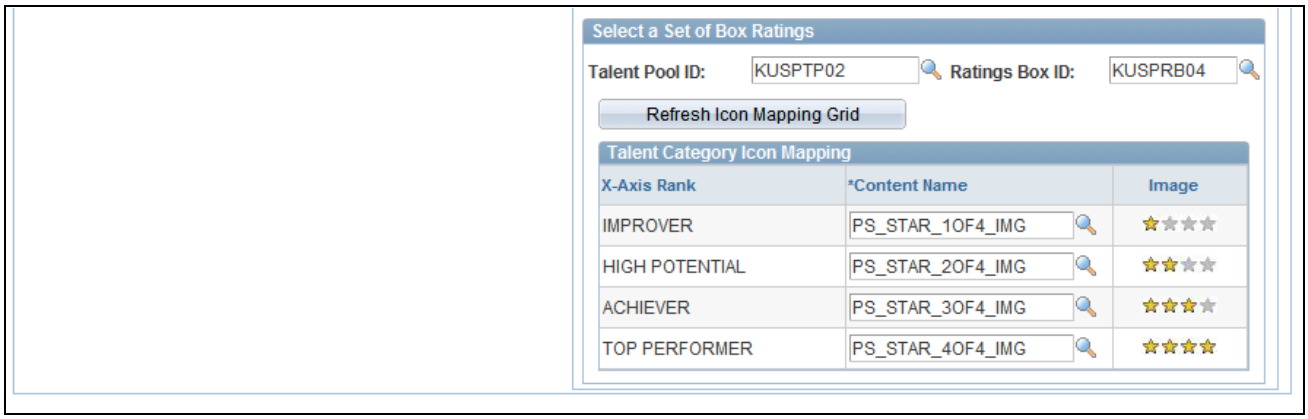
Configure Succession 360° Profile Content

You can specify the content on the Succession 360° page using the Succession 360° Setup - Profile Content page.

Access the Succession 360° Setup - Profile Content page (Set Up HRMS, Product Related, Organizational Development, Succession 360° Setup, Profile Content).



Succession 360° Setup - Profile Content page (1 of 2)



Succession 360° Setup - Profile Content page (2 of 2)

Non-Person Profile Content

Key Position Icon Select to display an icon on the Succession 360° page for any position defined as a key position using Position Management. The icon is visible in the Org Chart Node, Slate Node and Non-Person Profile sections of the Succession 360° page.

Key Job Code Icon Select to display an icon on the Succession 360° page if the job code is defined as a key job code using the job code table. The icon is visible in the Org Chart Node, Slate Node and Person Profile sections of the Succession 360° page.

Select up to eight 8 of the remaining check boxes in this region to include specific fields to display in the Profile Summary section of the Succession 360° page. The system displays the selected content in the profile summary section of the Succession 360° page in the order displayed on this page.

Non Person Attribute Count Displays the number of selected options in the Non-Person Profile region of this page. The selections made for the Key Position Icon or Key Job Code Icon are not included in the displayed count.

Person Profile Content

Key Person Icon Select to display an icon on the Succession 360° page for any employee defined as a key person. The icon is visible in the Org Chart Node, Slate Node and Person Profile sections of the Succession 360° page.

Select up to eight 8 of the remaining check boxes in this region to include specific data types in the Profile Summary section of the Succession 360° page. The system displays the selected content in the profile summary section of the Succession 360° page in the order displayed on this page.

Person Attribute Count Displays the number of selected options in the Person Profile region of this page. The selections made for the Photo or Key Person Icon fields are not included in the displayed count.

Talent Category Icon Mapping

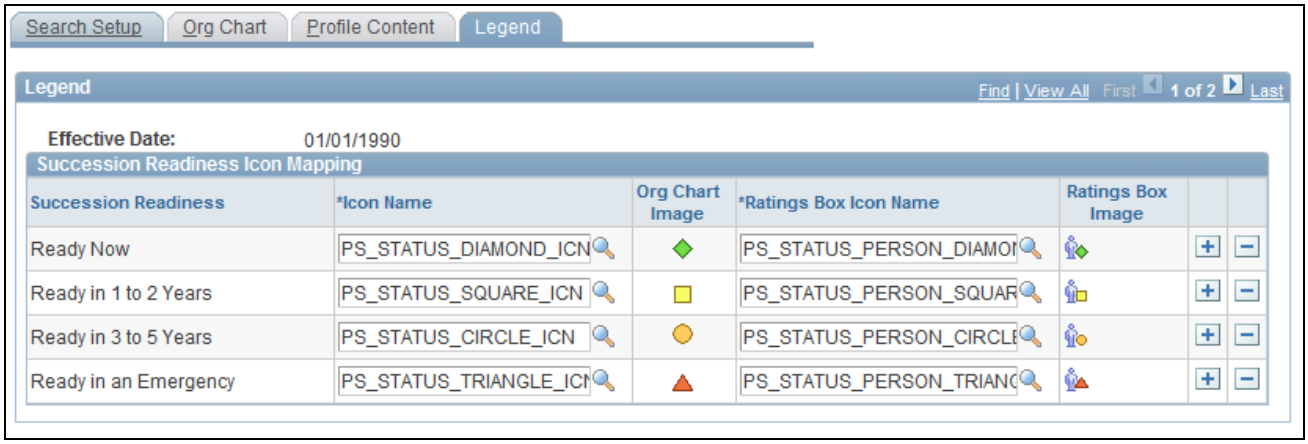
X-Axis Rank Displays the box rating labels defined in the X-axis for the specified Rating Box ID. The maximum numbers of displayed ratings is five. This area displays the box rating labels in reverse order. For example, the first row in the Talent Category Icon Mapping region displays the box 5 label on the X-axis The second row displays the box 4 label on the X-axis, and so on.

Content Name Specify pre-configured talent category icon names.

Image Displays the image associated with the value specified in the Content Name field. Five pre-configured icons are delivered and used as the default Talent Category icons.

Configuring Succession 360° Succession Readiness Legend

Access the Succession 360° Setup - Legend page (Set Up HRMS, Product Related, Organizational Development, Succession 360° Setup, Legend).



Succession 360° Setup - Legend page

Five pre-configured icons are delivered and used as the default Succession Readiness icons for use in the Succession Readiness legend.

Succession Readiness Displays the current system defined succession readiness translate values. Values are: *Now*, *1-2 years*, *3-5 years*, and *Emergency*.

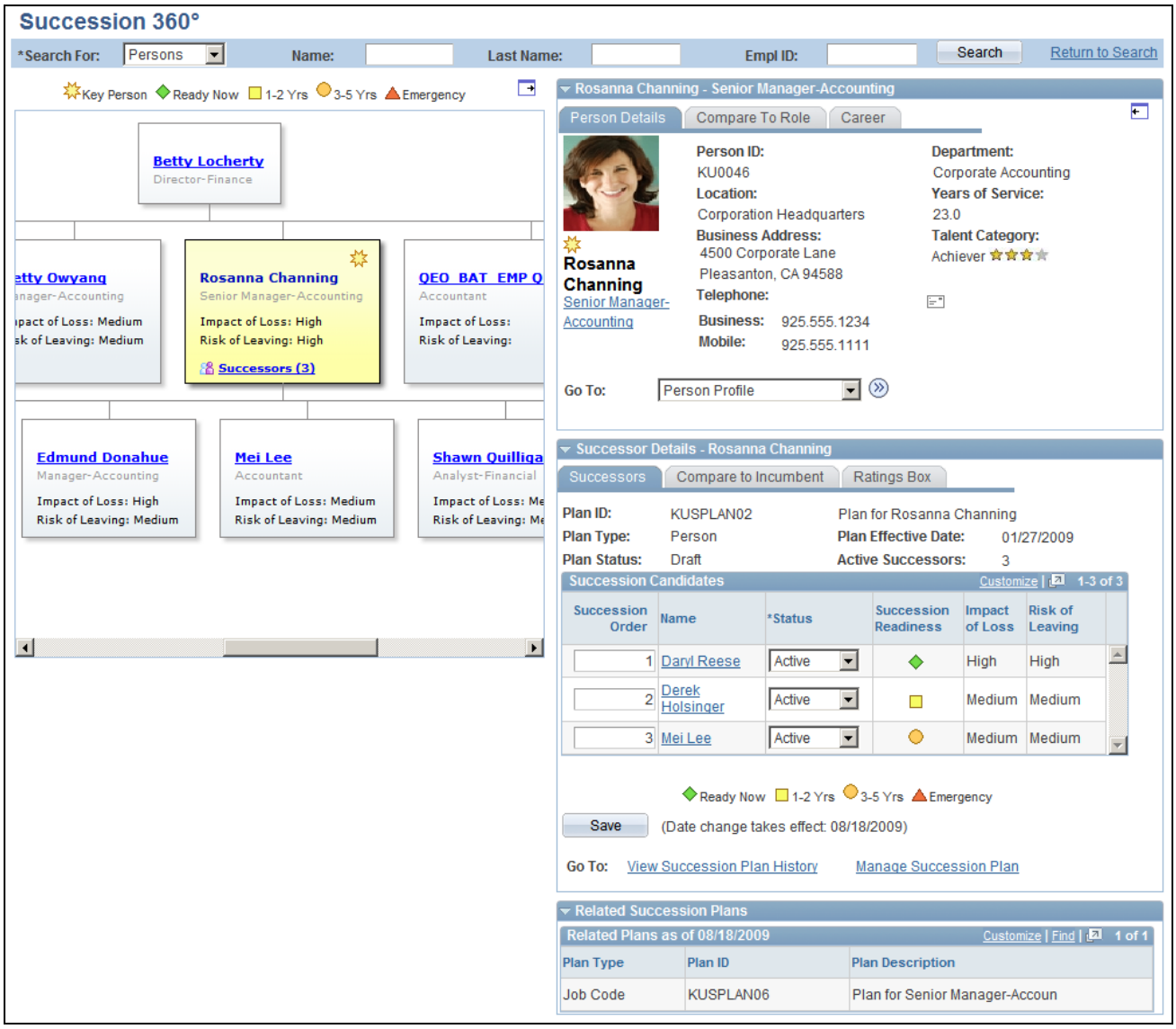
Icon Name For each value in the Succession Readiness column, specify the name of the icon image to display in the organizational chart, Succession Readiness legend, and Successors Details.

Ratings Box Icon Name For each value in the Succession Readiness column, specify the name of the icon image to display in the Ratings Box.

Org Chart Image and Ratings Box Image Displays the image associated with the specified values in theIcon Name and Ratings Box Icon Namefields.

Accessing Succession 360°

Access the Succession 360° page (Organizational Development, Succession Planning, Succession 360°).



Succession 360° page

The Succession 360° page has two primary sections:

- An organization chart or reporting hierarchy.

  This information, on the left side of the Succession 360° page focuses on a person or a role and enables you to navigate to another person or role of interest.

- A profile view.

  This region displays details regarding the person or role in focus on the organizational chart. Depending on the perspective of the Succession 360° page, you can compare the succession candidates to the role profile or the incumbent profile. You can expand or collapse this information to optimize the workspace for a particular task. For example, when focusing on succession information, you may choose to collapse the incumbent details section.

Organization Chart or Reporting Hierarchy

The system uses trees from Tree Manager to build the hierarchies rendered by the organization chart. The organization chart supports three types of hierarchies:

- Person-based

  The chart hierarchy derives from the reporting Access Type defined in the Succession 360° Setup component.

- Position-based

  The chart hierarchy derives from either Position Management data or a position tree as configured in the Succession 360° Setup component.

- Job code-based

  The chart hierarchy derives from a job code tree as configured in the Succession 360° Setup component.

You can scroll both vertically and horizontally through the chart on the Succession 360° page. The chart displays a maximum of three vertical levels at any time.

The focus chart node is displayed in a contrasting color from other nodes in the chart. You can change the focus node by clicking the name, job title, or role link in each node of the chart. Changing the focus node updates the contents of the profile section on the right-hand side of the Succession 360° page.

Profile View - Person-based

This region of the Succession 360° page displays details about the person that is the focus of the organization chart. The region has three tabs that change based on the selected hierarchy type.

For a person-based hierarchy, the profile view region displays the name and job code title from the job record of the employee specified in the focus node of the organization chart region. If a position title is not available, then the system displays the job code title. There are three tabs associated with a person-based profile view:

- Person Details

  The information on this tab is based on information in several Human Resources tables. You can configure the information on the Succession 360° Setup - Profile Content page.

Go To	Select the detailed career or profile page you want to access and click the Transfer icon to access the desired page. For the selected employee, select from the following pages: • Select *Career Development Plan* to go to the Career Development Plan page. • Select *Career Path* to go to the Career Path page. • Select *Person Profile* to go to the Profile Manager Person Profile page. • Select *Performance Document* to go to the Maintain Performance Documents page.
(Transfer icon)	Click the Transfer icon to access the selected page in the Go To field.

- Compare to Role

  Click the Compare to Role button on this tab to perform a Profile Manager-based comparison between the selected employee and their current role. The results display a side-by-side comparison of the employee's qualification content sections, if defined in Profile Manager, with those of the employee's current role, if defined in Profile Manager. The system displays a message indicating that the process is unavailable in the following cases:

  - If there are no defined profiles for the employee or role.
  - If the Verity search collections for Job Profile Management have not been created.

- Career

  The Career tab displays a summary of future career moves and career history for the current employee.

Profile View - Position or Job Code-based

This region of the Succession 360° page displays details about the selected role, job code, or position that is the focus of the organization chart. The region has three tabs that change based on the selected node in the organizational chart.

For a position-based or job code-based hierarchy, the profile view region displays the position or job code associated with the focus node of the organization chart region. There are three tabs associated with the profile view for non-person profiles:

- Details

  The information on this tab is based on the position or job code associated with the focus node of the organization chart region.

- Required Competencies

  The Required Competencies tab displays a list of competencies and associated required ratings, based on the Profile Management non-person profile for the role or job code selected in the organization chart region.

- Incumbents

  The Incumbents tab displays a grid of incumbents for the job code or position.

Compare Incumbent to Role	Select an employee from the displayed list and click to perform a Profile Manager-based comparison between the selected incumbent and the current role. The results display a side-by-side comparison of the incumbent's qualification content sections, if defined in Profile Manager, with those of the current job or role, if defined in Profile Manager. If there are no defined profiles for the employee or role, the system displays a message indicating that the process is unavailable.
View Career Detail	Select an incumbent from the displayed list and click to displays a summary of future career moves and career history for the selected incumbent.

Successor Details

This region of the Succession 360° page displays three tabs associated with the source succession plan:

- Successors

  This tab displays summary succession plan information and a succession slate grid, if the information is available, from the associated succession plan. The slate grid enables you to edit succession order and plan status, which is updated in the associated succession plan and the slate pop-up when you click the Save button in this region.

- Compare to Incumbent or Compare to Role

  Select a candidate and click the Compare to Incumbent button or the Compare to Role button to perform a comparison between the two profiles. If there are no defined profiles for the selected person or role, the system displays a message indicating that the process is unavailable.

- Ratings Box

  This tab enables you to view and edit all of the rating boxes defined for the succession plan for any previously rated candidates. There can be up to 3 rating boxes defined for a succession plan.

Related Succession Plans

This region of the Succession 360° page displays any succession plans in the system related to the person, position, or job code specified in the organization chart region of the page.

For persons in focus, the grid displays succession plans, if available, for the role the person holds.

For position in focus, the grid displays succession plans, if available, for either a job code associated with the focus position or an incumbent of the position.

For a job code in focus, the grid displays succession plans, if available, for either a position associated with the focus job code or an incumbent of the job code.

Reviewing Career Summaries

This section lists the pages used to review career summaries.

Pages Used to Review Career Summaries

Page Name	*Definition Name*	*Navigation*	*Usage*
Career Assignments	CAREER_SUMMARY	• Organizational Development, Succession Planning, Review Career Summaries, Career Assignments • Organizational Development, Succession Planning USF, Review Career Summary Info, Career Assignments	Review employee job status and job history.
Compensation	COMP_SUMMARY	• Organizational Development, Succession Planning, Review Career Summaries, Compensation • Organizational Development, Succession Planning USF, Review Career Summary Info, Compensation	Review employee compensation history.
Training	TRN_STUDNT_CRS_SUM	• Organizational Development, Succession Planning, Review Career Summaries, Training • Organizational Development, Succession Planning USF, Review Career Summary Info, Training	Review employee training history.

Running Succession Reports

This section provides an overview of succession planning reports and describes the pages used to run Succession Planning reports.

Understanding Succession Reports

The summary metrics in Succession Planning reports enable administrators to see key people or roles that are in line for succession planning and identify key persons or roles that require succession plans. This enables organizations to define activities and strategies to search for and select the best candidates for person and role-based succession plans.

Key People/Job Codes/Positions

The Key People/Job Codes/Positions page enables you to create the following reports:

- Plans for Key Entities, people, positions, and job codes
- Projected Vacancy for Key People
- Risk of Leaving for Key People

The Plans for Key Entities report tracks the status of succession plans for key people, key job codes, or key positions, as of the report date.

The Projected Vacancy for Key People report provides information about projected vacancies, career readiness information for a key employee or person's next job code or position, and the availability of successors to fill their projected vacancy.

The Risk of Leaving for Key People report enables managers and administrators to view the likelihood of key people leaving and impact of their loss on the organization. The system also indicates whether there are any possible successors to replace key employees with a high risk of leaving.

Talent Pool Readiness

The Talent Pool Readiness report displays all of the active members of an active talent pool. Changing the filters for the report enables managers and administrators to evaluate various talent pool readiness values.

Talent Pool Ratings Box Assignments

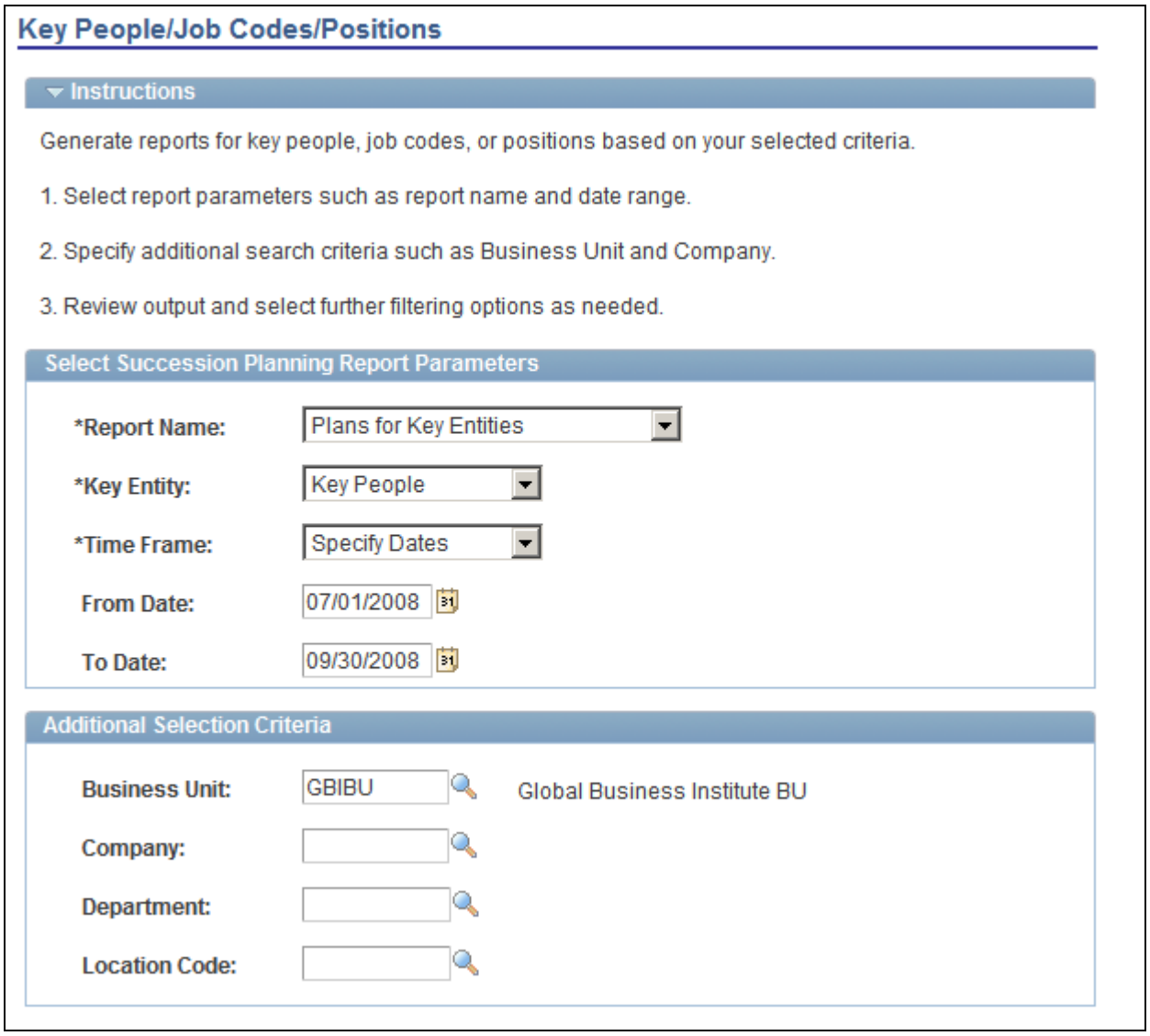
The Talent Pool Ratings Box Assignments report displays a box rating assignment summary of talent pool members for a given talent pool.

Pages Used to Run Succession Reports

Page Name	*Definition Name*	*Navigation*	*Usage*
Key People/Job Codes/Positions	HR_SUCC_METRICS1	Succession Planning, Reports, Key Person/Job Codes/Positions	View candidates for hierarchical-based succession planning, and identify key entities that require succession plans.
Talent Pool Readiness	HR_TPOOL_METRIC1	Succession Planning, Reports, Talent Pool Readiness	Displays the people assigned to an active talent pool and enables managers and administrators to evaluate various readiness values.
Talent Pool Ratings Box Assignments	HR_TPOOL_RATE1	Succession Planning, Reports, Talent Pool Ratings Box	Displays a box rating assignment summary of talent pool members for a given talent pool.

Key People/Job Codes/Positions

Access the Key People/Job Codes/Positions page (Succession Planning, Reports, Key Person/Job Codes/Positions).

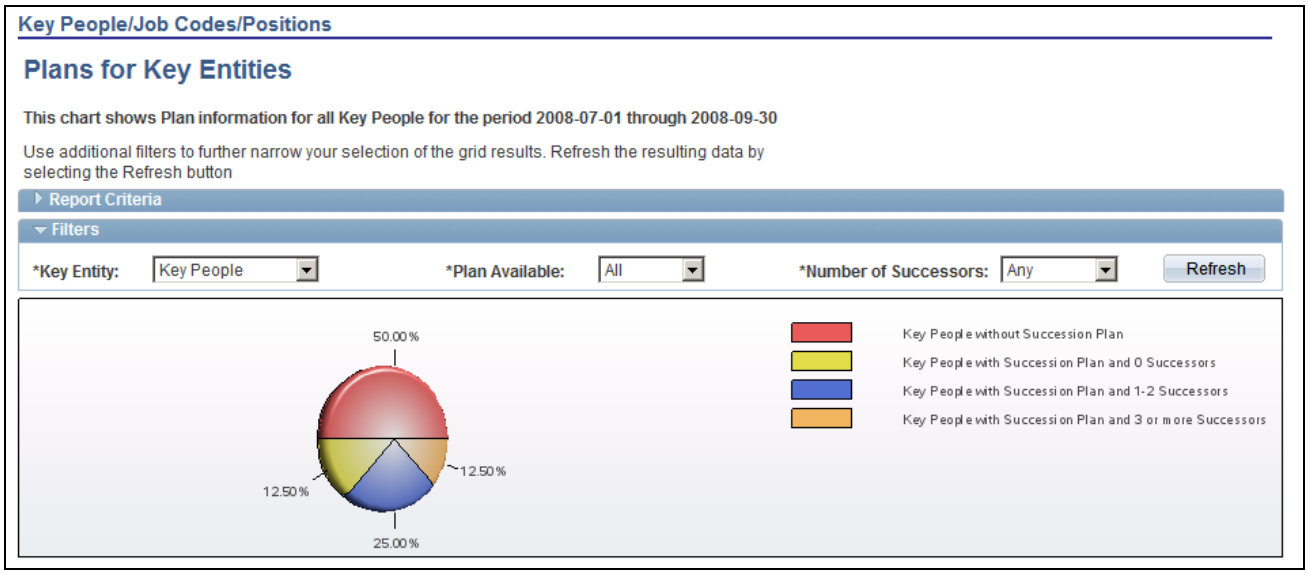


Key People/Job Codes/Positions page

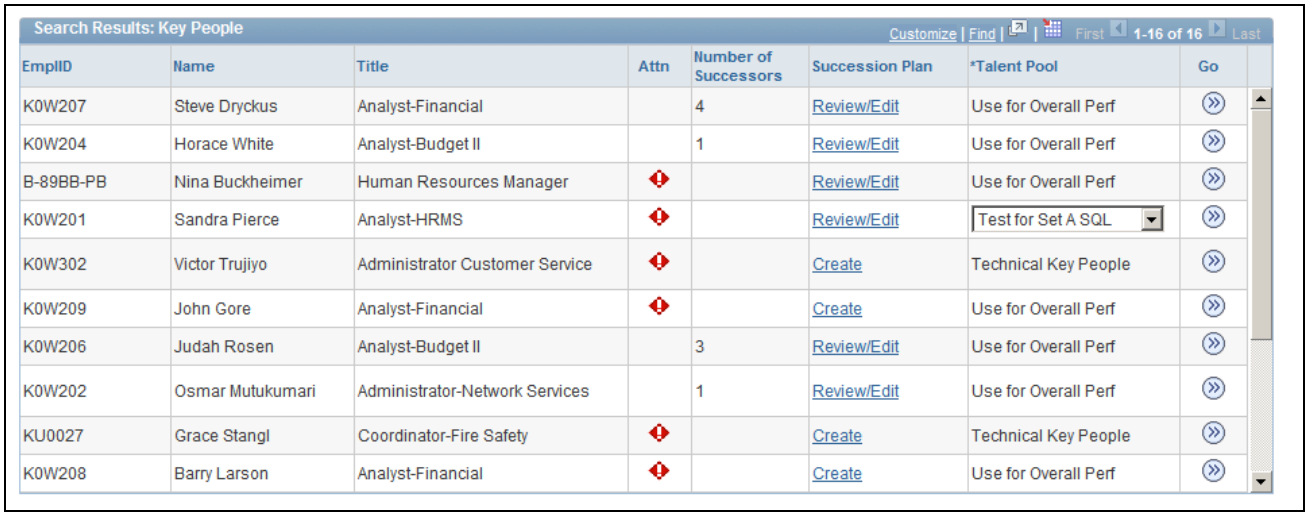
Report Name Select the type of report to view. Values are *Plans for Key Entities,Projected Vacancy for Key People*, and *Risk of Leaving for Key People.*

Plans for Key Entities

Access the Plans for Key Entities page (Select *Plans for Key Entities*, on the Key People/Job Codes/Positions page).



Plans for Key Entities page (1 of 2)



Search Results: Key People — Customize | Find | First 1-16 of 16 Last

EmplID	Name	Title	Attn	Number of Successors	Succession Plan	*Talent Pool	Go
K0W207	Steve Dryckus	Analyst-Financial		4	Review/Edit	Use for Overall Perf	
K0W204	Horace White	Analyst-Budget II		1	Review/Edit	Use for Overall Perf	
B-89BB-PB	Nina Buckheimer	Human Resources Manager	!		Review/Edit	Use for Overall Perf	
K0W201	Sandra Pierce	Analyst-HRMS	!		Review/Edit	Test for Set A SQL	
K0W302	Victor Trujiyo	Administrator Customer Service	!		Create	Technical Key People	
K0W209	John Gore	Analyst-Financial	!		Create	Use for Overall Perf	
K0W206	Judah Rosen	Analyst-Budget II		3	Review/Edit	Use for Overall Perf	
K0W202	Osmar Mutukumari	Administrator-Network Services		1	Review/Edit	Use for Overall Perf	
KU0027	Grace Stangl	Coordinator-Fire Safety	!		Create	Technical Key People	
K0W208	Barry Larson	Analyst-Financial	!		Create	Use for Overall Perf	

Plans for Key Entities page (2 of 2)

Key Entity Select to display the key people, key job codes, or key positions in the chart on this page.

Plan Available Select the basic status of succession plans for the specified key entities. Values are *All*,*Yes*, and *No*.

Number of Successors Select to track the number of successors for the specified key entities. Values are *Any*,*1-2*,*3 or more*.

Attn (attention) Displays an exclamation point when the number of successors is zero, otherwise this field is blank.

Number of Successors	Displays the number of possible successors for the key entity as of the dates specified for this report. If the key entity does not have a succession plan, this field is blank.
Succession Plan	Click a link in this column to create, review, or edit the succession plan for the key entity.
Talent Pool	This column displays a description of the talent pools associated with the key person, based on the report date. When a key person belongs to more than one talent pool, select the desired talent pool from a list. This column only displays for the Key People results set. The column is not displayed when the search is based on Key Job Codes or Key Positions since only people can be part of a talent pool.
Go	Click an icon in this row to display details of the selected talent pool. If there is more than one value in the Talent Pool field, you must select a talent pool before clicking on this icon. This column only displays for the Key People results set. The column is not displayed when the search is based on Key Job Codes or Key Positions since only people can be part of a talent pool.

Succession Planning Self-Service

PeopleSoft Enterprise delivers a manager self-service succession planning dashboard that allows managers to view and manage the succession planning information for their direct and indirect reports. The manager self-service succession dashboard supports the following views:

- View Succession Plans.
- View Person Profile Summaries.
- View successors and succession readiness levels, risk of leaving and impact of loss.
- Re-rank successors.
- Activate and deactivate successors.
- Compare an employee's person profile with their current role's profile.
- Compare a successors' profile to a succession plan's incumbent, job code or position
- Edit successor rating box assignments.

Self Service Pages Used in Succession Planning

Page Name	*Definition Name*	*Navigation*	*Usage*
Manage Succession Plans	HR_SUCC_PLN_MGR	Manager Self Service, Succession Planning, Manage Succession Plans	Review or edit plan details such as effective date, plan status, and projected vacancy date. Review incumbent job and career plan details.
Succession 360°	HR_VT_DASHBOARD	• Manager Self Service, Succession Planning, Succession 360° • Organizational Development, Succession Planning, Succession 360°	Visually review and manage a person or role within the context of the organization.

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Numerics/Symbols

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