

# **Oracle® Succession Planning**

Implementation and User Guide

Release 12.2

**Part No. E59066-07**

September 2024

Oracle Succession Planning Implementation and User Guide, Release 12.2

Part No. E59066-07

Copyright © 2010, 2024, Oracle and/or its affiliates.

Primary Author: Gowri Arur

Contributing Author: Vijay Sriperambuduri, Vishwanath Kuchibhotla

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software, software documentation, data (as defined in the Federal Acquisition Regulation), or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software," "commercial computer software documentation," or "limited rights data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle®, Java, MySQL, and NetSuite are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

#### Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

#### Access to Oracle Support

Oracle customer access to and use of Oracle support services will be pursuant to the terms and conditions specified in their Oracle order for the applicable services.



---

# Contents

## Send Us Your Comments

## Preface

### 1 Introduction to Oracle Succession Planning

Introduction to Oracle Succession Planning.....	1-1
---	-----

### 2 Implementing Oracle Succession Planning

<b>Implementing Oracle Succession Planning.....</b>	<b>2-2</b>
Oracle Succession Planning Licenses.....	2-2
Oracle Succession Planning Predefined Components.....	2-4
Implementing Oracle Succession Planning.....	2-9
Oracle Succession Planning Supplied Functions.....	2-14
User Access and Security in Oracle Succession Planning.....	2-18
Profile Options in Oracle Succession Planning.....	2-19
User and Extensible Lookups in Oracle Succession Planning .....	2-22
Extra Information Types for Succession Plans.....	2-22
<b>Implementing the Organization Chart.....</b>	<b>2-24</b>
Implementing the Organization Chart.....	2-24
Configuring the Organization Chart Module in Oracle Succession Planning.....	2-25
<b>Enabling Talent Matrix.....</b>	<b>2-35</b>
Configuring Talent Matrix.....	2-35

### 3 Configuring Common Information for Talent Profile and Succession Planning Functions

Configuring Common Information for Talent Profile and Succession Planning Functions	
---	--

.....	3-2
Defining the Lookups for 9-Box Matrixes in Oracle Succession Planning.....	3-2

## 4 Configuring the Talent Profile Function

<b>Configuring Talent Profile.....</b>	<b>4-2</b>
Configuring Manager and Personal Actions in Talent Profile.....	4-2
Configuring the Default XML Templates.....	4-16
Configuring the Quick Search and Hierarchy Regions.....	4-17
Personalizing Talent Profile .....	4-18
Configuring the Region Icons.....	4-23
Displaying Person Extra Information Types (EITs) as Talent Profile Page Regions.....	4-23
Displaying Person Special Information Types (SITs) as Talent Profile Page Regions.....	4-27
Displaying Custom Content as Talent Profile Page Regions.....	4-29

## 5 Setting up Custom Version of Talent Profile

<b>Setup Steps to Implement a Custom Version of Talent Profile Feature.....</b>	<b>5-2</b>
Setup Steps to Implement a Custom Version of the Talent Profile Feature.....	5-2
Setting up the Talent Profile Form Function.....	5-4
Setting up the Talent Profile Regions.....	5-5
Configuring the More Links in the Talent Profile Regions.....	5-12
Configuring Talent Profile Functions, Suitability Analyzer, and Compare Profile Templates .....	5-19

## 6 Setting up Information for the Succession Planning Functionality

<b>Setting Up the Succession Planning Functionality.....</b>	<b>6-1</b>
<b>Viewing Permissions and Details for Workers or Roles.....</b>	<b>6-5</b>
<b>Defining Additional Details and Permissions for Workers, Jobs, and Positions.....</b>	<b>6-6</b>
<b>Defining Succession Planning Preferences .....</b>	<b>6-10</b>
<b>Configuring Regions in the Talent Profile Region of the Worker Plan Details Tab.....</b>	<b>6-11</b>
<b>Mapping Succession Planning Lookup Values to Nine Box Values.....</b>	<b>6-12</b>

## 7 Configuring Suitability Matching

<b>Configuring Suitability Matching.....</b>	<b>7-2</b>
Configuring Suitability Matching.....	7-2

## 8 Managing Default Nine Box Matrix Templates

<b>Default Nine Box Matrix Templates.....</b>	<b>8-2</b>
Using the Default Nine Box Matrix Templates to Assess Workforce.....	8-2

<b>9</b>	<b>Managing Talent Matrix Templates</b>	
	<b>Managing Talent Matrix Templates</b> .....	9-2
	Using Talent Matrix.....	9-2
	Using the Talent Matrix Template Page.....	9-3
	Creating or Updating Talent Matrix Templates.....	9-4
<b>10</b>	<b>Using the Organization Chart</b>	
	<b>Using the Organization Chart</b> .....	10-2
	Using the Organization Chart.....	10-2
	Using the Organization Chart in Oracle Succession Planning.....	10-3
<b>11</b>	<b>Using Talent Profile</b>	
	<b>Identifying Workforce Talent Using Talent Profile</b> .....	11-2
	An Overview of Talent Profile.....	11-2
	Using Talent Profile as Managers.....	11-5
	Using Talent Profile as Workers.....	11-15
	Generating Printable Profiles.....	11-21
	<b>Assessing Workforce Talent</b> .....	11-24
	Using Performance Matrix (Potential) and Performance Matrix (Retention).....	11-24
	Using Performance Matrix (Potential).....	11-24
	Using Performance Matrix (Retention).....	11-27
	Comparing Talent Profiles.....	11-31
	Viewing the Talent Matrix.....	11-33
<b>12</b>	<b>Using Suitability Matching in Oracle Succession Planning</b>	
	<b>Using Suitability Matching in Oracle Succession Planning</b> .....	12-2
	Using Suitability Matching in Oracle Succession Planning.....	12-2
	Using the Suitability Analyzer.....	12-4
<b>13</b>	<b>Using the Succession Planning Functionality</b>	
	<b>Managing Succession Plans</b> .....	13-2
	Overview of the Succession Planning Portal.....	13-2
	Succession Planning for Talent Managers and Administrators.....	13-4
	Using the Analytics Tab.....	13-6
	Using the Worker Plan Details Tab.....	13-7
	Using the Manage Plans Tab.....	13-16
	Using the Talent Matrix Tab.....	13-20
	Using the Succession Plans: Overview Page .....	13-20

Creating Succession Plans .....	13-23
Updating and Completing Succession Plans .....	13-28
Viewing Succession Plan Details.....	13-30
Viewing the Succession Hierarchy .....	13-31

## **14 Analyzing Succession Planning**

<b>Analyzing Succession Planning .....</b>	<b>14-2</b>
Succession Plan Details for High Potential Workers Report.....	14-2
Readiness and Risk Analysis of Successors for High Potential Workers Report.....	14-4
Turnover Analysis of Key Talent Report.....	14-6
Succession Plan Effectiveness Report.....	14-8

## **HRMS Glossary**

## **Index**

---

# Send Us Your Comments

## **Oracle Succession Planning Implementation and User Guide, Release 12.2**

### **Part No. E59066-07**

Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document. Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the new Oracle E-Business Suite Release Online Documentation CD available on My Oracle Support and [www.oracle.com](http://www.oracle.com). It contains the most current Documentation Library plus all documents revised or released recently.

Send your comments to us using the electronic mail address: [appsdoc\\_us@oracle.com](mailto:appsdoc_us@oracle.com)

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

If you need assistance with Oracle software, then please contact your support representative or Oracle Support Services.

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



---

# Preface

## Intended Audience

Welcome to Release 12.2 of the *Oracle Succession Planning Implementation and User Guide*.

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

- The principles and customary practices of your business area
- Oracle Human Resources Management Systems (HRMS)

Oracle HRMS is a major component of the Oracle E-Business Suite of applications. If you are unfamiliar with Oracle HRMS, then Oracle suggests that you attend one or more of the Oracle HRMS training classes available through Oracle University.

- The Oracle Applications graphical user interface

To learn more about the Oracle Applications graphical user interface, read the *Oracle E-Business Suite User's Guide*.

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

## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

## Access to Oracle Support

Oracle customer access to and use of Oracle support services will be pursuant to the terms and conditions specified in their Oracle order for the applicable services.

## Structure

- 1 Introduction to Oracle Succession Planning
  - 2 Implementing Oracle Succession Planning
  - 3 Configuring Common Information for Talent Profile and Succession Planning Functions
  - 4 Configuring the Talent Profile Function
  - 5 Setting up Custom Version of Talent Profile
  - 6 Setting up Information for the Succession Planning Functionality
  - 7 Configuring Suitability Matching
  - 8 Managing Default Nine Box Matrix Templates
  - 9 Managing Talent Matrix Templates
  - 10 Using the Organization Chart
  - 11 Using Talent Profile
  - 12 Using Suitability Matching in Oracle Succession Planning
  - 13 Using the Succession Planning Functionality
  - 14 Analyzing Succession Planning
- HRMS Glossary

## Related Information Sources

Oracle HRMS shares business and setup information with other Oracle Applications products. Therefore, it is advised that you reference other user guides and implementation guides when you set up and use Oracle HRMS.

### Guides Related to All Products

#### *Oracle E-Business Suite User's Guide*

This guide explains how to navigate, enter and query data, and run concurrent requests using the user interface (UI) of Oracle E-Business Suite. It includes information on setting preferences and customizing the UI. In addition, this guide describes accessibility features and keyboard shortcuts for Oracle E-Business Suite.

#### *Oracle Application Framework Personalization Guide*

This guide covers the design-time and run-time aspects of personalizing applications built with Oracle Application Framework.

#### *Oracle E-Business Suite Maintenance Guide*

This guide contains information about the strategies, tasks, and troubleshooting activities that can be used to help ensure an Oracle E-Business Suite system keeps running smoothly, together with a comprehensive description of the relevant tools and utilities. It also describes how to patch a system, with recommendations for optimizing typical patching operations and reducing downtime.

#### *Oracle E-Business Suite Security Guide*

This guide contains information on a comprehensive range of security-related topics, including access control, user management, function security, data security, and auditing. It also describes how Oracle E-Business Suite can be integrated into a single

sign-on environment.

*Oracle E-Business Suite Setup Guide*

This guide contains information on system configuration tasks that are carried out either after installation or whenever there is a significant change to the system. The activities described include defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help.

*Oracle E-Business Suite Flexfields Guide*

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

**Guides Related to This Product**

*Oracle Human Resources Management Systems Implementation Guide*

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

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

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

*Oracle Human Resources Management Systems Enterprise and Workforce Management Guide*

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

*Oracle Human Resources Management Systems Workforce Sourcing, Deployment, and Talent Management Guide*

Learn how to use Oracle HRMS to represent your workforce. This includes recruiting new workers, developing their careers, managing contingent workers, and reporting on your workforce.

*Oracle Human Resources Management Systems Payroll Processing Management Guide*

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

*Oracle Human Resources Management Systems Compensation and Benefits Management Guide*

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

*Oracle Human Resources Management Systems FastFormula User Guide*

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

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

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

*Oracle Human Resources Management Systems Window Navigation and Reports Guide*

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

*Oracle Performance Management Implementation and User Guide*

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

*Oracle Succession Planning Implementation and User Guide*

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

*Oracle Human Resources Management Systems Approvals Management Implementation Guide*

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

*Oracle iRecruitment Implementation and User Guide*

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

*Oracle Learning Management Implementation Guide*

Learn how to implement and configure Oracle Learning Management (OLM).

*Oracle Learning Management User Guide*

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

*Oracle Time and Labor Implementation and User Guide*

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

*Oracle Labor Distribution User Guide*

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

## Integration Repository

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

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

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

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

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

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

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



---

## Introduction to Oracle Succession Planning

### Introduction to Oracle Succession Planning

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

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

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

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

all times.

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

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

## Identify Succession Planning Requirements

The first step in the succession planning process is to understand the succession planning requirements. Using Oracle Succession Planning, enterprises can identify:

- Workers in the enterprise who are critical to business.
- Roles (jobs and positions) that must always be staffed with competent and well-trained workers to sustain business.
- Competent workers who may leave the enterprise due to reasons, such as retirement, turnover, competitor offers, or other causes.

## View Worker Details Using the Organization Chart

An Organization Chart is a visual representation of relationships between workers in an organization. Talent managers can use the organization chart to view contact, employment, and salary details of workers.

## Identify Talent

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

## Process Multiple Actions Using the Side Navigator from Organization Chart or Talent Profile

Managers can process multiple self-service transactions effectively and with minimum navigation using the action links in a side navigator from the Organization Chart or

Talent Profile.

## Assess Workforce Talent

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

## Compare Talent Profiles

Enterprises can compare talent profiles of their workforce and use this information in succession planning. While creating a succession plan, managers can use the Show Suitable Successors feature that uses the competency-based search to display a list of workers who meet the competency requirements.

## Use Talent Matrix

Oracle Succession Planning supports:

1. An Oracle Application Development Framework (ADF)-based Talent Matrix. To view ADF-based Talent Matrix, implement Oracle WebLogic Server and set the *SP: Use Talent Matrix* profile option to Yes. If these steps are completed, then the ADF-based Talent Matrix is accessible from the following interfaces:
  - Succession Planning Portal, Talent Matrix tab
  - Succession Planning Portal, Create Succession Plan or Update Succession Plan page, 9 - Box Comparison button
2. A Talent Matrix PDF report. If the *SP: Use Talent Matrix* profile option is set to No, then the Talent Matrix PDF report is directly accessible from the following interfaces:
  - Succession Planning Portal, Talent Matrix tab
  - Succession Planning Portal, Create Succession Plan or Update Succession Plan page, 9 - Box Comparison button

## Use Talent Profile Matrixes (9-Box)

Talent Profile's performance matrixes: Performance Matrix (Potential) and Performance Matrix (Retention) provide insight into the depth and breadth of the talent. Managers can use these matrixes to assess the workforce:

- Performance
- Potential for growth
- Readiness level for promotion

- Retention prospects

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

Oracle Succession Planning provides the following default templates to display talent matrixes in the nine box format:

- Default Retention vs. Impact of Loss
- Default Performance vs. Potential
- Default Performance vs. Retention

### Suitability Matching

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

### Suitability Analyzer

Suitability Analyzer displays competency ratings of workers in a graphical format. Managers can use the Suitability Analyzer to compare competencies of workers for succession planning.

Oracle Succession Planning supports:

- An Oracle Application Development Framework (ADF)-based Suitability Analyzer. To view ADF-based Suitability Analyzer, implement Oracle WebLogic Server and set the *SP: Use Talent Matrix* profile option to Yes. If these steps are completed, then the ADF-based Suitability Analyzer is accessible from the following interfaces:
  - Succession Planning Portal, Create Succession Plan or Update Succession Plan page, Suitability Analyzer button
  - Find Suitable Successors for Worker: Suitable People page, Suitability Analyzer button, during succession plan creation or update.
- An Oracle Java Extension Toolkit (OJET)-based Suitability Analyzer. If the *SP: Use Talent Matrix* profile option is set to No, then the OJET-based Suitability Analyzer is accessible from the following interfaces:
  - Succession Planning Portal, Create Succession Plan or Update Succession Plan page, Suitability Analyzer button
  - Find Suitable Successors for Worker: Suitable People page, Suitability Analyzer button, during succession plan creation or update.

## Use the Succession Planning Portal

Oracle Succession Planning provides talent managers and plan administrators with portals for quick access to succession plans and to launch relevant actions from a single page. The Succession Planning Portal enables managers and plan administrators to:

- View analytical reports to assess succession planning effectiveness in their enterprise.
- View the hierarchy of workers reporting to them and easily identify key high potential workers within their hierarchy.
- Compare a worker's:
  - Potential with performance
  - Retention with performance
  - Retention with impact of loss
- View details of plans available for key high potential workers and process their plans.
- View recently reviewed and plans coming up for review.

## Create and Maintain Succession Plans

Talent managers can create and update succession plans for jobs, positions, and workers. They can add attachments to succession plans to document or support the decision making process and view assignment changes of probable successors. When a succession plan is created, key stakeholders of the plan can receive a workflow approval notification.

## View the Succession Hierarchy

The succession hierarchy is a visual representation of the successors identified for workers at each level. Talent managers and plan administrators can analyze the impact of succession plans that are in place, particularly at the middle and senior management levels in an enterprise. The succession hierarchy assists in tracking succession changes, understanding gaps in the succession hierarchy, and assessing the impact of these gaps on business continuity.

## Identify Developmental Activities

Availability of succession planning data enables enterprises to develop organization-wide training programs to address competency gaps. After assessing competencies and

evaluating talent profiles, managers can enroll workers in appropriate training. Oracle Succession Planning's integration with Oracle Learning Management enables managers to identify training courses and enroll workers in relevant courses.

## Analyze Succession Planning

Oracle Succession Planning delivers a range of actionable analytics that help plan administrators and talent managers to administer the succession planning process effectively and efficiently.

The following reports are available:

- **Succession Plan Details for High Potential Workers:** Enables to plan and manage the succession planning process. The report helps to track key high potential workers with and without succession plans.
- **Readiness and Risk Analysis of Successors for High Potential Workers:** Gives insight into the risk associated with probable successors identified for key high potential workers. The risk may be in terms of low readiness of the probable successors in a plan to assume higher responsibilities or inadequate number of successors identified.
- **Turnover Analysis of Key Talent:** Helps analyze the turnover details of probable successors identified for key high potential workers.
- **Succession Plan Effectiveness:** Helps to evaluate the effectiveness of the succession planning and management process based on the number of plans filled by potential successors identified for such plans.

## Reporting in Oracle Succession Planning

Oracle Succession Planning provides the following reports:

- **Compare Profile**  
Using this report, managers can compare the talent profiles of their workers.
- **Printable Profile**  
Using this feature, managers can print worker talent profiles.

## Integration with Other E-Business Products

Oracle Succession Planning is an integrated talent management solution that enables managers to plan and implement integrated succession management processes. Oracle Succession Planning and Oracle HRMS talent management products such as Oracle Learning Management, Oracle Performance Management, and the Oracle Compensation suite of products (Compensation Workbench, Total Compensation

Statement, and Salary Administration) use a single data repository to enable you to share and view common information for succession planning purposes. Oracle Succession Planning retrieves relevant data from Oracle HRMS, Oracle SSHR, Learning Management, Performance Management, and the Compensation suite of products.

## Key Concepts

For information on how to use features in Oracle Succession Planning, see:

- **Organization Chart**  
See: Using the Organization Chart in Oracle Succession Planning, page 10-3
- **Talent Profile**
  - Overview of Talent Profile, page 11-2
  - Using Talent Profile as Managers, page 11-5
  - Using Talent Profile as Workers, page 11-15
  - Using Performance Matrix (Potential) and Performance Matrix (Retention), page 11-24
  - Using the Default Nine Box Matrix Templates to Assess Workforce, page 8-2
  - Comparing Talent Profiles, page 11-31
  - Generating Printable Profiles, page 11-21
- **Talent Matrix**
  - Using Talent Matrix, page 9-2
  - Using the Talent Matrix Template Page, page 9-3
  - Creating or Updating Talent Matrix Templates, page 9-4
  - Viewing the Talent Matrix, page 11-33
- **Suitability Matching**  
Using Suitability Matching in Oracle Succession Planning, page 12-2
- **Succession Planning**
  - Overview of the Succession Planning Portal, page 13-2
  - Using the Analytics Tab, page 13-6

- Using the Worker Plan Details Tab, page 13-7
- Using the Manage Plans Tab, page 13-16
- Viewing the Succession Hierarchy, page 13-31

---

# **Implementing Oracle Succession Planning**

# Implementing Oracle Succession Planning

## Oracle Succession Planning Licenses

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

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

- **Talent Profile**

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

**Note**

Oracle Self-Service HR provides you with a minimal Talent Profile function to only view the talent profiles of your workforce. You require Oracle Succession Planning license to:

- Compare Talent Profiles
- Use performance matrixes (9-box): Performance Matrix (Potential), Performance Matrix (Retention)
- Use Suitability Analyzer

- **Suitability Matching**

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

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

- **Succession Planning**

Use the Succession Planning Portal page to:

- View analytical reports to assess succession planning in your enterprise.
- View the hierarchy of workers reporting to managers and easily identify key high potential workers with succession plans and for whom successors are not

yet identified.

- Compare a worker's:
  - Potential with performance: This matrix provides information on the performance and leadership potential of a worker.
  - Retention with performance: This matrix provides information on a worker's performance and risk of loss.
  - Retention with impact of loss: This matrix provides information on the risk of loss and the effect of a worker leaving the enterprise.
- View details of plans available for key high potential workers and process their plans.
- View successors identified for workers at each level using the succession hierarchy visual representation.
- View recently reviewed and plans coming up for review.

To use this feature, two separate responsibilities are available based on roles:

- Succession Planning: This responsibility is for talent managers.
  - Succession Planning for Administrators: This responsibility is for plan administrators.
- **Employee Succession Information**

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

    - Identify the succession potential of a worker
    - Determine whether a worker is a key person in the enterprise
    - Determine the retention prospects of a worker
    - Determine the impact of loss of a worker leaving the enterprise
  - **Succession Plans Old**

Customers who have implemented Succession Planning prior to R12.2 can use the Succession Plans Old menu, if required. For information on how to use the features available with this menu, refer to the *Oracle Succession Planning and Implementation Guide* prior to R12.2.

## Integration with Other E-Business Products

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

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

### Oracle Performance Management

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

Oracle Performance Management is a separately licensed product.

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

### Oracle Learning Management

Oracle Learning Management is an enterprise learning management system (LMS) that enables you to train your workforce effectively and at lower cost. Oracle Learning Management enables you to manage, de

## Oracle Succession Planning Predefined Components

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

### Predefined Responsibilities

Oracle Succession Planning supplies the following predefined responsibilities:

#### **Succession Planning**

The corresponding menu is Succession Planning (HR\_SUCCESSION\_MGMT) menu. The following table lists the functions available with the menu.

Prompt	Function Name
Talent Profile <i>Includes Organization Chart and Talent Profile tabs</i>	HR_TALENT_HOME_FUNC_MGR
Suitability Matching	HR_SUITABILITY_MATCH_SS
Succession Plans Old	PER_SUCCESSION_MGMT_SEARCH
Succession Planning	PER_SP_PLAN_PORTAL
Employee Succession Information	PER_SUCCESSION_PLAN_DETAILS

### Succession Planning for Administrators

The corresponding menu is Succession Planning for Administrators (HR\_PROF\_SUCC\_PLAN) menu. The following table lists the function available with the menu:

Prompt	Function Name
Succession Planning	PER_SP_PLAN_PORTAL

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

## Talent Profile Menus

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

### Talent Profile Based on Role Requirements

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

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

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

## Talent Matrix Menu

The following menu is delivered for Talent Matrix:

Name: Talent Matrix Menu (PER\_SP\_TALENT\_MENU)

Prompt	Function	Description	Function Code	Web HTML Call	Parameters
Manage Talent Matrix Templates	Manage Talent Matrix templates	Talent Matrix Template Page	PER_SP_TALENT_TEMPLATE_ATE	OA.jsp?page=/oracle/apps/per/selfservice/successionmgmt/ninebox/webui/NineBoxLevelSearchPG	None

Prompt	Function	Description	Function Code	Web HTML Call	Parameters
View Talent Matrix for Performance	Talent Matrix ADF Page	Talent Matrix ADF Page	PER_SP_TAL ENT_ADF	OA.jsp? page=/oracle/apps/per/selfservice/successionmgmt/portal/webui/PerSuccPortalHomePG&OA_SubTabIdx=3	None

- **Manage Talent Matrix Templates:** Administrators can use this function to search for published Talent Matrix templates, create, update, or delete Talent Matrix templates. See: *Creating or Updating Talent Matrix Templates*, page 9-4.
- **View Talent Matrix for Performance:** Administrators and managers can use this function to select a Talent Matrix template to view the Talent Matrix for workers in a manager's hierarchy. See: *Viewing the Talent Matrix*, page 11-33.

System administrators can add:

- The Talent Matrix Menu (PER\_SP\_TALENT\_MENU) to the Succession Planning for Administrators menu. This enables administrators to create Talent Matrix templates and view Talent Matrix of workers.
- The Talent Matrix ADF Page function to the Succession Planning menu, which is for talent managers. If you add this function, then users can only view Talent Matrix and cannot perform any Talent Matrix template related functions.

**Note:** The View Talent Matrix page will be rendered only if the 'Talent Matrix ADF Page' function is added to the menu and the 'SP: Use Talent Matrix' profile option is set to Yes.

Once you add the Talent Matrix Menu, the following functions are available to the responsibility:

- **Manage Talent Matrix Templates:** Users can click this prompt to navigate to the Talent Matrix Template page from where they can search for templates or create templates.
- **View Talent Matrix for Performance:** Users can click this prompt to navigate to the Talent Matrix in the Succession Planning Portal.

## Default Nine Box Matrix Templates

Oracle Succession Planning provides the following default templates to display talent matrixes in the nine box format:

- Default Retention vs. Impact of Loss
- Default Performance vs. Potential
- Default Performance vs. Retention

## Succession Planning Approval Workflow Process

The Succession Planning Approval Process (HR\_SP\_APPROVAL\_PRC) governs approvals in Oracle Succession Planning. This process is available in the HRSSA item type (HRSSA.wft) and routes the succession plans for approval and generates notifications.

Following attributes, messages, notifications, and functions are available with this process:

- Attribute: SP Plan Name (PLAN\_NAME )
- Notifications:
  - SP Approval Forward Notification (HR\_SP\_APPROVAL\_FWD\_NTF)
  - SP Notify Approver (HR\_SP\_APPROVER\_NTF)
  - Notification to Initiator post approval (HR\_SP\_POST\_APPR\_NTF)
  - Notify Initiator post reject (HR\_SP\_POST\_REJECT\_NTF)
- Messages:
  - SP Approval Forward Message (HR\_SP\_APPROVAL\_FWD\_MSG)
  - SP Notify Approver (HR\_SP\_NOTIFY\_APPROVER\_MSG)
  - SP Post Approval Message (HR\_SP\_POST\_APPR\_MSG)
  - SP Post Reject Message (HR\_SP\_POST\_REJECT\_MSG)
- Functions:
  - Commit (HR\_SP\_COMMIT)
  - Is Approval Required (HR\_SP\_IS\_APPROVAL\_REQD)

- Handle Rejected SP (HR\_SP\_REJECT)

## Implementing Oracle Succession Planning

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

### Prerequisites

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

See: Implementation Steps for Self-Service HR (SSHR), *Oracle SSHR Deploy Self-Service Capability Guide*

### Required Implementation Steps

#### 1. Set the HR: Succession Planning Licensed Profile Option

Controls whether Oracle Succession Planning is available. If your enterprise obtains a license, then you must set this profile option to Yes at the site level to work with Oracle Succession Planning.

#### 2. Create and Assign the Responsibilities to use Oracle Succession Planning

Based on your business requirements, create and assign the required Succession Planning and Succession Planning for Administrators responsibilities to managers and plan administrators. To create your own responsibilities, use the supplied responsibilities as samples.

See: Responsibilities, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

#### 3. Define the HR: Enable Talent Profile Option

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

#### 4. Set Up Action Menu for Self-Service Actions

The Talent Profile page has an Action drop down list. This list includes Self-Service or SSHR actions. Depending on your business needs, you must add the SSHR Personal Actions Menu and Manager Actions Menu to the supplied Succession Planning (HR\_SUCCESSION\_MGMT) menu or your own configured menu. This enables users to perform self-service functions from the Talent Profile page.

See: Configuring Manager and Personal Actions in Talent Profile, page 4-2

#### 5. **Configure Suitability Matching**

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

You can configure the Suitability Matching according to your business needs. For more information, see: Configuring Suitability Matching, page 7-2

#### 6. **Set Up the Succession Planning Functionality**

The Succession Planning functionality enables managers to plan for future vacant positions by identifying possible successors for workers, jobs, and positions.

For information on setting up Succession Planning, see: Setting Up the Succession Planning Functionality, page 6-1

#### 7. **Implement the Organization Chart**

An Organization Chart is a visual representation of relationships between workers in an organization. Talent managers can use the organization chart to view contact, employment, and salary details of workers.

See: Implementing and Configuring the Organization Chart in Oracle Succession Planning, page 2-25

### **System Implications of Using the Succession Planning Model in R12.2**

Following are the system implication of using the Succession Planning model in R12.2:

1. Customers planning to implement the Succession Planning model in R12.2 must use the **Succession Plans Old** menu to complete their existing succession plans. When customers upgrade to R12.2, existing succession plans will not be migrated to the new Succession Planning model.
2. Customers who upgrade to R12.2 cannot create succession plans when they compare talent profiles of employees. The Succession Planning tab that is available to managers when they compare profiles is hidden as the Talent Profile function is not integrated with the Succession Planning model in R12.2. *If required*, you can enable the Succession Planning tab by setting the **SuccPlanNew** parameter to N for the HR\_TALENTPROFILE\_SS and HR\_TALENT\_HOME\_FUNC\_MGR functions. However, when the Succession Planning tab is enabled, the Succession Plans feature that is available from this tab is the pre R12.2 version and not the R12.2 Succession Planning model.
3. Managers can view succession plan details of their workers when they navigate to the Talent Profile of workers. By default, the Talent Profile page of a worker

displays the Succession Plan region (SuccessionPlanNewOverviewRN) that is part of the R12.2 Succession Planning model. If you are not using the Succession Planning model of R12.2, then you must hide this version of the Succession Plan region and display the pre R12.2 Succession Plan region (SuccessionPlanOverviewRN) on the Talent Profile page. See: Personalizing Talent Profile, page 4-18

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

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

See: Setup Steps to Implement a Custom Version of Talent Profile Feature, page 5-2

### Set up International (Hijrah and Thai Buddhist) Calendars, if required

By default, the calendar in the Date Picker shows the Gregorian calendar. If required, you can enable the Hijrah or Thai Buddhist calendar by defining the following profile options:

- FND: Forms User Calendar: Choose a preferred calendar.
- FND: Calendar Week Start Day: Choose the first day of the week.

**Note:** Setting these profile options not only impacts the date picker fields but also the read-only date fields. All the date fields in the application will display the date format based on the profile definitions.

For information on how to set these profile options, refer to the Support for Calendars topic in the *Oracle E-Business Suite Setup Guide* and the *Hijrah and Thai Calendar Support in Oracle E-Business Suite Release 12.1* (Doc ID 807393.1) note on My Oracle Support.

### Additional Implementation Steps

- Enabling ADF-Based Talent Matrix

System administrators can enable ADF-based Talent Matrix by implementing Oracle WebLogic Server and setting the SP: Use Talent Matrix profile option to Yes. See *Implementing ADF-Based Talent Matrixes*, page 2-13.

- Enabling OJET-Based Suitability Analyzer

To enable managers to use Oracle Java Extension Toolkit (OJET) based Suitability Analyzer, you must assign the Suitability Analyzer Jet Page (PER\_SP\_SUIT\_JET\_PAGE) function to the relevant Succession Planning

responsibility (Succession Planning, Succession Planning New, Succession Planning for Administrators).

- Using Oracle Application Framework you can perform the following tasks on the Talent Profile page:
  - Personalize the Talent Profile regions  
See: Personalizing Talent Profile, page 4-18
  - Configure the Region icons  
See: Configuring the Region Icons, page 4-23
  - Configure Hierarchy list and quick search  
See: Configuring the Quick Search and Hierarchy Regions, page 4-17
  - Display regions on the Talent Profile page to view additional person specific details:
    - Person Extra Information Types (EITs)  
See: Displaying Person Extra Information Types (EITs) as Talent Profile Page Regions, page 4-23
    - Person Special Information Types  
See: Displaying Person Special Information Types (SITs) as Talent Profile Page Regions, page 4-27
    - Custom content  
See: Displaying Custom Content as Talent Profile Page Regions, page 4-29

**Note:** The EIT, SIT, and custom content regions do not support More links.

## Configuration Steps

After completing the required and additional implementation steps, you carry out the configuration steps, such as configuring the XML template for the Compare Profile report, defining lookups and EITs required for succession planning, and defining user ratings for 9-box matrixes in Talent Profile and Succession Planning Portal.

See: Configuring the Default XML Templates, page 4-16

See: Defining the Lookups for 9-Box Matrixes in Oracle Succession Planning, page 3-2

## Implementing ADF-Based Talent Matrixes

The ADF-based talent matrixes are built on Oracle Applications Development Framework (ADF).

To view the ADF-based talent matrixes, complete the following steps.

1. Complete deployment steps for talent matrixes in an Oracle WebLogic Server (WLS) instance. For information, refer to the My Oracle Support document: 2049909.1
2. Ensure that the External ADF Application URL profile option is set correctly at the Site level to integrate the application with Applications Development Framework (ADF). Enter the location of the Oracle WebLogic Server instance as the profile option value.

For example:

System Profile : External ADF Application URL (code:  
FND\_EXTERNAL\_ADF\_URL)

Sample value: https://<host>:<port>

3. Set the SP: Use Talent Matrix profile option to Yes to view ADF-based talent matrixes. For more information, see Profile Options in Oracle Succession Planning, page 2-19.

## Implementing ADF-Based Suitability Analyzer

1. The ADF-Based Suitability Analyzer helps to compare competencies of workers. This analyzer displays competencies in a graphical format. As Oracle Succession Planning uses Oracle Applications Development Framework (ADF) to render Suitability Analyzer, you must deploy Suitability Analyzer in an Oracle WebLogic Server (WLS) instance. For information, refer to the My Oracle Support document: 2049909.1

2. Ensure that the External ADF Application URL profile option is set correctly at the Site level to integrate the application with Applications Development Framework (ADF). Enter the location of the Oracle WebLogic Server instance as the profile option value.

For example:

System Profile : External ADF Application URL (code:  
FND\_EXTERNAL\_ADF\_URL)

Sample value: https://<host>:<port>

3. Set the SP: Use Talent Matrix profile option to Yes to view the Suitability Analyzer.

If you have implemented ADF and set this profile option to No, then the application does not display the Suitability Analyzer but provides an option to download PDF report of the Suitability Analyzer. For more information, see Profile Options in Oracle Succession Planning, page 2-19.

**Important:** To use the Oracle Java Extension Toolkit (OJET)-based Suitability Analyzer, ADF deployment is not required. You must set the *SP: Use Talent Matrix* profile option to No.

## Oracle Succession Planning Supplied Functions

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

### Supplied Menus

#### Succession Planning (HR\_SUCCESSION\_MGMT) menu

##### *Functions available with the Succession Planning Menu*

Prompt	Function	Function Name	Web HTML Call	Parameters
Talent Profile	HR_TALENT_HOME_FUNC_MGR	Talent Profile Home Function - Manager	OA.jsp?OAFunc=HR_TALENT_ORGCHART&OAHP=HR_TALENT_HOME_MENU_MGR&OASF=HR_TALENT_HOME_FUNC_MGR	SuccPlanNew=Y
Suitablilty Matching	HR_SUITABILITY_MATCH_MGR_SS	Suitability Matching Mgr	OA.jsp?page=/oracle/apps/per/selfservice/suitmatch/webui/SMManagerOptionsPG&akRegionApplicationId=800&OAFunc=HR_SUITABILITY_MATCH_MGR_SS	pPersonID=

Prompt	Function	Function Name	Web HTML Call	Parameters
Succession Plans Old	PER_SUCESSI ON_MGMT_SE ARCH	Succession Management Search	OA.jsp? page=/oracle/app s/per/selfservice/ successionmgmt/ webui/PerSuccPl anSearchPG	None
	PER_SUCESSI ON_MGMT_AD D_DET	Succession Management Addition Details	OA.jsp? page=/oracle/app s/per/selfservice/ successionmgmt/ webui/PerSuccPl anAddDetailsPG	None
	PER_SUCESSI ON_MGMT_CR EATE	Succession Management Create	OA.jsp? page=/oracle/app s/per/selfservice/ successionmgmt/ webui/PerSuccPl anCreatePG	None
	PER_SUCESSI ON_MGMT_EM P_DET	Succession Management Details	OA.jsp? page=/oracle/app s/per/selfservice/ successionmgmt/ webui/PerSuccPl anEmpOptionsP G	None
	PER_SUCESSI ON_MGMT_UP DATE	Succession Management Update	OA.jsp? page=/oracle/app s/per/selfservice/ successionmgmt/ webui/PerSuccPl anUpdatePG	None
	HR_FIND_PEOP LE_COMPREQ_ SS	Find Suitable People by Competency	OA.jsp? page=/oracle/app s/per/selfservice/ suitmatch/webui /SelectCompeten ciesPG&akRegio nApplicationId= 800&pMod=FPC	None

Prompt	Function	Function Name	Web HTML Call	Parameters
Employee Succession Information	PER_SUCESSI ON_PLAN_DET AILS	Employee Succession Information	OA.jsp? akRegionCode= HR_PERSON_T REE_TOP_SS&a kRegionApplicat ionId=800	pCalledFrom=PE R_SUCESSION _EIT_SS&addBre adCrumb=Y&de stination=PER_S UCESSION_EI T_SS
	PER_SUCESSI ON_EIT_SS	Succession Plan EIT	OA.jsp? akRegionCode= HR_CREATE_P ROCESS_TOP_S S&akRegionApp licationId=800& OAFunc=PER_S UCESSION_EI T_SS	pAMETranType =SSHRMS&pAM EAppId=800&pP rocessName=HR _EIT_JSP_PRC& pItemType=HRS SA&pCalledFro m=PER_SUCCES SION_EIT_SS&p PersonID=&pFro mMenu=Y
Succession Planning	PER_SP_PLAN_ PORTAL	Succession Plan Portal	OA.jsp? page=/oracle/app s/per/selfservice/ successionmgmt/ portal/webui/Per SuccPortalHome PG	pCalledFrom=PE R_SUCESSION _EIT_SS&addBre adCrumb=Y
	HR_TALENTPR OFILE_SS	Talent Profile	OA.jsp? page=/oracle/app s/per/talentprofil e/webui/TMEmp loyeePG&OAFu nc=HR_TALENT PROFILE_SS	MoreLinkMapM gr=HR_TP_MGR _MORE_LINK& MoreLinkMapE mp=HR_TP_EM P_MORE_LINK &SuccPlanNew= Y
	PER_SP_PLAN_ PORTAL_WRKR _DET	Succession Plan Portal Worker Details	OA.jsp? page=/oracle/app s/per/selfservice/ successionmgmt/ portal/webui/Per SuccPortalHome PG	None

Prompt	Function	Function Name	Web HTML Call	Parameters
	PER_SP_SUIT_J ET_PAGE	Suitability Analyzer Jet Page	OA.jsp? page=/oracle/app s/per/selfservice/ successionmgmt/ plan/webui/PerS PSuitAnalyzerGr aphPG	None

### Succession Planning for Administrators (HR\_PROF\_SUCC\_PLAN) menu

#### Functions available with the Succession Planning for Administrators Menu

Prompt	Function	Function Name	Web HTML Call	Parameters
Succession Planning		Succession Plan Portal	OA.jsp? page=/oracle/app s/per/selfservice/ successionmgmt/ portal/webui/Per SuccPortalHome PG	pCalledFrom=PE R_SUCCESSION _EIT_SS&addBre adCrumb=Y
	PER_NINE_BOX _MAPPING	PER_NINE_BOX _MAPPING	OA.jsp? page=/oracle/app s/per/selfservice/ successionmgmt/ nineboxlevel/we bui/NineBoxLev elSearchPG	None
	HR_PERSON_T REE_SS	Manager Actions Tree View	OA.jsp? akRegionCode= HR_PERSON_T REE_TOP_SS&a kRegionApplicat ionId=800	pDestination=H R_ACTIONS_SS &pCalledFrom= &addBreadCru mb=Y

Prompt	Function	Function Name	Web HTML Call	Parameters
	PER_SP_SUIT_J ET_PAGE	Suitability Analyzer Jet Page	OA.jsp? page=/oracle/app s/per/selfservice/ successionmgmt/ plan/webui/PerS PSuitAnalyzerGr aphPG	None

## User Access and Security in Oracle Succession Planning

This topic identifies the key concepts relating to Oracle Succession Planning user access and security and provides information on how to apply these concepts to address the needs of your enterprise.

Oracle Succession Planning uses the same security mechanisms as Oracle HRMS applications. By defining user profiles, security profiles, responsibilities, and menu structures, you can control who uses Oracle Succession Planning, which information they can access, and how they access it. See: *Security Overview, Oracle HRMS Configuring, Reporting, and System Administration Guide*

### Responsibilities

A responsibility combines low-level elements of user access configuration to control which functions the user can access (User Access to Functions) and on whom they can perform these actions (see User Access to People). You define responsibilities in the same way as you define responsibilities for Oracle HRMS applications. When you define your responsibilities, make sure they are available from Oracle Self-Service Web Applications.

### Users

You define users for Oracle Succession Planning in the same way as you define users for other Oracle HRMS applications. See: *Users Window, Oracle Applications System Administrator's Guide*. The Person field of the Users window is important for self-service applications as it acts as the link between the professional forms interface and the self-service application. This link enables the application to recognize who is using Oracle Succession Planning. For example, if a user's name is entered in the Person field, the user's name is displayed on the homepage.

## User Access to Talent Profiles and Succession Plans

### Restrict Access of Plan Administrators and Talent Managers to Specific Business

## Groups

By assigning the appropriate security profile, you can determine the business groups and organizations in which a plan administrator or manager can view talent profiles and view or create succession plans. See: *Security Profiles, Oracle HRMS Configuring, Reporting, and System Administration Guide*

## Setup Supervisor-Based Hierarchy Profiles for Managers

Restrict a manager's access to only their direct reports and lower levels of the hierarchy to which the manager has access. You set up a supervisor-based security profile which would restrict managers to viewing talent profiles and succession plans that are managed by people within their supervisor hierarchy. Managers can create succession plans for people within their supervisor hierarchy only.

The Talent Profile and Succession Planning features are person based and not assignment based, regardless of the multiple assignments that a worker has. Therefore, you must create person-based supervisor hierarchies. When you set up security based on supervisor hierarchies, select the Restrict By Supervisor (person-based) option, so that workers do not view plans created by people higher up in the supervisor hierarchy.

## Profile Options in Oracle Succession Planning

A user profile is a set of changeable options that affects the way your application runs. You can set user profiles at different levels. The levels below are used by the standard security hierarchy type:

- Site level: These settings apply to all users at an installation site.
- Application level: These settings apply to all users of any responsibility associated with the application.
- Responsibility level: These settings apply to all users currently signed on under the responsibility.
- User level: These settings apply to individual users, identified by their application usernames.

Values set at a higher level cascade as defaults to the lower levels. Values set at a lower level override any default from a higher level.

You use the System Profile Values window to set profile options at each level. If you change a user profile option value, your change takes effect as soon as your users log on again or change responsibilities.

## Profile Options Summary

The following table lists the profile options available for Oracle Succession Planning and the levels at which the profile options can be set.

Profile Option	Configurable Levels	Values (default value in boldface)	Required
SP: Maximum Plans for a Successor	Site, Application, Responsibility	--	No
SP: Show Terminated Worker Details	Site, Application, Responsibility	Yes, <b>No</b>	No
SP: Select Successors for Contingent Workers	Site, Application, Responsibility	<b>Yes</b> , No	No
SP: Approval Required	Site, Application, Responsibility, User	Yes, No	No
SP: Use Talent Matrix	Site, Application, Responsibility, User	Yes, No	No
SP: Default Talent Matrix Template	Site, Application, Responsibility, User	Yes, No	No

- **SP: Maximum Plans for a Successor:** Determines the maximum number of succession plans that can be created for a worker in an enterprise. As a profile option value, enter a numeral, for example, 3. In this example, only 3 succession plans can be created for a worker. When a manager tries to create the 4th plan, the application displays an error message. When counting the number of succession of plans that a worker can belong to, the application considers plans that are at the Active status only. If you leave the profile option blank, then any number of succession plans can be created for workers. As this profile option applies to all workers in an enterprise, system administrators can define the maximum number of plans for which workers can be identified as successors.
- **SP: Show Terminated Worker Details:** Controls search for terminated workers who are selected as probable successors or terminated workers for whom succession plans are created. This profile option and not the pEnableTerms function parameter governs the display of terminated worker records in the succession plan search. To enable managers to search for records of terminated workers, set the profile option value to Yes. If you leave the profile option value blank or set it to No, then managers cannot view records of terminated workers who are selected as probable successors or terminated workers for whom succession plans are created. The default value is No.

If the profile option is set to Yes, then HR Professionals and managers can create succession plans to identify probable successors for terminated workers. You can identify probable successors for the terminated worker only if the termination date

is later than the system date or equal to the system date. You cannot create succession plans for terminated workers if the termination date is earlier than the system date. For example, the system date is June 30, 2011 and the termination date of a worker is June 15, 2011. In this scenario, you cannot create a succession plan for the terminated worker.

- **SP: Select Successors for Contingent Workers:** Determines whether managers can create succession plans for contingent workers. Set the profile option value to Yes to create succession plans for contingent workers and identify potential successors for contingent workers. If you leave the profile option value blank or set it No, then managers cannot create succession plans for contingent workers. The default value is Yes.
- **SP: Approval Required:** Determines whether succession plans must go through the approval process. Set the profile option value to Yes to route succession plans through an approval process.

**Important:** Create rules to route succession plans for approvals using Oracle Approvals Management (AME). The application does not automatically route succession plans for approvals if you just set the SP: Approval Required profile option to Yes. You must define AME rules. See: *Setting Up the Succession Planning Functionality*, page 6-4

The application uses supervisor hierarchy to route the plans for approval. Oracle Succession Planning provides a predefined workflow approval process for succession plan approvals. See: *Succession Planning Approval Process*, page 2-8

- **SP: Use Talent Matrix:** This profile option is applicable only to ADF-based Talent Matrix and Suitability Analyzer. Oracle Succession Planning displays talent matrixes and Suitability Analyzer, which are built on Oracle Applications Development Framework (ADF). If you have implemented ADF and set the SP: Use Talent Matrix profile option to Yes, then the application displays ADF-based talent matrixes and Suitability Analyzer.

If you set this profile option to No, then the application displays:

- Talent Matrix in PDF report format
- OJET-based Suitability Analyzer
- **SP: Default Talent Matrix Template:** Enables plan administrators to select a default Talent Matrix template in the View Talent Matrix page. When viewing the Talent Matrix, managers and plan administrators can select a template that is different from the default one.

For information on profile options in Oracle HRMS, see: *User Profiles, Oracle HRMS*

## User and Extensible Lookups in Oracle Succession Planning

The following table contains a list of user and extensible lookups that are used within Oracle Succession Planning.

Lookup Type	Meaning	Access Level	Description
READINESS_LEVEL	Readiness Level	Extensible	Indicates how ready a worker is to move to the next level or role.
PER_RETENTION_POTENTIAL	Retention Potential of Person	User	Indicates the likelihood of a worker continuing to work with an enterprise.
PER_SP_IMPACT_OF_LOSS	Impact of Loss	Extensible	Indicates the effect when a worker leaves an organization.
PERFORMANCE_RATING	Performance Rating	User	Indicates the performance level of a worker in an organization.

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

## Extra Information Types for Succession Plans

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

### Job Career Management Information

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

This EIT is available as the Extra Job Information window in Oracle HRMS.

### Position Career Management Information

Records position tracking information required for succession plans. You can identify

whether a position is a key role in your enterprise and the turnover rate of the position. This EIT is available as the Extra Position Information window in Oracle HRMS.

## **Employee Succession Planning Information**

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

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

This EIT is available as the Employee Succession Planning Information page from the Succession Planning or the Succession Planning for Administrators responsibility. This EIT is also available as the Extra Person Information window in Oracle HRMS.

## **Job, Position, and Worker Succession Plan Permissions**

Defines permissions for workers, jobs, and positions. Permissions are set for a job, position, and worker and not for a succession plan. This EIT is available in the Permissions for Role or Worker region of the Define Role and Worker Details page.

You can:

- Control the display of permissions on the Create or Update Succession Plan pages.
- Define the maximum number of successors who can be identified for worker, job, or position plans.
- Define whether contingent workers can be selected as potential successors for a job, position, or worker.
- Define whether applicants can be selected as probable successors for a job, position, or worker.
- Control the display of the Add Successors button on the Create Succession Plan and Update Succession Plan pages.

See: Defining Additional Details and Permissions for Workers, Jobs, and Positions, page 6-6

# Implementing the Organization Chart

## Implementing the Organization Chart

The Organization Chart is built on Applications Development Framework (ADF) and the component used is hierarchyViewer, which is one of the ADF Data Visualization components. This topic provides information on how to implement and configure the Organization Chart. Oracle SSHR and Oracle Succession Planning provide the Organization Chart feature.

## Implementing the Organization Chart

To implement and use the Organization chart, complete the following steps:

### 1. Create AppsDataSource and deploy the .ear file

- Create AppsDataSource on an Oracle WebLogic Server (WLS) instance.
- Deploy your web application .ear file, which is OrgChartApplication.ear.

For information on how to create AppsDataSource and deploy the .ear file, refer to the My Oracle Support note: 1408355.1

### 2. Define the External ADF Application URL profile option

Set the External ADF Application URL profile option at the Site level to integrate the application with Applications Development Framework (ADF) and display the organization chart. Enter the location of the Oracle WebLogic Server instance as the profile option value.

For example:

System Profile : External ADF Application URL (code:  
FND\_EXTERNAL\_ADF\_URL)

Sample value : http://domain:port/OrgChart-ViewController-context-root

## Configuring the Organization Chart Components

To change the organization chart components, you must modify values in the ResourceBundle.properties present in the OrgChartApplication.ear file and then redeploy the file on the Oracle WebLogic Server instance. For more information, refer to the My Oracle Support note: 1408355.1

## Configuring the Organization Chart Module

To configure the Organization Chart module in:

- Oracle SSHR, see: *Configuring the Organization Chart Module in Oracle SSHR, Oracle SSHR Deploy Self-Service Capability Guide*
- Oracle Succession Planning, see: *Configuring the Organization Chart Module in Oracle Succession Planning, page 2-25*

## Configuring the Organization Chart Module in Oracle Succession Planning

This topic provides information to configure the Organization Chart module.

### Configuring the Organization Chart Module

#### Organization Chart JSP Page Name

TMOrgChartPG

#### Functions

You can access this module from the following functions:

User Name	Function Name	Responsibility and Prompt	Description
Talent Profile Home Function - Manager	HR_TALENT_HOME_FUNC_MGR	Succession Planning Talent Profile	Provides the Organization Chart, Talent Profile tabs and Manager Actions tabs.

#### Submenus

Following is a list of submenus for the Organization Chart module:

User Name	Submenu	Responsibility	Description
Talent Profile Main Home Menu - Manager	HR_TALENT_HOME_MENU_MGR	Succession Planning	Talent Profile Main Home Menu - Manager  Provides the Organization Chart and Talent Profile tabs

## Workflow

Not Applicable

## Configurable Tips and Instructions

Not Applicable

## Configurable FlexFields

Not Applicable

## Security Profile

Set the security profiles according to your business requirements to ensure that managers cannot view salary panel of workers who are not in their reporting hierarchy.

## Profile Options

Using the Organization Chart, managers can perform manager transactions. The application applies the following profiles when actions are launched from the Organization Chart:

- HR: Position Default Options for SSHR
- HR: Self Service Hire and Placement Default Values
- HR: Allow Concurrent Self Service Actions
- HR: Defer Update After Approval
- HR: Manage Self Service Actions When Future-Dated Changes Exist
- HR: Refresh Self Service actions with data from intervening actions
- HR: Allow processing of ineligible Self Service actions
- HR: Allow use of eligibility for Self Service actions
- HR: Enable Multiple Assignments in SSHR: If you wish to enable your managers to view and update multiple assignments for employees and workers, you can use the HR:Enable Multiple Assignments in SSHR system profile to allow this. See the Multiple Assignments section in the User Access and Security in Oracle SSHR, *Oracle SSHR Deploy Self-Service Capability Guide* topic.

## Configuring the Actions List

On a worker's panel card, an Actions link is available. However, this Actions link is empty by default. To make a list of actions available to talent managers, you must

define the HR: Manager Actions Menu profile option for the Succession Planning responsibility. The list of actions that a manager can perform is based on the value set for the profile option. For example, if you set the value as Manager Actions Menu (HR\_LINE\_MANAGER\_FUNCTIONS) for the Succession Planning responsibility, then managers can perform transactions available in the Manager Actions Menu for a worker.

The following table provides a list of functions available with the predefined Manager Actions Menu (HR\_LINE\_MANAGER\_FUNCTIONS):

Prompt	Function	Grant	Description
	Worker Status Change V5.2	Y	
Worker Status Change	Worker Status Change	Y	
	Change Hours V5.2	Y	
Change Hours	Change Hours	Y	
Termination	Termination	Y	
	Change Pay V5.2	Y	
Change Pay	Change Pay	Y	
Change Job	Change Job	Y	
	Transfer V5.2	Y	
Change Cost Center, Location and Manager	Change Cost Center, Location and Manager	Y	
Personal Information	Personal Information	Y	
Tenure Status	Tenure Status	Y	

<b>Prompt</b>	<b>Function</b>	<b>Grant</b>	<b>Description</b>
Transfer	Transfer	Y	
Education and Qualifications	Qualification	Y	
Other Professional Qualifications	Award	Y	
Competency Profile	Competency Profile	Y	
Work Preferences	Work Preferences	Y	
Resume	Resume	Y	
Training	Enroll and Cancel Training	N	
External Training	External Training	N	
Change Job and Terms	Change Job and Terms	Y	
Change Cost Center, Terms and Manager	Change Cost Center, Terms and Manager	Y	
Extra Information	Extra Information Types	Y	
	Change Worker Status and Terms V5.2	Y	
Change Worker Status and Terms	Change Worker Status and Terms	Y	

Prompt	Function	Grant	Description
Employee Review	Employee Reviews V4.0	Y	
Individual Compensation Distribution (Original)	Self Service Individual Distributions (Original)-Internal Use	Y	
Individual Compensation Distributions	Self Service Individual Compensation Distributions-Internal	Y	
	Organization Manager	N	Obsolete
	Hire V5.2	N	Obsolete
	Applicant Hire V5.2	N	Obsolete
	French Hire	N	Obsolete
	French Applicant Hire	N	Obsolete
Vehicle Mileage Expenses	SS Mileage Claim	Y	
Commutation Information	JP Commutation Information Self Service	Y	
Assign Schedules and Manage Exceptions	Assign Schedule	Y	

Prompt	Function	Grant	Description
Documents of Record	Documents of Record	Y	
Contact Extra Information	Contact Extra Information	Y	
	Hire	Y	
	Applicant Hire	Y	
	Special Information Types V4.0- OSHA	Y	
	Special Information Types V4.0- Stock Options	Y	
Competence Profile	ADS Competence Profile V4.0	Y	
Applicant Hire iRecruitment	Applicant Hire iRecruitment	Y	
Transfer with Compensation Distribution V4.0	Transfer with Comp V4.0	Y	
IRASLINE Person Extra Information Types	SG IRASLINE Person EIT	Y	
Private Vehicle Entry	SS Vehicle Repository	Y	
Assignment Costing	Assignment Costing	Y	

Prompt	Function	Grant	Description
	Assignment Costing Workflow Notify	Y	
	Reverse Termination	Y	
P11D	P11D Manager Action	Y	
Change Manager	Change Manager	Y	
Termination with Compensatio n	Termination with Compensation V4.0	Y	
Release Information	Release Information	Y	
Academic Rank	Academic Rank	Y	
Special Information	Special Information Types	Y	
Event And Bookings	Event And Bookings	Y	
Absence Management	Absence Management	Y	

For information about the HR: Manager Actions Menu profile option, refer to the *Oracle SSHR Deploy Self-Service Capability Guide*.

## Configuring the Action Links in the Side Navigation Container

When a manager selects an action in the Actions list in the Organization Chart and clicks Go, the page that appears has a side navigation to process multiple transactions. The side navigation helps managers to process and complete multiple self-service transactions for workers in their hierarchy without leaving the page.

The actions that appear in the side navigation container is driven by the SSHR Side Bar Menu (HR\_SS\_SIDEBAR) for manager actions.

The following table provides a list of manager actions that are supported and not supported in the side navigation container:

<b>Manager Action</b>	<b>Supported: Y/N</b>
Work Preferences	Y
Individual Compensation Distribution	Y
Private Vehicle Entry	Y
P11D	Y
Allocated Checklist	Y
P60	Y
Documents of Record	Y
Academic Rank	Y
Release Information	Y
Tenure Status	Y
Change Cost Centre, Location and Manager	Y
Termination with Compensation	Y
Change Cost Center, Terms and Manager	Y
Change Manager	Y
Contact Extra Information	Y

<b>Manager Action</b>	<b>Supported: Y/N</b>
Other Professional Qualifications	Y
Education and Qualifications	Y
Events and Bookings	Y
Extra Information	Y
IRASLINE Information Types	Y
Training Plans Manager	N
Transfer	Y
Worker Status Change	Y
Absence Management	Y
Enroll and Cancel Training	N
External Training	N
Resume	N
Assign Schedules and Manage Exceptions	Y
Assignment Costing	Y
Commutation Information	Y
Competency Profile	N
Special Information	Y
Termination	Y

Manager Action	Supported: Y/N
Change Job	Y
Change Pay	Y
Personal Information	Y
Employee Review	Y
Vehicle Mileage Expenses	Y
Manage Payroll Payments	Y
Change Worker Status and Terms	Y

**Important:** The manager actions whether launched from Self-Service Manager Actions, Organization Chart, or Talent Profile are the same. As some of the self-service functions are not supported in the side navigation container, there would be a mismatch between functions in the side navigation container and the drop-down list available in Organization Chart.

### Configuration Guidelines for the Side Navigator

The SSHR Side Bar Menu (HR\_SS\_SIDEBAR) contains a list of predefined supported functions including global and localization specific. During implementation, you can remove those functions that are not applicable to your legislation using the "function exclusion" feature available in the Responsibility window of the System Administrator responsibility.

# Enabling Talent Matrix

## Configuring Talent Matrix

**Important:** If you want to implement ADF-based Talent Matrix, then refer to Implementing ADF-Based Talent Matrixes, page 2-13.

Overview, see: Using Talent Matrix, page 9-2

1. Add the Talent Matrix menu or function to the relevant responsibilities. For information on the delivered menu for Talent Matrix, see: Oracle Succession Planning Predefined Components, page 2-4.
2. Link the "Employee Succession Planning Information" (PER\_SUCCESSION\_MGMT\_INFO) extra information type to the responsibilities that users access:  
  
Use the Information Type Security window to link EITs to a responsibility.  
  
See: Setting Up Extra Information Types For a Responsibility, *Oracle HRMS Configuring, Reporting, and System Administration Guide*
3. Define the lookup values required for Talent Matrix. These lookup types store the values required to map the XY axes levels in Talent Matrix.
  - PERFORMANCE\_RATING: Represents the Performance Rating Talent Matrix dimension.
  - READINESS\_LEVEL: Represents the Readiness Level Talent Matrix dimension.
  - PER\_RETENTION\_POTENTIAL: Represents the Retention Potential Talent Matrix dimension.
  - PER\_SP\_IMPACT\_OF\_LOSS: Represents the Impact of Loss Talent Matrix dimension.
4. Complete the extra information required to place workers in relevant grids in Talent Matrix using the Employee Succession Planning Information. You can also use the Extra Person Information window in Oracle HRMS.

**Note:** If you have already set up this information for use in other Succession Planning evaluation tools, then you can ignore this step.

If your enterprise uses Performance Management Plan Appraisals, then you need not manually enter the Succession Potential and Retention Potential segments of the Employee Succession Information EIT. The application uses the appraisal's

Advancement Potential region values. It populates the Succession Potential segment with the Advancement Potential region's Readiness Level value and Retention Potential segment with the Retention Level value.

5. Define and map lookups for talent matrix templates. Oracle Succession Planning provides the following default templates to display talent matrixes in the nine box format:
  - Default Retention vs. Impact of Loss
  - Default Performance vs. Potential
  - Default Performance vs. Retention

The default templates are 3\*3 matrix type templates. You can use the Create or Update Talent Matrix Templates page to update the default nine box matrix templates according to your business requirements. You can also create custom templates using the supported matrix types.

Before you start using default or custom templates, you must complete the following steps in this order:

1. To view performance, potential, retention, and impact of loss values for workers in the talent matrixes, Define the lookups for nine box matrixes. For more information, see *Defining the Lookups for 9-Box Matrixes in Oracle Succession Planning*, page 3-2.
2. Define the mapping between succession planning and nine box lookups. For information, see *Mapping Succession Planning Lookup Values to Nine Box Values*, page 6-12.

---

## **Configuring Common Information for Talent Profile and Succession Planning Functions**

# Configuring Common Information for Talent Profile and Succession Planning Functions

## Defining the Lookups for 9-Box Matrixes in Oracle Succession Planning

To assess workers' performance, potential, retention, and impact of loss using the 9-box matrixes on default or custom templates, you must complete the following steps:

1. Define the lookup types required for succession planning, page 3-2
2. Define the lookup types for 9-Box matrixes, page 3-3
3. Define mapping between succession planning and 9-box lookups , page 3-5

### 1. Define the Lookup Types Required for Succession Planning

Define the following lookup types to enable talent managers and plan administrators to evaluate a worker's performance, potential, retention, and impact of loss for succession planning. Add lookup values based on your business requirements.

- **PERFORMANCE\_RATING**: Indicates the performance rating of a worker, such as, Excellent, Average, and Poor.

Following 9-box matrixes use this lookup type:

- Performance Matrix (Potential) and Performance Matrix (Retention) of the Talent Profile functionality.
- Compare Potential with Performance and Compare Retention with Performance matrixes in the **Worker Plan Details** tab of the **Succession Planning Portal**
- **READINESS\_LEVEL**: Indicates the succession potential of a worker and promotion to the next higher role, such as Emergency Stand-In and Promotion in 1 Year.

Following 9-box matrixes use this lookup type:

- Performance Matrix (Potential) matrix of the Talent Profile functionality
- Compare Potential with Performance matrix in the **Worker Plan Details** tab of the **Succession Planning Portal**
- **PER\_RETENTION\_POTENTIAL**: Indicates the retention potential of a worker, such as High, Medium, and Low.

Following 9-box matrixes use this lookup type:

- Performance Matrix (Retention) matrix of the Talent Profile functionality
- Compare Retention with Performance and Compare Retention with Impact of Loss matrixes in the **Worker Plan Details** tab of the **Succession Planning Portal**
- PER\_SP\_IMPACT\_OF\_LOSS: Indicates the effect of a worker leaving the enterprise, such as High, Medium, and Low.

Compare Retention with Impact of Loss 9-box matrix in the **Worker Plan Details** tab of the **Succession Planning Portal** uses this lookup type.

For information how to add lookup values, see: Adding Lookup Types and Values, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

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

## 2. Define the Lookup Types for 9-Box Matrixes

To display values in 9-box matrixes, you must add values to the following lookup types. When adding the lookup values, you must specify the code so that the application can display the relevant rating for a worker in the 9-box. If you do not enter the code, then the 9-box does not display the rating. Define a maximum of three codes on a scale of 1 to 3.

- **PER\_9\_BOX\_LEVEL**

This lookup type is used to display the performance rating for a worker.

The following table provides an example of how you can define lookup values for PER\_9\_BOX\_LEVEL.

Code	Meaning	Description
1	Needs	Performance is significantly below the required level.
2	Meets	Performance is good and in-line with job requirements.
3	Exceeds	Worker has exceeded the required level of performance.

- **PER\_POTENTIAL\_9\_BOX\_LEVEL**

This lookup type is used to display a worker's potential and impact of loss ratings.

**Note:** When adding values to this lookup type, make sure that the lookup codes represent both the potential and impact of loss dimensions.

The following table provides an example of how you can define lookup values for PER\_POTENTIAL\_9\_BOX\_LEVEL.

Code	Meaning	Description
1	Low	Worker shows little or no potential to move to the next work level.  Impact of losing the worker is low.
2	Medium	Worker shows potential to advance to the next or higher work level.  Impact of losing the worker is moderate.
3	High	Worker has requisite skills and expertise and exhibits leadership qualities.  Impact of losing the worker is high.

- **PER\_RETENTION\_9\_BOX\_LEVEL**

This lookup type is used to display a worker's retention rating.

The following table provides an example of how you can define lookup values for PER\_RETENTION\_9\_BOX\_LEVEL.

Code	Meaning	Description
1	Low	Risk of losing the worker is high.
2	Medium	Risk of losing the worker is moderate.
3	High	Risk of losing the worker is minimal.

### 3. Define Mapping between Succession Planning and 9-box Lookups

The various matrixes do not directly use the succession planning lookup values. These matrixes display ratings on a scale of 1-3 using the 9-box lookup values. To correctly represent workers' performance, potential, retention, and impact of loss dimensions, you must map the succession planning lookup values to the 9-box lookup values.

Use the following table to identify the 9-box lookup type that is associated with a succession planning lookup type:

Succession Planning Lookup Type	9-Box Lookup Type
PERFORMANCE_RATING	PER_9_BOX_LEVEL
READINESS_LEVEL	PER_POTENTIAL_9_BOX_LEVEL
PER_RETENTION_POTENTIAL	PER_RETENTION_9_BOX_LEVEL
PER_SP_IMPACT_OF_LOSS	PER_POTENTIAL_9_BOX_LEVEL

The following example looks at why you must map a succession planning lookup type to a 9-box lookup type:

In your enterprise, you have defined the following values for the PERFORMANCE\_RATING lookup type to assess performance of workers:

1. Below Average
2. Average
3. Satisfactory

- 4. Good
- 5. Excellent
- 6. Outstanding

You have defined the following values for the PER\_9\_BOX\_LEVEL lookup to represent performance in the 9-box matrix:

Code	Meaning	Description
1	Needs	Performance is significantly below the required level.
2	Meets	Performance is good and in-line with job requirements.
3	Exceeds	Worker has exceeded the required level of performance.

As the application uses only three levels, you must map the six PERFORMANCE\_RATING lookup values to the three PER\_9\_BOX\_LEVEL codes using the **User Types and Statuses** window.

You can define the following mapping:

PERFORMANCE_RATING values	Mapped to PER_9_BOX_LEVEL
Below Average	1: Needs
Average	
Satisfactory	2: Meets
Good	
Excellent	3: Exceeds
Outstanding	

To map succession planning lookup values to the nine box values:

1. Navigate to the **Succession Planning Portal** page.

2. Click the **Manage Plans** tab.
3. Click the **Map Nine Box Values** link in the Administration Tasks section. The **Nine Box Values: Overview** page appears where you can search for mapped values. Click the **Map Nine Box Values** button to navigate to the **Define Nine Box Mapping** page to map succession planning lookup values to the nine box values. See: Mapping Succession Planning Lookup Values to Nine Box Values, page 6-12



---

## Configuring the Talent Profile Function

# Configuring Talent Profile

## Configuring Manager and Personal Actions in Talent Profile

This topic provides information on how to configure the manager and personal actions available from the following sections in the Talent Profile page.

- Actions list in the Talent Profile page
- Side Navigator in the Talent Profile page

## Configuring the Actions List

In Talent Profile, the standard Personal Actions or Manager Actions list is role based. The Actions list contains Personal Actions or Manager Actions depending on the profile the person is viewing.

- If the person viewing the Talent Profile page is an employee, then the actions that are available are defined by the value set for the HR: Personal Actions Menu profile option. These are the same actions that are available from the following navigation: Employee Self Service > Personal Actions.
- If the person viewing the Talent Profile page is an employee and is a manager, then the actions that are available are defined by the value set for the HR:Manager Actions Menu profile option. These are the same actions that are available from the following navigation: Manager Self Service > Manager Actions
- If the person viewing the Talent Profile page is a contingent worker, then the actions that are available are defined by the value set for the HR:Contingent Worker Personal Actions Menu profile option. These are the same actions that are available from the following navigation: Contingent Worker Self Service > Personal Actions.
- If the person viewing the Talent Profile page is a contingent worker and is a manager, then the actions that are available are driven by the value set for the HR: Contingent Worker Manager Actions Menu profile option. These are the same functions that are available from the following navigation: Manager Self Service > Manager Actions.

If you want to configure the Actions list according to your business requirements, then you must create custom menus using the predefined menus.

## Functions in the Available in the Predefined Personal Actions Menu

The following table provides a list of functions available in the predefined Personal Actions Menu:

Prompt	Sub Menu	Sub Menu Type	Function	Grant	Description
Personal Information			Personal Information	Y	
Payslip			Payslip	Y	
W4 Information			Employees W4 Information	Y	
Manage Payroll Payments			Manage Payroll Payments V4.0	N	
Release Information			Release Information	Y	
			Employee Appraisals	N	Obsolete - replaced with Employee: My Appraisals Page
Appraisals			Employee: My Appraisals Page	Y	
Suitability Matching			Suitability Matching	Y	
Tenure Status			Tenure Status Overview	Y	
Academic Rank			Academic Rank	Y	
Education and Qualifications			Qualification	Y	

Prompt	Sub Menu	Sub Menu Type	Function	Grant	Description
Other Professional Qualifications			Award	Y	
Competency Profile			Competency Profile	Y	
Work Preferences			Work Preferences	Y	
Resume			Resume	Y	
Apply for Job			Search and Apply for a Job Page	Y	
			Enroll and Cancel Training	N	
			External Training	N	
Employee W2			Employee W2	Y	
Extra Information			Extra Information Types	Y	
Special Information			Special Information Types	Y	
Event And Bookings			Event And Bookings	Y	
Employee Review			Employee Reviews V4.0	Y	

Prompt	Sub Menu	Sub Menu Type	Function	Grant	Description
Absence Management			Absence Management	Y	
			Training Plan Views	N	
Contact Extra Information			Contact Extra Information	Y	
Private Vehicle Entry			SS Vehicle Repository	Y	
Vehicle Mileage Expenses			SS Mileage Claim	Y	
Commutation Information			JP Commutation Information Self Service	Y	
Documents of Record			Documents of Record	Y	
Employment Verification			Employment Verification	Y	
Voluntary Termination			Voluntary Termination	Y	
Charitable Contributions			Charitable Contributions	Y	

Prompt	Sub Menu	Sub Menu Type	Function	Grant	Description
Manage Payroll Payments			Manage Payroll Payments V4.0	Y	
Employee Directory			Proxy Page	N	
Organization Manager V4.0			Organization Manager	Y	
	OTA Learner Application Menu	HOME PAGE		Y	
Defined Contribution Plan Enrollment			Defined Contribution Plan Enrollment	Y	

#### Functions Available in the Predefined Manager Actions Menu

The following table provides a list of functions available in the predefined Manager Actions menu.

Prompt	Function	Grant	Description
	Worker Status Change V5.2	Y	
Worker Status Change	Worker Status Change	Y	
	Change Hours V5.2	Y	

<b>Prompt</b>	<b>Function</b>	<b>Grant</b>	<b>Description</b>
Change Hours	Change Hours	Y	
Termination	Termination	Y	
	Change Pay V5.2	Y	
Change Pay	Change Pay	Y	
Change Job	Change Job	Y	
	Transfer V5.2	Y	
Change Cost Center, Location and Manager	Change Cost Center, Location and Manager	Y	
Personal Information	Personal Information	Y	
Tenure Status	Tenure Status	Y	
Transfer	Transfer	Y	
Education and Qualifications	Qualification	Y	
Other Professional Qualifications	Award	Y	
Competency Profile	Competency Profile	Y	
Work Preferences	Work Preferences	Y	
Resume	Resume	Y	

Prompt	Function	Grant	Description
Training	Enroll and Cancel Training	N	
External Training	External Training	N	
Change Job and Terms	Change Job and Terms	Y	
Change Cost Center, Terms and Manager	Change Cost Center, Terms and Manager	Y	
Extra Information	Extra Information Types	Y	
	Change Worker Status and Terms V5.2	Y	
Change Worker Status and Terms	Change Worker Status and Terms	Y	
Employee Review	Employee Reviews V4.0	Y	
Individual Compensation Distribution (Original)	Self Service Individual Distributions (Original)-Internal Use	Y	
Individual Compensation Distributions	Self Service Individual Compensation Distributions-Internal	Y	
	Organization Manager	N	Obsolete

Prompt	Function	Grant	Description
	Hire V5.2	N	Obsolete
	Applicant Hire V5.2	N	Obsolete
	French Hire	N	Obsolete
	French Applicant Hire	N	Obsolete
IRASLINE Information Types	SG IRASLINE Person EIT	Y	
Private Vehicle Entry	SS Manager Vehicle Repository	Y	
Vehicle Mileage Expenses	SS Mileage Claim	Y	
Commutation Information	JP Commutation Information Self Service	Y	
Assign Schedules and Manage Exceptions	Assign Schedule	Y	
Documents of Record	Documents of Record	Y	
Contact Extra Information	Contact Extra Information	Y	
	Hire	Y	
	Applicant Hire	Y	

Prompt	Function	Grant	Description
	Special Information Types V4.0- OSHA	Y	
	Special Information Types V4.0- Stock Options	Y	
Competence Profile	ADS Competence Profile V4.0	Y	
Applicant Hire iRecruitment	Applicant Hire iRecruitment	Y	
Transfer with Compensation Distribution V4.0	Transfer with Comp V4.0	Y	
IRASLINE Person Extra Information Types	SG IRASLINE Person EIT	Y	
Private Vehicle Entry	SS Vehicle Repository	Y	
Assignment Costing	Assignment Costing	Y	
	Assignment Costing Workflow Notify	Y	
	Reverse Termination	Y	
P11D	P11D Manager Action	Y	
Change Manager	Change Manager	Y	

Prompt	Function	Grant	Description
Termination with Compensation	Termination with Compensation V4.0	Y	
Release Information	Release Information	Y	
Academic Rank	Academic Rank	Y	
Special Information	Special Information Types	Y	
Event And Bookings	Event And Bookings	Y	
Absence Management	Absence Management	Y	

## Configuring the Action Links in the Side Navigation Container

Managers and workers can process multiple self-service transactions effectively and with minimum navigation using the action links in a side navigator. The side navigator appears in a separate page when they select an Action in the Talent Profile page.

The manager or personal actions that appear in the side navigation container are driven by the following menus:

- SSHR Emp Side Bar Menu (HR\_SS\_EMP\_SIDEBAR) for worker personal actions.

The following table provides a list of worker personal actions that are supported and not supported in the side navigation container:

Worker Action	Supported: Y/N
Personal Information	Y
Payslip	Y
W4 Information	Y

<b>Worker Action</b>	<b>Supported: Y/N</b>
Release Information	Y
Suitability Matching	N
Tenure Status	Y
Academic Rank	Y
Education and Qualifications	Y
Other Professional Qualifications	Y
Competency Profile	N
Work Preferences	Y
Resume	N
Employee W2	N
Extra Information	Y
Special Information	Y
Event & Bookings	Y
Employee Review	Y
Absence Management	Y
Contact Extra Information	Y
Private Vehicle Entry	Y
Documents of Record	Y
Voluntary Termination	Y
Manage Payroll Payments	Y

<b>Worker Action</b>	<b>Supported: Y/N</b>
Organization Manager	Y
Vehicle Mileage Expenses	Y
Employment Verficiation	Y
P60	Y
P11D	Y

- SSHR Side Bar Menu (HR\_SS\_SIDEBAR) for manager actions.

The following table provides a list of manager actions that are supported and not supported in the side navigation container:

<b>Manager Action</b>	<b>Supported: Y/N</b>
Work Preferences	Y
Individual Compensation Distribution	Y
Private Vehicle Entry	Y
P11D	Y
Allocated Checklist	Y
P60	Y
Documents of Record	Y
Academic Rank	Y
Release Information	Y
Tenure Status	Y

<b>Manager Action</b>	<b>Supported: Y/N</b>
Change Cost Centre, Location and Manager	Y
Termination with Compensation	Y
Change Cost Center, Terms and Manager	Y
Change Manager	Y
Contact Extra Information	Y
Other Professional Qualifications	Y
Education and Qualifications	Y
Events and Bookings	Y
Extra Information	Y
IRASLINE Information Types	Y
Training Plans Manager	N
Transfer	Y
Worker Status Change	Y
Absence Management	Y
Enroll and Cancel Training	N
External Training	N

Manager Action	Supported: Y/N
Resume	N
Assign Schedules and Manage Exceptions	Y
Assignment Costing	Y
Commutation Information	Y
Competency Profile	N
Special Information	Y
Termination	Y
Change Job	Y
Change Pay	Y
Personal Information	Y
Employee Review	Y
Vehicle Mileage Expenses	Y
Manage Payroll Payments	Y
Change Worker Status and Terms	Y

**Important:** The manager and personal actions whether launched from Self-Service Manager Actions, Personal Actions, Organization Chart or Talent Profile are the same. As some of the self-service functions are not supported in the side navigation container, there would be a mismatch between functions in the side navigation container and the drop-down list available in Talent Profile.

## Configuration Guidelines for the Side Navigator

The SSHR Side Bar Menu (HR\_SS\_SIDE BAR) and SSHR Emp Side Bar Menu (HR\_SS\_EMP\_SIDE BAR) contain a list of predefined supported functions including global and localization specific. During implementation, you can remove those functions that are not applicable to your legislation using the "function exclusion" feature available in the Responsibility window of the System Administrator responsibility.

## Enabling Managers to View and Perform Manager Actions for Multiple Assignments

Using Talent Profile, managers can view and perform manager actions for multiple assignments of an employee or worker in their hierarchy, if the subordinate has more than one assignment. If you wish to enable your managers to view and update multiple assignments for employees and workers, you can use the HR: Enable Multiple Assignments in SSHR system profile to allow this. See the Multiple Assignments section in the User Access and Security in Oracle SSHR, *Oracle SSHR Deploy Self-Service Guide* topic.

## Configuring the Default XML Templates

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

## Configure the Print Profile Default XML Template, if Required

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

You can create custom print profile templates based on your business requirements. Your custom print profile template must be based on the predefined Single Person Profile Template (PEREMPTP). Whenever you create a custom template to generate the Printable Profile (Full) report, you must set the custom template code as the value of the 'FullProfileTemplateCode' parameter value in the relevant Talent Profile launch function so that the application uses the custom print profile template.

To create and use a custom template of the Printable Profile (Full) report, follow these steps:

1. Log in to the XML Publisher Administrator responsibility.
2. Create a XML template based on the predefined PEREMPTP template. For example, name the custom template as Custom template for Talent Profile and code as PEREMPTPCUST.
3. Navigate to the Form Functions window using the System Administrator responsibility.

4. Query the relevant Talent Profile launch function to which you want to add the custom print profile template. For example, query the Talent Profile (HR\_TALENTPROFILE\_SS) function.
5. Click the Form tab. You view the existing parameter definitions.
6. Add the following parameter:  
FullProfileTemplateCode=PEREMPTPCUST  
  
**Important:** The parameter value must be same as the code of the custom template that you created in the earlier step.
7. Save your work.

## Configure the Compare Profile Default XML Templates, if Required

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

- Name: Talent Profile Comparison Report of 2 Employees  
Default File: PERCM2TP.rtf  
Code: PERCM2TP
- Name: Talent Profile Comparison Report of 3 Employees  
Default File: PERCM3TP.rtf  
Code: PERCM3TP

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

## Configuring the Quick Search and Hierarchy Regions

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

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

## Configuring the Quick Search Region

The Quick Search region displays two search options:

- Search Profile  
Displays profiles that logged in user can access. Users can select one of the profiles and click the Show Profile button to view the talent profile details.
- Recently Visited Profile  
This option displays recently viewed profiles. Currently, the visited profiles information is stored only during a transaction and this information is lost once the transaction ends.

To display the region, you must grant the HR\_TP\_VIEW\_GBL\_SEARCH\_SS function to the user.

Details of the Function

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

## Configuring the Hierarchy Bean

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

To display the hierarchy bean, you must the grant the HR\_TP\_VIEW\_PER\_HIERARCHY\_SS function to the user.

Details of the Function

- User Function Name: Talent Profile Show Person Hierarchy Enabled
- Type: SUBFUNCTION

## Personalizing Talent Profile

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

See: *Oracle Application Framework Personalization Guide* for more information on personalizing OA Framework pages.

## Talent Profile Regions

Use the information in the following table to create or rearrange regions on the Talent

Profile page (/oracle/apps/per/talentprofile/webui/TMProfileRN):

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

---

Region Display Name	Region Path
Other Information	/oracle/apps/per/talentprofile/additionalinfo/webui/AdditionalInformationRN
Appraisal	/oracle/apps/per/talentprofile/performance/webui/AppraisalChartRN
Other Professional Qualifications	/oracle/apps/per/talentprofile/qualifications/webui/AwardsOverviewRN
Benefits	/oracle/apps/per/talentprofile/benefit/webui/BenefitsOverviewRN
Career Path	/oracle/apps/per/talentprofile/careerpath/webui/CareerPathRN
Cash Compensation	/oracle/apps/per/talentprofile/empsalary/webui/SalaryCashCompGraphRN
Certification	/oracle/apps/per/talentprofile/learning/webui/CertificationsSummaryRN
Competencies	/oracle/apps/per/talentprofile/competency/webui/CompetencyOverviewRN
Compensation Statement	/oracle/apps/per/talentprofile/empsalary/webui/SalaryComponentsRN
Job History	/oracle/apps/per/talentprofile/employment/webui/CareerHistoryRN

---

Region Display Name	Region Path
Performance Objectives	<p>/oracle/apps/per/talentprofile/perfmanagement/webui/PerformanceManagementRN</p> <p><b>Note:</b> Talent Profile retrieves information about objectives from Oracle Performance Management. The plan administrator must select the Include Objective Setting in Process check box for a plan to display details of objectives in the Performance Objectives region for both direct and indirect reports of the manager. For more information, refer to the <i>Oracle Performance Management Implementation and User Guide</i></p>
Previous Employment	/oracle/apps/per/talentprofile/prevemp/webui/PrevEmploymentOverviewRN
Qualifications	/oracle/apps/per/talentprofile/qualifications/webui/QualificationsOverviewRN
Salary	/oracle/apps/per/talentprofile/empsalary/webui/SalaryOverviewRN
Succession Plan	<p>R12.2: /oracle/apps/per/talentprofile/successionplannew/webui/SuccessionPlanNewOverviewRN</p> <p>Pre R12.2: /oracle/apps/per/talentprofile/successionplan/webui/SuccessionPlanOverviewRN</p> <p>See this, page 4-21 section for more information.</p>
Training	/oracle/apps/per/talentprofile/training/webui/TrainingOverviewRN
Work Preferences	/oracle/apps/per/talentprofile/workpreference/webui/WorkPreferenceOverviewRN
Performance Matrix (Header is not shown)	/oracle/apps/per/talentprofile/performancematrix/webui/NineBoxSwitcherRN
Performance Ratings	/oracle/apps/per/talentprofile/performance/webui/PerformanceRatingRN

## Talent Profile Region Columns

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

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

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

See: *Oracle Application Framework Personalization Guide*, Extensibility chapter.

## Display the Relevant Succession Plan Region on the Talent Profile Page of a Worker

Managers can view succession plan details of their workers when they navigate to the Talent Profile of workers. By default, the Talent Profile page of a worker displays the Succession Plan region (SuccessionPlanNewOverviewRN) that is part of the R12.2 Succession Planning model.

The SuccessionPlanNewOverviewRN region contains the following columns:

- Successors Identified for
  - Name
  - Succession Status
  - Performance
  - Succession Potential
  - Retention Potential
  - Impact of Loss
  - Readiness Percent
- Succession Plans for
  - Worker/Role Name

- Plan Status
- Succession Status
- Performance
- Succession Potential
- Retention Potential
- Impact of Loss
- Readiness Percent

If you are not using the Succession Planning model of R12.2, then you must hide this version of the Succession Plan region and display the pre R12.2 Succession Plan region (SuccessionPlanOverviewRN) on the Talent Profile page.

The SuccessionPlanOverviewRN region contains the following columns:

- Successor For
  - Successor
  - Potential Level
  - Earliest Succession Date
- As Successor
  - Succession Plan For
  - Name
  - Potential Level
  - Earliest Succession Date

Complete the following steps to display the pre R12.2 Succession Plan region:

1. Navigate to the Talent Profile page of a worker.
2. Click the Personalize link.
3. Choose the appropriate context.
4. Click Complete View and Expand All options.
5. Navigate to the Flexible Layout row of the SuccessionPlanNewFlexRN region.

6. Click Remove Content and then select Yes. This action hides the R12.2 Succession Plan region.
7. Navigate to the Flexible Layout row that does not have content.
8. Click Add Content (green plus icon). The Add Content page appears.
9. Click Next until you view the Succession Plans option.
10. Select this option and click Apply.
11. Click Return to Application. The worker's Talent Profile page now displays the pre R12.2 Succession Plan region.

## Configuring the Region Icons

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

### Configuring the Region Icon in the Talent Profile Regions

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

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

## Displaying Person Extra Information Types (EITs) as Talent Profile Page Regions

To view additional details of workers, you can display the Person Extra Information Types (EITs) as regions on the Talent Profile page. You can display a maximum of 10 EIT regions. Use the Oracle Application Framework Personalization feature to display EITs as regions.

On the Talent Profile page, you can add the EIT region and then configure the *Flex: Descriptive Flex (HrEitDescFlex)* item in this region to display contexts and segments of your choice.

**Note:** The EIT region does not support More link.

To display EITs as regions, complete the steps explained in this topic.

## Prerequisites

1. Set up the following profile options to enable the Oracle Application Framework Personalization feature:
  - Personalize Self-service Defn
  - FND: Personalization Region Link Enabled
  - Self Service Accessibility Features

For information on the profile options, refer to the *Oracle Application Framework Personalization Guide*

2. Set up descriptive flexfield segments to record EIT data. EITs are defined using descriptive flexfields.

See: Extra Information Types, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

## Displaying EITs as Regions

### Example 1

In this example, you display the Passport Details region on the Talent Profile page. To display this region, you must have defined the required flexfield segments such as Country, Passport Number, Issue Date, and Expiry Date before carrying out these steps:

1. Navigate to the Talent Profile page.
2. Click the global Personalize Page link. As you have set the Self Service Accessibility Features profile option, the Page Layout Personalization page appears.
3. Select the required Personalization level and click Go.
4. Click the Content tab and select a layout where you want to add the EIT region.
5. Click the Add Content icon to add the new region.  
The Add Content page appears.
6. Select any one of the available Extra Information Types regions. 10 EIT predefined regions are available for Talent Profile. Oracle recommends that you select only one EIT region for each flexible layout.
7. Click Apply. You can view this region on the Talent Profile page.

As a next step, configure the EIT region to enter the title.

8. Click the Personalize icon for that region.
9. Scroll to the EitFlexRN<#>.TextCellRN row and click the Personalize icon of the Static Styled Text item.
10. Change the Prompt field with the desired title such as Passport Details and click Apply.

You specify the required flexfield context to see the EIT data for that context.

11. Click the Personalize icon of the Flex:Descriptive Flex item.
12. Enter the EIT context and the flexfield segments that you want to display. Use the following format when specifying the context and segments:

For example:

```
ContextName | SegmentName1 | SegmentName2
```

```
Passport Details | Country | Status | Passport Number | Date of Issue | Expiry Date
```

13. Click Apply to save your changes.

### Example 2

In this example, you display multiple EITs: Employee Succession Planning Information and Tenure Status Details. Note that you must have defined the required segments for these flexfields before carrying out these steps:

1. Navigate to the Talent Profile page.
2. Click the global Personalize Page link. As you have set the Self Service Accessibility Features profile option, the Page Layout Personalization page appears.
3. Select the required Personalization level and click Go.
4. Click the Content tab and select a layout where you want to add the EIT region
5. Click the Add Content icon to add the new region.  
The Add Content page appears.
6. Select any one of the available Extra Information Types regions. 10 EIT predefined regions are available for Talent Profile. Oracle recommends that you select only one EIT region for each flexible layout.
7. Click Apply. You can view this region on the Talent Profile page.  
As a next step, configure the EIT region to enter the title.
8. Click the Personalize icon for that region.

9. Scroll to the EitFlexRN<#>.TextCellRN row and click the Personalize icon of the Static Styled Text item.
10. Change the Prompt field with the desired title such as Passport Details and click Apply.  
You specify the required flexfield context to see the EIT data for that context.
11. Click the Personalize icon for the Flex:Descriptive Flex item.
12. Enter the multiple EIT contexts and the flexfield segments that you want to display. Use double pipe || to enter two different contexts while the segments can be separated by single pipe |  
For example:  

```
ContextName | SegmentName1 | SegmentName2 | | ContextName2 | SegmentName1 | SegmentName2
Employee Succession Planning Information | Succession Potential | Retention Potential | | Tenure Status | Tenure Status | Date Determined
```
13. Click Apply to save your changes.

## Restricting Access to Sensitive EIT Information

When you display EIT regions, there may be some information that is sensitive, which requires to be hidden from users who log in to the application. For example, if you configure an EIT to display additional succession planning information, managers can view such additional succession planning information when they navigate to their Talent Profile page as workers. To restrict the display of such sensitive information, use the 'ShowLoggedInDtIs' formvalue available with every EIT on the Talent Profile page. To control the display of EIT information for the logged in manager, you must specify the value using the OAF Personalization feature. If the value of this formvalue is set to 'Y', then the EIT information is visible to the logged in manager. If the value of this Form Value is set to 'N', then the EIT information is not displayed to the logged in manager.

Complete the following steps to restrict access to sensitive EIT information:

1. On the Talent Profile page, click the Personalize page link.
2. Select the 'Content' tab.
3. In the EIT region, click the Personalize properties (pencil) icon.
4. Select the Complete View radio button.
5. Click the Expand All link.

6. Click the Personalize icon for the Form Value personalization item.
7. Set the value to 'Y' or 'N' as required.
8. Click Apply to save your work.

## Displaying Person Special Information Types (SITs) as Talent Profile Page Regions

To view additional details of workers, you can display the person Special Information Types (SITs) as regions on the Talent Profile page. You can display a maximum of 10 SIT regions. Use the Oracle Application Framework Personalization feature to display SITs as regions.

On the Talent Profile page, you can add the SIT region and then configure the *Flex: Key flex for Sit (HrSitKeyFlex)* item to display contexts and segments of your choice.

**Note:** The SIT region does not support More link.

To display SITs as regions, complete the steps explained in this topic.

### Prerequisites

1. Set up the following profile options to enable the Oracle Application Framework Personalization feature:
  - Personalize Self-service Defn
  - FND: Personalization Region Link Enabled
  - Self Service Accessibility Features

For information on the profile options, refer to the *Oracle Application Framework Personalization Guide*

2. Set up key flexfield segments to record SIT data. SITs are stored in a key flexfield combination table where the combination of segments must be unique.

See: User Definable Key Flexfields, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

### Displaying SITs as Regions

#### Example 1

In this example, you display the Visa Details region on the Talent Profile page. To display this region, you must have defined the required flexfield segments such as Visa

## Type and Purpose of Visa.

1. Navigate to the Talent Profile page.
2. Click the global Personalize Page link. As you have set the Self Service Accessibility Features profile option, the Page Layout Personalization page appears.
3. Select the required Personalization level and click Go.
4. Click the Content tab and select a layout where you want to add the SIT region.
5. Click the Add Content icon to add the new region.  
The Add Content page appears.
6. Select any one of the available Special Information Type regions. 10 SIT predefined regions are available. Oracle recommends that you select only one SIT region for each flexible layout.
7. Click Apply. You can view this region on the Talent Profile page.  
As a next step, configure the SIT region to enter the title.
8. Click the Personalize icon for that region.
9. Scroll to the SitFlexRN<#>.TextCellRN row and click the Personalize icon of the Static Styled Text item.
10. Change the Prompt field with the desired title such as Visa Details and click Apply.  
You specify the required flexfield context to see the EIT data for that context.
11. Click the Personalize icon of the Flex:Descriptive Flex item.
12. Enter the SIT context and the flexfield segments that you want to display. Use the following format when specifying the context and segments:  
  
For example:  
  
ContextName | SegmentName1 | SegmentName2  
Visa Details | Visa Type | Purpose of Visa
13. Click Apply to save your work.

### Example 2

In this example, you display multiple SITs: Vehicle Profile and Work Environment. Note that you must have defined the required segments for these flexfields.

1. Navigate to the Talent Profile page.
2. Click the global Personalize Page link. The Page Layout Personalization page

appears.

3. Select the required Personalization level and click Go.
4. Click the Content tab and select a layout where you want to add the SIT region
5. Click the Add Content icon to add the new region.  
The Add Content page appears.
6. Select any one of the available Extra Information Types regions. 10 SIT predefined regions are available for Talent Profile. Oracle recommends that you select only one SIT region for each flexible layout.
7. Click Apply. You can view this region on the Talent Profile page.  
As a next step, configure the SIT region to enter the title.
8. Click the Personalize pencil icon for that region.
9. Scroll to the EitFlexRN<#>.TextCellRN row and click the Personalize icon of the Static Styled Text item.
10. Change the Prompt field with the desired title such as Passport Details and click Apply.  
You specify the required flexfield context to see the EIT data for that context.
11. Click the Personalize icon for the *Flex: Key Flex for Sit* item.
12. Specify the multiple SIT contexts and the flexfield segments that you want to display. Use double pipe || to enter two different contexts while the segments can be separated by single pipe |  
  
For example:  

```
ContextName | SegmentName1 | SegmentName2 | | ContextName2 | SegmentName1 | SegmentName2  
  
Vehicle Profile | Vehicle Type | Issue Date | Plate Number | State Issued | | Work Environment | Location | Plant | Field | Home
```
13. Click Apply to save your work.

## Displaying Custom Content as Talent Profile Page Regions

On the Talent Profile page, you can use custom regions to display business specific details. You can configure custom regions if you need to use information structures other than EITs or SITs. Use a SQL Statement to retrieve the business specific information from the database and then configure the custom regions to display the content. You can configure a maximum of 10 custom regions on the Talent Profile page.

**Note:** The custom region does not support More link.

To display custom content as regions, complete the steps explained in this topic.

## Prerequisites

1. Set up the following profile options to enable the Oracle Application Framework Personalization feature:

- Personalize Self-service Defn
- FND: Personalization Region Link Enabled
- Self Service Accessibility Features

For information on the profile options, refer to the *Oracle Application Framework Personalization Guide*

2. Create a database view based on one or more tables in the database. Consider security and information requirements before creating a database view.

You can use the Additional WHERE clause to display the data of the worker whose profile is being viewed, if the database view returns data for all workers. This clause uses specific parameters that are passed dynamically. Following are the parameters:

- `##PERSON_ID##` - Person ID of the currently viewed worker's profile
- `##PRIMARY_ASSIGNMENT_ID##` - Assignment ID of the currently viewed worker's profile
- `##LOGIN_PERSON_ID##` - Person ID of the logged in worker who is a manager
- `##BUSINESS_GROUP_ID##` - Business group ID of the currently viewed worker
- `##EFFECTIVE_DATE##` - Effective date in the format "YYYY-MM-DD HH24:MI:SS"

Following rules apply when you create a database view:

1. Views can be based on any database table.
2. Create an alias starting with 'D\_' or 'd\_' for the view columns that you want to display on the Talent Profile page.
3. Use the HR\_TP\_NAME\_TRANSLATIONS lookup type to create a lookup for each column that is created as an alias in the previous step. The lookup code

must be the same as the column alias. Provide a user friendly value in the Meaning column as this value appears as the column header in the custom region of the Talent Profile page.

Example of Lookup Codes

Code	Meaning
D_FULL_NAME	Full Name
D_PARTY_ID	Party Identifier

3. Write a SQL statement to retrieve data from the database view.

## Displaying Custom Content as Talent Profile Regions

### Example 1

In this example, you display the Worker Information region that has two columns: Name and Party Number. The Additional Where clause in this example has a `person_id` IN clause where the `login_person_id` and the `person_id` of the worker whose profile is being viewed are passed.

1. Navigate to the Talent Profile page.
2. Click the global Personalize Page link. As you have set the Self Service Accessibility Features profile option, the Page Layout Personalization page appears.
3. Select the required Personalization level and click Go.
4. Click the Content tab and select a layout where you want to add the custom region
5. Click the Add Content icon to add the new region.  
The Add Content page appears.
6. Select any one of the available Dynamic View regions. 10 Dynamic View predefined regions are available. Oracle recommends that you select only one dynamic region for each flexible layout.
7. Click Apply. You can view this region on the Talent Profile page.  
As a next step, configure the dynamic region to enter the title.
8. Click the Personalize icon for that region.

9. Scroll to the DyncVwFlexRN<#>.TextCellRN row and click the Personalize icon of the Static Styled Text item.
10. Change the Prompt field with the desired title such as Worker Information and click Apply.

The Dynamic View has three parameters that you must configure to display data in the region:

- Layout Style: Valid values are: TABLE - Table Layout and FORM - Message Component (Form) Style Layout
  - DyViewName: The database view name that you created to show the required data in the custom region.
  - DyWhereClause: Any additional where clause that is required to further filter the data retrieved from the view.
11. Click the personalize icon of the DyViewName item to specify the database view name.
  12. Change the Prompt field with the desired database view name for the region and click Apply.
  13. Click the personalize icon for the DyWhereClause item to specify the additional where clause.
  14. Change the Prompt field with the desired additional Where Clause for the region and click Apply.

---

## **Setting up Custom Version of Talent Profile**

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

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

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

### 1. Create Copies of the Supplied Talent Profile Menus

Using the Functional Administrator responsibility, create copies of the following supplied menus for Talent Profile.

- Talent Profile Manager Access Menu (HR\_TP\_MGR\_MENU)
- Talent Profile Employee Access Menu (HR\_TP\_EMP\_MENU)
- Suitability Matching Spider Menu (HR\_SUIT\_MATCH\_SPIDER\_MENU)
- Menu For All Seeded Report Template Functions (HR\_TP\_TEMPLATES\_MENU)

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

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

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

### 2. Create a form function to set up the custom Talent Profile functionality.

See: Setting up the Talent Profile Form Function, page 5-4

### 3. Set up the required Talent Profile regions for workers and managers. You can exclude the functions that you do not your workforce to use from the copied menus.

See: Setting up the Talent Profile Regions, page 5-5

### 4. If required, configure the More links on the Talent Profile regions that enable managers and workers to navigate to the relevant Oracle HRMS talent product

pages, such as Oracle SSHR, Oracle Performance Management, and Oracle Learning Management.

Configuring the More Links in the Talent Profile Regions, page 5-12

5. Configure the Talent Profile custom actions.

See: Configuring Manager and Personal Actions in Talent Profile, page 4-2

6. Configure the SSHR actions on the Talent Profile page.

See: Configuring Manager and Personal Actions in Talent Profile, page 4-2

7. Configure the Suitability Analyzer and Performance Matrix (Potential) and Performance Matrix (Retention) functions.

You can also determine the print and compare profile actions that you want managers to use.

See: Configuring Talent Profile Functions, Suitability Analyzer, and Compare Profile Templates, page 5-19

8. **Grant Menus or Add Menus to the Responsibility**

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

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

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

9. Display the custom Talent Profile for the predefined or the custom version of the Succession Planning Portal by defining the 'pTPFunctionName' function parameter. The predefined Succession Planning function is PER\_SP\_PLAN\_PORTAL function. If the parameter is defined, then the custom Talent Profile is available from the following pages:

- Manage Plans tab (PerSuccPortalHomePG )> Plan Search region > Search by Successor and Search by Plan options > Talent Profile columns
- Create Succession Plan (PerSPCreatePlanPG)
- Update Succession Plan (PerSPCreatePlanPG)

The following steps provide an example on how to define the 'pTPFunctionName' function parameter for the predefined Succession Planning function

(PER\_SP\_PLAN\_PORTAL).

1. Create a custom Talent Profile function using the predefined Talent Profile function (HR\_TALENTPROFILE\_SS) as a sample.
2. Navigate to the Functions page using the Functional Administrator responsibility.
3. Search for the Succession Planning function (PER\_SP\_PLAN\_PORTAL) function.
4. Click the Update button corresponding to the Succession Planning Portal function.
5. Add `&pTPFunctionName=<function name>` to the existing parameter list. If no parameters exist, remove the '&' from the parameter.
6. Click the Apply button.
7. Select the Caching Framework tab and then select Global Configuration.
8. Click Clear All Cache in the Cache Policy region.
9. Click Apply.

If you want to use the predefined Talent Profile page, then remove the `&pTPFunctionName` parameter added to the Succession Planning Portal function.

## Setting up the Talent Profile Form Function

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

Provide the following values:

### Description Tab Region

Function Name: <User Defined function name>, for example: HR\_TALENTPROFILE\_SS

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

### Properties Tab Region

Type: SSWA jsp function

### Form Tab Region

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

ORE\_LINK

**Note:** The parameters provided while creating the functions are used to configure the More links on the individual regions of the Talent Profile page. See: Configuring the More Links in the Talent Profile Regions, page 5-12

### Web HTML Tab Region

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

## Setting up the Talent Profile Regions

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

- Using Talent Profile as Managers, page 11-5
- Using Talent Profile as Workers, page 11-15

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

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

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

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

The following tables list the functions granted with the supplied menus: Talent Profile Manager Access Menu - HR\_TP\_MGR\_MENU and Talent Profile Employee Access Menu - HR\_TP\_EMP\_MENU. You can exclude the functions that you do not want managers or workers to use from the copied menus using the Functional Administrator responsibility.

**Supplied Talent Profile Manager Access Menu - HR\_TP\_MGR\_MENU**

<b>Name</b>	<b>Function</b>	<b>Type</b>	<b>Functionality</b>
Talent Profile Career Path Manager	HR_TP_MGR_CAR EER_PATH_SS	SUBFUNCTION	Region
Talent Profile Cash Compensation Manager	HR_TP_MGR_CAS H_COMP_SS	SUBFUNCTION	Region
Talent Profile Certifications Manager	HR_TP_MGR_CERT IFI_SS	SUBFUNCTION	Region
Compare Profile	HR_TP_MGR_COM PARE_WITH_ACT N	SUBFUNCTION	Action
Talent Profile Competency Manager	HR_TP_MGR_COM PETENCY_SS	SUBFUNCTION	Region
Talent Profile Compensation Statement Manager	HR_TP_MGR_COM P_STAT_SS	SUBFUNCTION	Region
Talent Profile Lookup Data AM	HR_TP_LKUP_DAT A_AM	REST	Rest Service

<b>Name</b>	<b>Function</b>	<b>Type</b>	<b>Functionality</b>
Talent Profile Lookup init AM	HR_TP_LKUP_INIT_AM	REST	Rest Service
Printable Profile	HR_TP_MGR_EXPO_RT_CUSTOM_ACTN	SUBFUNCTION	Action
Compare Profile	HR_TP_EMP_COMPARE_WITH_ACTN	SUBFUNCTION	Action
Talent Profile Perf Matrix Directs	HR_TP_PERFMATRIX_DIRECTS_SS	JSP	Action
Talent Profile Job History Manager	HR_TP_MGR_JOB_HIST_SS	SUBFUNCTION	Region
Performance Matrix ( Potential )	HR_TP_MGR_PERF_MATRIX_ACTN	SUBFUNCTION	Action
Talent Profile Performance Matrix Manager	HR_TP_MGR_PERF_MATRIX_SS	SUBFUNCTION	Region
Talent Profile Performance Objectives Manager	HR_TP_MGR_PERF_OBJ_SS	SUBFUNCTION	Region

<b>Name</b>	<b>Function</b>	<b>Type</b>	<b>Functionality</b>
Talent Profile Previous Employment Manager	HR_TP_MGR_PREV_EMP_SS	SUBFUNCTION	Region
Talent Profile Qualifications Manager	HR_TP_MGR_QUA_LIFI_SS	SUBFUNCTION	Region
Talent Profile Salary Overview Manager	HR_TP_MGR_SALA_RY_SS	SUBFUNCTION	Region
Talent Profile Succession Plan Manager	HR_TP_MGR_SUC_CESSION_SS	SUBFUNCTION	Region
Talent Profile Additional Information Manager	HR_TP_MGR_ADDI_TIONALINFO_SS	SUBFUNCTION	Region
Talent Profile Appraisal Manager	HR_TP_MGR_APPR_SS	SUBFUNCTION	Region
Talent Profile Awards Manager	HR_TP_MGR_AWA_RDS_SS	SUBFUNCTION	Region

<b>Name</b>	<b>Function</b>	<b>Type</b>	<b>Functionality</b>
Talent Profile Work Preferences Manager	HR_TP_MGR_WOR K_PREF_SS	SUBFUNCTION	Region
Talent Profile Training Manager	HR_TP_MGR_TRAI NING_SS	SUBFUNCTION	Region
Talent Profile Global Search Enabled	HR_TP_VIEW_GBL _SEARCH_SS	SUBFUNCTION	Region
Talent Profile Show Person Hierarchy Enabled	HR_TP_VIEW_PER_ HIERARCHY_SS	SUBFUNCTION	Region
Download Compare XML Button Security Renderer	HR_TP_OWNLLOAD _COMPARE_XML	SUBFUNCTION	Reporting Action
Download Export XML Button Security Renderer	HR_TP_DOWNLOA D_EXPORT_XML	SUBFUNCTION	Reporting Action
Talent Profile More Link Manager	HR_TP_MGR_MOR E_LINK	SUBFUNCTION	More link configuration option for Manager

<b>Name</b>	<b>Function</b>	<b>Type</b>	<b>Functionality</b>
Printable Profile ( Full )	HR_TP_MGR_EXPO RT_FULL_ACTN	SUBFUNCTION	Action
Talent Profile Performance Matrix Flash	HR_TP_PERF_MAT RIX_SWF	WIDGET	Action
Talent Profile Performance Matrix Succession Plan GRD	HR_TP_PERFMTRX _SUCCPLAN_GRD_ AM	REST	Rest Function
Talent Profile Performance Matrix Directs AM	HR_TP_PERFMTRX _GRD_AM	REST	Rest Service
Talent Profile Benefits Manager	HR_TP_MGR_BENF TS_SS	SUBFUNCTION	Region
Talent Profile Performance Ratings Managers	HR_TP_MGR_PERF RATING_SS	SUBFUNCTION	Region
Performance Matrix ( Retention )	HR_TP_MGR_RET_ PERF_MTRX_ACTN	SUBFUNCTION	Action

**Supplied Talent Profile Employee Access Menu - HR\_TP\_EMP\_MENU**

<b>Name</b>	<b>Function</b>	<b>Type</b>	<b>Functionality</b>
Talent Profile Additional Information Employee	HR_TP_EMP_ADDITIONALINFO_SS	SUBFUNCTION	Region
Talent Profile Appraisal Employee	HR_TP_EMP_APPR_SS	SUBFUNCTION	Region
Talent Profile Awards Employee	HR_TP_EMP_AWARDS_SS	SUBFUNCTION	Region
Talent Profile Career Path Employee	HR_TP_EMP_CAREER_PATH_SS	SUBFUNCTION	Region
Talent Profile Certifications Employee	HR_TP_EMP_CERTIFI_SS	SUBFUNCTION	Region
Talent Profile Competency Employee	HR_TP_EMP_COMPETENCY_SS	SUBFUNCTION	Region
Talent Profile Job History Employee	HR_TP_EMP_JOB_HISTORY_SS	SUBFUNCTION	Region
Talent Profile Performance Objectives Employee	HR_TP_EMP_PERFORMANCE_OBJ_SS	SUBFUNCTION	Region
Talent Profile Previous Employment Employee	HR_TP_EMP_PREVIOUS_EMP_SS	SUBFUNCTION	Region
Talent Profile Qualifications Employee	HR_TP_EMP_QUALIFICATIONS_SS	SUBFUNCTION	Region
Talent Profile Training Employee	HR_TP_EMP_TRAINING_SS	SUBFUNCTION	Region

Name	Function	Type	Functionality
Talent Profile Work Preferences Employee	HR_TP_EMP_WORK_PREF_SS	SUBFUNCTION	Region
Talent Profile More Link Employee	HR_TP_EMP_MORE_LINK	SUBFUNCTION	Region
Talent Profile Cash Compensation Employee	HR_TP_EMP_CASH_COMP_SS	SUBFUNCTION	Region
Talent Profile Salary Overview Employee	HR_TP_EMP_SALARY_SS	SUBFUNCTION	Region
Talent Profile Compensation Statement Employee	R_TP_EMP_COMP_S_TAT_SS	SUBFUNCTION	Region
Printable Profile	HR_TP_MGR_EXPO_RT_CUSTOM_ACTN	SUBFUNCTION	Action
Compare Profile	HR_TP_EMP_COMP_ARE_WITH_ACTN	SUBFUNCTION	Action
Printable Profile ( Full )	HR_TP_MGR_EXPO_RT_FULL_ACTN	SUBFUNCTION	Action
Talent Profile Benefits Employee	HR_TP_EMP_BENFT_S_SS	SUBFUNCTION	Region
Talent Profile Performance Ratings Employee	HR_TP_EMP_PERFR_ATING_SS	SUBFUNCTION	Region

## Configuring the More Links in the Talent Profile Regions

### Configuring the More Links in the Talent Profile Regions

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

the self-service pages using the More link.

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

- **Manager View**

Function Name: Talent Profile More Link Manager (HR\_TP\_MGR\_MORE\_LINK).  
This sub-function is included in the Talent Profile Manager Access Menu (HR\_TP\_MGR\_MENU)

- **Employee View**

Function Name: Talent Profile More Link Employee (HR\_TP\_EMP\_MORE\_LINK).  
This sub-function is included in the Talent Profile Employee Access Menu (HR\_TP\_EMP\_MENU).

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

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

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

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

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

MoreLinkMapMgr=HR\_TP\_MGR\_MORE\_LINK&MoreLinkMapEmp=HR\_TP\_EMP\_MORE\_LINK

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

The following sections provide information about the predefined parameters supplied with the HR\_TP\_EMP\_MORE\_LINK and HR\_TP\_MGR\_MORE\_LINK sub-functions.

## Talent Profile More Link Manager (HR\_TP\_MGR\_MORE\_LINK)

### Predefined Form Parameters

pTPMADDINFO=&pTPMBENFTS=BEN\_SS\_MGR\_ENRT&pTPMCARERPATH=&pTPMCOMPETNCY=HR\_COMPETENCE\_PROFILE\_SS&pTPMPERFMATRIX=&pTPMJOBHIST=&pTPMSALARY=&pTPMCOMPSTMT=&pTPMCASHCOMP=&pTPMCERT=OT

A\_LEARNER\_HOME\_SS&pTPMPERFOBJ=HR\_MGR\_TALMGMT\_SS&pTPMAPPRAISAL=HR\_VIEW\_APPRAISALS\_PAGE\_SS&pTPMPREVEMP=&pTPMAWARDS=HR\_AWARD\_SS&pTPMQUALIFI=HR\_QUALIFICATION\_SS&pTPMSUCPLAN=&pTPMTRAINING=OTA\_LEARNER\_HOME\_SS&pTPMWORKPREF=HR\_WORK\_PREFERENCES\_SS&pTPMPERFRATE=HR\_MGR\_VIEWS\_HIST\_SS

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

<b>Region Display Name</b>	<b>Region Code (Manager)</b>	<b>Parameter in the More Link Code</b>	<b>Default Parameter Value</b>	<b>Page that the More Link Displays</b>
Other Information	HR_TP_MGR_ADDITIONAL_SS	pTPMADDINFO	Blank	Add Attachment page.
Appraisal	HR_TP_MGR_APPRaisal_PPR_SS	pTPMAPPRAISAL	HR_VIEW_APPRAISALS_PAGE_SS	View Appraisals page
Other Professional Qualifications	HR_TP_MGR_AWARDS_SS	pTPMAWARDS	HR_AWARD_SS	Other Professional Qualifications
Benefits	HR_TP_MGR_BENEFITS_SS	pTPMBENFTS	BEN_SS_MGR_ENROLLMENT	Self-Service Benefits Enrollment
Career Path	HR_TP_MGR_CAREER_PATH_SS	pTPMCARERPATH	Blank	More link is not available in this region
Monetary Compensation	HR_TP_MGR_CASH_COMP_SS	pTPMCASHCOMP	Blank	More link is not available in this region

Region Display Name	Region Code (Manager)	Parameter in the More Link Code	Default Parameter Value	Page that the More Link Displays
Learning Certifications	HR_TP_MGR_CERTIFI_SS	pTPMCERT	OTA_LEARNER_HOME_SS	Learner Home
Competencies	HR_TP_MGR_COMPETENCY_SS	pTPMCOMPETENCY	HR_COMPETENCE_PROFILE_SS	Competency Profile
Compensation Statement	HR_TP_MGR_COMP_STAT_SS	pTPMCOMPSTMT	Blank	More link is not available in this region
Job History	HR_TP_MGR_JOB_HIST_SS	pTPMJOBHIST	Blank	More link is not available in this region
Performance Objectives	HR_TP_MGR_PERF_OBJ_SS	pTPMPERFOBJ	HR_MGR_TALGMT_SS	Performance Management page of the worker.
Previous Employment	HR_TP_MGR_PREV_EMP_SS	pTPMPREVEMP	Blank	More link is not available in this region
Qualifications	HR_TP_MGR_QUALIFI_SS	pTPMQUALIFI	HR_QUALIFICATION_SS	Education and Qualifications
Training	HR_TP_MGR_TRAINING_SS	pTPMTRAINING	OTA_LEARNER_HOME_SS	Learner Home
Work Preferences	HR_TP_MGR_WORK_PREF_SS	pTPMWORKPREF	HR_WORK_PREFERENCES_SS	Work Preferences

Region Display Name	Region Code (Manager)	Parameter in the More Link Code	Default Parameter Value	Page that the More Link Displays
Performance Rating	HR_TP_MGR_PEFRATING_SS	&pTPMPERFRATE	HR_MGR_VIEWS_HIST_SS	My Employee Information

## Talent Profile More Link Employee (HR\_TP\_EMP\_MORE\_LINK)

### Predefined Form Parameters

pTPMADDINFO=&pTPMBENFTS=BEN\_SS\_BNFT\_ENRT&pTPMCARERPATH=&pTPMCOMPETENCY=HR\_COMPETENCE\_PROFILE\_SS&pTPMPERFMATRIX=&pTPMJOBHIST=&pTPMSALARY=&pTPMCOMPSTMT=BEN\_TCS\_EMPSS\_WELCOME\_PG&pTPMCASHCOMP=BEN\_TCS\_EMPSS\_WELCOME\_PG&pTPMCERT=OTA\_LEARNER\_HOME\_SS&pTPMPERFOBJ=HR\_EMP\_TALMGMT\_SS&pTPMAPPRAISAL=HR\_EMP\_MY\_APPR\_SS&pTPMPREVEMP=&pTPMAWARDS=HR\_AWARD\_SS&pTPMQUALIFI=HR\_QUALIFICATION\_SS&pTPMSUCCLPLAN=&pTPMTRAINING=OTA\_LEARNER\_HOME\_SS&pTPMWORKPREF=HR\_WORK\_PREFERENCES\_SS&pTPMPERFRATE=HR\_EMP\_VIEWS\_SS

### More Links on the Talent Profile Worker View

Region Display Name	Region Code (Employee)	Parameter in the More Link Code	Default Parameter Value	Page that the More Link Displays
Other Information	HR_TP_EMP_ADDITIONALINFO_SS	pTPMADDINFO		Add Attachments
Appraisal	HR_TP_EMP_APPRaisal_SS	pTPMAPPRAISAL	HR_EMP_MY_APPR_SS	My Appraisals

Region Display Name	Region Code (Employee)	Parameter in the More Link Code	Default Parameter Value	Page that the More Link Displays
Other Professional Qualifications	HR_TP_EMP_AWARDS_SS	pTPMAWARDS	HR_AWARD_SS	Other Professional Qualifications
Benefits	HR_TP_EMP_BENFTS_SS	pTPMBENFTS	BEN_SS_BNFT_ENRT	Self Service Benefits Enrollments
Career Path	HR_TP_EMP_CARER_PATH_SS	pTPMCARERPATH	Blank	More link is not available in this region
Monetary Compensation	HR_TP_EMP_CASH_COMP_SS	pTPMCASHCOMP	BEN_TCS_EMPSS_WELCOME_PG	Total Compensation Statement
Certification	HR_TP_EMP_CERTIFI_SS	pTPMCERT	OTA_LEARNER_HOME_SS	Learner Home
Competencies	HR_TP_EMP_COMPETENCY_SS	pTPMCOMPETENCY	HR_COMPETENCE_PROFILE_SS	Competency Profile
Compensation Statement	HR_TP_EMP_COMP_STAT_SS	pTPMCOMPSTMNT	BEN_TCS_EMPSS_WELCOME_PG	Total Compensation Statement
Job History	HR_TP_EMP_JOB_HIST_SS	pTPMJOBHIST	Blank	More link is not available in this region

Region Display Name	Region Code (Employee)	Parameter in the More Link Code	Default Parameter Value	Page that the More Link Displays
Performance Objectives	HR_TP_EMP_P ERF_OBJ_SS	pTPMPERFOBJ	HR_EMP_TALMG MT_SS	Performance Management
Previous Employment	HR_TP_EMP_P REV_EMP_SS	pTPMPREVEMP	Blank	More link is not available in this region
Qualifications	HR_TP_EMP_Q UALIFI_SS	pTPMQUALIFI	HR_QUALIFICATI ON_SS	Education and Qualifications
Salary	HR_TP_EMP_S ALARY_SS	pTPMSALARY	Blank	More link is not available in this region
Succession Plan	HR_TP_EMP_S UCCESSION_SS	pTPMSUCCPLAN	Blank	This region is not available in the Employee view
Training	HR_TP_EMP_T RAINING_SS	pTPMTRAINING	OTA_LEARNER_H OME_SS	Learner Home
Work Preferences	HR_TP_EMP_W ORK_PREF_SS	pTPMWORKPREF	HR_WORK_PREFE RENCES_SS	Work Preferences
Performance Matrix (Header is not shown)	HR_TP_EMP_P ERF_METRICES _SS	pTPMPERFMATRIX	Blank	More link is not applicable

Region Display Name	Region Code (Employee)	Parameter in the More Link Code	Default Parameter Value	Page that the More Link Displays
Performance Ratings	HR_TP_EMP_P ERFRATING_SS	&pTPMPERFRATE	HR_EMP_VIEWS_S S	My Information

You can display EIT, SIT, and custom content on the Talent Profile page, see:

- Person Extra Information Types (EITs)  
See: Displaying Person Extra Information Types (EITs) as Talent Profile Page Regions, page 4-23
- Person Special Information Types  
See: Displaying Person Special Information Types (SITs) as Talent Profile Page Regions, page 4-27
- Custom content  
See: Displaying Custom Content as Talent Profile Page Regions, page 4-29

**Note:** The EIT, SIT, and custom content regions do not support More links.

## Configuring Talent Profile Functions, Suitability Analyzer, and Compare Profile Templates

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

### Configuring the Talent Profile Actions

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

- Performance Matrix (Potential)
- Performance Matrix (Retention)

- Compare Profile
- Printable Profile
- Printable Profile (Full)

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

The following tables provide details about all the talent action sub-functions.

***Talent Actions available in the Talent Profile Manager Access Menu - HR\_TP\_MGR\_MENU***

<b>Name</b>	<b>Function</b>	<b>Type</b>	<b>Functionality</b>
Compare Profile	HR_TP_MGR_COM PARE_WITH_ACT N	SUBFUNCTION	Action
Talent Profile Lookup Data AM	HR_TP_LKUP_DAT A_AM	REST	Rest Service
Talent Profile Lookup init AM	HR_TP_LKUP_INIT _AM	REST	Rest Service
Printable Profile	HR_TP_MGR_EXPO RT_CUSTOM_ACT N	SUBFUNCTION	Action
Compare Profile	HR_TP_EMP_COM PARE_WITH_ACT N	SUBFUNCTION	Action
Talent Profile Perf Matrix Directs	HR_TP_PERFMATR IX_DIRECTS_SS	JSP	Action

Name	Function	Type	Functionality
Performance Matrix (Potential)	HR_TP_MGR_PERF_MATRIX_ACTN	SUBFUNCTION	Action
Printable Profile (Full)	HR_TP_MGR_EXPO_RT_FULL_ACTN	SUBFUNCTION	Action
Talent Profile Performance Matrix Flash	HR_TP_PERF_MATRIX_SWF	WIDGET	Action
Talent Profile Performance Matrix Succession Plan GRD	HR_TP_PERFMATRIX_SUCCPLAN_GRD_AM	REST	Rest Function
Talent Profile Performance Matrix Directs AM	HR_TP_PERFMATRIX_GRD_AM	REST	Rest Service
Performance Matrix (Retention)	HR_TP_MGR_RET_PERF_MTRX_ACTN	SUBFUNCTION	Action

**Talent Actions available in the Talent Profile Employee Access Menu - HR\_TP\_EMP\_MENU**

Name	Function	Type	Functionality
Printable Profile	HR_TP_MGR_EXPO_RT_CUSTOM_ACTN	SUBFUNCTION	Action
Compare Profile	HR_TP_EMP_COMPARE_WITH_ACTN	SUBFUNCTION	Action

Name	Function TypeFunctionality	Type	Functionality
Printable Profile ( Full )	HR_TP_MGR_EXPO RT_FULL_ACTN	SUBFUNCTION	Action

## Enable Managers to Use the Suitability Analyzer

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

To enable managers to use the Suitability Analyzer, you can either add the supplied Suitability Matching Spider Menu - (HR\_SUIT\_MATCH\_SPIDER\_MENU) or a copy of the supplied menu to the responsibility that managers use to render the Suitability Analyzer.

### *Suitability Matching Spider Menu - (HR\_SUIT\_MATCH\_SPIDER\_MENU)*

Name	Type	Function	Functionality
Function for Competency Spider Page	HR_SUIT_MATCH_S PIDER_SEC_FUNC	JSP	Page
Suitability Matching Spider flash	HR_SUIT_MATCH_S PIDER_SWF	WIDGET	Rest Function
Suitability Matching getRowData	HR_SUIT_MATCH_F LEX_GRD	REST	Rest Service
Suitability Matching saveRowData	HR_SUIT_MATCH_F LEX_SRD	REST	Rest Service
Talent Profile Lookup Data AM	HR_TP_LKUP_DAT A_AM	REST	Rest Service
Talent Profile Lookup init AM	HR_TP_LKUP_INIT_ AM	REST	Rest Service

## Configuring the Predefined Report Templates Menu

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

Name	Function	Type	Functionality
Seeded 2 People Comparison Template Function	PERCM2TP	SUBFUNCTION	Reporting Access
Seeded 3 People Comparison Template Function	PERCM3TP	SUBFUNCTION	Reporting Access
Seeded Single Person Profile Template Function	PEREMPTP	SUBFUNCTION	Reporting Access

You can exclude the functions that you do want managers to use from the copied menus.



---

# Setting up Information for the Succession Planning Functionality

## Setting Up the Succession Planning Functionality

To enable talent managers and plan administrators to use the Succession Planning functionality, you must complete the following setup tasks.

### To set up information for the Succession Planning functionality:

1. Link the following succession plan information types to the responsibilities that users access:
  - Employee Succession Planning Information
  - Job Career Management Information
  - Position Career Management Information

Use the Information Type Security window to link EITs to a responsibility.

See: *Setting Up Extra Information Types For a Responsibility, Oracle HRMS Configuring, Reporting, and System Administration Guide*

2. Define the lookup types required for succession planning:

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

**Employee Succession Planning Information**

<b>Segment</b>	<b>Lookup Type</b>	<b>Any Other Information</b>
Key Person	Yes No	-
Succession Potential	READINESS_LEVEL	-
Retention Potential	PER_RETENTION_POTENTIAL	-
Start Date	Not applicable	The application automatically populates the segment with the latest appraisal start date.
End Date	Not applicable	The application automatically populates the segment with the latest appraisal end date.
Appraisal Completion Date	Not applicable	The application automatically populates the segment with the latest appraisal completion date.
Impact of Loss	PER_SP_IMPACT_OF_LOSS	

**Job Career Management Information**

<b>Segment</b>	<b>Lookup Type</b>
Key Role	Yes No
Turnover Rate	PER_SUCC_PLAN_RISK_LEVEL

### **Position Career Management Information**

<b>Segment</b>	<b>Lookup Type</b>
Key Role	Yes No
Turnover Rate	PER_SUCC_PLAN_RISK_LEVEL

See: Defining the Lookups for 9-Box Matrixes in Oracle Succession Planning, page 3-2

3. Set up profile options. See: Profile Options in Oracle Succession Planning, page 2-19
4. Complete the extra information required for succession plans for worker, jobs, and positions using the following windows and pages:
  - For a worker, use the Employee Succession Planning Information page in Oracle Succession Planning. You can also use the Extra Person Information window in Oracle HRMS. Oracle Succession Planning displays the EIT information when talent managers or administrators view details of successors in the Worker Plan Details tab, Manage Plans tab, and Succession Plans: Overview page.

**Note:** If your enterprise uses Performance Management Plan Appraisals, then you need not manually enter the Succession Potential and Retention Potential segments of the Employee Succession Information EIT. The application uses the appraisal's Advancement Potential region values. It populates the Succession Potential segment with the Advancement Potential region's Readiness Level value and Retention Potential segment with the Retention Level value.

- For a position, use the Extra Position Information window in Oracle HRMS.
- For a job, use the Extra Job Information window in Oracle HRMS.

See: Extra Information Types for Succession Plans, page 2-22

5. Define permissions for jobs, positions, or workers using the Define Role and Worker Details page, Permissions for Role or Worker region. See: Defining Additional Details and Permissions for Worker, Jobs, and Positions , page 6-6
6. Add segments to the Add'l Succession Planning Det descriptive flexfield to capture additional information required for succession plans in your enterprise. This

flexfield appears as the Additional Succession Details region in the Create Succession Plan and Update Succession Plan pages.

7. If you plan to use approvals for succession plans, then complete the following steps:
  1. Set the SP: Approval Required profile option to Yes. See: Profile Options in Oracle Succession Planning, page 2-19
  2. Create rules to route succession plans for approvals using Oracle Approvals Management (AME). The application does not automatically route succession plans for approvals if you just set the SP: Approval Required profile option to Yes. You must define AME rules. To define AME rules, use the Oracle Self Service Human Resources (SSHRMS) transaction type. Complete these steps:
    1. Navigate to the Approvals Management Business Analyst responsibility.
    2. In the Quick Links regions, click Configuration Variables.
    3. Select the Oracle Self Service Human Resources (SSHRMS) transaction type and click Go.
    4. Query the AME rule associated with SSHRMS transaction type: SSHR rule for at most 1 approver in supervisor chain
    5. Click Add Condition.
    6. Add the workflow name "SP Approval Process" to the rule.

For more information on configuring AME rules, see: Default Use of AME Configuration in SSHR, *Oracle SSHR Deploy Self-Service Guide*

3. Configure the workflow process: Succession Planning Approval Process (HR\_SP\_APPROVAL\_PRC), if required based on your business and enterprise requirements. Although Oracle provides this workflow process, we recommend that you leave this process intact and create your own process if any process changes are required. The Oracle Workflow Builder enables you to copy the delivered process and modify it to suit your requirements. For more information, see: Configuring Workflow Attribute Values, *Oracle SSHR Deploy Self-Service Guide*
4. Use the Succession Planning Preferences page and set preferences to display analytical reports for succession plans in your enterprise. See: Defining Succession Planning Preferences , page 6-10
5. Display regions in the Worker Plan Details tab, Talent Profile region to view additional person specific details:
  - Person Extra Information Types (EITs)

- Person Special Information Types (SITs)
- Custom content

See: Configuring Regions in the Talent Profile Region of the Worker Plan Details Tab, page 6-11

**Note:** If you have already configured these regions on the Talent Profile function, then you can use those regions to view additional information.

8. Hide the Audit Details region in the Create and Update Succession Plan pages using personalization, if you use approvals for succession plans. If you use approvals, the Created By and Last Updated By fields in this region display the name of the last approver instead of the person who creates or last updates the plan.

### **Display Succession Plans for Ex-Employees:**

To display successions plans created for ex-employees and ex-contingent workers, you must set the SP: Show Terminated Worker Details to Yes. See: Profile Options in Oracle Succession Planning, page 2-19

## **Viewing Permissions and Details for Workers or Roles**

Using the Succession Planning for Administrators responsibility, plan administrators can navigate to the Permissions for Role or Worker page to view permissions defined for a worker, job, or position.

From the Succession Planning responsibility, managers can navigate to the Permissions for Role or Worker page to view permissions defined for a worker. If the administrator creates a plan for a job or position and assigns the plan to a manager, then the manager can view the permissions for the job or position only if the Display Permissions parameter is set to Yes for that role.

To view permissions defined for workers, jobs, or positions, select the appropriate search criterion. When you select a worker, job, or position, select the name and click Go to view additional details and permissions for the worker, job, or position.

For example, additional details and plan permissions are defined for a worker: John Smith. When you search for the worker John Smith, you can view the following information in the search results table:

- Whether managers can view business permissions when they create or update succession plans for John.
- The maximum number of succession plans that managers can create for John.

- The maximum number of probable successors who can be identified for John.
- Whether managers can select contingent workers or applicants as probable successors for John.
- Whether managers can select any worker as a probable successor for John.

## What's Next

For information on creating and updating permissions, see: Defining Additional Details and Permissions for Worker, Jobs, and Positions, page 6-6

## Defining Additional Details and Permissions for Workers, Jobs, and Positions

Use the Role and Worker Details page to define permissions for workers, jobs, and positions. You can select the method that the application must use to analyze the readiness of successors in a plan.

### **Permissions that Administrators and Talent Managers can Define:**

Using the Succession Planning for Administrators responsibility, plan administrators can define additional details and permissions for a worker, job, or position. These permissions apply when successions plans are created for workers, jobs, or positions.

Using the Succession Planning responsibility, managers can also define permissions for workers. If the administrator creates a plan for a job or position and assigns the plan to a manager, then the manager can only view the permissions but cannot update the permissions. If the administrator creates a plan for a worker and assigns that plan to a manager, then the manager can view and update permissions for the worker.

### **Using the Define Role and Worker Details Page:**

The following paragraphs explain the information that you can define using the Define Role and Worker Details page.

#### **Selecting Role or Worker:**

In the Select Role or Worker section, select the worker, job, or position to define additional details and plan permissions. Note that when you define permissions, these apply to the worker, job, or position that you select and not to the succession plans created for the worker, job, or position.

#### **Selecting the Method to Calculate Readiness**

In the Additional Information for Role or Worker, select the method that the application must use to analyze the readiness of successors in a plan. By default the value to calculate the risk is set to Average Readiness Percent. The lack of readiness of

successors is a risk for a plan. The risk can be either the low readiness percent of the probable successors identified in the plan to move on to a higher role or lower number of probable successors identified for a succession plan.

The Readiness and Risk Analysis of Probable Successors report provides information on the risk associated with probable successors identified for key high potential workers. For this report, the application calculates the high, medium, and low value bands based on the readiness analysis calculation method that you select in the Readiness Analysis Based on field. For more information see: How the application performs readiness analysis to indicate the plan risk, page 6-7

### **How the application performs readiness analysis to indicate the plan risk**

When defining permissions for a job, position, or worker, an administrator can select any one of the following options in the Readiness Analysis Based on field:

- Average Readiness Percent. This is the default value.
- Maximum Readiness Percent
- Minimum Readiness Percent

The following examples explain the impact of selecting each one of the options.

#### **Example 1:**

The following example explains the method of readiness calculation if the Minimum Readiness Percent option is selected:

Vision Senior Manager succession plan has the following probable successors:

1. Alice Smith with readiness of 80%
2. Ted Harris with readiness of 60%
3. Maria Fernandez with readiness of 40%

In this case, the application calculates risk as:  $100 - \text{the Minimum Readiness Percent}$ , which is  $100 - 40 = 60\%$ . Therefore, the risk aspect of this plan is Medium, as it is in the 25-75% range.

#### **Example 2:**

The following example explains the method of calculation if the Average Readiness Percent option is selected:

Vision Territory Sales Manager succession plan identifies the following probable successors:

1. Robert Wise with readiness of 20%
2. Amy Price with readiness of 20%

3. Tracy Wilson with readiness of 30%

Plan Average Readiness Percent is calculated as  $20+20+30/3=23.33\%$ . In this case, the application calculates risk as:  $100 - \text{Plan Average Readiness Percent}$ , which is  $100-23.33=76.67\%$ . Therefore, the risk aspect of this plan is High, as it is higher than 75%.

### **Example 3:**

The following example explains the method of calculation if the Maximum Readiness Percent option is selected for a plan:

Alison Brown VP succession plan identifies the following successors:

1. Julie Palmer with readiness percent of 20%
2. Andrew Bright with readiness percent of 20%
3. James Snow with readiness percent of 30%

In this case, the application calculates risk as  $100 - \text{the Maximum Readiness Percent}$ , which is  $100-30=70\%$ . Therefore, the risk aspect of this plan is Medium as it is in the range of 25-75%.

### **Defining Permissions for Role or Worker**

In the Permissions for Role or Worker section, define the following permissions for the selected role or worker:

- **Display Permissions:** This field controls the display of Plan Permissions region on the Create Succession Plan and Update Succession Plan pages. If you select Yes, then managers can view business permissions when they create or update plans for the selected job, position, or worker. If you select No, then managers cannot view business permissions when they create or update plans for the selected job, position, or worker.
- **Maximum Plans for a Role or Worker:** This field controls the maximum number of successions plans that can be defined for the selected role or worker. For example, if the value for this field is set to 1, then only one succession plan can be created for the role or worker.
- **Maximum Successors for a Role or Worker:** This field controls the maximum successors that can be selected for a role or worker. When counting the maximum number, the application considers the number of active plans in which the worker is identified as a probable successor and whether the worker's succession status is Active.
- **Select Contingent Workers as Successors:** This field defines whether managers can select contingent workers as probable successors in plans for a job, position or worker. If you select Yes, then contingent workers can be selected as successors in plans for a job, position, or worker.

- **Select Applicants as Successors:** This field defines whether managers can select applicants as probable successors in plans for a job, position or worker. If you select Yes, then applicants can be selected as probable successors in plans for a job, position or worker. Only applicants whose application status is Accepted can be selected as probable successors.
- **Select any Worker as Successor:** This field controls the display of the Add Successors button on the Create Succession Plan and Update Succession Plan pages. If you select Yes, then the Add Successors button appears and managers can select any worker as a probable successor. If you select No, then the Add Successors button does not appear and managers must select probable successors using the Show Suitable Successors feature, which is a competency based search.

### **Example of how plan permissions work**

In this example, Barry Erickson is a plan administrator and defines the following permissions for a worker.

Barry completes the following steps:

1. Logs in to the Succession Planning for Administrator responsibility.
2. Selects the Succession Planning link.
3. Navigates to the Succession Planning Portal and clicks the Manage Plans tab.
4. Clicks the Plan Permissions link. The Permissions for Role or Worker page appears.
5. Clicks the Define Permissions button. The Define Role or Worker Details page appears.
6. Selects Terence Bennet as the worker to define permissions.
7. Enters the following values in the permissions fields:
  1. Display Permissions: Yes.
  2. Maximum Plans for a Role or Worker: 3.
  3. Maximum Successors for a Role or Worker: 3.
  4. Select Contingent Workers as Successors: Yes.
  5. Select Applicants as Successors: No.
  6. Select any Worker as Successor: No.

Now, Blair Palmer, manager of Terence Bennet logs in to the Succession Planning responsibility to create a succession plan for Terence.

Blair completes the following steps:

1. Selects the Succession Planning link.
2. Clicks the Manage Plans tab.
3. Clicks Create. The Create Succession Plan page appears.
4. Views the Plan Permissions region and selects contingent workers as probable successors for Terence. Note that the Add Successors button is not visible.
5. Clicks the Show Suitable Successors button and initiates a competency based search for probable successors for Terence.

### **Updating Permissions:**

Plan administrators can query and update permissions for all jobs, positions, and workers within their security profile.

## **Defining Succession Planning Preferences**

Use the Succession Planning Preferences page and set preferences to display analytical reports for succession plans in your enterprise.

### **Setting Preferences to View Succession Analytics:**

Plan administrators and talent managers can view analytical reports to analyze succession planning in their enterprise.

Select the option to display succession metrics. You can select:

- Whether the succession metrics is displayed in a graphical format only
- Whether the succession metrics is displayed in a summarized tabular format only
- Whether the succession metrics is displayed in both graphical format and summarized tabular format

### **Setting Preferences to View Succession Plans:**

Plan administrators and talent managers can view recently reviewed plans and plans that would be available for review in the Manage Plans tab region of the Succession Planning Portal.

In the View Succession Plans region, as a plan administrator or talent manager, you can set a preference to enable the application to display:

- Plans reviewed in the last specific number of days. For example, if the plan administrator sets the preference to view plans reviewed in the last 30 days, then

the Manage Plans tab region displays plans reviewed in the last 30 days from the system date.

- Plans that will come up for review in the next specific number of days. For example, if the plan administrator sets the preference to view plans that will come up for review in the next 30 days, then the Manage Plans tab region displays plans that will come up for review in the next 30 days from the system date.

## Configuring Regions in the Talent Profile Region of the Worker Plan Details Tab

You can configure the Talent Profile region in the Worker Plan Details tab to display person EIT, SIT, and custom content.

If you have already configured these regions on the Talent Profile function, then you can use those regions to view additional information.

### Prerequisites:

Following are prerequisite steps before you can configure regions in the Talent Profile region of the Worker Plans tab.

1. Set up the following profile options to enable the Oracle Application Framework Personalization feature:
  - Personalize Self-service Defn
  - FND: Personalization Region Link Enabled
  - Self Service Accessibility Features

For information on the profile options, refer to the *Oracle Application Framework Personalization Guide*

2. Set up descriptive flexfield segments to record EIT data. EITs are defined using descriptive flexfields.

See: Extra Information Types, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

3. Set up key flexfield segments to record SIT data. SITs are stored in a key flexfield combination table where the combination of segments must be unique.

See: User Definable Key Flexfields, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

To display the regions, you must navigate to the Succession Planning Portal page (PerSuccPortalHomePG).

Follow the steps discussed in these topics to display regions:

The steps to configure regions in the Talent Profile page and Talent Profile section in the Worker Plan Details are the same.

See: Displaying Person Extra Information Types (EITs) as Talent Profile Page Regions, page 4-23

See: Displaying Person Special Information Types (SITs) as Talent Profile Page Regions, page 4-27

See: Displaying Custom Content as Talent Profile Page Regions, page 4-29

## Mapping Succession Planning Lookup Values to Nine Box Values

This topic explains how plan administrators can use the following pages:

- **Nine Box Values: Overview**
- **Define Nine Box Mapping**

### Prerequisites

Oracle Succession Planning matrixes do not directly use the succession planning lookup values. These matrixes display ratings on a scale of 1-3 using the nine box lookup values. To correctly represent performance, potential, retention, and impact of loss ratings of workers in the matrixes, you must map the succession planning lookup values to the nine box lookup values.

Before you map nine box values, you must:

1. Define the lookup types required for succession planning, page 3-2
2. Define the lookup types for 9-Box matrixes, page 3-3

See: Defining the Lookups for 9-Box Matrixes in Oracle Succession Planning, page 3-2

To map succession planning lookup values to the nine box values:

1. Log in to the Succession Planning for Administrators responsibility.
2. Navigate to the **Succession Planning Portal** page.
3. Click the **Manage Plans** tab.
4. Click the **Map Nine Box Values** link in the **Administration Tasks** section. The **Nine Box Values: Overview** page appears where you can search for mapped values. See: Using the Nine Box Values: Overview Page, page 6-13

Click **Map Nine Box Values** to navigate to the **Define Nine Box Mapping** page to map succession planning lookup values to the nine box values. See: Using the Define Nine Box Mapping Page, page 6-13

### **Using the Nine Box Values: Overview Page:**

Use this page to search and manage nine box mapping values.

You can select a succession planning lookup type and a nine box level and search if mapping exists between the succession planning lookup value and nine box value. You can view and delete mappings of succession planning lookups with nine box levels.

To map a succession planning lookup type value with a nine box level value, click **Map Nine Box Values**. The **Define Nine Box Mapping** page appears.

### **Using the Define Nine Box Mapping Page:**

When you select a nine box level, you can view the lookup values defined for the nine box level. Select nine box level lookup values that you want to map to the succession planning lookup value. Click **Save** and **Continue Mapping** to save your mapping and map more values. Otherwise, you can click **Apply** to save the mapping and return to the **Nine Box Values: Overview** page.



---

## Configuring Suitability Matching

# Configuring Suitability Matching

## Configuring Suitability Matching

This topic provides details about the Suitability Matching module.

### *Suitability Matching Options*

<b>Category</b>	<b>Option</b>	<b>Access by Responsibility</b>
Find a Person for a Work Opportunity	Find Suitable People by Role	Manager, HR Professional
Find a Person for a Work Opportunity	Find Suitable People by Competency	Manager, HR Professional
Find a Person for a Work Opportunity	Compare People by Current Role	Manager, HR Professional
Find a Person for a Work Opportunity	Compare Named Successors for a Position	HR Professional
Find a Person for a Work Opportunity	Compare Applicants for a Vacancy	Manager, HR Professional
Find a Work Opportunity for a Person	Find Work Opportunities by Role	Manager, Employee, HR Professional
Find a Work Opportunity for a Person	Find Work Opportunities by Competency	Manager, Employee, HR Professional
Find a Work Opportunity for a Person	Compare Pending Applications	Manager, Employee, HR Professional
Find a Work Opportunity for a Person	Compare Succession Options	HR Professional

Category	Option	Access by Responsibility
Find a Work Opportunity for a Person	Compare Current Assignments	Manager, Employee, HR Professional

## Menu and Function Names

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

### *Menu and Function Names*

User Menu Name	Function Name
Manager Self-Service (LINE_MANAGER_ACCESS_V4.0)	Suitability Matching Mgr (HR_SUITABILITY_MATCH_MGR_SS)
Employee Self-Service (EMPLOYEE_DIRECT_ACCESS_V4.0)	Suitability Matching (HR_SUITABILITY_MATCH_SS)
Contingent Worker Self-Service (HR_CWK_DIRECT_ACCESS)	Suitability Matching (HR_SUITABILITY_MATCH_SS)
HR Professional (HR_PROF_SELF_SERVICE_V4.0)	Suitability Matching Hr (HR_SUITABILITY_MATCH_HR_SS)

## Workflow

Suitability Matching uses no configurable workflow processes.

## Tips and Instructions

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

The following table describes the tips and instructions.

**Tips and Instructions**

---

<b>Region</b>	<b>Attribute Name</b>	<b>Message Name</b>
AddCompetenciesPG	SelectCompInst	HR_INST_ADD_COMP_TO_LIST
CompGapsPG	SMCompGapsInst	HR_INST_COMP_GAPS_SS
ComparePeopleListPG	PersonListInst	HR_INST_PERSON_LIST
CompareSuccessorsListPG	PersonListInst	HR_INST_PERSON_LIST
CurrentAssignmentsPG	CurrentAssnInst	HR_INST_ASSIGNMENT_LIST
GraphByCompetencePG	GraphCompInst	HR_INST_GRAPH_COMP
GraphByPersonPG	GraphPersonInst	HR_INST_GRAPH_PERSON
GraphByWorkOppPG	GraphWorkOppInst	HR_INST_GRAPH_WORKOPP
PersonCompetenciesPG	PersonCompInst	HR_INST_PERSON_SELECT_COMP
PersonListPG	PersonListInst	HR_INST_PERSON_LIST
RefineSearchPG	RefineSearchInst	HR_INST_REFINE_SEARCH
SManagerOptionsPG	ManagerOppInst	HR_INST_SUITMATCH_LMDA_OPTIONS
SManagerOptionsPG	WorkOppInst	HR_INST_WORK_OPP_OPTIONS
SManagerOptionsPG	PersonOppInst	HR_INST_PERSON_OPP_OPTIONS
SOptionsPG	HROptionsInst	HR_INST_SUITMATCH_LMDA_OPTIONS

---

<b>Region</b>	<b>Attribute Name</b>	<b>Message Name</b>
SOptionsPG	WorkOppInst	HR_INST_WORK_OPP_OPTIONS
SOptionsPG	PersonOppInst	HR_INST_PERSON_OPP_OPTIONS
SMPersonOptionsPG	PersonPageOppInst	HR_INST_SUITMATCHEDA_OPTIONS
SMTTrainingActivitiesPG	SMTTrainActInst	HR_INST_TRAIN_ACT_SS
SelectCompetenciesPG	SelectCompInst	HR_INST_SELECT_COMP
SelectMultiRolePG	SelectRoleInst	HR_INST_MULTI_SELECT_ROLE
SelectRolePG	SelectRoleInst	HR_INST_SELECT_ROLE
SelectRolePG	CompareByRoleInst	HR_INST_COMPARE_PEOPLE_ROLE
SelectRolePG	SelectPositionInst	HR_INST_SELECT_POSITION
SelectRolePG	SelectVacancyInst	HR_INST_SELECT_VACANCY
SuccessionOptionsPG	SuccOptionsInst	HR_INST_SUCCESSION_OPTIONS
SuitableWorkOppListPG	WorkOppListInst	HR_INST_SUITABLE_WORKOPP_LIST
VacancyListPG	VacancyListInst	HR_INST_VACANCIES_LIST
WorkOppListPG	WorkOppListInst	HR_INST_WORKOPP_LIST
MultiJobLovPG	SearchInst	FND_LOV_GO
MultiOrganizationLovPG	SearchInst	FND_LOV_GO

Region	Attribute Name	Message Name
MultiPositionLovPG	SearchInst	FND_LOV_GO
MultiVacancyLovPG	SearchInst	FND_LOV_GO

## Configurable Flexfields

Suitability Matching uses no configurable flexfields.

## Profile Options

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

The following table describes the profile options.

### *Profile Options*

Profile	Configurable Level	Values (default value in boldface)	Value Required?
HR: SM Manager Find Work Opp Menu (HR_SM_PERSONAL_ACTIONS_MENU)	Responsibility	<b>HR_SM_PERSONAL_FUNCTIONS</b> (at Responsibility: HR Professional) <b>HR_SM_PERSONAL_FUNCTIONS</b> (at Responsibility: Manager Self-Service)	Yes
HR: SM Manager Find Person Menu (HR_SM_MANAGER_ACTIONS_MENU)	Responsibility	<b>HR_SM_MANAGER_FUNCTIONS</b> (at responsibility: HR Professional) <b>HR_SM_MANAGER_FUNCTIONS</b> (at responsibility: Manager Self-Service)	Yes

Profile	Configurable Level	Values (default value in boldface)	Value Required?
HR: SM Employee Find Work Opp Menu (HR_SM_EMP_PERSONAL_ACTIONS_MENU)	Responsibility	<b>HR_SM_EMP_PERSONAL_FUNCTIONS</b> (at responsibility: Employee Self-Service)	Yes



---

**Managing Default Nine Box Matrix  
Templates**

# Default Nine Box Matrix Templates

## Using the Default Nine Box Matrix Templates to Assess Workforce

Oracle Succession Planning provides the following default templates to display talent matrixes in the nine box format:

- Default Retention vs. Impact of Loss
- Default Performance vs. Potential
- Default Performance vs. Retention

These templates are of 3\*3 matrix type.

## Default Nine Box Matrix Templates

Oracle Succession Planning uses default templates to display talent matrixes in the following interfaces.

- **Talent Profile** page (of an employee). For more information, see *Using Talent Profile as Managers*, page 11-5.
- **Worker Plan Details** tab in the **Succession Planning Portal** page
  - Select the following actions:
    - Performance Matrix (Potential)
    - Performance Matrix (Retention)
  - View matrixes for a worker in a nine box when you compare a worker's:
    - Potential with performance
    - Retention with performance
    - Retention with impact of loss
  - View successors identified for a worker and identify the worker's placement in the talent matrix grids.
  - View succession plans for a worker and identify the worker's placement in the talent matrix grids.

For information, see *Using the Worker Plan Details Tab*, page 13-7.

- **Create Succession Plan** page  
Click **9-Box Comparison** to assess the performance and potential of successors. For more information, see *Creating Succession Plans*, page 13-23.
- **Talent Matrix** tab in the **Succession Planning Portal** page  
You can use the default templates or create custom templates. For more information, see *Using the Talent Matrix Template Page*, page 9-3.



---

# Managing Talent Matrix Templates

# Managing Talent Matrix Templates

## Using Talent Matrix

The Talent Matrix that you view depends on the configuration choice that your enterprise has made.

1. An Oracle Application Development Framework (ADF)-based Talent Matrix. To view ADF-based Talent Matrix, implement Oracle WebLogic Server and set the *SP: Use Talent Matrix* profile option to Yes. If these steps are completed, then the ADF-based Talent Matrix is accessible from the following interfaces:
  - Succession Planning Portal, Talent Matrix tab
  - Succession Planning Portal, Create Succession Plan or Update Succession Plan page, 9 - Box Comparison button
2. A Talent Matrix PDF report. If the *SP: Use Talent Matrix* profile option is set to No, then the Talent Matrix PDF report is directly accessible from the following interfaces:
  - Succession Planning Portal, Talent Matrix tab
  - Succession Planning Portal, Create Succession Plan or Update Succession Plan page, 9 - Box Comparison button

Talent Matrix:

- Provides the flexibility to define the matrix type as per the business requirements of the enterprise. Enterprises can select from the supported matrix types. For example, either 2\*2 or 4\*4 matrix type.
- Supports multi-dimensional attributes to create a talent matrix. Different combinations of Performance Rating, Retention Potential, Readiness Level, and Impact of Loss dimensions help to identify suitable successors. Enterprises have the flexibility to specify the dimensions of the X and Y axes of the Talent Matrix.
- Enables plan administrators to create different templates by selecting the matrix type and X and Y axes dimensions based on the business requirements of the enterprise. Talent Managers can use these templates to view the Talent Matrix for a particular combination.
- Enables managers to view the talent matrix of workers in their hierarchy. The Change Manager option helps to view the talent matrix of workers in different managers' hierarchy.

- Helps identify the assessment level of workers and view succession details of workers placed in specific grids. An icon is displayed for a worker to indicate if a succession plan exists for the worker or not. Using this icon, plan administrators or managers can view succession details or create succession plans for the worker.
- Enables printing of the Talent Matrix and also view a list of workers for whom succession details are incomplete.

## Talent Matrix Functions

The following functions are available to plan administrators and managers:

- **Manage Talent Matrix Templates:** Administrators can use this function to search for published Talent Matrix templates, create, update, or delete Talent Matrix templates.
- **View Talent Matrix for Performance:** Administrators and managers can use this function to select a Talent Matrix template to view the talent matrix for workers in a logged in manager's hierarchy.

For information on the delivered menu for Talent Matrix, see: Oracle Succession Planning Predefined Components, page 2-4

## Key Concepts

- Using the Talent Matrix Template Page, page 9-3
- Creating or Updating Talent Matrix Templates, page 9-4
- Viewing the Talent Matrix, page 11-33

## Using the Talent Matrix Template Page

**Important:** This topic explains how to use the Talent Matrix Template page. For information on how to map succession planning lookup values to nine box values using the Nine Box Values: Overview and Define Nine Box Mapping pages, see: Mapping Succession Planning Lookup Values to Nine Box Values, page 6-12.

If the Manage Talent Matrix Templates function is added to the responsibility, then plan administrators can navigate to the Talent Matrix Template page using the Talent Matrix for Performance, Manage Talent Matrix Templates link of the responsibility.

For an overview, see: Using Talent Matrix, page 9-2

As an administrator, you can:

## Search for Templates

Search for draft and published templates using search criteria such as the matrix name, matrix type, and business group. If you select the Published Templates check box, then the search results display only published templates.

## View Search Results

The search results table displays information about the current or published templates depending on the search criteria that you use. From the search results table, you can perform the following tasks for a talent matrix template:

- Preview
- Update
- Delete

## Create Template

Click the Create Template button to navigate to the Create or Update Talent Matrix Template page to create or update a template. See: Creating or Updating Talent Matrix Templates, page 9-4.

## Creating or Updating Talent Matrix Templates

For an overview, see:

- Using Talent Matrix, page 9-2
- Using the Talent Matrix Template Page, page 9-3

Use the **Create or Update Talent Matrix Template** page to create or update talent matrix templates to use in succession planning. You navigate to this page by clicking **Create Template** on the **Talent Matrix Template** page. You can create different templates based on your business requirements.

**Important:** Before you create template, analyze the business requirements of your enterprise and then define templates.

### Updating Default Nine Box Matrix Templates

Oracle Succession Planning provides the following default templates to display talent matrixes. These default templates are of 3\*3 matrix type and display assessment information in the nine box format.

- Default Retention vs. Impact of Loss
- Default Performance vs. Potential
- Default Performance vs. Retention

You can use the **Create or Update Talent Matrix Template** page to update the default templates. However, you cannot delete default templates. The application displays an error message if you try to delete default templates.

## Creating Talent Matrix Template

The following steps are involved in creating a talent matrix template:

1. Enter template details.
2. Specify labels for the grids based on the matrix chosen.
3. Map the XY axes lookup values to each level in the matrix.

To create a talent matrix template, provide the following details.

## Entering Template Details

1. Enter the template name.
2. Select the matrix type.

**Note:** The application supports the matrix type until 3\*3. You can define up to 3 levels of X and Y axes.

3. Select the X and Y axes values from the following supported values:
  - Impact of Loss
  - Performance Rating
  - Readiness Level
  - Retention Potential

The following table provides an example of combinations of the X and Y axes that you can choose:

S.No	X-Axis Dimension	Y-Axis Dimension
1	Performance Rating	Retention Potential
2	Performance Rating	Readiness Level
3	Performance Rating	Impact of Loss
4	Retention Potential	Performance Rating
5	Retention Potential	Readiness Level
6	Retention Potential	Impact of Loss
7	Impact of Loss	Performance Rating
8	Impact of Loss	Readiness Level
9	Impact of Loss	Retention Potential
10	Readiness Level	Performance Rating
11	Readiness Level	Impact of Loss
12	Readiness Level	Retention Potential

4. Enter the start date from which this talent matrix template is valid.
5. Enter the date up to which the talent matrix template is valid.
6. Select the **Global Template** check box if you want to create a template to use across business groups.

## Specifying Grid Labels

In the **Grid Labels** section, the number of grids and the XY axes column values depend on the selections that you make in the Template Details section.

1. Enter a label for each of the grids to identify the assessment level of the grid. When a template is selected to view the Talent Matrix of the workforce, the application places workers in relevant grids of the Talent Matrix based on the talent matrix mappings and the succession planning extra information entered for each worker.

2. Select the check boxes of the appropriate grids to enable users view succession details of workers placed in specific grids in the Talent Matrix. If you do not select a check box of a grid, then succession planning details are not visible available for workers placed in that grid. If you select a check box of a grid, then in the Talent Matrix, an icon is displayed for a worker to indicate if a succession plan exists for the worker or not. Using this icon, managers or administrators can view succession details or create succession plans for the worker. See: Viewing the Talent Matrix, page 11-33.

Depending on the matrix type chosen, the grids in the rows represent the X axis values on a scale from the lowest to the highest and the grids in the columns represent the Y axis values on a scale from the lowest to the highest.

Here is an example of providing the grid labels.

In this example, you are creating a template to assess high performers and their readiness level.

You select a 3\*3 Matrix type. The X and Y axes values are: Performance Rating and Readiness Level. In this scenario, you can view 9 grids for the 3\*3 matrix type.

You name the grids as follows:

Y Axis - Readiness Level

X Axis - Performance Rating

---

Rising	Outstanding	Star
Above Average	Competent	Meets Expectations
Learner	Needs Training	Average

---

As the template is to identify high performers and their readiness level, you select the check boxes for the grids with labels: Rising, Outstanding, and Star only. When managers select this template to view the Talent Matrix they can view succession details and create successions plans if plans are not available for workers placed in these grids. To prevent managers from creating succession plans for grids such as Learner, Needs Training, and Average, do not select the check boxes of these grids.

After you provide the grid labels, map the XY axes lookup values to each of the levels in the matrix. For example, if you select 3\*3 matrix type, then there are 3 levels of the XY Axes to map.

## Mapping XY Axes

In this region, map the XY axes lookup values to each level in the matrix. For example, for a 4\*4 matrix, there would be 4 levels. Multiple lookup values can be mapped to each

level on the X and Y axes. You can choose to map XY axes simultaneously or independently.

- If you select the Map Axes Simultaneously option, then select the XY axes level first and map the lookup values for each level of the XY axes.
- If you select the Map Axes Independently option, then select the X axis level and Y axis level to map the lookup values for each level respectively.

To understand mapping the XY axes lookup values to each level in the matrix, the following example uses the 3\*3 Matrix type and Performance Rating and Readiness Level as the X and Y axes values respectively.

### Mapping X Axis

In your enterprise, you have defined the following values for the PERFORMANCE\_RATING lookup type to assess the performance of workers:

1. Below Average
2. Average
3. Satisfactory
4. Good
5. Excellent
6. Outstanding

---

Level	Lookup Values
1	Below Average Average
2	Satisfactory Good
3	Excellent Outstanding

---

### Mapping Y Axis

In your enterprise, you have defined the following values for the READINESS\_LEVEL lookup type to assess the readiness level of workers:

1. Low
2. Average

- 3. Medium
- 4. Good
- 5. High
- 6. Excellent

Level	Lookup Values
1	Low Average
2	Medium Good
3	High Excellent

### Saving Mapping

When you map each level of the XY axes to the grid, make sure to save the mapping.

### Reviewing and Saving Template

After you complete mapping the lookup values for the X axis and Y axis values, you can save the mapping and review the template definition.

### Publishing Template

Select the **Publish** check box to publish the template. When you publish the template, plan administrators or managers can select this template when viewing talent matrix of workers in a manager's hierarchy. See: Viewing the Talent Matrix, page 11-33.



---

## Using the Organization Chart

# Using the Organization Chart

## Using the Organization Chart

An Organization Chart is a visual representation of relationships between workers in an organization. The organization chart that managers and workers view is based on supervisor hierarchy.

## How to Use the Organization Chart and Control Panel

The application uses the Hierarchy Viewer component of Oracle Application Development Framework (ADF) to render the Organization Chart. The hierarchy viewer Control Panel enables a user to manipulate the position and appearance of the organization chart at runtime. The organization chart includes a control panel, a number of nodes, and links that connect the nodes. The nodes are connected to panel cards that display worker information. You can expand or collapse a hierarchy.

The following section explains how to use the Control Panel:

- Click the Hide or Show Control Panel button to hide or expand the Control Panel.
- Use the Pan Control to reposition the organization chart component within the viewport.
- Use the Zoom to Fit control to zoom a organization component so that all nodes are visible within the viewport.
- Use the different Zoom Controls to zoom the organization chart components.
- Use the Panel Selector to view information. The panel information that you can view depends on your role. For example, managers can view Contact Information, Employment Details, and Salary of workers in their hierarchy. Workers can view Contact Information and Employment Details of other workers in their organization.
- Use the Layout Selector to change the layout of the organization chart. You can select layouts such as vertical top down, horizontal left-to-right, tree, radial or circle.

## Using Panel Cards

Panel cards display different sets of information depending on whether the user is a manager or worker. You can click the navigation buttons at the bottom of the panel card to navigate to the next set of information. You can isolate each of the cards and restore cards to the chart. Click the upward navigation arrow to view the hierarchy above any

specific worker.

For information on Organization Chart:

- For managers in Oracle SSHR, see: *Using the Organization Chart as Managers in Oracle SSHR, Oracle SSHR Deploy Self-Service Capability Guide*
- For workers in Oracle SSHR, see: *Using the Organization Chart as Workers in Oracle SSHR, Oracle SSHR Deploy Self-Service Capability Guide*
- In Oracle Succession Planning, see: *Using the Organization Chart in Oracle Succession Planning, page 10-3*

## Using the Organization Chart in Oracle Succession Planning

Talent managers and plan administrators can navigate to the Organization Chart using the Succession Planning responsibility, Talent Profile function. If you are a manager, then when you click the Organization Chart tab, the chart displays the hierarchy of the manager who logs in. By default, the chart displays ten direct reports. If there are more than ten direct reports, then you can navigate to the next set of direct reports using the side navigator icon. For each selected node, you can view the hierarchy and then drill further down the hierarchy. If there are workers on secondary assignment reporting to a manager, then the organization chart represents this reporting structure in a dotted line format. If you are not a manager and do not have any workers reporting to you, then you view your panel card.

See: *How to Use the Organization Chart and Control Panel, page 10-2*

## Searching for Workers

You can perform a simple or an advanced search to search for workers. Search results of a simple search display person name and job. Advanced search criteria includes first name, last name, manager name, job and organization. Click Add Fields to add additional search criteria. You can save your searches to use them in future. Following your search, click the person name to view the person's details and hierarchy in the organization chart format.

## Viewing Worker Information

As a talent manager or administrator, you can view the following information in different panels for a worker:

- **Contact Information:** View email, work phone, and address of the worker. Email is a link that helps you to send mail from the organization chart. When you click the Email link, the email client on your local machine opens and the worker's email ID automatically appears in the To field.

- **Employment Details:** View the employee number, work location, organization, job, position, and grade.
- **Salary:** View the worker's salary, salary currency, grade, and grade range. You can view salary details of workers in your hierarchy only. You cannot view salary details of workers above your hierarchy or workers outside of your security profile although you can view their contact and employment information.

**Note:** You can view information in panel fields only if data is available. For employees, you can view their Contact Information, Employment Details, and Salary. For contingent workers, you can view their Contact Information and Employment Details.

## Performing Actions

You can perform actions for workers only if your administrator has enabled functions from the Actions list. Click the Actions link on the person details panel to perform self-service action for a worker, such as change the job, pay, or manager, and update education qualifications. When you click the Actions link and select an action, the action is launched in a page in the Manager Actions tab. The links of all manager actions appear in the side navigation container on the left side of the page. You can complete the transaction and move on to other transactions without leaving the page. You can process multiple transactions for a worker from this page. The manager actions that you can perform depend on the configuration choices that your enterprise makes. Manager self-service actions can be performed only for primary assignments and not secondary assignments.

## Viewing and Performing Manager Actions for Multiple Assignments

Managers can view details and perform manager actions for multiple assignments of an employee or worker in their hierarchy, if the subordinate has more than one assignment. If there are workers on secondary assignment reporting to a manager, then the organization chart represents this reporting structure in a dotted line format.

**Note:** Managers can perform these actions for multiple assignments only if the Multiple Assignments feature is enabled and the appropriate security access is setup.

## Identifying Key High Potential Workers

You can identify key high potential workers for whom succession plans exist and workers who do not have at least one succession plan. Icons below the Actions link help you to identify such workers.

**Note:** You can view these icons if your administrator has assigned you the Succession Planning functions.



---

## Using Talent Profile

# Identifying Workforce Talent Using Talent Profile

## An Overview of Talent Profile

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

## Talent Profile Features

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

### View Complete Talent Information

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

- Competencies
- Qualifications
- Other Professional Qualifications
- Previous Employment
- Learning Certifications
- Training
- Appraisals
- Performance Objectives
- Succession Plans
- Job History
- Career Path

- Work Preferences
- Salary
- Benefits
- Monetary Compensation
- Compensation Statement
- Other Information
- Performance Ratings

### View Details and Process Manager Actions for Multiple Assignments

Managers can view details and perform manager actions for multiple assignments of an employee or worker in their hierarchy, if the subordinate has more than one assignment. Managers can perform these actions for multiple assignments only if the Multiple Assignments feature is enabled and the appropriate security access is setup.

### View 9-Box Matrixes

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

- Potential vs. Performance: This matrix provides information on performance and leadership potential.
- Retention vs. Performance: This matrix provides information on performance and risk of loss.

Oracle Succession Planning uses default templates to display nine box matrixes. For more information, see *Using the Default Nine Box Matrix Templates to Assess Workforce*, page 8-2.

These matrixes derive values from the following products:

- Performance Value

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

- Potential Value

If your enterprise uses Oracle Performance Management, then the application derives the Potential value from the **Readiness Level** field in the **Advancement**

**Potential** region on the **Give Final Ratings: Main Appraiser** page of the Appraisals function. Otherwise, the Potential value is derived from the **Succession Potential** field in the Employee Succession Planning Information EIT or the **Employee Succession Management Information** page.

- Retention Value

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

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

## Compare Talent Profiles

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

## Print Talent Profiles

Managers can print a worker's talent profile. The application provides a default print option with all the configured regions. Managers have the flexibility to select required talent profile regions and print a custom view of the talent profile.

## Maintain Notes

Workers and managers can create and update notes to record important information about their talent profile such as notes about appraisals or learning plans.

## Create and Use Tags

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

## Perform Self-Service Actions

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

Managers can use Talent Profile to launch personal actions or manager actions from a side navigator. The side navigator helps managers to process and complete multiple self-service transactions for themselves or for workers in their hierarchy without leaving the page. Workers can use Talent Profile to launch personal actions from the side navigator and complete multiple self-service personal actions without leaving the page.

### **Use Talent Profile Based on Role Requirements**

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

### **Use Flexible Search Options to Search for Talent Profiles**

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

## **Key Concepts**

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

- Using Talent Profile as Managers, page 11-5
- Using Talent Profile as Workers, page 11-15
- Viewing Performance Matrix (Potential), page 11-24
- Viewing Performance Matrix (Retention), page 11-27
- Comparing Talent Profiles, page 11-31
- Generating Printable Profiles, page 11-21

## **Using Talent Profile as Managers**

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

**Note:** Currently, Talent Profile supports only supervisor hierarchy.

As a manager, when you navigate to the **Talent Profile** page of a worker, you can:

- View worker details
- View talent information presented in different regions
- View Performance Matrix (9-Box)
- Perform talent actions
  - View Performance Matrix (Potential)
  - View Performance Matrix (Retention)
  - Compare talent profiles
  - Print talent profiles
- Perform self-service actions

## View Worker Details

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

## View Details and Process Manager Actions for Multiple Assignments

Managers can view details and perform manager actions for multiple assignments of an employee or worker in their hierarchy, if the subordinate has more than one assignment. In the **Assignment** field, select the assignment of a worker to view details and perform the appropriate manager actions. Employment details and the talent profile information presented in the talent regions vary depending on the assignment that you select. Managers can perform these actions for multiple assignments only if the Multiple Assignments feature is enabled and the appropriate security access is setup.

## View Talent Information Presented in Different Regions

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

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

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

## Competencies

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

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

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

## Appraisals

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

**Note:** Talent Profile does not display information from self appraisals.

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

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

## Performance Objectives

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

Click the **More** link to navigate to the **Performance Management** page of the worker. For each performance management plan, you can view a list of tasks. The application enables these tasks at appropriate times during the performance-management period.

### View Performance Objectives of an Indirect Report

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

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

## Qualifications

The **Qualifications** region displays the education qualifications information such as qualification type, title, and status.

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

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

## Learning Certifications

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

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

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

## Training

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

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

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

## Other Professional Qualifications

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

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

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

## Job History

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

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

## Career Path

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

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

## Benefits

You can view the benefits enrollments of the worker such as programs, plans, and options. You can also view with the benefits' coverage start date and coverage amounts.

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

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

## Work Preferences

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

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

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

## Previous Employment

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

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

## Monetary Compensation

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

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

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

## Succession Plan

The succession plan information that you view for a worker depends on the release level of Oracle Succession Planning that your enterprise uses:

If your enterprise uses R12.2 Oracle Succession Planning then you can view the following information:

- Successors Identified for

This table lists the potential successors of the worker. You can view information such as workers' performance level, succession and retention potential, and readiness percent.

- Succession Plans

This table lists the succession plans identified for the worker. Information that you can view includes whether the succession plan is for a worker or role, plan status, and the workers' performance level, succession and retention potential, and readiness percent.

**Note:** If your enterprise uses pre R12.2 Oracle Succession Planning then you can view the following information:

- Successor For:

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

- As Successor:

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

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

## Other Information

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

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

## Salary

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

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

## Compensation Statement

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

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

## Performance Ratings

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

**Note:** If your enterprise uses Oracle Performance Management to evaluate workforce performance, then your enterprise can hide the

**Performance Ratings** region . In this case, use **Appraisals** region to view performance ratings.

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

### **Any Other Additional Information**

In addition to the default Talent Profile regions, your enterprise can configure and display regions specific to your enterprise requirements, such as Additional Residency Information or Passport Details.

### **Perform Talent Actions**

You can:

#### **View 9-Box Matrixes**

You can compare a worker's:

- **Potential vs. Performance:** This matrix provides information on performance and leadership potential.
- **Retention vs. Performance:** This matrix provides information on performance and risk of loss.

Oracle Succession Planning uses default templates to display nine box matrixes. For more information, see *Using the Default Nine Box Matrix Templates to Assess Workforce*, page 8-2.

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

You can use performance matrixes information for succession planning.

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

See: *Using Performance Matrix (Potential) and Performance Matrix (Retention)*, page 11-24

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

## Compare Profile

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

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

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

See: Comparing Talent Profiles, page 11-31

## Print Talent Profile

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

See: Generating Talent Profiles, page 11-21

## Perform Self-Service Actions

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

When you select an action and click **Go**, the action is launched in a page with a side navigation container in the **Manager Actions** tab. All the manager action links appear in the side navigation container on the left side of the page. You can select any one of the action links from the side navigation container, complete a transaction, and move on to other transactions without leaving the page. You can process multiple manager actions for a worker from this page.

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

## Using Talent Profile as Workers

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

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

**Note:** Employees or contingent workers can view talent profile of their primary assignment only.

### View Employment Details

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

### View Talent Information Presented in Different Regions

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

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

- Competencies
- Appraisals
- Performance Objectives
- Qualifications
- Learning Certifications
- Training
- Other Professional Qualifications

- Job History
- Career Path
- Benefits
- Work Preferences
- Previous Employment
- Monetary Compensation
- Other Information
- Salary
- Compensation Statement
- Performance Ratings

## Competencies

The Competencies region displays your current competencies. You can view the level and status of the competencies.

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

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

## Appraisals

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

**Note:** Talent Profile does not display information from self appraisals.

Click the More link to navigate to the My Appraisals page to view or update your appraisals. The Appraisal Process, *Oracle Performance Management Implementation and User Guide*

## Performance Objectives

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

Click the More link to navigate to the Performance Management page to view your Performance Management Task List. The tasks are those appropriate to the performance management plan (PMP) and can vary from one PMP to another. The application enables these tasks at appropriate times during the performance-management period. For example, you can perform the appraisal-management task during the appraisal-task period only.

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

## Qualifications

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

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

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

## Learning Certifications

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

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

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

## Training

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

Click the More link to navigate to the Learner Home page to view additional training details. Use the Catalog page to browse categories, search for and enroll in courses, or

request enrollment from an approver.

After you enroll in training, the Talent Profile page displays the updated information.

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

## **Other Professional Qualifications**

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

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

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

## **Job History**

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

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

## **Career Path**

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

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

## **Benefits**

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

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

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

## **Work Preferences**

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

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

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

### **Previous Employment**

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

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

### **Monetary Compensation**

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

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

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

### **Other Information**

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

### **Salary**

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

### **Compensation Statement**

This region displays your total compensation information including compensation awards and benefits. Compensation information can include monetary awards such as salary and bonus awards as well as non-monetary awards such as stock options.

Benefits information can include medical and dental benefits (optionally showing the cost to your organization).

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

### Performance Ratings

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

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

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

Click the More link to navigate to the My Information page that displays details such as salary, performance, and absence.

### Any Other Additional Information

In addition to the default Talent Profile regions, your enterprise can configure and display regions specific to your enterprise requirements, such as Additional Residency Information or Passport Details.

### Perform Self-Service Actions

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

When you select an Action and click Go, the action is launched in a page with a side navigation container in the Personal Actions tab. All the personal action links appear in the side navigation container on the left side of the page. You can complete the transaction launched, and move on to other transactions without leaving the page. You can process multiple transactions for yourself.

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

## Print Talent Profile

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

## Generating Printable Profiles

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

## Contents of the Printable Profile

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

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

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

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

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

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

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

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

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

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

#### Performance

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

#### Potential

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

#### Retention

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

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

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

# Assessing Workforce Talent

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

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

- See: Using Performance Matrix (Potential), page 11-24
- See: Using Performance Matrix (Retention), page 11-27

**Important:** Oracle Succession Planning uses default templates to display nine box matrixes. For more information, see *Using the Default Nine Box Matrix Templates to Assess Workforce*, page 8-2. If your enterprise has implemented and configured the steps to use the default templates, then you can view the talent matrixes. Otherwise, the application provides an option to download PDF reports of the talent matrixes instead of displaying them.

## Using Performance Matrix (Potential)

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

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

## What the Performance Matrix (Potential) Represents

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

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

### Assess Performance

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

### Assess Potential

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

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

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

### **Assessing Performance and Potential**

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

- **Performance**

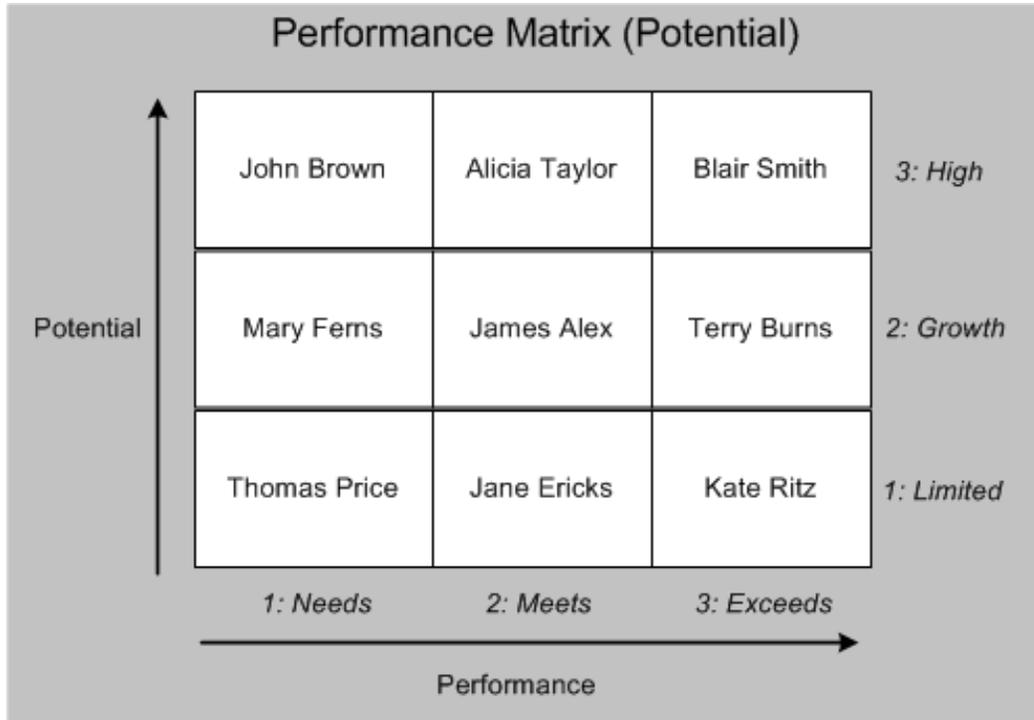
If your enterprise uses Oracle Performance Management, then the application derives the Performance value from the Overall Rating field on the Give Final Ratings: Main Appraiser page of the Appraisals function. Otherwise, the Performance value is derived from the Performance window in Oracle HRMS.

- **Potential**

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

### **Understanding Performance Matrix (Potential)**

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



This examples uses the following rating scales:

**Performance**

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

**Potential**

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

qualities.

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

- Blair Smith  
Indicates that Blair exceeds the required performance level and has high potential.
- Terry Burns  
Indicates that Terry exceeds the required performance level and has moderate growth potential.
- Kate Ritz  
Indicates that Kate exceeds the required performance level and has limited potential.

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

### **Benefits of Performance Matrix (Potential)**

The Performance Matrix (Potential):

- Provides performance and potential details of the workforce in a clear and intuitive manner.
- Helps managers to determine the potential and job fit of workers.
- Helps enterprises identify potential internal top performers for future positions.
- Facilitates managers to make informed decision about career and succession planning for their workers.

### **Using Performance Matrix (Retention)**

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

Managers require tools to:

- Examine the number of workers who will continue to remain in the enterprise or likely to move out of the enterprise.
- Analyze the connection between performance and retention prospects.

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

## Assessing Performance and Retention

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

- **Performance**

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

- **Retention**

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

## What Performance Matrix (Retention) Represents

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

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

### Assess Performance

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

### Assess Retention

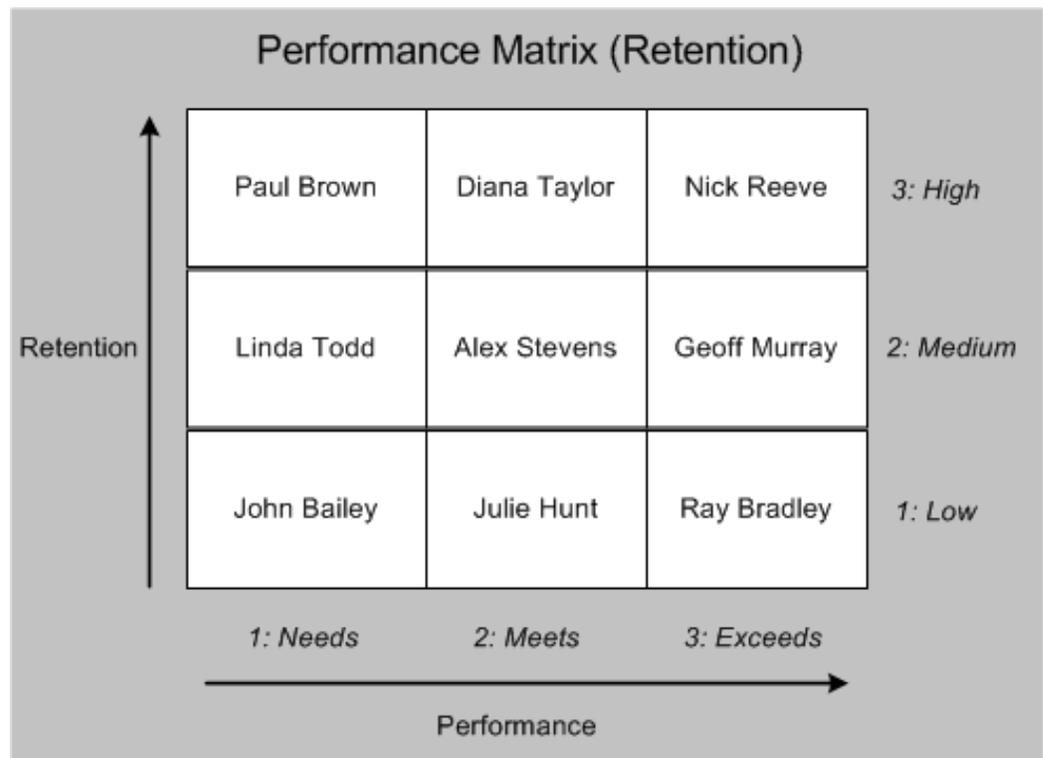
Use the vertical y-axis to understand the retention prospect of workers. The matrix plots retention on a scale of 1 to 3.

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

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

### Understanding Performance Matrix (Retention)

This diagram shows the Performance Matrix (Retention) for workers who report to Mike Connors starting with Nick Reeve who is placed on the Exceeds Performance/High Retention grid



This examples uses the following rating scales:

#### Performance

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

Indicates that the worker has exceeded the required level of performance.

#### Retention

- 1: Low

Indicates that the risk of losing the worker is high.

- 2: Medium

Indicates that the risk of losing the worker is moderate.

- 3: High

Indicates that the risk of losing the worker is minimal.

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

- Nick Reeve

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

- Geoff Murray

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

- Ray Bradley

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

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

### **Benefits of Performance Matrix (Retention)**

The Performance Matrix (Retention):

- Provides details of performance and retention prospects of the workforce in a clear and intuitive manner.
- Helps enterprises to identify potential internal top performers who have high retention prospect for future positions.
- Facilitates analysis of retention and turnover strategies of the enterprise. For example, managers can use the matrix information and develop retention strategies and reward systems that increase employee involvement, and promote development, recognition, and advancement of the workforce.

## Comparing Talent Profiles

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

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

## Generating the Compare Profile Report

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

## Contents of the Compare Profile Report

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

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

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

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

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

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

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

#### Performance

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

#### Potential

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

#### Retention

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

Indicates that the risk of losing the worker is minimal.

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

See: Using Performance Matrix (Potential) and Performance Matrix (Retention), page 11-24

## Viewing the Talent Matrix

For an overview, see:

- Using Talent Matrix, page 9-2
- Using the Talent Matrix Template Page, page 9-3

As a plan administrator or manager, when you click the Succession Planning link, the Succession Planning Portal appears where you can view the Talent Matrix tab.

## Viewing the Talent Matrix

1. Select the template of your choice. You can select a default template or a custom template if available.
2. Select the manager to view the talent matrix for workers in a manager's hierarchy.

When you select the template and a manager and click **Go**, the application displays the ADF-based Talent Matrix or the Talent Matrix PDF report depending on the configuration that your enterprise has made.

## Talent Matrix PDF Report

The Talent Matrix PDF report contains the following information:

- **Employment Details:** This table shows employee name, assignment number, manager, department, and job.
- **Template Details:** This table shows details of the template that is used to generate the Talent Matrix PDF report. You can view details such as name of the template, matrix type, x and y axes dimensions.
- **View workers in relevant grids of the Talent Matrix based on the talent matrix mappings and the succession planning extra information entered for each worker.** Only workers directly reporting to the manager are plotted in the Talent Matrix grids and not the indirect reports.

## ADF-Based Talent Matrix

You can view workers directly reporting to a manager placed in talent matrix grids. To enable the manager to have a complete picture of their assignees plotted on the Talent Matrix, the list of (only) direct assignees not plotted on the Talent Matrix is displayed in the View Employees with Incomplete Succession Details list.

Depending on the talent matrix template grid specifications, an icon is displayed for each worker to indicate if a succession plan exists for the worker or not. If a succession plan is defined for a worker, then a check mark is displayed and if the plan is not created, then an X icon acts as the indicator. Click the check mark to view the successor details for the worker or employee.

**Note:** While creating a template, if the administrator has not selected the check box for a specific grid, then the succession details will not be available for workers placed in that grid.

Click the X mark to define the succession plan for the worker or employee. To view the worker person card, click a worker's name in the grid. You can view the worker's job details and succession indicators. The succession indicators depend on the X and Y axes of the selected talent matrix template. For example, if the template is to assess impact of loss and retention, only those values are shown.

### Performing Actions

- **View Employees with Incomplete Succession Details:** Click this link to view a list of employees for whom succession planning details are incomplete. The incomplete succession details are based on the X or Y or both axes values in the talent matrix template. For example, if the template is to assess performance rating and readiness level and if relevant information is not available for an employee, then that employee is listed in View Employees with Incomplete Succession Details list.
- **Print Talent Matrix:** Use this action to print the Talent Matrix report in an Adobe Acrobat PDF format.

---

## Using Suitability Matching in Oracle Succession Planning

# Using Suitability Matching in Oracle Succession Planning

## Using Suitability Matching in Oracle Succession Planning

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

### Suitability Matching Options Available to Managers

The Suitability Matching page for managers displays two regions:

**Note:** You must select the Include Core Competencies check box to use competency requirements defined at the business group level in the Suitability Matching feature. Otherwise, the application uses the competency requirements set below the business group level.

In the Find a Person for a Work Opportunity region, the Include Core Competencies check box appears for these actions:

- Find Suitable People by Role
- Find Suitable People by Competency

In the Find a Work Opportunity for a Person region, the Include Core Competencies check box appears for the Find Work Opportunities by Competency action.

When you compare current assignments, the application uses competency requirements defined for organization, job, and position of the assignment and does not consider competency requirements defined at the business group level.

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

Using the options available in this region, managers can:

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

competencies that the managers specify.

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

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

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

Using the options available in this region, managers can:

- Find work opportunities for an individual who fits the competency profile for one or more jobs, positions, departments, vacancies, or some combination of these criteria.
- Find work opportunities for an individual employee or contingent worker who matches a list of competencies that the managers specify.

On the Find suitable successors for Worker : Suitable People page, a pop-up window displays details of workers such as contact and employment, when managers place the mouse over a worker name in the following tables:

- Matches All Essential and Desirable Competencies
- Matches All Essential Competencies
- Matches All Desirable Competencies
- Matches Some or No Essential or Desirable Competencies
- Compare an applicant's competency profile with the competency profiles of existing vacancies.
- Compare, by competency, an employee's or contingent worker's current assignments.

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

## Using the Suitability Analyzer

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

The Suitability Analyzer tool appears when you click the Suitability Analyzer button on

the Find Suitable Successors for Worker: Suitable People page to compare worker competencies. The competencies that you view on this page are the competencies of the worker for whom you are creating a succession plan.

See: Using the Suitability Analyzer, page 12-4

## Using the Suitability Analyzer

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

Suitability Analyzer appears when you click the Suitability Analyzer button on the Find Suitable Successors for Worker: Suitable People page to compare worker competencies.

The Suitability Analyzer enables you to view competency ratings for selected workers and competencies. You can select specific workers and compare the competency ratings.

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

**Important:** The application displays the OJET-based Suitability Analyzer or the ADF-based Suitability Analyzer depending on the configuration that your enterprise has made.

---

## Using the Succession Planning Functionality

# Managing Succession Plans

## Overview of the Succession Planning Portal

Oracle Succession Planning provides talent managers and plan administrators with portals for quick access to succession plans and to launch relevant actions from a single page.

Talent managers can access the Succession Planning Portal using the Succession Planning responsibility. Plan administrators can access the Succession Planning Portal using the Succession Planning for Administrators responsibility.

The Succession Planning Portal presents information in the following three tabbed regions:

## Analytics

Plan administrators and talent managers can view analytics for succession plans using these reports:

- **Succession Plan Details for High Potential Workers:** Use this report to plan and manage the succession planning process in your enterprise. Talent managers and plan administrators can use this report to track key high potential workers with and without succession plans. See: Succession Plan Details for High Potential Workers Report, page 14-2
- **Readiness and Risk Analysis of Successors for High Potential Workers:** Use this report to view the risk associated with probable successors identified for key high potential workers. The risk may be either in terms of low readiness of the probable successors to assume higher responsibilities or inadequate number of successors identified. See: Readiness and Risk Analysis of Successors for High Potential Workers Report, page 14-4
- **Turnover Analysis of Key Talent:** Use this report to analyze the turnover details of probable successors identified for key high potential workers. See: Turnover Analysis of Key Talent Report, page 14-6
- **Succession Plan Effectiveness:** Use this report to evaluate the effectiveness of the succession planning and management process in your enterprise based on the number of plans filled by potential successors identified for such plans. See: Succession Plan Effectiveness Report, page 14-8

## Worker Plan Details

Using the Worker Plan Details tab, plan administrators and talent managers can:

- View personal information, employment details, additional succession information.
- View the talent profile of the selected worker.
- View placement of a selected worker of in the various grids of the 9-Box matrix to compare potential with performance, retention with impact of loss, or retention with performance.
- Launch succession planning tasks such as create and update succession plans.
- Launch Performance Matrix (Potential) and Performance matrix (Retention) matrixes.
- Create and maintain additional information for workers using the Worker Succession Management Information action.
- View succession plan details of probable successors who have been identified for a selected worker.
- View details of succession plans created for a selected worker.

See: Using the Worker Plan Details Tab , page 13-7

## Manage Plans

The Manage Plans tab helps plan administrators and talent managers to:

- View recently reviewed succession plans.
- View plans coming up for review.
- Manage succession plans. Search for plans using the options:  
     Search by plan  
     Search by successor

See: Using the Manage Plans Tab, page 13-16

## Map Succession Planning Lookup Values to Nine Box Values

The Map Nine Box Values link is available in the Administration Tasks section of the Manage Plans tab.

Oracle Succession Planning matrixes do not directly use the succession planning lookup values. These matrixes display ratings on a scale of 1-3 using the nine box lookup values. To correctly represent workers' performance, potential, retention, and impact of loss ratings in the matrixes, you must map the succession planning lookup values to the nine box lookup values.

See: Mapping Succession Planning Lookup Values to Nine Box Values, page 6-12

## Define Plan Permissions

The Plan Permissions link is available in the Administration Tasks section of the Manage Plans tab.

Use the Plan Permissions link to define permissions for workers, jobs, and positions. Plan administrators can define additional details and permissions for a worker, job, or position. These permissions apply when successions plans are created for workers, jobs, or positions. Managers can define permissions for workers. If the administrator creates a plan for a job or position and assigns the plan to a manager, then the manager can only view the permissions but cannot update the permissions. If the administrator creates a plan for a worker and assigns that plan to a manager, then the manager can view and update permissions for the worker. See: Defining Additional Details and Permissions for Workers, Jobs, and Positions, page 6-6

## Talent Matrix

Depending on the Talent Matrix (ADF-based or PDF report) that is enabled, talent managers and plan administrators can use this tab to view the Talent Matrix of workers in a manager's hierarchy.

See: Viewing the Talent Matrix, page 11-33.

## Succession Planning for Talent Managers and Administrators

Talent managers can access the Succession Planning Portal using the Succession Planning responsibility. Plan administrators can access the Succession Planning Portal using the Succession Planning for Administrators responsibility. The Succession Planning Portal provides the following tabs:

- Analytics
- Worker Plan Details
- Manage Plans

For more information, see: Overview of the Succession Planning Portal, page 13-2

The following table lists the tasks that talent managers and administrators can perform using the Succession Planning portal:

Task	Talent Managers	Administrators
View Workers in the Worker Plan Details tab	View workers in their supervisor hierarchy based on their security profile.	View workers based on their security profile.
Create Succession Plans	<p>Create plans for workers.</p> <p>Create plan details for jobs or positions by identifying appropriate successors if plan administrators assign job or position plans to managers.</p>	Create plans for workers, jobs, or positions.
<p>Update Succession Plans</p> <p><b>Note:</b> Specific rules apply when updating plans. See: Updating and Completing Succession Plans, page 13-28</p>	<p>Update plans for workers.</p> <p>Update plans for jobs or positions if plan administrators assign job or position plans to managers.</p>	Update plans for workers, jobs, or positions.
<p>Delete Succession Plans</p> <p><b>Note:</b> Specific rules apply when deleting plans. See: Updating and Completing Succession Plans, page 13-28</p>	<p>Delete plans for workers.</p> <p>Delete plans for jobs or positions if plan administrators assign job or position plans to managers.</p>	Delete plans for workers, jobs, or positions.
Search Succession Plans	<p>Search plans for workers.</p> <p>Search plans for jobs or positions if plan administrators assign job or position plans to managers. Based on the setup such plans will be displayed in the Recently Reviewed Plans or Plans to be Reviewed table on the Manage Plans tab.</p>	Search plans for workers, jobs, or positions.

<b>Task</b>	<b>Talent Managers</b>	<b>Administrators</b>
Define Permissions	<p>Define permissions for workers.</p> <p>Only view permissions for jobs or positions if plan administrators assign job or position plans to managers. For worker plans assigned by plan administrators, managers can view and update the permissions.</p>	Define permissions for workers, jobs, or positions.
View Permissions	<p>View permissions for workers.</p> <p>View permissions for jobs or positions if plan administrators assign job or position plans to managers. For worker plans assigned by plan administrators, managers can view and update permissions.</p>	View permissions for workers, jobs, or positions.
Delete Permissions	<p>Delete permissions for workers.</p> <p>Cannot delete permissions for jobs or positions even if plan administrators assign job or position plans to managers.</p>	Delete permissions for workers, jobs, or positions.
View Talent Matrix ( <i>If your enterprise has enabled the Talent Matrix feature</i> )	View talent matrix of workers in a manager's hierarchy.	View talent matrix of workers in a manager's hierarchy.

## Using the Analytics Tab

Using the Analytics tab in the Succession Planning Portal, talent managers and plan administrators can view the following reports:

- **Succession Plan Details for High Potential Workers:** Use this report to plan and manage the succession planning process in your enterprise. Talent managers and plan administrators can use this report to track key high potential workers with and without succession plans. See: Succession Plan Details for High Potential Workers

Report, page 14-2

- **Readiness and Risk Analysis of Successors for High Potential Workers:** Use this report to view the risk associated with probable successors identified for key high potential workers. The risk may be either in terms of low readiness of the probable successors to assume higher responsibilities or inadequate number of successors identified. See: **Readiness and Risk Analysis of Successors for High Potential Workers Report**, page 14-4
- **Turnover Analysis of Key Talent:** Use this report to analyze the turnover details of probable successors identified for key high potential workers. See: **Turnover Analysis of Key Talent Report**, page 14-6
- **Succession Plan Effectiveness:** Use this report to evaluate the effectiveness of the succession planning and management process in your enterprise based on the number of plans filled by potential successors identified for such plans. See: **Succession Plan Effectiveness Report**, page 14-8

## Using the Worker Plan Details Tab

This topic explains how talent managers and plan administrators can use the **Worker Plan Details** tab in the **Succession Planning Portal**, when they navigate to this tab using the Succession Planning or Succession Planning Administrator responsibility.

### Initial View of the Worker Plan Details Tab

When a plan administrator or manager logs in and navigates to the **Worker Plan Details** tab, the application displays details of the person who has logged in. When the plan administrator or manager searches for a worker or clicks the name of a worker in the left pane, the application displays the selected worker's details.

### View Details of Workers

In the left pane:

- Talent managers can view a list of workers in their supervisor hierarchy.
- Administrators can view a list of workers that they can access based on their security profile.

Administrators can directly search for any worker within their security profile using the Name field and drill down to a specific worker to view their details.

You cannot search for terminated workers as the Talent Profile search does not support the display of terminated workers. To search for terminated workers for whom succession plans are available, use the **Manage Plans** tab. The ability to view terminated workers and their probable successors, depends on how your enterprise defines the SP:

Show Terminated Worker Details profile option. See: Profile Options in Oracle Succession Planning, page 2-19

Plan administrators or talent managers can select a worker in the left pane to perform the following tasks:

## View Employment Details

The employment details are read-only. The employment details include the organization that the selected worker belongs to, job and position of the worker, supervisor, and location of the worker.

## View Succession Management Information

The succession management details that you view for the selected worker are retrieved from the **Extra Person Information** window in Oracle HRMS or the **Employee Succession Management Information** page.

You can view the following information:

- Whether the worker is a key worker
- Leadership or succession potential that indicates how soon the worker can move on to a higher role
- Performance or appraisal rating of the worker
- What is the likelihood of the worker continuing to work with the organization
- Impact of the worker leaving the enterprise

## View Contact Details

The contact details that you view are read-only and include information such as the e-mail id of the worker, work, home and mobile phone numbers, and the primary address.

## Launch Succession Planning Related Actions

You can select the following actions:

### Performance Matrix (Potential)

Select this action and click **Go** to view the **Performance Matrix** page that shows the Performance vs. Potential matrix of all the direct reports in a manager's hierarchy. See: Using Performance Matrix (Retention), page 11-24

### **Performance Matrix (Retention)**

Select this action and click **Go** to view the **Performance Matrix** page that shows the Performance vs. Retention matrix of all the direct reports in a manager's hierarchy. See: Using Performance Matrix (Retention), page 11-24

### **Create and Maintain Succession Plan**

Select this action to display the **Succession Plans: Overview** page. You can search for existing plans or create plans. See: Using the Succession Plans: Overview page, page 13-20.

### **Worker Succession Management Information**

Select this link to create or update details related to the worker's succession plan. In the **Employee Succession Planning Information** page, which displays the Employee Succession Planning Information EIT fields, you can add or update the following details for the selected worker:

- Whether the worker is key worker
- Succession potential value
- Performance or appraisal rating value
- Retention potential value
- Impact of loss value

### **View Matrixes for a Worker in 9-Box**

Oracle Succession Planning uses default templates to display nine box matrixes. For more information, see Using the Default Nine Box Matrix Templates to Assess Workforce, page 8-2.

For the selected worker, you can compare the worker's:

- **Potential with Performance:** This matrix provides information on the performance and leadership potential of a worker. You can view the Performance rating on the horizontal x-axis on a scale of 1 to 3 and the Potential rating on the vertical y-axis on a scale of 1 to 3.
- **Compare Retention with Impact of Loss:** This matrix provides information on the risk of loss and the effect of the worker leaving the enterprise. You can view the Retention rating on the horizontal x-axis on a scale of 1 to 3 and the Impact of Loss rating on the vertical y-axis on a scale of 1 to 3.
- **Retention with Performance:** Provides information on a worker's performance and

risk of loss. You can view the Performance rating on the horizontal x-axis on a scale of 1 to 3 and the Retention rating on the vertical y-axis on a scale of 1 to 3.

These matrixes derive values from the following products:

- Performance Value

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

- Potential Value

If your enterprise uses Oracle Performance Management, then the application derives the Potential value from the **Readiness Level** field in the **Advancement Potential** region on the Give Final Ratings: Main Appraiser page of the Appraisals function. Otherwise, the Potential value is derived from the **Succession Potential** field in the **Employee Succession Planning Information** page or the **Extra Person Information** window.

- Retention Value

If your enterprise uses Oracle Performance Management, then the application derives the Retention value from the **Retention Level** field in the **Advancement Potential** region on the **Give Final Ratings: Main Appraiser** page of the Appraisals function. Otherwise, the Retention value is derived from the **Retention Potential** field in the **Employee Succession Planning Information** page or the **Extra Person Information** window.

- Impact of Loss

The Impact of Loss value is derived from the **Impact of Loss** field in the **Employee Succession Planning Information** page or **Extra Person Information** window.

**Important:** Rating scales on the matrixes are configurable and depend on the ratings scales defined by the enterprise.

For example, your enterprise can define the following rating scales:

#### **Performance**

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

#### **Potential**

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

#### **Retention**

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

#### **Impact of Loss**

- 1: Low: Indicates that the effect of the worker leaving the enterprise is low.
- 2: Medium: Indicates that the effect of the worker leaving the enterprise is moderate.
- 3: High: Indicates that the effect of the worker leaving the enterprise is high.

## **View Talent Profile**

For the selected worker, you can view the following talent profile information:

**Note:** The Talent Profile region that is available in the Worker Plan Details tab region is different from the Talent Profile functionality available with Oracle Succession Planning.

## **Competencies**

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

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

## **Appraisals**

The **Appraisals** region displays the appraisal information using a bar graph. The bar graph is a column chart where the x-axis shows the appraisal period end date and the y-axis shows the appraisal rating of the worker and the total rating value. You can easily distinguish the rating of the worker and the total rating value as the bar graph uses

different color codes. Talent Profile displays information only from appraisals that are given an overall rating, regardless of whether the appraisals are created using the Appraisals function or appraisals are created as part of performance management plans. The bar graph displays information for five appraisals.

**Note:** Talent Profile does not display information from self appraisals.

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

## Qualifications

The **Qualifications** region displays the education qualifications information such as qualification type, title, and status.

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

## Training

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

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

## Job History

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

## Previous Employment

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

## Any Other Additional Information

In addition to the default Talent Profile regions, your enterprise can configure and display regions specific to your enterprise requirements, such as Career Goals.

## View Successors Identified for a Worker

You can view the following information about probable successors identified for the selected worker:

- Succession plan created for the worker.
- Status of the plan, whether the plan is at the Active, Draft, Inactive, or Completed status.
- Name of the probable successor identified for the selected worker. The application displays an icon for a successor, who is terminated. The ability to view succession plans of terminated workers depends on the setting of the SP: Show Terminated Worker Details profile option in your enterprise. If you can view the probable successor who is terminated, then you can update the plan to select other probable successors.
- Succession status of the selected worker for the plan. The application displays the Active, Inactive, or Placed status depending on the succession status of the worker.
- Worker's placement in the Performance vs. Potential 9-Box grid. The placement is based on values selected for the worker in the succession plan.
- Worker's placement in the Performance vs. Retention 9-Box grid. The placement is based on values selected for the worker in the succession plan.
- Worker's placement in the Retention vs. Impact of Loss grid. The placement is based on values selected for the worker in the succession plan.

Oracle Succession Planning uses default templates to display nine box matrixes. For more information, see *Using the Default Nine Box Matrix Templates to Assess Workforce*, page 8-2.

- How ready the probable successor is to assume responsibility for the next identified role.
- Whether the worker is eligible for promotion.
- Ranking of the selected worker when compared to other probable successors for the same plan.
- Additional succession plan details. Click the **Succession Details** icon to navigate to the **Succession Details** page to provide information, such as the earliest and the latest succession date. Indicate whether the worker is eligible for promotion.
- Assignment changes from the time the probable successor is nominated to the plan till the system date so that plan administrator gets a complete view of all the

assignment changes. The assignment changes are tracked for different dates. Note that even if the successor belongs to multiple plans, assignment changes remain the same across plans. When you click the Assignment Changes icon, a pop-up window appears that shows assignment changes such as changes to the employment category, assignment category, supervisor, location, grade step, grade or department. For example, a worker is nominated to a succession plan on 01-Jan-2011. On 01-Feb-2011, there are changes to the organization, job, position, grade and location. Later, on 01-May-2011, there are changes to the organization, assignment category and employee category. The Assignment Changes pop-up displays changes on the dates 01-Feb-2011 and 01-May-2011. You can click the date links, view the old value and new value for the respective parameters.

- Existing attachments available with the plan. You can add attachments, if required to provide further information on the succession plan.

If the **Update** icon is enabled, navigate to the **Update Succession Plan** page to change plan details. The ability to update or delete plans depends on the plan status and plan approval status, if your enterprise has setup approvals. For more information, see: [Updating and Completing Succession Plans, page 13-28](#)

If the **Delete** icon is enabled, you can delete the successor. The ability to delete a successor depends on the plan status and successor's status. For more information, see: [Updating and Completing Succession Plans, page 13-28](#)

## View Succession Plans for a Worker

You can view the following information about succession plans available for the selected worker:

- Succession plan created for the worker.
- Status of the plan, whether the plan is at the Active, Draft, Inactive, or Completed status.
- Name of the worker or the role for which the selected worker is identified as a probable successor.
- Whether the succession plan is for a worker, job, or position .
- Worker's placement in the Performance vs. Potential 9-Box grid. The placement is based on values selected for the worker in the succession plan.
- Worker's placement in the Performance vs. Retention 9-Box grid. The placement is based on values selected for the worker in the succession plan.
- Worker's placement in the Retention vs. Impact of Loss grid. The placement is based on values selected for the worker in the succession plan.

Oracle Succession Planning uses default templates to display nine box matrixes. For more information, see *Using the Default Nine Box Matrix Templates to Assess Workforce*, page 8-2.

- Succession status of the selected worker for the plan. The Active, Inactive, or Placed values are displayed depending on the succession status of the worker.
- How ready the probable successor is to assume responsibility for the next identified role.
- Is the worker eligible for promotion.
- Ranking of the selected worker when compared to the other probable successors for the same plan.
- Additional succession plan details. Click the **Succession Details** icon to navigate to the **Succession Details** page to provide information, such as the earliest and the latest succession date. Select whether the worker is eligible for promotion.
- Assignment changes from the time the probable successor is nominated to the plan till the system date so that plan administrator gets a complete view of all the assignment changes. The assignment changes are tracked for different dates. Note that even if the successor belongs to multiple plans, assignment changes remain the same across plans. When you click the **Assignment Changes** icon, a pop-up window appears that shows assignment changes such as changes to the employment category, assignment category, supervisor, location, grade step, grade or department. For example, a worker is nominated to a succession plan on 01-Jan-2011. On 01-Feb-2011, there are changes to the organization, job, position, grade and location. Later, on 01-May-2011, there are changes to the organization, assignment category and employee category. The Assignment Changes pop-up displays changes on the dates 01-Feb-2011 and 01-May-2011. You can click the date links, view the old value and new value for the respective parameters.
- Existing attachments available with the plan. You can add attachments, if required to provide further information on the succession plan.

If the **Update** icon is enabled, navigate to the **Update Succession Plan** page to change plan details. The ability to update or delete plans depends on the plan status and plan approval status, if your enterprise has setup approvals. For more information, see: *Updating and Completing Succession Plans*, page 13-28

If the **Delete** icon is enabled, you can delete the successor. The ability to delete a successor depends on the plan status and successor's status. For more information, see: *Updating and Completing Succession Plans*, page 13-28

## Using the Manage Plans Tab

This topic explains how talent managers and plan administrators can use the Manage Plans tab in the Succession Planning Portal, when they navigate to this tab using the Succession Planning or Succession Planning Administrator responsibility.

On this tab, plan administrators or talent managers can:

- View recently reviewed plans
- View plans coming up for review
- Search for plans using options such as search by plan or search by successor
- Use the Map Nine Box Values link to map succession planning lookup values to the nine box values. Oracle Succession Planning matrixes do not directly use the succession planning lookup values. These matrixes display ratings on a scale of 1-3 using the nine box lookup values. To correctly represent workers' performance, potential, retention, and impact of loss ratings in the matrixes, you must map the succession planning lookup values to the nine box lookup values.

See: Mapping Succession Planning Lookup Values to Nine Box Values, page 6-12

- Use the Plan Permissions link to define permissions for workers, jobs, and positions. Plan administrators can define additional details and permissions for a worker, job, or position. These permissions apply when successions plans are created for workers, jobs, or positions. Managers can define permissions for workers. If the administrator creates a plan for a job or position and assigns the plan to a manager, then the manager can only view the permissions but cannot update the permissions. If the administrator creates a plan for a worker and assigns that plan to a manager, then the manager can view and update permissions for the worker. See: Defining Additional Details and Permissions for Workers, Jobs, and Positions, page 6-6

## Recently Reviewed Plans

The plans that you view in this table depend on the preference set by the plan administrator in the Succession Planning Preferences page. Plan administrators can set a preference to enable the application to display plans reviewed in the last specific number of days. For example, if the plan administrator sets the preference to display plans reviewed in the last 30 days, then the plans reviewed in the last 30 days from the system date will be displayed in the table.

The following columns are available:

- Plan Details: Name of the succession plan with details of the plan such as whether the plan is for a job, position, or worker with the name of the role or worker.

- Last Updated Date: Date the succession plan was last updated.
- Plan Status: Status of the plan, whether the plan is at the Active, Draft, Inactive, or Completed status.
- View: Click the View icon to navigate to the Succession Plans: Review page and review the succession plan details.
- Update: If the Update icon is enabled, you can update the plan. For more information, see: Updating and Completing Succession Plans, page 13-28

## Plans to be Reviewed

The plans that you view in this table depend on the preference set by the plan administrator in the Succession Planning Preferences page. Plan administrators can set a preference to enable the application to display plans that will come up for review in the next specific number of days. For example, if the plan administrator sets the preference to display plans that will come up for review in the next 30 days, then this table displays plans that will come up for review in the next 30 days from the system date.

The following columns are available:

- Plan Details: Name of the succession plan with details of the plan such as whether the plan is for a job, position or worker with the name of the role or worker.
- Last Updated Date: Date the succession plan was last updated.
- Next Review Date: Date defaults from the created or updated plan.
- Plan Status: Status of the plan, whether the plan is at the Active, Draft, Inactive, or Completed status.
- View: Click the View icon to navigate to the Succession Plans: Review page and review the succession plan details.
- Update: If the Update icon is enabled, then you can update the plan. For more information, see: Updating and Completing Succession Plans, page 13-28

## Plan Search

Plan administrators or talent managers can search for plans using the following options:

- Search by a plan
- Search by a successor

The ability to search for terminated workers to view probable successors identified for

terminated workers depends on the setting of the SP: Show Terminated Worker Details profile option. See: Profile Options in Oracle Succession Planning, page 2-19

## Search for Plans Using the Plan Criteria

Talent managers can search for succession plans for workers in their hierarchy. They can search for job and position plans if such plans are assigned to them by plan administrators. Plan administrators can search for succession plans for workers, jobs, and positions based on their access to workers in their security profile. Plan start or end dates are available as the search criteria. Search for a specific plan using a plan name or plan owner. The security profile defines the list of search values that appear in the Organization, Business Group, Job, or Position fields.

The search results table displays the following information based on the search option that you select.

You can view the following columns in the search results table when you select the Search by Plan option:

- **Name:** Displays the plan name. When you click the plan node, you can view whether the plan is for a job, position, or worker, and based on which the job, position, or worker name is visible. Expand each plan to view names of the successors in the plan.
- **Plan Status:** Displays the plan status for the plan. When you click the plan node, you can view successors identified for a plan and their status.
- **Approval Status:** Indicates the plan status, such as, Approved, Pending Approval, or Rejected.
- **Readiness Percent:** Indicates how ready a successor is to move to the next higher role. This is the readiness percent of the successor for the specific plan.
- **Rank:** Displays ranking of the successor for the plan.
- **Organization:** Organization that the successor belongs to.
- **Business Group:** Business group that the successor belongs to.
- **Talent Profile:** Click the icon to view the talent profile of the probable successor. This icon is not enabled for applicants who are identified as probable successors.

**Note:** A manager who is the plan owner of a succession plan can view only the names of the probable successors for the plan, if the successors are outside the security profile of the manager. The Talent Profile icon for such successors who are outside the security profile of the manager is grayed out. This ensures that the manager is not able to view salary or other sensitive information of workers

who are outside their security profile.

- **View:** Click the View icon to navigate to the Succession Plans: Review page and review the succession plan details.
- **Update:** Update the plan, if the Update icon is enabled. See: Updating and Completing Succession Plans, page 13-28
- **Delete:** Delete the plan, if the Delete icon is enabled. See: Updating and Completing Succession Plans, page 13-28

### **Search for Plans Using the Successor Criteria**

Search for a plan using the search criteria of a probable successor. This search option provides the ability to search for succession plans where readiness percent is between or is equal to a specified range or value. Search for a successor at any one of the statuses: Active, Inactive, or Placed.

You can view the following columns in the search results table when you select the Search by Plan option:

- **Name:** Succession plan name. You can view whether the plan is for a job, position, or worker, based on which the name of the role or worker is displayed.
- **Successor:** Name of the successor.
- **Successor Status:** Succession status of the selected worker for the succession plan, such as, Active, Placed, or Inactive.
- **Approval Status:** Indicates the plan status, such as, Approved, Pending Approval, or Rejected.
- **Succession potential**
- **Performance Rating:** If your enterprise uses Oracle Performance Management, then this column reflects the successor's latest appraisal rating.
- **Risk of loss:** Indicates the likelihood of the successor leaving the enterprise
- **Impact of Loss:** Indicates the effect of the successor leaving the enterprise
- **Readiness Percent:** Indicates how ready the successor is to move to the next higher role. This is the readiness percent of the successor for the specific plan.
- **Rank:** Displays ranking of the successor for the plan.
- **Talent Profile:** Talent Profile: Click the icon to view the talent profile of the probable

successor

- **Comments:** View any feedback or observation related to the succession plan or the successor
- **Update:** Update the plan, if the Update icon is enabled. See: [Updating and Completing Succession Plans](#), page 13-28
- **Delete:** Delete the plan, if the Delete icon is enabled. See: [Updating and Completing Succession Plans](#), page 13-28

## Create Plans

Plan administrators can create succession plans for jobs, positions, and workers. Managers can create succession plans for workers. When plan administrators or talent managers review plans, they can update the plans. If either the administrator or the initial manager who creates the plan adds successors to a plan and then changes the plan owner to a new manager, the new plan owner can control and manage the plan. The new plan owner can also delete successors added by the plan administrator or earlier plan owner.

To create succession plans, see: [Creating Succession Plans](#), page 13-23

## Using the Talent Matrix Tab

Depending on the Talent Matrix (ADF-based or PDF report) that is enabled, talent managers and plan administrators can use this tab to view the Talent Matrix of workers in a manager's hierarchy. Use this tab to view the Talent Matrix of workers in a manager's hierarchy. See: [Viewing the Talent Matrix](#), page 11-33.

## Using the Succession Plans: Overview Page

This topic describes how to use the Succession Plans: Overview page.

From this page, you can:

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

Plan administrators or talent managers can search for plans using the following options:

- Search by a plan
- Search by a successor

The ability to view terminated workers and their probable successors, depends on how your enterprise defines the SP: Show Terminated Worker Details profile option. See:

## Search for Plans Using the Plan Criteria

You can search for plans using the following criteria:

- Succession plan for a job, position, or worker. Managers can search for succession plans for workers in their hierarchy. They can search for job and position plans that are assigned to them by plan administrators. Plan administrators can search for succession plans for workers, jobs, and positions in their security profile.
- Succession plan name
- Start date or end date of the succession plan
- Plan name
- Plan owner
- Plan status, such as, Active, Completed, Draft, or Inactive
- Business group or organization. The values that are available in these fields depend on the security profile of the user.

## Search for Plans Using the Successor Criteria

You can search for a plan using the search criteria of a probable successor. This search provides the ability to search for succession plans where readiness percent is between or is equal to a specified range or value. You can search for a successor at any one of the statuses: Active, Inactive, and Placed.

## Viewing Plan Details

The search results table displays the following information based on the search option selected.

You can view the following columns in the search results table when you select the Search by Plan option:

- Name: Displays the plan name. When you click the plan node, you can view whether the plan is for a job, position, or worker, and based on which the job, position, or worker name can be seen. You can expand each plan to view names of the successors in the plan.
- Plan Status: Displays the plan status for the plan. When you click the plan node, you can view successors identified for a plan and their status.
- Approval Status: Indicates the plan status, such as, Approved, Pending Approval,

or Rejected.

- **Readiness Percent:** Indicates how ready the successor is to move on to the next higher role. This is the readiness percent of the successor for the specific plan.
- **Rank:** Displays ranking of the successor for the plan.
- **Organization:** Organization that the successor belongs to.
- **Business Group:** Business group that the successor belongs to.
- **Talent Profile:** Click the icon to view the talent profile of the probable successor. The Talent Profile icon is not enabled for applicants who are identified as probable successors.
- **View:** Click the View icon to navigate to the Succession Plans: Review page and review the succession plan details
- **Update:** Update the plan, if the Update icon is enabled. See: Updating and Completing Succession Plans, page 13-28
- **Delete:** Delete the plan, if the Delete icon is enabled. See: Updating and Completing Succession Plans, page 13-28

You can view the following columns in the search results table when you select the Search by Plan option:

- **Name:** Succession plan name. You can view whether the plan is for a job, position, or worker, based on which the name of the role or worker is displayed.
- **Successor:** Name of the successor.
- **Successor Status:** Succession status of the selected worker for the succession plan, such as, Active, Placed, or Inactive.
- **Approval Status:** Indicates the plan status, such as, Approved, Pending Approval, or Rejected.
- **Succession potential:** Indicates the successor's ability to move to the next role.
- **Performance Rating:** If your enterprise uses Oracle Performance Management, then this column reflects the successor's latest appraisal rating.
- **Risk of loss:** Indicates the likelihood of the successor leaving the enterprise
- **Impact of Loss:** Indicates the effect of the successor leaving the enterprise
- **Readiness Percent:** Indicates how ready the successor is to move on to the next

higher role. This is the readiness percent of the successor for the specific plan.

- Rank: Displays ranking of the successor for the plan.
- Talent Profile: Talent Profile: Click the icon to view the talent profile of the probable successor
- Comments: View any feedback or observation related to the succession plan or the successor
- Update: Update the plan, if the Update icon is enabled. See: Updating and Completing Succession Plans, page 13-28
- Delete: Delete the plan, if the Delete icon is enabled. See: Updating and Completing Succession Plans, page 13-28

To create succession plans, see: Creating Succession Plans, page 13-23

## Creating Succession Plans

This topic explains how to create succession plans.

### Creating a Succession Plan

Follow these steps to create a succession plan:

#### Entering Plan Details

1. Select the worker, job, or position to create a succession plan. Managers can create succession plans for workers only using the Succession Planning responsibility. Managers can create succession plans for jobs or positions if plan administrators assign job or position plans to them. Plan administrators can select a worker, job, or position to create a succession plan.

**Note:** The ability to create succession plans to identify probable successors for terminated workers depends on how your enterprise configures the SP: Show Terminated Worker Details profile option. If the profile option is set to Yes, then HR Professionals and managers can create succession plans to identify probable successors for terminated workers. You can identify probable successors for the terminated worker only if the termination date is later than the system date or equal to the system date. You cannot create succession plans for terminated workers if the termination date is earlier than the system date. For example, the system date is June 30, 2011 and the termination date of a worker is June 15, 2011.

In this scenario, you cannot create a succession plan for the terminated worker.

2. Select the name of the worker, job, or position based on the value selected in the **Plan for** field.
3. Enter the start and end dates for the period which the plan is applicable. The current date is the start date.
4. Select the plan owner. Plan administrators can create a plan and select a manager as the plan owner to assign the plan to the manager.
5. Accept the default status of the plan, which is Draft. When you create a plan, the default value is always Draft. Enter the plan name and description.
6. Specify the date when the succession plan must be reviewed.

### Viewing Plan Permissions

The **Plan Permissions** region appears depending on the permissions set for the worker, job, or position that you select. See: Defining Additional Details and Permissions for Workers, Jobs, and Positions, page 6-6

If the **Plan Permissions** region is visible, then you can view the following information:

- The maximum number of plans that can be created for a worker, job, or position.
- The maximum number of probable successors that can be selected.
- Whether contingent workers and applicants can be selected as probable successors.
- Whether managers can add any worker as a probable successor. If the **Add Specific Successors** permission is set to Yes, then the **Add Successors** button is visible.

### Adding Attachments

You can add supporting documents as plan attachments.

When creating a succession plan, you can use the following features to find suitable successors:

### Using the Show Suitable Successors Feature

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

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

See: Suitability Matching, page 12-2

### Using the Add Successors Feature

The **Add Successors** button is visible only if the plan administrator sets the **Add Specific Successors** business permission to Yes for the selected worker, job, or position in the **Defining Role and Worker Details** page. Click the **Add Successors** button to select required workers as successors.

### Entering Details of Probable Successors

After you select probable successors using the Show Suitable Successors or Add Successors feature, enter the following information for the probable successors:

- Select the successor's status. You can select Active, Inactive, or Placed status.
- Enter a numeric value, for example 80, as the readiness percentage to indicate how ready the probable successor is to move to the identified role.
- Specify when the worker is eligible to move to a new position.
- Click the **Succession Details** icon to navigate to the **Succession Details** page. Enter the succession dates, such as the earliest date on which a worker can move to a new position. You can select whether the worker is eligible for a promotion. You can provide enterprise specific details for succession plans if the **Additional Succession Details** region is available.
- Add your comments on the succession plan. An **Add Attachment** window appears when you move the mouse over the plus icon in the **Comments** column. You can add text, provide a URL to a relevant document, or attach a supporting document. You can also upload attachments using the **Add Attachment** page that appears when you click the plus icon in the **Comments** column.
- Rank successors for the plan, if you identify more than one successor for a worker or role.
- View the succession hierarchy, which is a visual representation of the successors identified for a worker. The application enables this icon only if a probable successor is identified for the selected worker. By default, the succession hierarchy is displayed downwards from the selected worker's level. See: The Succession

Hierarchy, page 13-31

- View the worker's talent profile. You can view the worker's talent information such as competencies, qualifications, learning certifications, appraisal ratings, and performance objectives. The Talent Profile feature captures and displays complete worker talent details on a single-interface. For more information on using Talent Profile, see: Using Talent Profile as Managers, page 11-5

**Note:** A manager who is the plan owner of a succession plan can view only the names of the probable successors for the plan, if the successors are outside the security profile of the manager. The Talent Profile icon for such successors who are outside the security profile of the manager is grayed out. This ensures that the manager is not able to view salary or other sensitive information of workers who are outside their security profile.

If your enterprise has set up additional information for job, position, and worker, then the following information appears automatically:

- Key role and turnover rate for a role (job or position): The application retrieves information for the position or job from the Extra Position Information window or the **Extra Job Information** window in Oracle HRMS.
- Key person, succession, and retention potential of a person: The application retrieves information for the worker from the **Employee Succession Planning Information** page in Oracle Succession Planning or the **Extra Person Information** window in Oracle HRMS.
- Impact of loss of the worker: The application retrieves information for the worker from the **Employee Succession Planning Information** page in Oracle Succession Planning or the **Extra Person Information** window in Oracle HRMS.

If you change the additional information values when creating a plan, such changes do not impact the information that is already defined for the job, position, or worker in the **Extra Job Information** window, **Extra Position Information** window, **Extra Person Information** window or **Employee Succession Planning Information** page.

## Using 9-Box Comparison

**Note:** Oracle Succession Planning uses default templates to display nine box matrixes.

To assess the performance and potential of the successors, select the applicable successors and click **9-Box Comparison**. Depending on the nine box matrix set up in your enterprise, the application displays either ADF-based nine box matrix or directly displays a Talent Matrix PDF report.

### PDF Report - Nine Box Comparison Matrix

The Talent Matrix PDF report displays employment details and talent matrix mapping with grid labels using the 3\*3 matrix.

The PDF report shows the placement of probable successors in the talent matrix grids for following **default** templates.

- Default Retention vs. Impact of Loss
- Default Performance vs. Potential
- Default Performance vs. Retention

### ADF-Based Nine Box Comparison Matrix

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

- Assess Performance:  
Use the horizontal x-axis to assess the performance of workers. Performance is plotted on three scales.
- Assess Potential:  
Use the vertical y-axis to assess the future potential. Potential is plotted on three scales.

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

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

### Using the Suitability Analyzer

Select probable successors and use the Suitability Analyzer to view competencies of the successors.

### Reviewing the Succession Plan Details

Review details of the succession plans. Click **Submit**. If your enterprise has set up approvals for succession plans, then the application routes the succession plan for further approvals.

## Updating and Completing Succession Plans

See: Updating and Completing Succession Plans, page 13-28

## Updating and Completing Succession Plans

You update a succession plan to modify details such as succession dates or the readiness level. You can record your comments on the update. When updating a plan, click the **Succession Details** icon, to view the **Audit Details** region that provides the following information:

- Plan creation date.
- Person who initially created the succession plan
- Person who last updated the succession plan
- The date when the plan is last updated

**Note:** If your enterprise has set up approvals for succession plans, then for an approved or a completed plan, the application shows the final approver as the person who has created or last updated the plan.

If you change the additional information values when updating a plan, such changes do not impact the information that is already defined for the job, position, or worker in the **Extra Job Information** window, **Extra Position Information** window, **Extra Person Information** window or **Employee Succession Planning Information** page.

**Note:** A manager who is the plan owner of a succession plan can view only the names of the probable successors for the plan, if the successors are outside the security profile of the manager. The Talent Profile icon for such successors who are outside the security profile of the manager is grayed out. This ensures that the manager is not able to view salary or other sensitive information of workers who are outside their security profile.

When you update a plan, the application routes the updated plan for approval, if your enterprise has setup approvals.

## Completing a Succession Plan

After you create an initial version of the plan, you can update the plan and set the Plan Status to Completed. When you select the Completed plan status, the following fields appear:

- **Filled From Plan:** You can select Yes or No to indicate whether a successor is selected from the list of probable successors identified in the plan. If you select Yes, then the Plan Filled by field displays workers who are part of the list of successors identified in the plan. If you select No, then the Plan Filled by field does not appear. Such a scenario may indicate that either the successor is selected from external recruitment or transferred to succeed the worker or role.
- **Plan Filled on:** Enter the date on which you select a successor from the list of successors and indicate that the plan is complete. The current date appears by default in this field. You can modify the current date.
- **Plan Filled by:** If you select Yes in the Filled from Plan field, then select the successor from the list of probable successors identified in the plan.

When you complete a plan, the application routes the changed plan for approval, if your enterprise has setup approvals.

## How Status Values Work

The following predefined statuses are available:

### Plan Status

A plan status indicates at what stage a succession plan is at.

- **Draft:** When you create a succession plan, by default, the plan status is Draft. You can update a plan in draft status as often as necessary. You can also delete a draft plan.
- **Active:** If approvals are set up in your enterprise, then when the plan is approved, the plan status becomes Active. If approvals are not used, then when you submit the plan, the status becomes Active. You cannot delete plans that are at the Active status.
- **Inactive:** When you update a succession plan, you can set the plan status to Inactive to indicate that the plan is not in use. You can set the plan status to Inactive based on various business reasons. When you set the plan status to Inactive, the status of the successors in the plan does not change. After the plan status changes to Inactive, plan administrators or managers cannot select successors for inactive plans. Plans at the inactive status are not considered in the metrics calculation in analytical reports.
- **Completed:** When you update a succession plan, you can select the Completed status to indicate that the plan is filled and a successor is identified. You cannot update or delete plans that are at the Completed status or change the status of completed plans to Active.

## Successor Status

A successor status indicates the status of a probable successor in a specific plan, even if the worker belongs to multiple plans.

- **Active:** When you create or update a succession plan, you can select the Active status to indicate that the worker is considered in the list of probable successors.
- **Inactive:** When you create or update a succession plan, you can select the Inactive status for a probable successor to indicate that the worker is no longer considered as a probable successor. For example, if a probable successor is on long leave of absence or on a sabbatical, then you can select this status. You can evaluate and then change the successor status. Successors at the inactive status are not considered in the metrics calculation in analytical reports.
- **Placed:** When you create or update a succession plan, you can select the Placed status for a probable successor to consider that the particular worker is a successor. You can set the successor status to Placed only for plans that are at the Completed status.

## Plan Approval Status

If your enterprise uses the Succession Planning Approvals process, then the application automatically tracks the approval status of succession plans. The following section explains the status and tasks that you can perform for plans that are at different approval statuses:

- **Approved:** A plan that is approved based on the levels of required approvals. Approved plans can be updated or deleted.
- **Rejected:** A plan that is not approved. Rejected plans can be updated or deleted.
- **Work in Progress:** In a situation where the plan is created but the approval is rejected, then the plan status is Draft and the approval status is Work in Progress. Such plans can be updated or deleted.
- **Pending Approval:** Plans that require approval. Plans pending approval cannot be updated or deleted.

## Viewing Succession Plan Details

Use the Succession Plans: Review page to review succession plan details.

This page appears when you click the View icon in the following tables:

- Recently Reviewed Plans and Plans to be Reviewed tables in the Manage Plans tab

- Search results table when you search for plans in the Succession Plans: Overview page

## Viewing Plan Details

You can view the following basic details:

- Whether the plan is for a worker, job, or position
- Name of the worker or role
- Plan name
- Start and end dates of the plan
- Plan owner and status
- Plan next review date

If any attachments are added to the plan, then you can review the supporting documents

The page provides information such as:

- Probable successors identified for a role or worker
- Succession status
- Succession potential of the successors
- Performance rating
- Retention potential
- Impact of the worker leaving the enterprise
- Readiness percent
- Rank of the worker when compared to the other probable successors for the same plan
- Succession details such as the earliest and latest succession dates.

## Viewing the Succession Hierarchy

The succession hierarchy is a visual representation of the probable successors identified for workers at each level. It helps talent managers and plan administrators to analyze succession plans that are in place, particularly for senior and top executives in an

enterprise.

Plan administrators and managers can navigate to the View Succession Hierarchy page by clicking the View Succession Hierarchy icon for a worker when creating or updating succession plans. The View Succession Hierarchy icon appears only if at least one probable successor is identified.

On the View Succession Hierarchy page, you can view probable successors who are identified for a worker in a downward view. A successor hierarchy below the selected worker is displayed. For example, if Linda Crowley is a manager, you can view the workers who are identified as probable successors for Linda. You can view the name of the successor and details such as succession status, succession potential, retention potential, readiness percent, and rank. This page also indicates the number of plans in which a worker is identified as a probable successor. If a worker is identified in multiple plans, then you can evaluate the readiness percent of the worker across plans and identify the most suitable role for the worker.

---

## Analyzing Succession Planning

# Analyzing Succession Planning

## Succession Plan Details for High Potential Workers Report

Use this report to track key high potential workers with and without succession plans to effectively plan and manage succession planning in your enterprise. The report includes only those workers that the logged in manager or plan administrator can access based on their security profile. Depending on the preferences set for display of the succession metrics, you can view metrics in a tabular format, graph, or both. As succession plans are not assignment based, the metrics count calculation is based on person. The metrics count in the summary table may include employees or contingent workers. Inclusion of contingent workers depends on permissions set. This report considers plans created for workers only and not plans for jobs or positions.

**Note:** This report considers only active plans for its calculations and does not consider completed plans.

The report presents the following columns:

- **Country:** List of countries based on the logged in manager or plan administrator's security profile. Click the country name to drill down to view details of plans in each country.
- **Key Workers:** Number of key workers identified in each country. The report counts only those workers for whom the Key Person field is set to Yes in the Employee Succession Planning Information page or the Extra Person Information window in Oracle HRMS.
- **Key and High Potential Workers:** Number of workers who are both key and identified as having high potential. The report counts only those workers for whom the Key Person field is set to Yes and Succession Potential field is set to High in the Employee Succession Planning Information page or the Extra Person Information window in Oracle HRMS.
- **Key but not High Potential Workers:** Number of workers who are identified as key but not identified as having high potential. The report counts only those workers for whom the Key Person field is set to Yes and Succession Potential field is not set to High in the Employee Succession Planning Information page or the Extra Person Information window in Oracle HRMS. Click the number link to view the employee details in a pop-up window.
- **Key and High Potential Workers with Succession Plans:** Number of high potential workers for whom at least one succession plan is created.

- Key and High Potential Workers with no Succession Plans: Number of key and high potential workers for whom not even a single succession plan is created. Click the number link to view the employee details in a pop-up window.

## Country Details Table

This table appears when you click the country name. The drill down from the country link of the summary table provides details of all plans within the logged in person's security profile and not just plans created for key and high potential workers. This feature enables managers and plan administrator to get a complete view of succession plans within the enterprise. The drill down details that you view are independent of the summary table. In the country details you may view active plans for workers who may not be key workers or have high potential. The plan details for a country may also include applicants who are identified as probable successors based on permissions set. Successors at the Inactive status and plans at the Inactive status are not visible in the country details.

You can view the following details:

- Name: Business group or groups in the country, succession plan name, information whether the plan is for a worker, job, or position along with the name and successors.
- Plan Status: Status of the plan such as Active or Completed.
- Person Type: Indicates the person type of the successor, such as employee, applicant, or ex-employee.
- Organization: Name of the organization to which the worker belongs.
- Job: Name of the worker's job.
- Position: Name of the worker's position.
- Performance Rating: Performance rating of the worker. The report retrieves this information from the Performance Management field in the Employee Succession Planning Information page or the Extra Person Information window in Oracle HRMS.
- Retention Potential: Retention potential value retrieved from the Risk of Loss field in the Employee Succession Planning Information page or the Extra Person Information window in Oracle HRMS.
- Impact of Loss: Retention potential value retrieved from the Impact of Loss field in the Employee Succession Planning Information page or the Extra Person Information window in Oracle HRMS.

- Readiness Percent: Readiness percent of the worker retrieved from the succession plan.

## Bar Graph

The x-axis in the bar graph shows the number of workers. The y-axis shows succession metrics that you view in the summary table in a graphical format.

## Readiness and Risk Analysis of Successors for High Potential Workers Report

Use this report to view information about the risk associated with probable successors identified for key high potential workers. You can evaluate the risk aspect for your succession plans. The risk may be in terms of low readiness of the probable successors to assume higher responsibilities or inadequate number of successors for a plan. Depending on the preferences set for display of succession metrics, you can view metrics in a tabular format, graph, or both. This report considers plans created for workers only and not plans for jobs or positions.

The report includes only those workers that the logged in manager or plan administrator can access based on their security profile. As succession plans are not assignment based, the metrics count calculation is based on person.

**Note:** This report considers only active plans for its calculations and does not consider completed plans.

The Readiness and Risk Analysis of Successors for High Potential Workers report presents the following columns. The metrics count in the summary table may include employees or contingent workers. Inclusion of contingent workers depends on permissions set.

- Country: List of countries based on the logged in manager or plan administrator's security profile. Click the country name to drill down to view details of plans in each country.
- Key High Potential Workers: Number of high potential workers from among those workers who are identified as key. The report counts only those workers for whom the Key Person field is set to Yes and Succession Potential field is set to High in the Employee Succession Planning Information page or the Extra Person Information window in Oracle HRMS.
- Key and High Potential Workers with Successors: Number of key and high potential workers for whom at least one probable successor is identified. A pop-up window on the number link displays information such as the worker name, position, job, performance rating, and person type.

- **Key and High Potential Workers with no Successors:** Number of key and high potential workers for whom not even one probable successor is identified. A pop-up window on the number link displays information such as the worker name, position, job, performance rating, and person type.
- **Readiness and Risk Analysis Details:** Number of workers who are placed in the High, Medium, and Low risk bands of a succession plan. The application calculates the high, medium, and low band values based on the readiness analysis calculation method that your plan administrator selects in the Define Role and Worker Details page. The readiness percent and the risk percent is consolidated at the plan level depending on the defined calculation criteria. For more information, see: *Defining Additional Details and Permissions for Worker or Roles in Plans*, page 6-6

## Country Details Table

This table appears when you click the country name. The drill down from the country link of the summary table provides details of all plans within the logged in person's security profile and not just plans created for key and high potential workers. This feature enables managers and plan administrator to get a complete view of succession plans within the enterprise. The drill down details that you view are independent of the summary table. In the country details, you may view active plans for workers who may not be key workers or have high potential. The plan details for a country may also include applicants who are identified as probable successors based on permissions set. Successors at the Inactive status and plans at the Inactive status are not visible in the country details.

You can view the following details:

- **Name:** Business group or groups in the country, succession plan name, information whether the plan is for a worker, job, or position along with the name and successors.
- **Plan Status:** Status of the plan such as Active or Completed.
- **Person Type:** Indicates the person type of the successor, such as employee, applicant, or ex-employee.
- **Risk Percent:** Risk percent of each plan.
- **Readiness Percent:** Readiness percent at the plan level based on the defined calculation criteria (Minimum, Average, or Maximum readiness percent), and the level of each individual successor in the plan.
- **Rank:** Each probable successor's rank as identified in the plan.

## Pie Chart

The pie chart is a graphical representation of the number of workers in the low, medium, and high risk bands. You cannot drill down from the pie chart.

## Turnover Analysis of Key Talent Report

Use this report to analyze the turnover details of probable successors identified for key high potential workers. The report includes only those workers that the logged in manager or plan administrator can access based on their security profile. Depending on the preferences set for display of succession metrics, you can view metrics in a tabular format, graph, or both. As succession plans are not assignment based, the metrics count calculation is based on person. This report considers plans created for workers only and not plans for jobs or positions.

**Note:** This report considers only active plans for its calculations and does not consider completed plans.

The report presents the following columns. The metrics count in the summary table may include employees or contingent workers. Inclusion of contingent workers depends on permissions set.

- **Country:** List of countries based on the logged in manager or plan administrator's security profile. Click the country name to drill down to view details of plans in each country.
- **Key High Potential Workers:** Total number of key and high potential workers in active succession plans.
- **Key and High Potential Workers with Successors:** Number of key and high potential successors for whom at least one successor is identified.
- **Number of Successors Across Plans:** Number of probable successors identified for all key and high potential workers. Though a worker is identified as a successor in multiple plans, the application counts this worker as only one successor in the calculation of number of successors across plans. Applicants are not considered in the count for number of successors across plans as the applicants are not part of any manager's security profile.
- **Terminated Successors:** Number of successors in active succession plans terminated as of the system date. The termination date must be earlier than the system date or equal to the system date. The report does not count workers whose termination date is later than the system date.
- **Turnover Percent:** Percentage of number of successors who are terminated. The

report calculates the turnover percent based on the total number of successors. You can sort the turnover percent in a descending order. Applicants are not terminated and therefore are not included in the metrics count or in the calculation of the turnover percent.

## Country Details Table

This table appears when you click the country name. The drill down from the country link of the summary table provides details of all plans within the logged in person's security profile and not just plans created for key and high potential workers. This feature enables managers and plan administrator to get a complete view of the succession plans within the enterprise. The drill down details that you view are independent of the summary table. In the country details you may view active plans for workers who may not be key workers or have high potential. The plan details for a country may also include applicants who are identified as probable successors based on permissions set. Successors at the Inactive status and plans at the Inactive status are not visible in the country details.

You can view the following details:

- Name: Business group or groups in the country, succession plan name, information whether the plan is for a worker, job, or position along with the name and successors.
- Plan Status: Status of the plan such as Active or Completed
- Person Type: Indicates the person type of the successor, such as employee, applicant, or ex-employee.
- Organization: Name of the organization to which the successor belongs.
- Job: Name of the successor's job.
- Position: Name of the successor's position.
- Terminated: Value Yes or No to indicate if a successor is an active or terminated worker.
- Rank: Rank that is given to the successor when the plan is created.
- Readiness Percent: Readiness percent entered for the successor when the plan is created.
- Retention Potential: Retention potential of the key high potential worker. The report retrieves this information from the Retention Potential field of the Employee Succession Planning Information page or the Extra Person Information window in Oracle HRMS.

- **Impact of Loss:** Impact of loss of the key high potential worker. The report retrieves this information from the Impact of Loss field, field of the Employee Succession Planning Information page or the Extra Person Information window in Oracle HRMS.

## Pie Chart

The pie chart is a graphical representation of the number active successors and terminated successors. You cannot drill down from the pie chart.

## Succession Plan Effectiveness Report

Use this report to evaluate the effectiveness of the succession planning process in your enterprise. This report provides details on the number of plans that are filled by potential successors identified in plans. The effectiveness percent calculation is based on the number of completed plans (plans that are at the Completed status) and not on the total number of plans.

The reports includes only those workers that the logged in manager or plan administrator can access based on their security profile. Depending on the preferences set for display of the succession metrics, you can view metrics in a tabular format, graph, or both. As succession plans are not assignment based, the metrics count calculation is based on person. The metrics count in the summary table includes the number of plans created for key and high potential workers only. This report considers plans created for workers and not plans for jobs or positions.

The report presents the following columns:

- **Country:** List of countries based on the logged in manager or plan administrator's security profile. Click the country name to drill down to view details of plans in each country.
- **Total Number of Plans:** Total number of key and high potential workers with at least one succession plan. Inactive plans are not considered in the count of total number of plans.
- **Number of Completed Plans:** Number of succession plans that are completed.
- **Successor Selected from Plan:** Number of successors selected from the list of probable successors identified for the plan.
- **Effectiveness Percent:** Percentage of succession plans for which successors are identified from the list of probable successors. For example, the number of completed succession plans is 5. If 3 succession plans are closed since a successor is selected from the list of probable successors in a plan, then the effective percent of the plan is 60.

## Country Details Table

This table appears when you click the Country name in the Summary table. The country information is independent of the metrics count. You may view active plans created for workers who may not be a key worker or have high potential. The plan details may also include contingent workers or applicants who are identified as probable successors based on permissions set.

You can view the following columns:

- **Name:** Business group or groups in the country, succession plan name, information whether the plan is for a worker, job, or position along with the name and successors.
- **Plan Status:** Status of the plan such as Active or Completed
- **Person Type:** Indicates the person type of the successor, such as employee, applicant, or ex-employee.
- **Owner:** Name of the plan owner of the succession plan.
- **Date Created:** Date on which the succession plan is created.
- **Date Closed:** Date when a worker is selected as the successor from the probable list of successors and the plan is closed. The report retrieves this information from the succession plan.
- **Filled by Worker:** Name of the worker who is selected as the successor from the probable list of successors in the plan. The report retrieves information from the succession plan. If the filled by worker column is blank for a plan, then the blank value indicates that the successor is not from the plan.

## Pie chart

The pie chart is a graphical representation of the succession plan effectiveness data. You can view the following segments:

- **Open Plans segment** indicates the percentage of plans that are yet to be filled by successors from the list of probable successors identified in plans.
- **Closed Plans segment** indicates percentage of succession plans that are closed when the plans are filled by successors identified from the list of probable successors in plans.



---

# Glossary

## **360-Degree Appraisal**

Part of the Performance Management Appraisal function and also known as a Group Appraisal. This is an employee appraisal undertaken by managers with participation by reviewers.

## **Absence**

A period of time in which an employee performs no work for the assigned organization.

## **Absence Case**

Two or more absences for the same person that you associate manually because they share a common factor, such as the same underlying cause.

## **Absence Type**

Category of absence, such as medical leave or vacation leave, that you define for use in absence windows.

## **Accrual**

The recognized amount of leave credited to an employee which is accumulated for a particular period.

## **Accrual Band**

A range of values that determines how much paid time off an employee accrues. The values may be years of service, grades, hours worked, or any other factor.

## **Accrual Period**

The unit of time, within an accrual term, in which PTO is accrued. In many plans, the same amount of time is accrued in each accrual period, such as two days per month. In other plans, the amount accrued varies from period to period, or the entitlement for the full accrual term is given as an up front amount at the beginning of the accrual term.

## **Accrual Plan**

See: *PTO Accrual Plan*, page Glossary-31

**Accrual Term**

The period, such as one year, for which accruals are calculated. In most accrual plans, unused PTO accruals must be carried over or lost at the end of the accrual term. Other plans have a rolling accrual term which is of a certain duration but has no fixed start and end dates.

**Action**

In AME, an Action is the *Then* part of an Approval Rule that specifies how the application must progress a transaction's approval process in a particular way depending on the conditions met.

**Action Type**

In AME, an action type is the generic container for specific actions. It enables you to specify the action to take if a transaction meets the condition of an approval rule. The action type, thus, generates the appropriate approvers for a transaction. As an AME administrator you can make particular action types available for specified transaction types.

**Activity Rate**

The monetary amount or percentage associated with an activity, such as \$12.35 per pay period as an employee payroll contribution for medical coverage. Activity rates can apply to participation, eligibility, coverages, contributions, and distributions.

**Actual Premium**

The per-participant premium an insurance carrier charges the plan sponsor for a given benefit.

**Administrative Enrollment**

A type of scheduled enrollment caused by a change in plan terms or conditions and resulting in a re-enrollment.

**AdvancePay**

A process that recalculates the amount to pay an employee in the current period, to make an authorized early payment of amounts that would normally be paid in future payroll periods.

**Agency**

An external organization that assists an enterprise in their recruitment process. Agencies act on behalf of the candidates to help them search and apply for jobs. They provide candidates to the fill up job openings in an enterprise or sometimes handle the complete placement process for a vacancy.

**Agency Candidate**

An agency candidate is a person whose profile is created in iRecruitment by a recruiting agency. This profile includes personal and professional information.

**Agency User**

An external person who belongs to a recruiting agency and accesses iRecruitment to conduct recruiting activities such as creating candidates and applying on behalf of the candidates.

**Alert**

An email notification that you can set up and define to send a recipient or group of recipients a reminder or warning to perform a certain task or simply a notification to inform the recipient of any important information.

**Align**

To define a relationship between objectives. Workers can align their own objectives with objectives that other workers have shared with them. Aligned objectives are also known as *supporting objectives*.

**AME**

Oracle Approvals Management Engine. A highly extensible approvals rules engine that enables organizations implementing Oracle Applications to simply and effectively define business rules that determine who must approve a transaction originating within an application. You can devise simple or complex rules, as your organization requires, which then form part of your overall business flow. A central repository holds all the rules to facilitate management and sharing between business processes.

**API**

Application Programmatic Interfaces, used to upload data to the Oracle Applications database. APIs handle error checking and ensure that invalid data is not uploaded to the database.

**Applicant**

An applicant is a person who submits an application for employment to an organization.

**Applicability**

In HRMS budgeting, a term describing whether a budget reallocation rule pertains to donors or receivers.

**Applicant/Candidate Matching Criteria**

Matching functionality in the iRecruitment system that systematically identifies which

candidates and applicants possess the skills, knowledge and abilities to be considered for a specific vacancy. The following columns are used for matching:

- Skills
- FT/PT
- Contractor/Employee
- Work at Home
- Job Category
- Distance to Location
- Key Words
- Salary

### **Apply for a Job**

An SSHR function that enables an employee to, apply, search and prepare applications for an internally advertised vacancy.

### **Appraisal**

An appraisal is a process where an employee's work performance is rated and future objectives set.

See also: *Assessment*, page Glossary-5.

### **Appraisee**

The person who is the subject of an appraisal.

### **Appraiser**

A person, usually a manager, who appraises an employee.

### **Appraising Manager**

The person who initiates and performs an Employee-Manager or 360 Degree Appraisal. An appraising manager can create appraisal objectives.

### **Approval Rule**

In AME, a business rule that determines a transaction's approval process. You construct rules using *conditions* and *actions*. For example, you can write a business rule with the conditions that if the total cost of a transaction is less than 1000 USD, and the transaction is for travel expenses, then the action must be to obtain approval from the immediate supervisor of the person triggering the transaction.

**Approver Groups**

In AME, an approver group is a collection of approvers you define, which you can include as part of actions when you set up your approval rules.

**Arrestment**

Scottish court order made out for unpaid debts or maintenance payments.

See also: *Court Order*, page Glossary-12

**Assessment**

An information gathering exercise, from one or many sources, to evaluate a person's ability to do a job.

See also: *Appraisal*, page Glossary-4.

**Assignment**

A worker's assignment identifies their role within a business group. The assignment is made up of a number of assignment components. Of these, organization is mandatory, and payroll is required (for employees only) for payment purposes.

**Assignment Number**

A number that uniquely identifies a worker's assignment. A worker with multiple assignments has multiple assignment numbers.

**Assignment Rate**

A monetary value paid to a contingent worker for a specified period of time. For example, an assignment rate could be an hourly overtime rate of \$10.50.

**Assignment Set**

A grouping of employees and applicants that you define for running QuickPaint reports and processing payrolls.

See also: *QuickPaint Report*, page Glossary-32

**Assignment Status**

For workers, used to track their permanent or temporary departures from your enterprise and, for employees only, to control the remuneration they receive. For applicants, used to track the progress of their applications.

**Attribute**

In AME, attributes are the business facts of a transaction, such as the total amount of a transaction, percentage of a discount, an item's category, or a person's salary and so on. These business variables form part of the conditions of an approval rule, and determine how the transaction must progress for approvals.

**Authoria**

A provider of health insurance and compensation information, that provides additional information about benefits choices.

**BACS**

Banks Automated Clearing System. This is the UK system for making direct deposit payments to employees.

**Balance Adjustment**

A correction you make to a balance. You can adjust user balances and assignment level predefined balances only.

**Balance Dimension**

The period for which a balance sums its balance feeds, or the set of assignments/transactions for which it sums them. There are five time dimensions: Run, Period, Quarter, Year and User. You can choose any reset point for user balances.

**Balance Feeds**

These are the input values of matching units of measure of any elements defined to feed the balance.

**Balances**

Positive or negative accumulations of values over periods of time normally generated by payroll runs. A balance can sum pay values, time periods or numbers.

See also: *Predefined Components* , page Glossary-30

**Bargaining Unit**

A bargaining unit is a legally organized group of people which have the right to negotiate on all aspects of terms and conditions with employers or employer federations. A bargaining unit is generally a trade union or a branch of a trade union.

**Base Summary**

A database table that holds the lowest level of summary. Summary tables are populated and maintained by user-written concurrent programs.

**Beneficiary**

A person or organization designated to receive the benefits from a benefit plan upon the death of the insured.

**Benefit**

Any part of an employee's remuneration package that is not pay. Vacation time,

employer-paid medical insurance and stock options are all examples of benefits.

See also: *Elements*, page Glossary-16

### **Block**

The largest subordinate unit of a window, containing information for a specific business function or entity. Every window consists of at least one block. Blocks contain fields and, optionally, regions. They are delineated by a bevelled edge. You must save your entries in one block before navigating to the next.

See also: *Region*, page Glossary-33, *Field*, page Glossary-18

### **Budget Measurement Type (BMT)**

A subset of Workforce Measurement Type. It consists of a number of different units used to measure the workforce. The most common units are headcount and full time equivalent.

### **Budget Value**

In Oracle Human Resources you can enter staffing budget values and actual values for each assignment to measure variances between actual and planned staffing levels in an organization or hierarchy.

### **Business Group**

The business group represents a country in which your enterprise operates. It enables you to group and manage data in accordance with the rules and reporting requirements of each country, and to control access to data.

### **Business Group Currency**

The currency in which Oracle Payroll performs all payroll calculations for your Business Group. If you pay employees in different currencies to this, Oracle Payroll calculates the amounts based on exchange rates defined in the system.

### **Business Number (BN)**

In Canada, this is the employer's account number with Revenue Canada. Consisting of 15 digits, the first 9 identify the employer, the next 2 identify the type of tax account involved (payroll vs. corporate tax), and the last 4 identify the particular account for that tax.

### **Business Rule**

See Configurable Business Rules, page Glossary-10

### **Cafeteria Benefits Plan**

See: *Flexible Benefits Program*, page Glossary-18

### **Calendar Exceptions**

If you are using the Statutory Absence Payments (UK) feature, you define calendar exceptions for an SSP qualifying pattern, to override the pattern on given days. Each calendar exception is another pattern which overrides the usual pattern.

### **Calendars**

In Oracle Human Resources you define calendars that determine the start and end dates for budgetary years, quarters and periods. For each calendar you select a basic period type. If you are using the Statutory Absence Payments (UK) feature, you define calendars to determine the start date and time for SSP qualifying patterns.

### **Canada/Quebec Pension Plan (CPP/QPP) Contributions**

Contributions paid by employers and employees to each of these plans provide income benefits upon retirement.

### **Candidate**

(iRecruitment) A candidate is a person who has either directly provided their personal and professional information to a company's job site or provided their resume and details to a manager or recruiter for entering in the iRecruitment system.

### **Candidate Offers**

An SSHR function used by a line manager to offer a job to a candidate. This function is supplied with its own responsibility.

### **Career Path**

This shows a possible progression from one job or position from any number of other jobs or positions within the Business Group. A career path must be based on either job progression or position progression; you cannot mix the two.

### **Carry Over**

The amount of unused paid time off entitlement an employee brings forward from one accrual term to the next. It may be subject to an expiry date i.e. a date by which it must be used or lost.

See also: *Residual*, page Glossary-34

### **Cascade**

A process managers at each level in a hierarchy use to allocate their own objectives to workers who report directly to them. This technique enables the allocation of enterprise objectives in some form to all workers.

### **Cash Analysis**

A specification of the different currency denominations required for paying your

employees in cash. Union contracts may require you to follow certain cash analysis rules.

### **Ceiling**

The maximum amount of unused paid time off an employee can have in an accrual plan. When an employee reaches this maximum, he or she must use some accrued time before any more time will accrue.

### **Certification**

Documentation required to enroll or change elections in a benefits plan as the result of a life event, to waive participation in a plan, to designate dependents for coverage, or to receive reimbursement for goods or services under an FSA.

### **Child/Family Support Payments**

In Canada, these are payments withheld from an employee's compensation to satisfy a child or family support order from a Provincial Court. The employer is responsible for withholding and remitting the payments to the court named in the order.

### **Collective Agreement**

A collective agreement is a form of contract between an employer or employer representative, for example, an employer federation, and a bargaining unit for example, a union or a union branch.

### **Collective Agreement Grade**

Combination of information that allows you to determine how an employee is ranked or graded in a collective agreement.

### **Communications**

Benefits plan information that is presented in some form to participants. Examples include a pre-enrollment package, an enrollment confirmation statement, or a notice of default enrollment.

### **Compensation**

The pay you give to employees, including wages or salary, and bonuses.

See also: *Elements*, page Glossary-16

### **Compensation Category**

A group of compensation items. Compensation Categories determine the type of compensation that you award under a plan.

### **Compensation Object**

For Standard and Advanced Benefits, compensation objects define, categorize, and help to manage the benefit plans that are offered to eligible participants. Compensation

objects include programs, plan types, plans, options, and combinations of these entities.

### **Competency**

Any measurable behavior required by an organization, job or position that a person may demonstrate in the work context. A competency can be a piece of knowledge, a skill, an attitude, or an attribute.

See also: *Unit Standard Competency*, page Glossary-40

### **Competency Assessment Template**

The entity that configures the Competencies section of an appraisal.

See also: *Objective Assessment Template*, page Glossary-25

### **Competency Evaluation**

A method used to measure an employees ability to do a defined job.

### **Competency Profile**

Where you record applicant and employee accomplishments, for example, proficiency in a competency.

### **Competency Requirements**

Competencies required by an organization, job or position.

See also: *Competency*, page Glossary-10, *Core Competencies*, page Glossary-11

### **Competency Type**

A group of related competencies.

### **Condition**

In AME, a Condition is the *If* part of an Approval Rule that specifies the conditions a transaction must meet to trigger an approval action. A condition consists of an attribute, which is a business variable, and a set of attribute values that you can define. When a transaction meets the specified attribute values, then the application triggers the appropriate action.

### **Configurable Business Rule**

In HRMS position control and budgeting, predefined routines (also called process rules) that run when you apply an online transaction, and validate proposed changes to positions, budgets, or assignments. You set their default status level (typically Warning) to Warning, Ignore, or Error.

### **Configurable Forms**

Forms that your system administrator can modify for ease of use or security purposes by means of Custom Form restrictions. The Form Customization window lists the forms and their methods of configuration.

**Consideration**

(iRecruitment) Consideration means that a decision is registered about a person in relation to a vacancy so that the person can be contacted.

**Consolidation Set**

A grouping of payroll runs within the same time period for which you can schedule reporting, costing, and post-run processing.

**Contact**

A person who has a relationship to an employee that you want to record. Contacts can be dependents, relatives, partners or persons to contact in an emergency.

**Content**

When you create a spreadsheet or word processing document using Web ADI, the content identifies the data in the document. Content is usually downloaded from the Oracle application database.

**Contingent Worker**

A worker who does not have a direct employment relationship with an enterprise and is typically a self-employed individual or an agency-supplied worker. The contingent worker is not paid via Oracle Payroll.

**Contract**

A contract of employment is an agreement between an employer and employee or potential employee that defines the fundamental legal relationship between an employing organization and a person who offers his or her services for hire. The employment contract defines the terms and conditions to which both parties agree and those that are covered by local laws.

**Contribution**

An employer's or employee's monetary or other contribution to a benefits plan.

**Core Competencies**

Also known as *Leadership Competencies* or *Management Competencies*. The competencies required by every person to enable the enterprise to meet its goals.

See also: *Competency*, page Glossary-10

**Costable Type**

A feature that determines the processing an element receives for accounting and costing purposes. There are four costable types in Oracle HRMS: costed, distributed costing, fixed costing, and not costed.

**Costing**

Recording the costs of an assignment for accounting or reporting purposes. Using Oracle Payroll, you can calculate and transfer costing information to your general ledger and into systems for project management or labor distribution.

**Court Order**

A ruling from a court that requires an employer to make deductions from an employee's salary for maintenance payments or debts, and to pay the sums deducted to a court or local authority.

See also: *Arrestment*, page Glossary-5

**Credit**

A part of the Qualifications Framework. The value a national qualifications authority assigns to a unit standard competence or a qualification. For example, one credit may represent 10 hours of study, a unit standard competence may equate to 5 credits, and a qualification may equate to 30 credits.

**Criteria Salary Rate**

Variable rate of pay for a grade, or grade step. Used by Grade/Step Progression.

**Current Period of Service**

An employee's period of service is current if their most recent hire date is on or before the effective date, and either the employee does not have a termination date for their latest employment, or their termination date is later than the effective date.

The table below provides an example using an effective date of 12 October 2004:

Effective Date	Hire Date	Termination Date	Current Period of Service?
12 Oct 2004	23 Jan 1994	16 Aug 2003	No
12 Oct 2004	14 Oct 2004	ANY	No
12 Oct 2004	14 Mar 2000	NONE	Yes
12 Oct 2004	11 Sep 2001	15 Oct 2004	Yes

**Additional Information:** In Oracle HRMS an employee cannot transfer from one business group to another. To move from one business group to another, the business group they are leaving must terminate the

employee, and the business group they are joining must re-hire the employee. Therefore the definition of period of service, above, does not take account of any service prior to the most recent business group transfer.

### **Current Period of Placement**

A contingent worker's period of placement, page Glossary-28 is current if their most recent placement start date is on or before the effective date, and either the contingent worker does not have a placement end date for their latest placement or their placement end date is later than the effective date.

<b>Effective Date</b>	<b>Place Date</b>	<b>End Placement Date</b>	<b>Current Period of Placement?</b>
12 Oct 2004	23 Jan 1994	16 Aug 2003	No
12 Oct 2004	14 Oct 2004	ANY	No
12 Oct 2004	14 Mar 2000	NONE	Yes
12 Oct 2004	11 Sep 2001	15 Oct 2004	Yes

### **Database Item**

An item of information in Oracle HRMS that has special programming attached, enabling Oracle FastFormula to locate and retrieve it for use in formulas.

### **Date Earned**

The date the payroll run uses to determine which element entries to process. In North America (and typically elsewhere too) it is the last day of the payroll period being processed.

### **Date Paid**

The effective date of a payroll run. Date paid dictates which tax rules apply and which tax period or tax year deductions are reported.

### **Date To and Date From**

These fields are used in windows not subject to DateTrack. The period you enter in these fields remains fixed until you change the values in either field.

See also: *DateTrack*, page Glossary-13, *Effective Date*, page Glossary-15

**DateTrack**

When you change your effective date (either to past or future), DateTrack enables you to enter information that takes effect on your new effective date, and to review information as of the new date.

See also: *Effective Date*, page Glossary-15

**Default Postings**

(iRecruitment) Default text stored against business groups, organizations, jobs, and/or positions. The default postings are used to create job postings for a vacancy.

**Dependent**

In a benefit plan, a person with a proven relationship to the primary participant whom the participant designates to receive coverage based on the terms of the plan.

**Deployment**

The temporary or permanent employment of an employee in a business group.

See also: *Secondment*, page Glossary-36

**Deployment Factors**

See: *Work Choices*, page Glossary-42

**Deployment Proposal**

The entity that controls the permanent transfer or temporary secondment of an employee from a source business group to a destination business group. The HR Professional in the destination business group creates the deployment proposal using the Global Deployments function.

**Derived Factor**

A factor (such as age, percent of fulltime employment, length of service, compensation level, or the number of hours worked per period) that is used in calculations to determine Participation Eligibility or Activity Rates for one or more benefits.

**Descriptive Flexfield**

A field that your organization can configure to capture additional information required by your business but not otherwise tracked by Oracle Applications.

See also: *Key Flexfield*, page Glossary-22

**Deviation**

A change to the standard approver list is a deviation.

**Developer Descriptive Flexfield**

A flexfield defined by your localization team to meet the specific legislative and

reporting needs of your country.

See also: *Extra Information Types*, page Glossary-18

### **Direct Deposit**

The electronic transfer of an employee's net pay directly into the account(s) designated by the employee.

### **Discoverer Workbook**

A grouping of worksheets. Each worksheet is one report.

**Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1*.

### **Discoverer Worksheet**

A single report within a workbook. A report displays the values of predefined criteria for analysis.

### **Distribution**

Monetary payments made from, or hours off from work as allowed by, a compensation or benefits plan.

### **Download**

The process of transferring data from the Oracle HRMS application to your desktop (the original data remains in the application database).

### **Effective Date**

The date for which you are entering and viewing information. You set your effective date in the Alter Effective Date window.

See also: *DateTrack*, page Glossary-13

### **EIT**

See: *Extra Information Type*, page Glossary-18

### **Electability**

The process which determines whether a potential benefits participant, who has satisfied the eligibility rules governing a program, plan, or option in a plan, is able to elect benefits. Participants who are *eligible* for benefits do not always have *electable* benefit choices based on the rules established in a benefit plan design.

### **Element Classifications**

These control the order in which elements are processed and the balances they feed.

Primary element classifications and some secondary classifications are predefined by Oracle Payroll. Other secondary classifications can be created by users.

### **Element Entry**

The record controlling an employee's receipt of an element, including the period of time for which the employee receives the element and its value.

See also: *Recurring Elements*, page Glossary-33, *Nonrecurring Elements*, page Glossary-25

### **Element Link**

The association of an element to one or more components of an employee assignment. The link establishes employee eligibility for that element. Employees whose assignment components match the components of the link are eligible for the element.

See also: *Standard Link*, page Glossary-38

### **Elements**

Components in the calculation of employee pay. Each element represents a compensation or benefit type, such as salary, wages, stock purchase plans, and pension contributions.

### **Element Set**

A group of elements that you define to process in a payroll run, or to control access to compensation information from a configured form, or for distributing costs.

### **Eligibility**

The process by which a potential benefits participant satisfies the rules governing whether a person can ever enroll in a program, plan, or option in a plan. A participant who is *eligible* for benefits must also satisfy *electability* requirements.

### **Eligibility Profile**

A set of eligibility criteria grouped together. Eligibility profiles help determine eligibility for compensation and benefits and are re-usable. Eligibility profiles can be linked to a compensation object (such as a program, plan, or option), a collective agreement, a grade ladder, or a work schedule to restrict eligibility for these.

### **Employee**

A worker who has a direct employment relationship with the employer. Employees are typically paid compensation and benefits via the employer's payroll application.

Employees have a system person type of Employee and one or more assignments with an assignment type of Employee.

### **Employee Histories**

An SSHR function for an employee to view their Learning History, Job Application

History, Employment History, Absence History, or Salary History. A manager can also use this function to view information on their direct reports.

### **Employment Category**

A component of the employee assignment. Four categories are defined: Full Time - Regular, Full Time - Temporary, Part Time - Regular, and Part Time - Temporary.

### **Employment Equity Occupational Groups (EEOG)**

In Canada, the Employment Equity Occupational Groups (EEOG) consist of 14 classifications of work used in the Employment Equity Report. The EEOGs were derived from the National Occupational Classification system.

### **Employment Insurance (EI)**

Benefit plan run by the federal government to which the majority of Canadian employers and employees must contribute.

### **Employment Insurance Rate**

In Canada, this is the rate at which the employer contributes to the EI fund. The rate is expressed as a percentage of the employee's contribution. If the employer maintains an approved wage loss replacement program, they can reduce their share of EI premiums by obtaining a reduced contribution rate. Employers would remit payroll deductions under a different employer account number for employees covered by the plan.

### **Enrollment Action Type**

Any action required to complete enrollment or de-enrollment in a benefit.

### **Entitlement**

In Australia, this is all unused leave from the previous year that remains to the credit of the employee.

### **ESS**

Employee Self Service. A predefined SSHR responsibility.

### **Event**

An activity such as a training day, review, or meeting, for employees or applicants. Known as *class* in OLM.

### **Ex-Applicant**

Someone who has previously applied for a vacancy or multiple vacancies, but all applications have ended, either because the applicant has withdrawn interest or they have been rejected. Ex-Applicants can still be registered users.

**Expected Week of Childbirth (EWC)**

In the UK, this is the week in which an employee's baby is due. The Sunday of the expected week of childbirth is used in the calculations for Statutory Maternity Pay (SMP).

**Extra Information Type (EIT)**

A type of developer descriptive flexfield that enables you to create an unlimited number of information types for six key areas in Oracle HRMS. Localization teams may also predefine some EITs to meet the specific legislative requirements of your country.

See also: *Developer Descriptive Flexfield*, page Glossary-14

**Field**

A view or entry area in a window where you enter, view, update, or delete information.

See also: *Block*, page Glossary-7, *Region*, page Glossary-33

**Flex Credit**

A unit of "purchasing power" in a flexible benefits program. An employee uses flex credits, typically expressed in monetary terms, to "purchase" benefits plans and/or levels of coverage within these plans.

**Flexible Benefits Program**

A benefits program that offers employees choices among benefits plans and/or levels of coverage. Typically, employees are given a certain amount of flex credits or moneys with which to "purchase" these benefits plans and/or coverage levels.

**Flexible Spending Account**

(FSA) Under US Internal Revenue Code Section 125, employees can set aside money on a pretax basis to pay for eligible unreimbursed health and dependent care expenses. Annual monetary limits and use-it-or-lose-it provisions exist. Accounts are subject to annual maximums and forfeiture rules.

**Form**

A predefined grouping of functions, called from a menu and displayed, if necessary, on several windows. Forms have blocks, regions and fields as their components.

See also: *Block*, page Glossary-7, *Region*, page Glossary-33, *Field*, page Glossary-18

**Format Mask**

A definition of a person-name format. The format mask comprises standard name components, such as title, first name, and last name, in an order appropriate to its purpose and legislation.

**Format Type**

A format-mask classification that identifies the mask's purpose. Oracle HRMS defines the Full Name, Display Name, List Name, and Order Name format types. You can also define your own format types for use in custom code.

**Full Time Equivalent (FTE)**

A Workforce Measurement Type (WMT) that measures full time equivalent. Although the actual value and calculation may vary, this value is taken from the Assignment Budget Value (ABV) in Oracle HRMS. If the Assignment Budget Value in Oracle HRMS is not set up then a FastFormula is used to determine the value to be calculated.

**Global Value**

A value you define for any formula to use. Global values can be dates, numbers or text.

**Goods or Service Type**

A list of goods or services a benefit plan sponsor has approved for reimbursement.

**Grade**

A component of an employee's assignment that defines their level and can be used to control the value of their salary and other compensation elements.

**Grade Comparatio**

A comparison of the amount of compensation an employee receives with the mid-point of the valid values defined for his or her grade.

**Grade Ladder**

The key component of Grade/Step Progression. You use a grade ladder to categorize grades, to determine the rules for how an employee progresses from one grade (or step) to the next, and to record the salary rates associated with each grade or step on the ladder.

**Grade Rate**

A value or range of values defined as valid for a given grade. Used for validating employee compensation entries.

**Grade Scale**

A sequence of steps valid for a grade, where each step corresponds to one point on a pay scale. You can place each employee on a point of their grade scale and automatically increment all placements each year, or as required.

See also: *Pay Scale*, page Glossary-27

**Grade Step**

An increment on a grade scale. Each grade step corresponds to one point on a pay scale.

See also: *Grade Scale*, page Glossary-19

**Grandfathered**

A term used in Benefits Administration. A person's benefits are said to be grandfathered when a plan changes but they retain the benefits accrued.

**Group**

A component that you define, using the People Group key flexfield, to assign employees to special groups such as pension plans or unions. You can use groups to determine employees' eligibility for certain elements, and to regulate access to payrolls.

**Group Certificate**

In Australia, this is a statement from a legal employer showing employment income of an employee for the financial year..

**Headcount(HEAD)**

A Workforce Measurement Type (WMT) that measures headcount. Although the actual value and calculation may vary, this value is taken from the Assignment Budget Value (ABV) in Oracle HRMS. If the Assignment Budget Value in Oracle HRMS is not set up then a FastFormula is used to determine the value to be calculated.

**Hierarchy**

An organization or position structure showing reporting lines or other relationships. You can use hierarchies for reporting and for controlling access to Oracle HRMS information.

**High Availability**

iRecruitment functionality that enables enterprises to switch between two instances to continuously support the candidate job site.

**Imputed Income**

Certain forms of indirect compensation that US Internal Revenue Service Section 79 defines as fringe benefits and taxes the recipient accordingly. Examples include employer payment of group term life insurance premiums over a certain monetary amount, personal use of a company car, and other non-cash awards.

**Incumbent**

In Oracle HRMS, the term Incumbent refers to an active worker (employee or

contingent worker).

### **Individual Compensation Distribution**

A tool that enables managers assign one-time or recurring awards, bonuses, and allowances to qualified employees such as housing allowances, spot bonuses, and company cars. Also enables employees to enter voluntary contributions, such as savings plans, charitable organizations, and company perquisites.

### **Info Online**

A generic framework to integrate Oracle applications with partner applications, enabling users to access information from third-party providers, My Oracle Support and Oracle Learning Management.

### **Initiator**

A person who starts a 360 Degree appraisal (Employee or Self) on an individual. An initiator and the appraisee are the only people who can see all appraisal information.

### **Input Values**

Values you define to hold information about elements. In Oracle Payroll, input values are processed by formulas to calculate the element's run result. You can define up to fifteen input values for an element.

### **Instructions**

An SSHR user assistance component displayed on a web page to describe page functionality.

### **Integrating Application**

In AME, an application that uses Oracle Approvals Management Engine to manage the approval processes of its transactions.

### **Integrator**

Defines all the information that you need to download or upload from a particular window or database view using Web ADI.

### **Interface**

A Web ADI term for the item that specifies the columns to be transferred from the Oracle applications database to your desktop or vice versa.

### **Involuntary**

Used in turnover to describe employees who have ceased employment with the enterprise not of their own accord, for example, through redundancy.

**Job**

A job is a generic role within a business group, which is independent of any single organization. For example, the jobs "Manager" and "Consultant" can occur in many organizations.

**Job Posting**

An advertisement for a specific vacancy. This is the public side of the vacancy for which a candidate would apply.

**Key Flexfield**

A flexible data field made up of segments. Each segment has a name you define and a set of valid values you specify. Used as the key to uniquely identify an entity, such as jobs, positions, grades, cost codes, and employee groups.

See also: *Descriptive Flexfield*, page Glossary-14

**Layout**

Indicates the columns to be displayed in a spreadsheet or Word document created using Web ADI.

**Learning Management**

Oracle's enterprise learning management system that administers online and offline educational content.

**Leave Loading**

In Australia, an additional percentage amount of the annual leave paid that is paid to the employee.

**Leaver's Statement**

In the UK, this Records details of Statutory Sick Pay (SSP) paid during a previous employment (issued as form SSP1L) which is used to calculate a new employee's entitlement to SSP. If a new employee falls sick, and the last date that SSP was paid for under the previous employment is less than eight calendar weeks before the first day of the PIW for the current sickness, the maximum liability for SSP is reduced by the number of weeks of SSP shown on the statement.

**Legal Employer**

A business in Australia that employs people and has registered with the Australian Tax Office as a Group Employer.

**Legal Entity**

A legal entity represents the designated legal employer for all employment-related

activities. The legal authorities in a country recognize this organization as a separate employer.

### **Life Event**

A significant change in a person's life that results in a change in eligibility or ineligibility for a benefit.

### **Life Event Collision**

A situation in which the impacts from multiple life events on participation eligibility, enrollability, level of coverage or activity rates conflict with each other.

### **Life Event Enrollment**

A benefits plan enrollment that is prompted by a life event occurring at any time during the plan year.

### **Linked PIWs**

In the UK, these are linked periods of incapacity for work that are treated as one to calculate an employee's entitlement to Statutory Sick Pay (SSP). A period of incapacity for work (PIW) links to an earlier PIW if it is separated by less than the linking interval. A linked PIW can be up to three years long.

### **Linking Interval**

In the UK, this is the number of days that separate two periods of incapacity for work. If a period of incapacity for work (PIW) is separated from a previous PIW by less than the linking interval, they are treated as one PIW according to the legislation for entitlement to Statutory Sick Pay (SSP). An employee can only receive SSP for the maximum number of weeks defined in the legislation for one PIW.

### **LMSS**

Line Manager Self Service. A predefined SSHR responsibility.

### **Long Service Leave**

Leave with pay granted to employees of a particular employer after a prescribed period of service or employment with that employer.

### **Lookup Types**

Categories of information, such as nationality, address type and tax type, that have a limited list of valid values. You can define your own Lookup Types, and you can add values to some predefined Lookup Types.

### **Lower Earnings Limit (LEL)**

In the UK, this is the minimum average weekly amount an employee must earn to pay National Insurance contributions. Employees who do not earn enough to pay National

Insurance cannot receive Statutory Sick Pay (SSP) or Statutory Maternity Pay (SMP).

### **Manager**

(iRecruitment) A manager accesses the iRecruitment system to document their hiring needs and conduct their recruiting activities online. Specifically, these activities include vacancy definition, searching for candidates, and processing applicants through the vacancy process.

### **Manager-Employee Appraisal**

Part of the Appraisal function. A manager appraisal of an employee. However, an appraising manager does not have to be a manager.

### **Mapping**

If you are bringing in data from a text file to Oracle HRMS using a spreadsheet created in Web ADI, you need to map the columns in the text file to the application's tables and columns.

### **Maternity Pay Period**

In the UK, this is the period for which Statutory Maternity Pay (SMP) is paid. It may start at any time from the start of the 11th week before the expected week of confinement and can continue for up to 18 weeks. The start date is usually agreed with the employee, but can start at any time up to the birth. An employee is not eligible to SMP for any week in which she works or for any other reason for ineligibility, defined by the legislation for SMP.

### **Medicare Levy**

An amount payable by most taxpayers in Australia to cover some of the cost of the public health system.

### **Menus**

You set up your own navigation menus, to suit the needs of different users.

### **My Account**

(iRecruitment) My Account is the total of either a candidate or applicant's personal and vacancy-specific information including the information needed to manage their progress through the recruitment process.

### **NACHA**

National Automated Clearing House Association. This is the US system for making direct deposit payments to employees.

**National Identifier**

This is the alphanumeric code that is used to uniquely identify a person within their country. It is often used for taxation purposes. For example, in the US it is the Social Security Number, in Italy it is the Fiscal Code, and in New Zealand it is the IRD Number.

**National Occupational Classification (NOC) code**

In Canada, the National Occupational Classification (NOC) System was developed to best reflect the type of work performed by employees. Occupations are grouped in terms of particular tasks, duties and responsibilities. The use of this standardized system ensures consistency of data from year to year within the same company as well as between companies. These codes are used in the Employment Equity Report.

**Net Accrual Calculation**

The rule that defines which element entries add to or subtract from a plan's accrual amount to give net entitlement.

**Net Entitlement**

The amount of unused paid time off an employee has available in an accrual plan at any given point in time.

**Nonrecurring Elements**

Elements that process for one payroll period only unless you make a new entry for an employee.

See also: *Recurring Elements*, page Glossary-33

**North American Industrial Classification (NAIC) code**

The North American Industrial Classification system (NAICs) was developed jointly by the US, Canada and Mexico to provide comparability in statistics regarding business activity across North America. The NAIC replaces the US Standard Industrial Classification (SIC) system, and is used in the Employment Equity Report.

**Not in Program Plan**

A benefit plan that you define outside of a program.

**Objective Assessment Template**

The entity that configures the Objectives section of the appraisal.

See also: **Competency Assessment Template**, page Glossary-10

**Objectives Library**

A collection of reusable objectives. HR Professionals can either create individual objectives in the Objectives Library or import them from an external source.

**Off-Boarding**

Descriptive term covering all HR processes and procedures involved in removing a worker from your organization, including termination, relocation, and long-term sickness.

**OLM**

Oracle Learning Management.

**On-Boarding**

Descriptive term covering all HR processes and procedures involved in hiring and integrating a worker in your organization, including recruitment, hiring, and orientation.

**Online Analytical Processing (OLAP)**

Analysis of data that reveals business trends and statistics that are not immediately visible in operational data.

**Online Transactional Processing (OLTP)**

The storage of data from day-to-day business transactions into the database that contains operational data.

**Open Enrollment**

A type of scheduled enrollment in which participants can enroll in or alter elections in one or more benefits plans.

**Options**

A level of coverage for a participant's election, such as Employee Only for a medical plan, or 2x Salary for a life insurance plan.

**Oracle FastFormula**

Formulas are generic expressions of calculations or comparisons you want to repeat with different input values. With Oracle FastFormula you can write formulas using English words and basic mathematical functions. The output of FastFormulas is fed back into reports.

**Organization**

A required component of employee assignments. You can define as many organizations as you want within your Business Group. Organizations can be internal, such as departments, or external, such as recruitment agencies. You can structure your organizations into organizational hierarchies for reporting purposes and for system access control.

**Organization Manager Hierarchy**

An HRMS structure that contains supervisors and subordinates on a reporting chain who also own organizations. HRMS uses this hierarchy to filter the information you display in report modules.

**OSSWA**

Oracle Self Service Web Applications.

**Outcome**

For a unit standard competence, a behavior or performance standard associated with one or more assessment criteria. A worker achieves a unit standard competence when they achieve all outcomes for that competence.

**Overrides**

You can enter overrides for an element's pay or input values for a single payroll period. This is useful, for example, when you want to correct errors in data entry for a nonrecurring element before a payroll run.

**Parameter Portlet**

A portlet in which you select a number of parameters that may affect all your portlets on your page. These may include an effective date, the reporting period, the comparison type, the reporting manager, and the output currency for your reports. The parameter portlet is usually available at the top of the portal page.

**Pattern**

A pattern comprises a sequence of time units that are repeated at a specified frequency. The Statutory Absence Payments (UK) feature, uses SSP qualifying patterns to determine employees entitlement to Statutory Sick Pay (SSP).

**Pattern Time Units**

A sequence of time units specifies a repeating pattern. Each time unit specifies a time period of hours, days or weeks.

**Pay Scale**

A set of progression points that can be related to one or more rates of pay. Employee's are placed on a particular point on the scale according to their grade and, usually, work experience.

See also: *Grade Scale*, page Glossary-19

**Pay Value**

An amount you enter for an element that becomes its run item without formula calculations.

See also: *Input Values*, page Glossary-21

### **Payment Type**

There are three standard payment types for paying employees: check, cash and direct deposit. You can define your own payment methods corresponding to these types.

### **Payroll**

A group of employees that Oracle Payroll processes together with the same processing frequency, for example, weekly, monthly or bimonthly. Within a Business Group, you can set up as many payrolls as you need.

### **Payroll Reversal**

A payroll reversal occurs when you reverse a payroll run for a single employee, in effect cancelling the run for this employee.

### **Payroll Rollback**

You can schedule a payroll rollback when you want to reverse an entire payroll run, cancelling out all information processed in that run. To preserve data integrity, you can roll back only one payroll at a time, starting with the one most recently run.

### **Payroll Run**

The process that performs all the payroll calculations. You can set payrolls to run at any interval you want.

### **People List**

An SSHR line manager utility used to locate an employee.

### **Performance Management Plan**

The entity that defines the performance-management process for a specified period. A component of the Workforce Performance Management function.

### **Performance Management Viewer (PMV)**

A reporting tool that displays the report that corresponds to one or more PMF targets.

### **Period of Incapacity for Work (PIW)**

In the UK, this is a period of sickness that lasts four or more days in a row, and is the minimum amount of sickness for which Statutory Sick Pay can be paid. If a PIW is separated by less than the linking interval, a linked PIW is formed and the two PIWs are treated as one.

### **Period of Placement**

The period of time a contingent worker spends working for an enterprise. A contingent worker can have only one period of placement at a time; however, a contingent worker

can have multiple assignments during a single period of placement.

**Period Type**

A time division in a budgetary calendar, such as week, month, or quarter.

**Personal Public Service Number (PPS)**

The Irish equivalent to National Insurance number in the UK, or the Social Security number in the US.

**Personal Tax Credits Return (TD1)**

A Revenue Canada form which each employee must complete. Used by the employee to reduce his or her taxable income at source by claiming eligible credits and also provides payroll with such important information as current address, birth date, and SIN. These credits determine the amount to withhold from the employee's wages for federal/provincial taxes.

**Person Search**

An SSHR function which enables a manager to search for a person. There are two types of search, Simple and Advanced.

**Person Type**

There are eight system person types in Oracle HRMS. Seven of these are combinations of employees, ex-employees, applicants, and ex-applicants. The eighth category is 'External'. You can create your own user person types based on the eight system types.

**Personal Scorecard**

A collection of objectives for a single worker arising from a single Performance Management Plan.

**Personnel Actions**

*Personnel actions* is a public sector term describing business processes that define and document the status and conditions of employment. Examples include hiring, training, placement, discipline, promotion, transfer, compensation, or termination. Oracle HRMS uses the term *self-service actions* synonymously with this public sector term. Oracle Self Service Human Resources (SSHR) provides a configurable set of tools and web flows for initiating, updating, and approving self-service actions.

**Plan Design**

The functional area that allows you to set up your benefits programs and plans. This process involves defining the rules which govern eligibility, available options, pricing, plan years, third party administrators, tax impacts, plan assets, distribution options, required reporting, and communications.

**Plan Sponsor**

The legal entity or business responsible for funding and administering a benefits plan. Generally synonymous with employer.

**Position**

A specific role within the Business Group derived from an organization and a job. For example, you may have a position of Shipping Clerk associated with the organization Shipping and the job Clerk.

**Predefined Components**

Some elements and balances, all primary element classifications and some secondary classifications are defined by Oracle Payroll to meet legislative requirements, and are supplied to users with the product. You cannot delete these predefined components.

**Process Rule**

See Configurable Business Rules, page Glossary-10

**Professional Information**

An SSHR function which allows an employee to maintain their own professional details or a line manager to maintain their direct reports professional details.

**Proficiency**

A worker's perceived level of expertise in a competency, in the opinion of an assessor, over a given period. For example, a worker may demonstrate the communication competency at Novice or Expert level.

**Progression Point**

A pay scale is calibrated in progression points, which form a sequence for the progression of employees up the pay scale.

See also: *Pay Scale*, page Glossary-27

**Prospect Pool**

(iRecruitment) The prospect pool contains all registered users who have given permission for their information to be published.

**Provincial/Territorial Employment Standards Acts**

In Canada, these are laws covering minimum wages, hours of work, overtime, child labour, maternity, vacation, public/general holidays, parental and adoption leave, etc., for employees regulated by provincial/territorial legislation.

**Provincial Health Number**

In Canada, this is the account number of the provincially administered health care plan

that the employer would use to make remittances. There would be a unique number for each of the provincially controlled plans i.e. EHT, Quebec HSF, etc.

### **PTO Accrual Plan**

A benefit in which employees enroll to entitle them to accrue and take paid time off (PTO). The purpose of absences allowed under the plan, who can enroll, how much time accrues, when the time must be used, and other rules are defined for the plan.

### **QPP**

(See Canada/Quebec Pension Plan)

### **QA Organization**

Quality Assurance Organization. Providers of training that leads to Qualifications Framework qualifications register with a QA Organization. The QA Organization is responsible for monitoring training standards.

### **Qualification Type**

An identified qualification method of achieving proficiency in a competence, such as an award, educational qualification, a license or a test.

See also: *Competence*, page Glossary-10

### **Qualifications Framework**

A national structure for the registration and definition of formal qualifications. It identifies the unit standard competencies that lead to a particular qualification, the awarding body, and the field of learning to which the qualification belongs, for example.

### **Qualifying Days**

In the UK, these are days on which Statutory Sick Pay (SSP) can be paid, and the only days that count as waiting days. Qualifying days are normally work days, but other days may be agreed.

### **Qualifying Pattern**

See: *SSP Qualifying Pattern*, page Glossary-37

### **Qualifying Week**

In the UK, this is the week during pregnancy that is used as the basis for the qualifying rules for Statutory Maternity Pay (SMP). The date of the qualifying week is fifteen weeks before the expected week of confinement and an employee must have been continuously employed for at least 26 weeks continuing into the qualifying week to be entitled to SMP.

**Quebec Business Number**

In Canada, this is the employer's account number with the Ministère du Revenu du Québec, also known as the Québec Identification number. It consists of 15 digits, the first 9 identify the employer, the next 2 identify the type of tax account involved (payroll vs. corporate tax), and the last 4 identify the particular account for that tax.

**Questionnaire**

A function which records the results of an appraisal.

**QuickPaint Report**

A method of reporting on employee and applicant assignment information. You can select items of information, paint them on a report layout, add explanatory text, and save the report definition to run whenever you want.

See also: *Assignment Set*, page Glossary-5

**QuickPay**

QuickPay allows you to run payroll processing for one employee in a few minutes' time. It is useful for calculating pay while someone waits, or for testing payroll formulas.

**Ranking**

(iRecruitment) A manually entered value to indicate the quality of the applicant against other applicants for a specific vacancy.

**Rates**

A set of values for employee grades or progression points. For example, you can define salary rates and overtime rates.

**Rate By Criteria**

A function that enables the calculation of pay from different rates for each role a worker performs in a time period.

**Rating Scale**

Used to describe an enterprise's competencies in a general way. You do not hold the proficiency level at the competence level.

**Record of Employment (ROE)**

A Service Canada form that must be completed by an employer whenever an interruption of earnings occurs for any employee. This form is necessary to claim Employment Insurance benefits.

**Recruitment Activity**

An event or program to attract applications for employment. Newspaper advertisements, career fairs and recruitment evenings are all examples of recruitment activities. You can group several recruitment activities together within an overall activity.

**Recurring Elements**

Elements that process regularly at a predefined frequency. Recurring element entries exist from the time you create them until you delete them, or the employee ceases to be eligible for the element. Recurring elements can have standard links.

See also: *Nonrecurring Elements*, page Glossary-25, *Standard Link*, page Glossary-38

**Recruiting Area**

A recruiting area consists of a set of countries, business groups, and locations. Define recruiting areas using the Generic Hierarchy function of Oracle HRMS. In iRecruitment, when managers create vacancies, they can select multiple locations as vacancy locations using recruiting areas.

**Referenced Rule**

In HRMS budgeting, any predefined configurable business rule in the Assignment Modification, Position Modification, or Budget Preparation Categories you use as the basis for defining a new rule.

See Configurable Business Rules, page Glossary-10

**Region**

A collection of logically related fields in a window, set apart from other fields by a rectangular box or a horizontal line across the window.

See also: *Block*, page Glossary-7, *Field*, page Glossary-18

**Registered Pension Plan (RPP)**

This is a pension plan that has been registered with Revenue Canada. It is a plan where funds are set aside by an employer, an employee, or both to provide a pension to employees when they retire. Employee contributions are generally exempt from tax.

**Registered Retirement Savings Plan (RRSP)**

This is an individual retirement savings plan that has been registered with Revenue Canada. Usually, contributions to the RRSP, and any income earned within the RRSP, is exempt from tax.

**Registered User**

(iRecruitment) A person who has registered with the iRecruitment site by entering an e-mail address and password. A registered user does not necessarily have to apply for

jobs.

### **Reporting Group**

A collection of programs and plans that you group together for reporting purposes, such as for administrative use or to meet regulatory requirements.

### **Report Parameters**

Inputs you make when submitting a report to control the sorting, formatting, selection, and summarizing of information in the report.

### **Report Set**

A group of reports and concurrent processes that you specify to run together.

### **Requisition**

The statement of a requirement for a vacancy or group of vacancies.

### **Request Groups**

A list of reports and processes that can be submitted by holders of a particular responsibility.

See also: *Responsibility*, page Glossary-34

### **Residual**

The amount of unused paid time off entitlement an employee loses at the end of an accrual term. Typically employees can carry over unused time, up to a maximum, but they lose any residual time that exceeds this limit.

See also: *Carry Over*, page Glossary-8

### **Responsibility**

A level of authority in an application. Each responsibility lets you access a specific set of Oracle Applications forms, menus, reports, and data to fulfill your business role. Several users can share a responsibility, and a single user can have multiple responsibilities.

See also: *Security Profile*, page Glossary-36, *User Profile Options*, page Glossary-41, *Request Groups*, page Glossary-34, *Security Groups*, page Glossary-34

### **Resume**

A document that describes the experience and qualifications of a candidate.

### **RetroPay**

A process that recalculates the amount to pay an employee in the current period to account for retrospective changes that occurred in previous payroll periods.

**Retry**

Method of correcting a payroll run or other process *before* any post-run processing takes place. The original run results are deleted and the process is run again.

**Revenue Canada**

Department of the Government of Canada which, amongst other responsibilities, administers, adjudicates, and receives remittances for all taxation in Canada including income tax, Employment Insurance premiums, Canada Pension Plan contributions, and the Goods and Services Tax (legislation is currently proposed to revise the name to the Canada Customs and Revenue Agency). In the province of Quebec the equivalent is the Ministère du Revenu du Québec.

**Reversal**

Method of correcting payroll runs or QuickPay runs *after* post-run processing has taken place. The system replaces positive run result values with negative ones, and negative run result values with positive ones. Both old and new values remain on the database.

**Reviewer (SSHR)**

A person invited by an appraising manager to add review comments to an appraisal.

**RIA**

Research Institute of America (RIA), a provider of tax research, practice materials, and compliance tools for professionals, that provides U.S. users with tax information.

**Rollback**

Method of removing a payroll run or other process *before* any post-run processing takes place. All assignments and run results are deleted.

**Rollup**

An aggregate of data that includes subsidiary totals.

**Run Item**

The amount an element contributes to pay or to a balance resulting from its processing during the payroll run. The Run Item is also known as calculated pay.

**Salary Basis**

The period of time for which an employee's salary is quoted, such as hourly or annually. Defines a group of employees assigned to the same salary basis and receiving the same salary element.

**Salary Rate**

The rate of pay associated with a grade or step. Used by Grade/Step Progression.

**Scheduled Enrollment**

A benefits plan enrollment that takes place during a predefined enrollment period. Scheduled enrollments can be administrative, or open.

**Search by Date**

An SSHR sub-function used to search for a Person by Hire date, Application date, Job posting date or search by a Training event date.

**Secondment**

The temporary transfer of an employee to a different business group.

**Security Group**

Security groups enable HRMS users to partition data by Business Group. Only used for Security Groups Enabled security.

See also: *Responsibility*, page Glossary-34, *Security Profile*, page Glossary-36, *User Profile Options*, page Glossary-41

**Security Groups Enabled**

Formerly known as Cross Business Group Responsibility security. This security model uses security groups and enables you to link one responsibility to many Business Groups.

**Security Profile**

Security profiles control access to organizations, positions and employee and applicant records within the Business Group. System administrators use them in defining users' responsibilities.

See also: *Responsibility*, page Glossary-34

**Self Appraisal**

Part of the Appraisal function. This is an appraisal undertaken by an employee to rate their own performance and competencies.

**Separation Category**

Separation category groups the leaving reasons. HRMSi refers to Termination Category as Separation Category.

See also: *termination category*, page Glossary-39

**Site Visitor**

(iRecruitment) A person who navigates to the iRecruitment web site and may view job

postings. This person has not yet registered or logged in to the iRecruitment system. This individual may search for postings on the web site and also has the ability to log in or register with the iRecruitment site.

### **SMP**

See: *Statutory Maternity Pay*, page Glossary-38

### **Social Insurance Number (SIN)**

A unique number provided by Human Resources Development Canada (HRDC) to each person commencing employment in Canada. The number consists of 9 digits in the following format (###-###-###).

### **Source Deductions Return (TP 1015.3)**

A Ministère du Revenu du Québec form which each employee must complete. This form is used by the employee to reduce his or her taxable income at source by claiming eligible credits and also provides payroll with such important information as current address, birth date, and SIN. These credits determine the amount of provincial tax to withhold from the employee's wages.

### **Special Information Types**

Categories of personal information, such as skills, that you define in the Personal Analysis key flexfield.

### **Special Run**

The first run of a recurring element in a payroll period is its normal run. Subsequent runs in the same period are called special runs. When you define recurring elements you specify Yes or No for special run processing.

### **SSHR**

Oracle Self-Service Human Resources. An HR management system using an intranet and web browser to deliver functionality to employees and their managers.

### **SSP**

See: *Statutory Sick Pay*, page Glossary-38

### **SSP Qualifying Pattern**

In the UK, an SSP qualifying pattern is a series of qualifying days that may be repeated weekly, monthly or some other frequency. Each week in a pattern must include at least one qualifying day. Qualifying days are the only days for which Statutory Sick Pay (SSP) can be paid, and you define SSP qualifying patterns for all the employees in your organization so that their entitlement to SSP can be calculated.

### **Standard HRMS Security**

The standard security model. Using this security model you must log on as a different

user to see a different Business Group.

### **Standard Link**

Recurring elements with standard links have their element entries automatically created for all employees whose assignment components match the link.

See also: *Element Link*, page Glossary-16, *Recurring Elements*, page Glossary-33

### **Statement of Commissions and Expenses for Source Deduction Purposes (TP 1015.R.13.1)**

A Ministère du Revenu du Québec form which allows an employee who is paid partly or entirely by commissions to pay a constant percentage of income tax based on his or her estimated commissions for the year, less allowable business expenses.

### **Statement of Earnings (SOE)**

A summary of the calculated earnings and deductions for an assignment in a payroll period.

### **Statement of Remuneration and Expenses (TD1X)**

In Canada, the Statement of Remuneration and Expenses allows an employee who is paid partly or entirely by commission to pay a constant percentage of income tax, based on his or her estimated income for the year, less business-related expenses.

### **Statutory Adoption Pay**

In the UK, Statutory Adoption Pay (SAP) is payable to a person of either sex with whom a child is, or is expected to be, placed for adoption under UK law.

### **Statutory Maternity Pay**

In the UK, you pay Statutory Maternity Pay (SMP) to female employees who take time off work to have a baby, providing they meet the statutory requirements set out in the legislation for SMP.

### **Statutory Sick Pay**

In the UK, you pay Statutory Sick Pay (SSP) to employees who are off work for four or more days because they are sick, providing they meet the statutory requirements set out in the legislation for SSP.

### **Statutory Paternity Pay**

In the UK, Statutory Paternity Pay Birth (SPPB) is payable to a person supporting the mother at the time of birth. In cases of adoption, the primary carer receives Statutory Adoption Pay, while the secondary carer receives Statutory Paternity Pay Adoption (SPPA).

**Suitability Matching**

An SSHR function which enables a manager to compare and rank a persons competencies.

**Superannuation Guarantee**

An Australian system whereby employers are required to contribute a percentage of an eligible employee's earnings to a superannuation fund to provide for their retirement.

**Supplier**

An internal or external organization providing contingent workers for an organization. Typically suppliers are employment or recruitment agencies.

**Supporting Objective**

An objective aligned with another objective. Supporting objectives contribute to the achievement of the objectives they support.

**Tabbed Regions**

Parts of a window that appear in a stack so that only one is visible at any time. You click on the tab of the required region to bring it to the top of the stack.

**Task Flows**

A sequence of windows linked by buttons to take you through the steps required to complete a task, such as hiring a new recruit. System administrators can create task flows to meet the needs of groups of users.

**Tax Point**

The date from which tax becomes payable.

**Template Letter**

Form letter or skeleton letter that acts as the basis for creating mail merge letters. The template letter contains the standard text, and also contains field codes, which are replaced by data from the application during the mail merge process.

**Terminating Employees**

You terminate an employee when he or she leaves your organization. Information about the employee remains on the system but all current assignments are ended.

**Termination Category**

When employees leave an enterprise, the decision is either made by the employee or by the enterprise. When the decision is made by the employee the termination is Voluntary. When the decision is made by the enterprise, the termination is Involuntary.

HRMSi elsewhere refers to Termination Category as Separation Category.

**Termination Rule**

Specifies when entries of an element should close down for an employee who leaves your enterprise. You can define that entries end on the employee's actual termination date or remain open until a final processing date.

**Tips**

An SSHR user assistance component that provides information about a field.

**Total Compensation Statement**

A module to communicate compensations, rewards, and benefits to employees and contingent workers.

**Transaction Type**

In AME, an integrating application may divide its transactions into several categories, where each category requires a distinct set of approval rules. Each set of rules is a transaction type. Different transaction types can use the same attribute name to represent values that the application fetches from different places. This enables several transaction types to share approval rules, thus facilitating a uniform approval policy across multiple transaction types.

**Transcendentive**

A third-party compensation management solutions provider, that provides additional information about benefits choices.

**Unit Standard**

A nationally registered document that describes a standard of performance. The standard is typically defined and maintained by industry representatives.

**Unit Standard Competency**

A competency that is defined in a Unit Standard and linked to a Qualifications Framework qualification.

**Upload**

The process of transferring the data from a spreadsheet on your desktop, created using Web ADI, back to the Oracle HRMS application.

**User Assistance Components**

SSHR online help comprising tips and instructions.

**User Balances**

Users can create, update and delete their own balances, including dimensions and balance feeds.

See also: *Balances*, page Glossary-6

**User Profile Options**

Features that allow system administrators and users to tailor Oracle HRMS to their exact requirements.

See also: *Responsibility*, page Glossary-34, *Security Profile*, page Glossary-36

**User-based Security**

With this type of security, the application generates the security permissions for a current user when that user logs on to a system. The system uses the security profile (can be position, supervisor, or organization-based, for example) to generate security permissions for the current user, for example, based on the user's position. An alternative to user-based security is a security profile with defined security rules, for example, to specify that the top-level position for a position-based security profile is Position A, irrespective of the current user's position.

**View**

An example of an interface that you can use to download data from the Oracle HRMS application to a spreadsheet using Web ADI.

**Viewer (SSHR)**

A person with view only access to an appraisal. An appraising manager or an employee in a 360 Degree Self appraisal can appoint view only access to an appraisal.

**Viewer (Web ADI)**

A desktop application, such as a spreadsheet or word processing tool, that you use to view the data downloaded from Oracle HRMS via Web ADI.

**Voluntary**

Term used in turnover to describe employees who have ceased employment with the enterprise of their own accord, for example, by resigning.

**Waiting Days**

In the UK, statutory Sick Pay is not payable for the first three qualifying days in period of incapacity for work (PIW), which are called waiting days. They are not necessarily the same as the first three days of sickness, as waiting days can be carried forward from a previous PIW if the linking interval between the two PIWs is less than 56 days.

**WCB Account Number**

In Canada, this is the account number of the provincially administered Workers' Compensation Board that the employer would use to make remittances. There would be a unique number for each of the provincially controlled boards i.e. Workplace Safety & Insurance Board of Ontario, CSST, etc.

**Work Choices**

Also known as Work Preferences, Deployment Factors, or Work Factors. These can affect a person's capacity to be deployed within an enterprise, such willingness to travel or relocate. You can hold work choices at both job and position level, or at person level.

**Worker**

An employee, page Glossary-16 or a contingent worker, page Glossary-11

**Workers' Compensation Board**

In Canada, this is a provincially governed legislative body which provides benefits to employees upon injury, disability, or death while performing the duties of the employer. Workers' Compensation Board premiums are paid entirely by the employer.

**Workflow**

An Oracle application which uses charts to manage approval processes and in addition is used in SSHR to configure display values of sections within a web page and instructions.

**Workforce Measurement Type (WMT)**

Groups of different units combined to measure the workforce. The most common units are headcount and full time equivalent.

**Workforce Measurement Value (WMV)**

A WMT value, for example, headcount or FTE.

**Workforce Performance Management**

The Oracle HRMS functions that support enterprise-directed objective setting, management, and assessment.

**Work Structures**

The fundamental definitions of organizations, jobs, positions, grades, payrolls and other employee groups within your enterprise that provide the framework for defining the work assignments of your employees.





---

# Index

## A

---

### Analytics

- Readiness and Risk Analysis of Successors for High Potential Workers report, 14-4
- Succession Plan Details for High Potential Workers report, 14-2
- Succession Plan Effectiveness report, 14-8
- Turnover Analysis of Key Talent report, 14-6

## D

---

- Default Nine Box Matrix Templates, 8-2

## E

---

### EIT

- Employee Succession Planning Information, 2-23
- Job, Position, and Worker Succession Plan Permissions, 2-23
- Job Career Management Information, 2-22
- Position Career Management Information, 2-22

### EITs

- Succession Plans, 2-22

## M

---

- mapping between succession planning and 9-box lookups, 3-5

## O

---

- Oracle Succession Planning

- additional implementation steps, 2-11
- configuration steps, 2-12
- defining lookups for 9 box matrixes, 3-2
- implementing, 2-9
- introduction, 1-1
- Organization Chart, 10-3
- Performance Matrix (Potential), 11-24
- Performance Matrix (Retention), 11-27
- predefined responsibility, 2-4
- required implementation steps, 2-9
- Suitability Analyzer, 12-4
- Suitability Matching, 12-2
- Supplied components, 2-4
- Talent Profile, 11-2
- Talent Profile menus, 2-5

### Oracle Succession Planning

- Extra information types (EITs), 2-22
- features, 2-2
- Integration with Other E-Business Products, 2-4
- licenses, 2-2
- profile options, 2-19
- supplied functions, 2-14
- user access and security, 2-18
- user and extensible lookups, 2-22

### Organization chart

- implementing and configuring, 2-24

### Organization Chart

- using, 10-2

## P

---

- Performance Matrix (Potential)

- viewing, 11-24
- Performance Matrix (Potential) and Performance Matrix (Retention), 11-24
- Performance Matrix (Retention)
  - viewing, 11-27
- Plan
  - view details, 13-21
- Plans
  - adding attachments, 13-24
  - completing, 13-28
  - entering details of probable successors, 13-25
  - entering plan details, 13-23
  - recently reviewed, 13-16
  - reviewing succession details, 13-27
  - search, 13-17
  - to be reviewed, 13-17
  - updating and completing, 13-27, 13-28
  - using Suitability Analyzer, 13-27
  - using the 9-box comparison, 13-26
  - using the Add Successors feature, 13-25
  - using the Show Suitable Successors feature, 13-24
  - viewing details, 13-30
  - viewing plan permissions, 13-24
- Plans search
  - plan criteria, 13-21
  - successor criteria, 13-21
- Plans search
  - plan criteria, 13-18
  - successor criteria, 13-19
- Print Profile and Compare Profile Default XML
- Templates
  - configuring, 4-17

## **R**

---

- Rating Scale Values for Matrixes (9-Box)
  - configuring, 3-3

## **S**

---

- Status
  - plan, 13-29
  - plan approval, 13-30
  - successor, 13-29
- Succession hierarchy
  - viewing, 13-31
- Succession plan

- creating, 13-23
- Succession Planning Portal
  - Analytics tab, 13-2, 13-6
  - Manage Plans tab, 13-3, 13-16
  - talent managers and plan administrators, 13-2
  - Talent Matrix tab, 13-20
  - Worker Plan Details tab, 13-2, 13-7
- Succession plans
  - creating, 13-23
- Succession Plans
  - Extra Information Types, 2-22
- Succession Plans functionality
  - setting up, 6-1
- Succession Plans Overview page
  - using, 13-20
- Suitability Analyzer
  - enabling, 5-22

## **T**

---

- Talent Matrix
  - configuring, 2-35
  - using, 9-2
  - viewing, 11-33
- Talent Matrix Template page, 9-3
- Talent Profile
  - 9-Box Matrix, 11-3
  - Appraisals region, 11-8, 13-11
  - Benefits region, 11-10
  - Career Path region, 11-10
  - Compare profile, 11-14
  - Compensation Statement region, 11-12
  - Competencies region, 11-7
  - configuring actions, 5-19
  - configuring report templates menu, 5-23
  - features, 11-2
  - Job History region, 11-9
  - Learning Certifications region, 11-9
  - managers, 11-5
  - Monetary Compensation region, 11-11
  - Other Information region, 11-12
  - Other Professional Qualifications region, 11-9
  - Performance Objectives region, 11-8
  - Performance Ratings region, 11-12
  - personalizing, 4-18
  - Previous Employment region, 11-10
  - print, 11-4, 11-4, 11-14, 11-21

- Qualifications region, 11-8
- Salary region, 11-12
- Training region, 11-9
- view, 11-2
- view 9-Box matrixes, 11-13
- view worker details, 11-6
- workers, 11-15
- Work Preferences region, 11-10
- Talent Profile
  - Succession Plan region, 11-11
- Talent Profile in Oracle Succession Planning
  - configuring the More Links in the Talent Profile Regions, 5-12
  - setting up a custom version, 5-2
  - setting up the Talent Profile Form Function, 5-4
  - setting up the Talent Profile Regions, 5-5
- Talent Profile Quick Search and Hierarchy Regions
  - configuring, 4-17
- Talent Profile Region icons
  - configuring, 4-23
- Talent Profiles
  - comparing, 11-31

## **W**

---

- Worker Plan Details tab
  - launch succession planning actions, 13-8
  - view contact details, 13-8
  - view employment details, 13-8
  - view matrixes, 13-9
  - view succession management information, 13-8
  - view succession plans for a worker, 13-14
  - view successors identified for a worker, 13-13
  - view Talent Profile, 13-11
  - view worker details, 13-7

