Talent Management Cloud

Implementing Talent Review and Succession Management

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1 Introduction

Overview of Implementing Talent Review and Succession Management

This guide explains the setup and implementation tasks of Oracle Fusion Talent Review and Succession Management Cloud Service. Using the tasks described in this guide, you can:

- Configure Talent Review settings
- Create Talent Review templates
- Manage potential assessments
- Set up talent review meetings
- Configure Succession Management lookups

Oracle Fusion Talent Review and Succession Management Cloud Service is part of the Workforce Development offering of Oracle Human Capital Management Cloud. To start an implementation of Oracle Human Capital Management Cloud, a user with the Application Implementation Consultant role (ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB) must opt into the offerings applicable to your business requirements. Refer to the Oracle Applications Cloud Using Functional Setup Manager guide to manage the opt-in and setup of your offerings.

This topic:

- Lists where to find information about prerequisite tasks and pertinent information about implementing Oracle Fusion Talent Review and Succession Management Cloud
- Describes the Talent Review and Succession Management functional areas of the Workforce Development offering

Prerequisites

Before setting up Oracle Fusion Talent Review and Succession Management Cloud Service you must implement either:

- HCM Base
- Talent Management Base

You are also required to configure other applications and elements. The table lists sources of information, including guides and help topics, and a description of what they contain, to help you set up the configuration that fits your business needs and processes.

Source	Contents
Oracle HCM Cloud Getting Started with Oracle Talent Management Cloud	Provides an overview of Talent Management Cloud options, purchasing and activation options, basic information for implementing Talent Management applications, and describes work areas
Oracle Talent Management Cloud Implementing Talent Management Base	Describes user and role synchronization, implementation user setup, enterprise and workforce structures, workforce profiles, approvals, help configuration, and more

Source	Contents
Oracle Global Human Resources Cloud Implementing Global Human Resources	Describes user and role synchronization, implementation user setup, enterprise and workforce structures, workforce profiles, approvals, help configuration, and more
Human Capital Management Cloud Securing Oracle HCM Cloud	Describes Oracle Human Management Cloud security, types of roles and how to create them, managing user accounts, types of security profiles and managing them, and Oracle Fusion Transactional Business Intelligence and Business Intelligence Publisher security

Workforce Development Offering

Use this offering to configure your employee profiles, manage goals, review performance, and manage succession plans. The following table describes the primary features of this offering that are explained in this guide. For the full list of functional areas and features in this offering, use the Associated Features report that you review when you plan the implementation of your offering.

Functional Area	Description
Talent Review	Use this to conduct talent review meetings, and assess employee performance and progress. You can associate succession plans and talent pools with a talent review meeting. You can also assign tasks to the meeting reviewees and create notes about the meeting.
Succession Management	Use this to create and manage succession plans for key personnel or incumbents in important jobs or positions. You can also add notes to succession plans.

Related Topics

- Planning Your Implementation: Procedure

Guide Structure

This guide explains the setup and implementation tasks of Oracle Fusion Talent Review and Succession Management Cloud Service.

This topic describes the contents of each chapter included in the following sections of the guide:

- Introduction
- Talent Review
- Succession Management
- Talent Pools
- Personalization Using Transaction Design Studio

Introduction

Chapter	Title	Contents
1	Introduction	An overview of Oracle Fusion Talent Review and Succession Management implementation and description of the guide structure

Talent Review

Chapter	Title	Task	Contents
2	Talent Review Overview and Integrations		An overview of Oracle Fusion Talent Review and description of how it integrates with other applications
3	Talent Review Profile Options and Descriptive Flexfields	Manage Talent Review Profile Option Values Manage Talent Review Descriptive Flexfields	Describes the consequences of setting up the talent review profile option and defining a segment for a descriptive flexfield for Talent Review
4	Talent Review Templates	Configure Talent Review Dashboard Options	Describes how to create talent review templates and configure the box chart matrix
5	Potential Assessment	Manage Potential Assessment	Provides an overview of the potential assessment and describes how to configure it
6	Talent Review Tasks and Notes	Manage Talent Review Lookups Manage Talent Review Notifications	Provides an overview of talent review tasks and notes and how to use them

Succession Management

Chapter	Title	Task	Contents
7	Succession Management	Manage Succession Management Lookups	• Overview of succession management • Describes how succession plans, talent pools, and talent reviews work together • Overview of succession management lookups and descriptive flexfields

Chapter	Title	Task	Contents
			• Describes how the user can configure alerts for succession plans • Explains how you can use succession plan related deep links • Describes how you can add an object note to a succession plan

Talent Pools

Chapter	Title	Task	Contents
8	Talent Pools	Manage Descriptive Flexfields	• Overview of talent pools • Overview of talent pool related descriptive flexfields • Explains how you can use talent pool related deep links

Personalization Using Transaction Design Studio

Chapter	Title	Contents
9	Personalization Using Transaction Design Studio	Explains the actions to use in Transaction Design Studio to configure Talent Review, Succession Management, and Talent Pool pages.

2 Talent Review Overview and Integrations

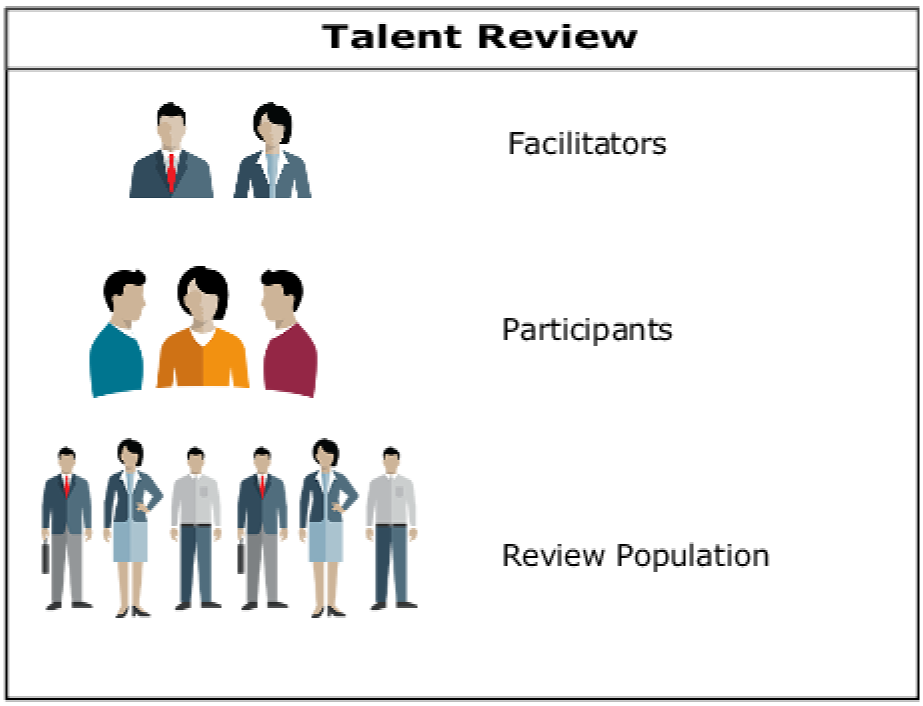
Talent Review

The talent review process involves one or more talent review meetings. Its purpose is to evaluate workers who are part of the review population, assess their strengths, and address areas of risk for the organization.

Use the Talent Review work area to create, edit, and conduct talent review meetings. Select **My Client Groups** > **Talent Review** to access this work area.

Talent Review Stakeholders

This image shows the stakeholders of a talent review meeting.



This table lists what facilitators and participants do in a talent review meeting.

Stakeholder	Who They Are	What They Can Do	Comments
Facilitators	• Human resource (HR) specialist (or other HR business partner) • Organizational business leader	• Manage and conduct the meeting. • Add development and performance goals for the review population.	• Goals created in a Talent Review meeting are automatically assigned to the worker as an individual goal. The worker or manager can view the goal in the worker's goal page.

Stakeholder	Who They Are	What They Can Do	Comments
		• Create tasks for the review population. • Create notes about the meeting. • Add workers in the talent review meeting dashboard to talent pools and succession plans. • Create talent pools and succession plans for the meeting.	• You track tasks to completion using the Tasks page.
Participants	Line managers	• Review worker profile, performance, goals, and compensation data before the meeting starts. • Calibrate ratings of the review population. • View worker data, such as competencies and degrees in the worker's person spotlight.	You can review worker ratings for any level of the organization. For example, you can review workers in an organization as a single group. Or, you can filter workers by job, location, or other categories.

Worker Ratings

As a meeting participant, you can review the ratings of workers to understand worker strengths and weaknesses. You can view any of these ratings on the box chart matrix:

- Performance
- Potential
- Overall competencies
- Overall goals
- Impact of loss
- Risk of loss
- Talent score

You can configure the box chart views and combine the ratings to review data critical to your business process. You can switch from one view to another and can rate the workers using different criteria on the alternate view.

Any rating updates from the meeting appear in the worker profile data. You can identify them as talent review ratings to distinguish them from other ratings, such those from a performance evaluation.

Talent Review Deep Links

You can use deep links to navigate directly to the Talent Review pages indicated in this table.

Deep Link	Navigates To
Overview (HR_TALENT_REVIEW_ OVERVIEW)	Facilitator Talent Review Meetings page

Deep Link	Navigates To
Overview (MGR_TALENT_REVIEW_ OVERVIEW)	Manager Talent Review Meetings page

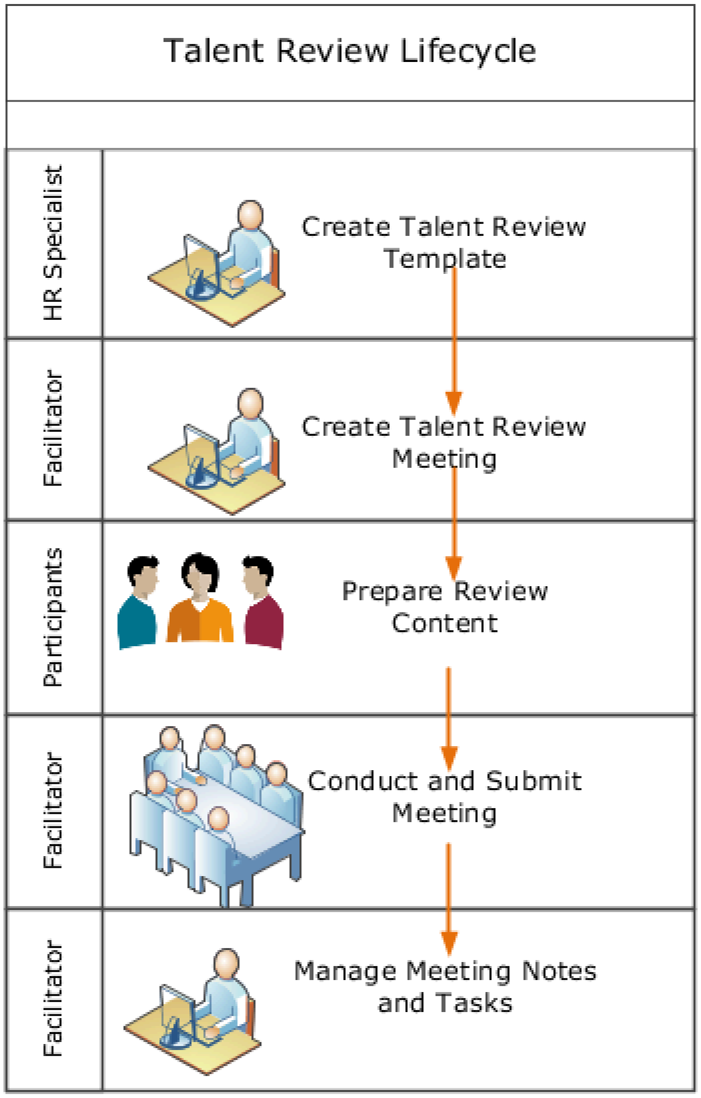
Related Topics

- Succession Management
- How Succession Plans, Talent Pools, and Talent Reviews Work Together
- Talent Pools
- Talent Review Life Cycle

Talent Review Life Cycle

The talent review process includes tasks from creating the meeting template through conducting the review meeting to managing notes and tasks created for the meeting. Manage talent reviews in the Talent Review work area. Select **My Client Groups** > **Talent Review** .

This image shows the different stages of the talent review process and identifies responsibilities.



Let's now see what each stage involves.

Create Talent Review Template

The human resource (HR) specialist creates a talent review template in the Setup and Maintenance work area. Facilitators can use the same template for many talent reviews. In the template, the HR specialist can specify these attributes of a meeting:

- The size of the review population
- The box-chart matrix options and default presentation
- The data available to meeting participants
- The actions that participants can perform

The HR specialist can also indicate if the review can include succession plans and talent pools.

Create a Meeting

Meeting facilitators, who have the HR specialist role can create talent review meetings. A meeting can have multiple facilitators, any of whom can perform these tasks when creating a meeting:

1. Select a talent review template.
2. Schedule the meeting.
3. Select the content available for reviewers to prepare before the meeting, from the options specified in the talent review template.
4. Select meeting participants and designate them as either reviewers or participants who act as observers.
5. Identify the review population.

When a facilitator submits the meeting configuration, if **New meeting scheduled notification** is enabled, the participants receive notifications to prepare review content for the meeting.

Prepare Review Content

Participants who are designated as reviewers submit content for their direct and indirect reports before the meeting is conducted. The content can include ratings for these profile data:

- Performance
- Potential
- Overall competencies
- Overall goals
- Impact of loss
- Risk of loss
- Talent score

Reviewers can grant access to other managers below them in their hierarchy to submit data for their own direct reports. When reviewers submit the data, any changes to the ratings appear in the profiles of reviewed workers.

These talent review notifications can be enabled for tracking content submission:

- **Talent review content preparation reminder notification**: Facilitators can send reminder notifications to reviewers when the submission deadline approaches.
- **Submit talent review meeting content notification**: Facilitators receive a notification when reviewers submit their ratings.

Conduct the Talent Review Meeting

The facilitator starts the meeting in the Talent Review work area. During the meeting, participants provide information about the worker ratings. The facilitator then calibrates the ratings on the dashboard.

Workers in the review population who weren't assessed before the facilitator started the meeting appear in the meeting Holding Area, if it's available.

The facilitator, after consulting with the participants can perform any of these actions during the meeting:

- View and update the meeting box chart.
- Review profile and compensation details of individual workers in the review population on the worker's person spotlight.

- Compare current data to that from previous meetings.
- Compare a worker to another worker or to a job profile.
- Open the organization chart of the organization that's being reviewed.
- Add workers in the review population to talent pools or succession plans, if the pools and plans are included in the meeting template.
- Move workers in the review population from the box chart to the Holding Area or from the Holding Area to the box chart.
- Assign performance and development goals to workers.
- Assign tasks to anyone in the organization.
- Create notes for workers in the review population.
- Save the meeting or submit it to freeze the data.

Note: Facilitators can perform actions depending on the meeting template configuration.

These are the consequences of a facilitator saving the meeting data:

- Goals, notes, and tasks are saved immediately.
- Workers can access performance goals assigned to them from their goal management pages, and manage development goals from their career development pages.

When the facilitator submits the meeting data, any profile changes appear in the worker's profile record.

Manage Notes and Tasks

Facilitators can manage and monitor notes and tasks added in meetings, and review them for all workers for all meetings.

Related Topics

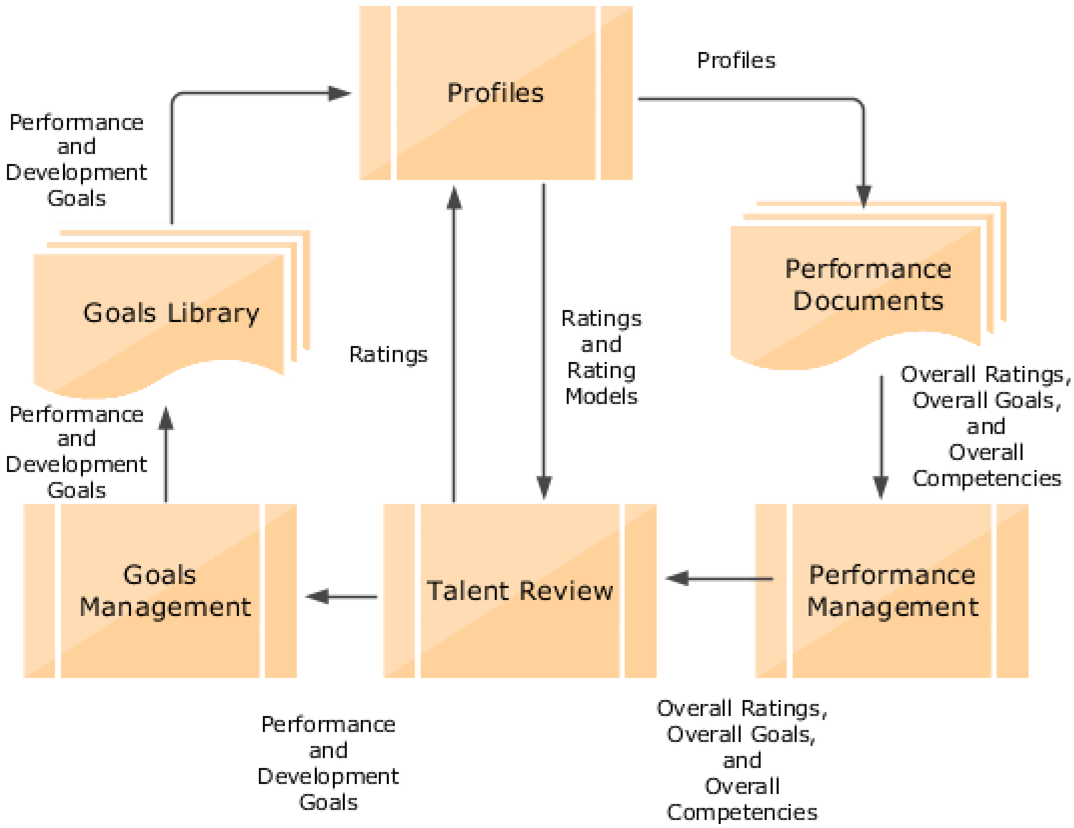
- Talent Review Template
- Guidelines for Selecting Participants for Talent Reviews
- How You Prepare Content for a Talent Review Meeting

How Talent Review Works with Profiles, Goals, and Performance Management

Talent review integrates with Profiles, Goals Management, and Performance Management. You use talent review templates to control this integration. Create talent review templates on the Manage Talent Review Templates page. In the Setup and Maintenance work area, use the following:

- Offering: Workforce Development
- Functional Area: Talent Review
- Task: Configure Talent Review Dashboard Options

This image shows the data integration of Talent Review with Profiles, Goals Management, and Performance Management.



Talent Review and Profiles

You can include any of these ratings and their associated rating models from Profiles in a talent review template:

- Performance
- Potential
- Overall Competencies Rating
- Overall Goals Rating
- Impact of Loss
- Risk of Loss
- Talent Score

Reviewers rate the review population based on the ratings included in the template. When a facilitator conducts the meeting, the participants can view the ratings of each worker in the review population on the meeting dashboard. The facilitator can show how the latest ratings compare with the prior ratings of the workers stored in profiles.

The latest overall performance rating for a worker can come from any of these sources:

- Overall rating in the performance document

- Rating that a participant provides while preparing the review content before the meeting
- Career Planning card

The facilitator can change the ratings of the workers during the meeting. When the facilitator submits the meeting, the ratings of the workers in the review population is updated in Profiles.

Talent Review and Goals

A facilitator can assign a performance goal or a development goal to a worker in the review population while conducting a Talent Review meeting. A facilitator can assign a new goal or an existing goal from the goal library. Workers can view the goals assigned on their performance goal or development goal pages.

Talent Review and Performance Management

You can enable ratings for the performance document sections. If the performance document is configured to do so, when a performance document is completed, the worker's profile is updated to include these changes made in the performance document:

- Overall ratings
- Competencies and proficiency rating levels
- Competencies and goals section ratings

When the ratings are enabled, you can configure the talent review template to include overall worker competencies, overall ratings, and overall goals ratings

Related Topics

- Update Existing Setup Data
- Oracle Fusion Profile Management Components: How They Work Together
- Rating Models
- Goal Library

Deep Links

You can use deep links to provide easy navigation directly to a page in the HCM Cloud application. Deep links can also be used for mobile responsive pages on your intranet, custom and third-party applications, or in a document. This helps people run transactions in the HCM cloud and provides quick access to their HR information.

To access deep links:

1. Open the main menu.
2. Go to **Tools** > **Deep Links** .
3. Copy the URL for a deep link.
4. Paste the URL in the desired location.

When you open Deep Links, you will find a list of all available deep links.

Configure a Talent Review Box Assignment Event to Trigger Checklist Tasks

This example shows how to use the condition builder to configure the **Box Assignment** checklist event. Let's assume that you want line managers to do these tasks when a member of the review population moves to the **Top Talent** box on the Talent Review dashboard:

- Include the member in a particular talent pool.
- Add some development goals for the member.

You need to do these tasks to configure the **Box Assignment** checklist event:

1. Create a Talent Review Box Assignment checklist template.
2. Configure the **Box Assignment** event.
3. Add tasks for the manager.

Create a Talent Review Box Assignment Checklist Template

1. In Setup and Maintenance, go to the **Checklist Templates** task.

   Tip: You can also use the **Checklist Templates** quick action available in My Client Groups.

2. Create a checklist template.
3. On the General tab, specify values as indicated in this table.

Field	Value
Name	Talent Review Box Assignment
Status	Active
Category	A suitable category. For example, **Talent Management**.

4. Click **Save**.

Configure the Box Assignment Event

1. Click the Actions and Events tab.
2. In the Configure Events section, click **Add**.
3. Select **Box Assignment** in the **Name** list of values.
4. Click **Edit Condition** to display the Condition Builder.
5. Click **Create Group**.

6. Select the values indicated in this table.

Condition Column	Value to Select
Attribute	Box Assignment Name
Operator	Equals
Operand Type	Constant
Operand Value	Top Talent **Note:** The values listed depend on the box assignment values configured in the Talent Review meeting template.

7. Click **OK** to close the Condition Builder.
8. Click **Save**.

Add Tasks for the Manager

1. Click the Tasks tab.
2. Click **Add Task** to add a task.
3. On the Details sub tab, specify values as indicated in this table.

Field	Value
Name	Add to Pool
Status	Active
Sequence	1
Performer	Line Manager
Owner	Line Manager
Task Type	Application Task
Application Task	Add to Talent Pool

Field	Value

4. Click **Save and Close**.
5. Click **Add Task** to add the second task.
6. On the Details sub tab, specify values as indicated in this table.

Field	Value
Name	Add Development Goals
Status	Active
Sequence	2
Performer	Line Manager
Owner	Line Manager
Task Type	Application Task
Application Task	Add Development Goal

7. Click **Save and Close** to return to the Tasks tab.
8. Click **Save and Close**.

Related Topics

- How You Configure Events in Checklists

FAQs

How can I diagnose any issues with Talent Review data?

Run the Talent Review Integrity Validations test if you have access to the Diagnostic Dashboard. From the Settings and Actions menu, select **Run Diagnostic Tests**. The test generates a report identifying invalid rows, which you can repair or remove.

You can validate these from the test results:

- Business groups are valid and exist.

- Foreign key attributes aren't null.
- Row counts on setup tables are greater than zero.

3 Talent Review Profile Options and Descriptive Flexfields

Search Logic Profile Options for Client List of Values

You can use the logic <codeph>CONTAINS</codeph> to create the client list of values. This returns results containing the characters you enter. Optionally, for individual list of values, you could change this logic to <codeph>STARTS WITH</codeph>, to return results that start with the search characters you enter.

For example, when you search for a person with the name John Smith while using the logic `CONTAINS`, you can search by '**jo'** or **'sm'** or **'th'**. When you use the logic `STARTS WITH`, your search must start with '**j'**.

Use the logic `STARTS WITH` when your list contains thousands of values (more than 15,000 records) to improve the search performance. Or, if you don't partition your data by set ID.

> **Note:** If you change the search logic for a client list of values, the logic changes in all pages where the list of values is used.

Related Topics

- Search Logic Profile Options for Client List of Values
- Search Logic Profile Options for Client List of Values in Global Human Resources

Talent Review Profile Options

As an application implementor, you can use Talent Review profile values to configure the Oracle Fusion Talent Review work area in these ways:

- Specify the folder to store analyses for selecting the review population for a meeting.
- Indicate if meeting facilitators can include themselves in the review population or not.
- Enable responsive Oracle Fusion Talent Review pages.
- Configure how manager search works in responsive pages.

General Profile Option

This table describes the Talent Review profile value for specifying the default reports folder and lists the task that you need to use to change the profile value.

Profile Option Code	Profile Display Name	Default Value	What Happens When You Change the Profile Value	Task to Use	Comments
HRR_DEFAULT_ REPORT_FOLDER	Default Reports Folder for Talent Review	None	HR specialists can add analyses to the specified folder. They can then select an analysis to add workers to the review population of a talent review meeting.	Talent Review Profile Option Values	• You can copy the folder path directly from Oracle Transactional Business Intelligence (OTBI) by navigating to Properties for one of the analyses in the folder. You can then paste the copied location in the **Profile Value** field. • You can enter only one folder location. • The profile value must start with a forward slash (/), but not end with a forward slash.
ORA_HRR_ALLOW_ FACILITATOR_TO_ SEARCH_OWN	Allow facilitator to add themselves to the review population	Y	Meeting facilitators can't include themselves in the review population of a Talent Review meeting.	Manage Administrator Profile Values	If a Talent Review meeting has more than one facilitator, a facilitator can add any of the other facilitators to the review population. Also, facilitators can always include themselves as review participants.

Responsive Profile Options

Some profile options are specific to responsive Talent Review. Use the Manage Administrator Profile Values task to change the responsive Talent Review profile options.

Tip: Select the **Talent Review** application and click **Search**.

This table describes the Talent Review profile values that are used for responsive Talent Review pages and lists the default value of the profile options.

Profile Option Code	Profile Display Name	Default Value	Effect of Enabling
ORA_HRR_TALENT_REVIEW_ RESPONSIVE_ENABLED	Mobile-Responsive Talent Review Pages Enabled	Y	You will see the responsive Talent Review pages.

Profile Option Code	Profile Display Name	Default Value	Effect of Enabling
ORA_HRR_LOV_SEARCH_ TRMANAGERS_STARTSWITH	Search for Talent Review Managers Starts with Enabled	Y	When you search for managers to include in a meeting on a responsive Talent Review page, the search results include manager names that start with the specified characters.

Related Topics

- How You Select the Review Population for a Talent Review Meeting
- Overview of Profile Options

Descriptive Flexfields for Talent Review

You can add descriptive flexfields to theseTalent Review entities:

- Meeting template
- Meeting configuration details

You can use descriptive flexfields to add your company-specific attributes to an entity.

Define Descriptive Flexfield Segments for Talent Review

Use the Manage Talent Review Descriptive Flexfields task to define a segment for a descriptive flexfield for Talent Review.

This table describes two descriptive flexfields available by default in Talent Review.

Flexfield Code	Name	Description
HRR_DASHBOARD_TMPLS_B	Dashboard Template	Fields for template details that appear on the Create Talent Review Template and Manage Talent Review Template pages.
HRR_MEETINGS	Dashboard Meetings	Fields for meeting configuration details that appear on the Create and Edit Talent Review Meeting: Enter Meeting Details pages.

Related Topics

- Overview of Descriptive Flexfields
- Overview of Flexfields
- Considerations for Planning Descriptive Flexfields
- Considerations for Managing Descriptive Flexfields

4 Talent Review Templates

Talent Review Template

The talent review template controls these aspects of a talent review meeting:

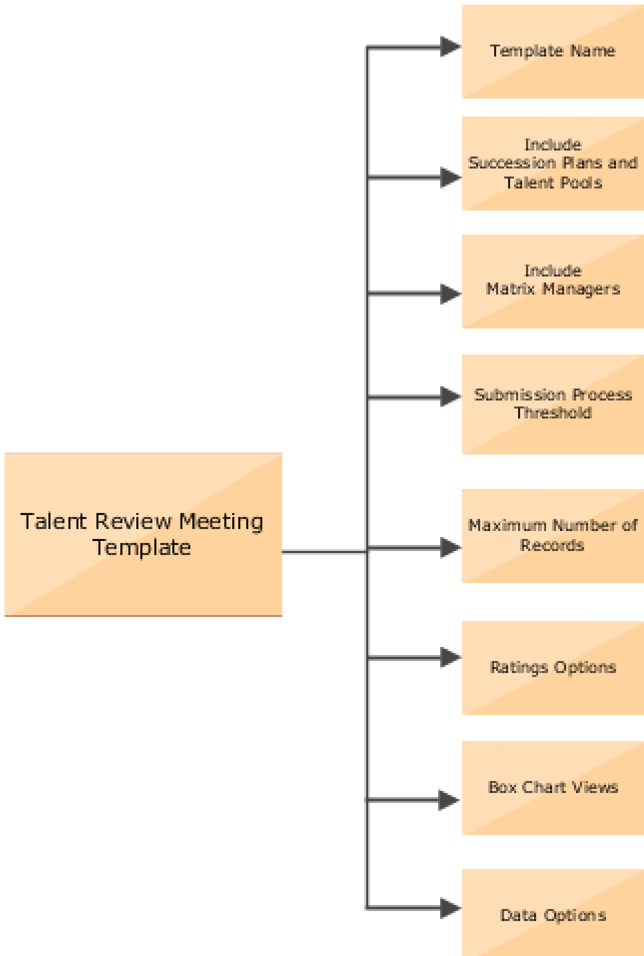
- Inclusion of succession plans and talent pools
- Inclusion of matrix managers as reviewers
- Maximum number of records for a meeting
- Layout of the box chart that displays employee ratings
- Filters that facilitators can use in a meeting
- Actions that facilitators can perform

As an implementor, you create templates which facilitators can use to create talent review meetings. Facilitators can use the same template for many meetings.

You create talent review templates on the Talent Review Templates page. You can navigate to this page in these ways:

- Use the Configure Talent Review Dashboard Options task in the Setup and Maintenance work area.
- Use the **Search Talent Review Template** quick action available in My Client Groups.

This image shows what you typically specify while creating a Talent Review meeting template.



The maximum number of records you specify in the template is the maximum number of employees allowed for the review population. The default value is 500.

Why You May Need Many Templates

You may need to create multiple templates for these cases:

- Each organization or geographic region uses different rating models to rate employees.
- Organizations use different box-chart configurations. For example, one organization uses a nine-box configuration and another uses a six-box configuration.
- Industry or legislative rules governing diversity data, such as age and gender, vary by organization or geographic region.

What Happens When You Include Succession Plans and Talent Pools

When you include succession plans and talent pools in a template, facilitators and reviewers can perform these actions:

- When creating a meeting based on the template, facilitators can add succession plans and talent pools that they can access to the meeting.

- When preparing review content, reviewers can add employees to plans and pools that they can access in the participant view of the dashboard. They can also add succession plans and talent pools.

While conducting a meeting, facilitators can perform these actions:

- Add employees in the review population as candidates to plans included or created in a meeting.
- Add employees in the review population as members of talent pools included or created in a meeting.

What Happens When You Include Matrix Managers as Reviewers

The setting for inclusion of matrix managers as reviewers is carried over to new meetings that are created based on the template. Note that this setting doesn't apply to existing meetings that were created based on the template. If you enable the inclusion of matrix managers as reviewers in the template, and if facilitators don't change this setting in the meeting configuration when they create a new meeting, facilitators can add matrix managers as reviewers for the meeting. Here's what happens when facilitators include matrix managers in the meeting:

- Matrix managers receive notification when the talent review meeting in which they're included is scheduled or updated.
- They can view and rate their dotted line reports on the Prepare Review Content page if they have the relevant profile security permissions.
- They can add notes and tasks for their dotted line reports.
- On the Talent Review meeting dashboard, they can perform the same actions as other managers included in the meeting.

How You Decide the Submission Process Threshold

The submission process threshold is used to automatically run a scheduled process to update ratings in the employee profiles for these actions:

- **Facilitator submits the meeting**: The submission process threshold indicates the size of the review population. For example, if you enter 500 as the submission process threshold, when there are 500 or more employees in the review population, a scheduled process is automatically run to update the profile ratings when the facilitator submits the meeting.
- **Manager submits the ratings after preparing review content**: The submission process threshold indicates the maximum number of employees the manager can rate. For example, if you enter 200 as the submission process threshold, when there are 200 or more employees rated by the manager while preparing review content, a scheduled process is automatically run to update the profile ratings when the manager submits the ratings.

When the scheduled process starts, a message displays the job number. You can also see the job number of the process next to the meeting status in the Talent Review Meetings overview page. You can track the process using this job number.

What You Can Specify in the Ratings Options Section

You can configure the ratings that you plan to use to rate the review population or show as a display option in the Ratings Options section.

1. Click **Add** to add a new rating.

2. Select a rating.

   Its display label automatically populates. But you can change the display label.
3. If you don't want to use the rating to rate the review population, then clear the corresponding **Use to Rate Review Population** check box.

Note: After adding a rating, you can't select the same rating to add.

You can use the ratings for which the **Use to Rate Review Population** check box is selected to set up the box chart and table views of the meeting dashboard created based on the template.

Note: Customizations done for the Rating Options section prior to 22A release won't be available now. You need to recreate the customizations again.

How You Can Set Up the Box Chart Views

You can make available different box chart views for the facilitators to use while conducting the meeting. This enables the facilitators to rate the review population on different parameters. For example, you can create one view that allows meeting participants to rate employees both on risk of loss and performance. You can also create a single rating view that allows the meeting participants to rate the overall competency of the employees in the review population.

1. Specify these values for creating the box chart views:

   - **View name**: Enter a unique name that will let the facilitator know the use of the box chart view.
   - **View Type**: Select from the two available types.
   - **X-Axis or Single Rating**: Select the rating that you want to use on the X-Axis of the box chart or for the single rating view.
   - **Y-Axis**: Select the rating that you want to use on the Y-Axis of the box chart.
2. Select one box chart view as the default.
3. Configure the boxes that appear in the box chart.

   - For box charts of the **XY View** type, the number of rating categories in the rating models you selected determines the box-chart dimensions. For example, one rating model combination may deliver a nine-box configuration and another a six-box configuration. For each box, you can specify a label
   - For box charts of the **Single Rating View** type, you select the dimensions and the rating levels to populate each box.

Note: You need to submit at least one XY or single rating view. Select the corresponding **Submit Box Assignment** check box.

What You Can Specify in the Data Options Selection

In the Data Options section, select the data and actions available to meeting facilitators and participants during a Talent Review meeting. You typically select these values:

- The analytic options that you want to appear on the box chart matrix. Facilitators and participants can select up to two of these values at one time during the meeting.
- The filters to be displayed on the Talent Review meeting dashboard.

- The actions facilitators can perform while conducting the review meeting.
- The diversity-related information to be made available on the Talent Review meeting dashboard. Facilitators and participants can highlight selected segments of the review population based on these options.

Related Topics

- Box Chart Matrix Options
- Talent Review Data Options
- How Talent Review Works with Profiles, Goals, and Performance Management
- Talent Review Life Cycle
- How Succession Plans, Talent Pools, and Talent Reviews Work Together

Box Chart Matrix Options

You can see the box chart matrix on the Talent Review meeting dashboard. Configure it in the review template by specifying these values:

- Ratings to make available
- Box chart views

You create talent review templates on the Manage Talent Review Templates page. In the Setup and Maintenance work area, use these values:

- **Offering**: Workforce Development
- **Functional Area**: Talent Review
- **Task**: Configure Talent Review Dashboard Options

Ratings

This table describes the ratings that you can include in a Talent Review template.

Ratings	Description
Impact of loss	Evaluate the real or perceived effects on an organization when a person leaves.
Overall Competencies	Evaluate the overall competency of a person. A competency is a combination of measurable knowledge, skills, and personal attributes that contribute to a person's performance. **Note:** If the performance document is configured to allow section ratings and to update Profiles with the performance document rating, then the overall competencies rating is pulled from Profiles. Else, facilitators need to update this rating while conducting the talent review meeting.
Overall Goals	Evaluate the overall goal achievement of a person.

Ratings	Description
	Note: If the performance document is configured to allow section ratings, then the overall goals rating is pulled from Profiles. Else, facilitators need to update this rating while conducting the talent review meeting.
Performance	Evaluate a person based on their work.
Potential	Evaluate a person's attainable level of excellence or ability to achieve success.
Risk of loss	Evaluate the likelihood of a person leaving the company.
Talent score	Evaluate a person's overall value to the organization using a rating model your organization defines. You can score workers based on factors beyond performance and potential. These might include readiness, ability to mentor, and learning agility.

Configure Ratings

You need to set up the ratings to use in the template.

1. Specify a label for all the ratings. The label that you assign appears on the box chart matrix for the rating when it's used as an axis in the box chart. It also appears on the table view of the box chart that displays the ratings and additional information used in the meeting.
2. Select the rating model to use for all the ratings.
3. Select the ratings you want to be available for inclusion in the box chart.

   Note: Even if you don't make the risk of loss and impact of loss ratings available for the box chart, you can still select these ratings as analytic options in the template. As analytic options, the ratings appear on the box chart matrix with different colors or shapes to distinguish each worker's rating.

It's a good idea to select a rating model that's also used for the rating type in other Talent Management offerings. These are the advantages for facilitators and participants when you select a consistent rating model:

- They can view the latest worker's Profile data in the meeting.
- They can compare the meeting ratings with those from previous meetings and determine the worker's progress.

Note: You must set up rating models in Oracle Fusion Profile Management to make them available in Talent Review.

Box Chart Views

In the Box Chart Views section of the template, you add and configure the available views, using the ratings you selected in the Ratings Options section.

The rating models that you selected for the ratings in a view determines the dimensions and number of boxes in the box chart. For example, if you map a performance rating model with two rating categories to the X-axis, and a potential rating model with three categories to the Y-axis, then the box chart contains six boxes (2 x 3).

Note: The rating models you select for the X and Y axes of an XY view must contain rating categories. If the rating models you select don't have rating categories, the box chart doesn't appear because the dimensions can't be determined.

Configure Box Chart Views

You can configure multiple unique box chart views to display worker ratings. In the meeting, facilitators can update worker ratings for the rating types you specify as views in the box chart.

1. Add views. You can add two types of views:
    - **XY View**: Uses two separate ratings as the axes
    - **Single Rating View**: Uses one rating as the lone measure
2. Set the default view. Facilitators can switch between views during the meeting.
3. Label the boxes that appear in the box chart:
    - For ratings used in the XY view, you can enter any label.
    - For the Single Rating view, select a value from the **Short Description** attribute along with the box chart dimensions. You can select from one to five rows and columns, up to a maximum of 25 (5 x 5) boxes in the box chart.
4. You can submit the box assignment for only one XY and one Single Rating view. When you select Submit Box Assignment for a view, the labels of the boxes appear in the table view of the box chart.

Enable Background Colors

You can enable background colors for each box of a box chart view and make it easy for facilitators and participants to distinguish levels or ratings. For example, if you have a 9-box box chart that shows potential and performance, you can use these color shades:

- **Light pink**: For low performance and low potential
- **Magenta**: For high performance and low potential
- **Coral**: For medium performance and potential
- **Orange red**: For low performance and high potential
- **Crimson**: For high performance and potential

Note: People with color vision deficiency can't differentiate some colors.

To enable background colors:

1. In the Box Chart Views section, click the Edit icon in the Configure Boxes column for the view that you want to enable background colors for.
2. In the Configure Boxes dialog box, select the color for the boxes that you want to have a colored background.

    Tip: Click **Show hexadecimal code** to view the hexadecimal code for the colors.

3. Click **OK**.

If you don't select a color for any box, then the background color of the box is gray by default.

The colors configured are applied to the boxes in the box chart of the meeting dashboard when facilitators conduct a meeting or reviewers preview the dashboard while preparing review content. The Prior Ratings legend also shows the colors configured.

Note: You need to configure colors for each box chart view. The colors configured for one view aren't applied to other views.

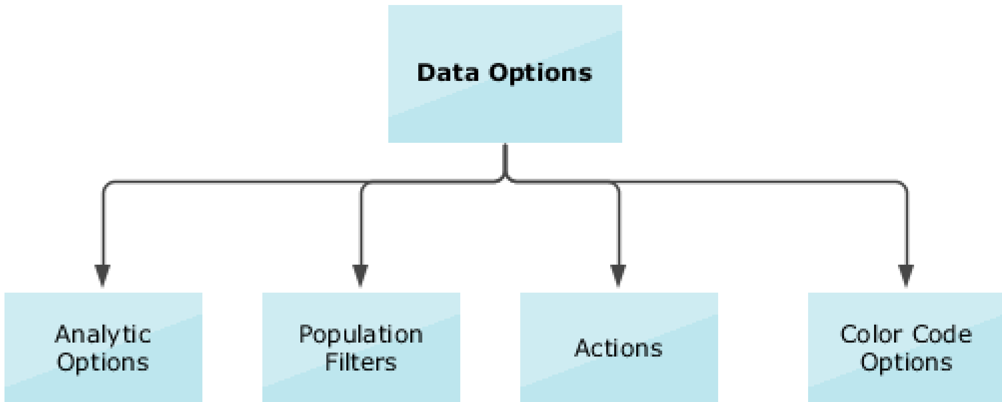
Related Topics

- Talent Review Data Options
- Update Existing Setup Data

Talent Review Data Options

When creating a talent review meeting template, you specify the data and actions available to meeting facilitators and participants. To create a talent review meeting template, use the Configure Talent Review Dashboard Options task in the Setup and Maintenance work area.

Note: To restrict access to reviewers, meeting facilitators can override the configured data options on the Prepare Review Content page when creating a meeting.



Let's look at each of these data options.

Analytic Options

This table lists the analytic options of the talent review meeting template and shows when these options are available.

Analytic Option	Condition for Availability
Risk of loss	Risk of loss rating model must exist

Analytic Option	Condition for Availability
Impact of loss	Impact of loss rating model must exist
Mobility	Mobility content type must exist

The profile management business process has predefined values for each of these analytic options. The selected analytic options appear on the box chart matrix. Facilitators and reviewers can select up to two of these values at one time during the meeting.

Population Filters

You can select the filters to be displayed on the talent review meeting dashboard. These filters include business unit, job, and competency. Facilitators can filter the review population using these filters.

These options let you specify whom to include in the review population:

- **Manager**: Shows all managers in the review population hierarchy, even if they have no direct reports in the review population.
- **Reviewers and Participants**: Shows all the direct and indirect reports of the reviewers and participants if they're part of the review population.
- **Subordinate Level**: Shows only the subordinates of the meeting business leader.
- **Management Level**: Shows only people at the specified management level.

Actions

You can select the actions options shown in this table for the Actions section of the talent review dashboard.

Action Options	What It Does	Comments
Add Notes	Facilitators can add notes about the meeting or for any person in the review population. Facilitators can also manage notes created by the worker's manager during the content preparation phase before the talent review.	
Add Task	Facilitators can assign tasks to meeting participants and others.	The tasks added appear in the Manage Notes and Tasks task the facilitator uses after the meeting to follow up on assigned tasks.
Add Goal	Facilitators can create goals or assign performance or development goals from the goal library.	The goal management business process must be available to create performance goals. The career development business process must be available to create development goals.
Enable Holding Area	The Holding Area displays workers without ratings at the start of the meeting.	During the meeting, participants can move workers to this area from the box chart. If you don't enable the Holding Area, workers without

Action Options	What It Does	Comments
		ratings at the start of the meeting don't appear in the review.
Enable Compare	Participants can compare a worker with other workers or a job profile.	You can see the **Enable Compare** check box in the Actions section of the Talent Review Template page only if the **Hide Person Compare Flow** profile option's value is **N**.
Enable Organization Chart	Participants can view the organization chart of the organization being reviewed.	
Enable Potential Assessment	Before the meeting, reviewers answer potential assessment questions on the Prepare Review Content page. The potential rating is calculated automatically based on the responses.	

Color Code Options

Use the color code options to let facilitators and participants to highlight selected segments of the review population. Facilitators can view the average ratings for all workers within that option. For example, if a facilitator selects the **Location** color code option while conducting the meeting, all workers in the review population are categorized by location. Workers belonging to the same location are highlighted with the same color.

Related Topics

- Talent Review Template
- How Succession Plans, Talent Pools, and Talent Reviews Work Together

Talent Review Display Options

When creating or editing a talent review meeting template, you can specify the display options that meeting facilitators and participants can see on the meeting dashboard for these ratings:

- Risk of loss
- Impact of loss
- Mobility

To create or edit a talent review meeting template, use the **Configure Talent Review Dashboard Options** task in the Setup and Maintenance work area.

Configure Display Options

Here's how you configure the display options in the talent review meeting template:

1. From the **Preferred Display Option** list, select whether you want to show colors or shapes.

2. Specify the colors or shapes to use for each analytic value.

> **Note:** You can't select a color or shape for the **No value** and **Secured** analytic values. You can see default colors or shapes for these analytic values.

3. Save your changes.

You can enter only the preferred display option for an analytic and not select any shapes or colors for each value. But if you do so, the facilitators and participants may see some random shapes or colors on the dashboard. Let's assume that you selected **Colors** as the preferred display option for the **Risk of Loss** rating but didn't specify the colors to show for each value. The facilitator may once see a high risk of loss in red, medium in yellow, and low in green. The next time the colors shown for the values may not be the same.

Advantages of Configuring Display Options

After you specify the display options, facilitators can view consistent shapes or colors for each analytic rating value. For example if you selected **Colors** as the preferred display option for the **Risk of Loss** rating and then selected the red color for the **High** value, then in all meetings that are created based on the template, the facilitator will always see high **Risk of Loss** ratings indicated by the red color.

How You Include Matrix Managers as Reviewers

Your organization can ensure a comprehensive review of its employees by allowing matrix managers to rate the performance of their dotted line reports. Matrix managers are additional managers who aren't defined as the employee's line manager. Matrix management can be enabled on these two Talent Review pages:

- Meeting templates
- Meeting configuration pages

Meeting Template

If your organization usually includes matrix managers in your Talent Review meetings, as administrators you can enable inclusion of matrix managers in the Talent Review template.

1. In the Setup and Maintenance work area, search for and select the **Configure Talent Review Dashboard Options** task.
2. Create or edit an existing template.
3. Select the **Include matrix managers as reviewers** check box.
4. Save your changes.

Meeting Configuration Pages

Even if your administrators haven't enabled adding matrix managers as reviewers, as facilitators you can enable this when you create a Talent Review meeting.

1. Create a talent review meeting.
2. In the Review Participants section, select the **Include matrix managers as reviewers** check box.
3. Submit your meeting configuration after you have configured the meeting.

Note that the setting in the Talent Review meeting configuration determines the inclusion or exclusion of matrix managers. If you clear the Include matrix managers as reviewers check box in the meeting configuration, matrix managers can't review their dotted line reports even if matrix management is enabled in the template.

FAQs

Can I edit a talent review template after it has been used for a meeting?

Yes. On the Manage Talent Review Templates page, you can edit attributes including axis labels, default view, box labels, color scheme, and data options. You can't edit the template name, owner, status, or selected rating models.

Changes take effect when you next open the meeting.

What happens if I don't select a preferred display option for the ratings or specify the color or shape to use for a rating level?

The facilitators and participants will see random colors or shapes on the meeting dashboard for the analytic values. For example, a facilitator may see a high **Risk of Loss** in red once and may see the same rating value in green the next time.

Can I specify the same preferred display option for more than one analytic?

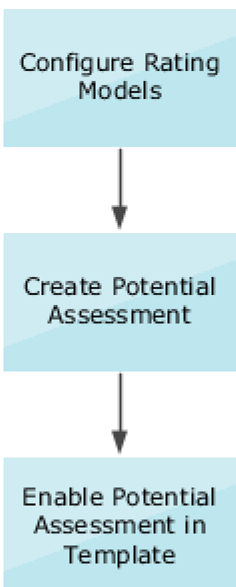
Yes. But note that on the Talent Review meeting dashboard, only the preference for the first selected analytic option is honored. Let's assume that you selected **Colors** as the preferred display option for both **Risk of Loss** and **Impact of Loss** analytics in the template. When conducting the meeting, the facilitator first selects the **Risk of Loss** display option on the dashboard. The facilitator can see only the color preferences that you selected for the **Risk of Loss** analytic. The colors specified for the **Impact of Loss** analytic is ignored.

5 Potential Assessment

How You Set Up Potential Assessment

The potential assessment is a questionnaire that reviewers of a talent review meeting can use to rate the potential of workers.

Administrators need to create and configure potential assessments before reviewers can use them to prepare review content. This image shows how to set up a potential assessment to rate the review population of a talent review meeting.



Configure Rating Models

An administrator needs to configure the Potential and Potential Assessment rating models to add or change rating levels or review points. As an administrator, you manage rating models on the Profile Rating Models page. In the Setup and Maintenance work area, use these values:

- Offering: Workforce Development
- Functional Area: Talent Review
- Task: Configure Talent Review Dashboard Options

Create Potential Assessment

An administrator needs to create a potential assessment before it's available to use in meetings.

1. Use the Potential Assessment task available in the Setup and Maintenance work area.

2. Locate the predefined potential assessment questionnaire named **Potential Rating** that's available in the **Potential Rating** folder.
3. Select if you want to create a new version of the questionnaire or update the existing questionnaire.
4. Add questions to the questionnaire.
5. Associate responses in the Potential Rating Model with the questions added.

Enable Potential Assessment

As an administrator, on the talent review template, you need to enable reviewers to access potential assessment:

1. Use the Configure Talent Review Dashboard Options task available in the Setup and Maintenance work area.
2. Create a new template or edit an existing template.
3. Select the **Enable Potential Assessment** check box in the Data Options section of the template.

Related Topics

- Questionnaires
- Rating Models
- Update Existing Setup Data

Guidelines for Configuring a Potential Assessment

If you want to allow your reviewers to use the potential assessment feature to rate workers, you need to first configure a Potential Assessment questionnaire. Use the Potential Assessment task in the Setup and Maintenance work area to do this. The Potential Assessment questionnaires are available in the Potential Rating folder.

To configure a Potential Assessment questionnaire:

1. In the Potential Rating folder, edit the **Potential Rating** questionnaire.
2. Select one of these options and click **OK**.
    - Create a New Version of the Questionnaire
    - Update Existing Questionnaire
3. Edit the basic information:
    - Name of the questionnaire
    - Status
    - In the **Instructions and Help Materials** section, enter any instructions for questionnaire users. This text appears on the first page of the questionnaire.
4. Add sections if you want to.
5. Add or create questions in each section and select response type.
6. Review and save the questionnaire.

Sections

You need to have at least one section for a Potential Assessment questionnaire. You use different sections to group questions by question type or other criteria. For each section, you can enter specific instructions.

You can select these options for a section:

- **Required**: To ensure that respondents answer all questions in the section.
- **New Page**: To start the section on a new page.

You can also control the order of questions and responses in the section.

Questions and Responses

In each section, you can add questions in these ways:

- Create new questions.
- Add questions from the Potential Assessment question library.

Note: You can't add questions from the question library used for other questionnaires.

For each question that you create, you need to specify these values:

- Question text
- Response type: Single choice from a list or a radio button

Available Responses

The responses are determined by the rating levels in the Potential Assessment rating model:

- The number of rating levels is the same as the number of potential responses.
- The text of the response is the short description value for the rating level.
- The value of each response is the numeric rating of the rating level.

Number of Questions

The number of questions you add is determined by these parameters:

- Number of rating levels and numeric rating for each in the Potential Assessment rating model
- Rating level and corresponding range of review points for each rating level in the Potential Rating Model

To get a valid potential rating, add enough questions so the total of the numeric value of the responses maps to an appropriate level in the review points. The maximum total value for each rating level should fall between the review point range for the level.

Number of Questions Examples

Consider the rating model configuration shown in this table.

Potential Assessment Rating Model Rating Level	Potential Assessment Rating Model Numeric Rating	Potential Rating Model Rating Level	Potential Rating Model Review Points	Potential Rating Model Review Points Range For Each Level	Final Potential Rating
1	1	1	1	0-13	1-Low

Potential Assessment Rating Model Rating Level	Potential Assessment Rating Model Numeric Rating	Potential Rating Model Rating Level	Potential Rating Model Review Points	Potential Rating Model Review Points Range For Each Level	Final Potential Rating
2	2	2	2	14-21	2-Medium
3	3	3	3	22-99	3-High

The number of questions must ensure that the review points from the Potential Assessment rating model map to the review points range in the Potential rating model.

Let's assume that there are 7 questions. Here's the total points for each rating level in the Potential Assessment rating model.

- **Rating Level 1**: 7 * 1 = 7 points
- **Rating Level 2**: 7 * 2 = 14 points
- **Rating Level 3**: 7 * 3 = 21 points

You can see that for Rating Level 3, the total points is less than the review points range of the Potential rating model.

Now, let's assume that there are 8 questions. Here's the total points for each rating level in the Potential Assessment rating model.

- **Rating Level 1**: 8 * 1 = 8 points
- **Rating Level 2**: 8 * 2 = 16 points
- **Rating Level 3**: 8 * 3 = 24 points

All these scores from the Potential Assessment rating model map correctly to the review points range in the Potential rating model. This shows that you need to create 8 questions to rate potential.

Now, consider the rating model configuration shown in this table. The review points range is changed here.

Potential Assessment Rating Model Rating Level	Potential Assessment Rating Model Numeric Rating	Potential Rating Model Rating Level	Potential Rating Model Review Points	Potential Rating Model Review Points Range For Each Level	Final Potential Rating
1	1	1	1	0-7	1-Low
2	2	2	2	8-12	2-Medium
3	3	3	3	13-99	3-High

For this review point range, you need to create 5 questions to rate potential.

Related Topics

- Example of Rating Potential Using the Potential Assessment
- How You Set Up Potential Assessment
- Configure a Potential Assessment

Example of Rating Potential Using the Potential Assessment

The potential assessment is a questionnaire that calculates potential rating for a worker based on the responses reviewers provide before a talent review meeting. The potential assessment calculates the total number of points for each response based on the Potential Assessment rating model. The Potential Assessment maps the total to the Potential Rating Model to determine the potential rating.

Talent review reviewers use the potential assessment on the Prepare Review Content page. Select **My Client Groups** > **Talent Review** . You create the potential assessment on the Manage Questionnaires page. In the Setup and Maintenance work area, use the following:

- Offering: Workforce Development
- Functional Area: Talent Review
- Task: Manage Potential Assessment

Settings That Affect Potential Assessment

There are three configurations that affect the ranking score:

- Number of rating levels, and the numeric rating assigned to each level, in the Potential Assessment rating model
- Number of rating levels, and review points and points range assigned to each level in the Potential Rating Model
- Number of questions in the Potential Rating (potential assessment) questionnaire

How Potential Rating Is Calculated

The potential assessment contains a set of questions with responses associated with the Potential Assessment rating model. Each possible response represents one unique rating level in the Potential Assessment rating model. The value of each response is the same as the numeric rating for the rating level.

Each rating level in the Potential Rating Model is associated with a range of review points.

When the reviewer completes the potential assessment:

1. The total value of the selected responses is calculated by adding the numeric rating for the rating levels in Potential Assessment rating model.
2. The calculated total is compared to the range of review points in the Potential Rating Model to determine the rating level.
3. The final potential rating is the rating level that corresponds to the sum of the review points in the Potential Rating Model that fit in the range between the From Points and To Points.

Example

In this example:

- The Potential Rating questionnaire contains eight questions.
- The Potential Assessment rating model contains three rating levels, one for each possible response to the questions. Each rating level has a numeric rating. The responses and their numeric ratings are:
  - Strongly Agree: 3
  - Agree: 2
  - Disagree: 1
- The Potential Rating Model has three rating levels. The table shows the numeric ratings for each rating level in the Potential Rating Model, the short description that describes the rating level, the review points, and the points range for each level.

Note: You must configure all the Potential Rating Model attributes shown in the table to use the potential assessment.

Numeric Rating for Rating Level	Short Description	Review Points	Points Range: From Points	Points Range: To Points
1	Low	1	0	13
2	Medium	2	14	20
3	High	3	21	99

Reviewers must answer each question to ensure that the potential assessment is valid. Because the lowest possible rating value for each question is 1, the minimum score is 8. The maximum score is 24. If the sum of the reviewer's selections is 16, that corresponds to the points range of 14-20, and the review points level is 2. The associated numeric rating for the rating level is 2 for that review points level. Therefore, the final potential rating is **2-Medium**.

Related Topics

- Accessing Tasks to Update Existing Setup Data: Procedure

Configure a Potential Assessment

This example demonstrates how to configure a potential assessment questionnaire that talent reviewers can use to rate worker potential before a talent review meeting.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
How many sections?	One
How many questions should I create for the questionnaire?	Eight

Summary of the Tasks

Configure the Potential Assessment questionnaire.

1. Enter questionnaire basic information.
2. Enter questionnaire contents.
3. Create questions.

Prerequisites

1. Configure the Potential Assessment rating model using the attributes shown in the following table.

Rating Level	Name and Short Description	Numeric Rating
DISAGREE	Disagree	1
AGREE	Agree	2
STRONGLY_AGREE	Strongly Agree	3

2. Configure the Potential rating model using the attributes shown in the table.

Rating Level	Name and Short Description	Review Points	Review Points From Points	Review Points To Points
LOW	Low	1	0	13
MEDIUM	Medium	2	14	20
HIGH	High	3	21	99

Entering Questionnaire Basic Information

1. In the **Set Up and Maintenance** work area, click **Manage Potential Assessment** to open the **Manage Questionnaires** page.

2. In the Search Results section, select **Potential Rating** and click **Edit** to open the **Edit Questionnaire: Potential Rating** dialog box.
3. Leave **Update Existing Questionnaire** selected and click **OK** to open the Edit Questionnaire Basic Information page.
4. On the Edit Questionnaire Basic Information page, complete the fields, as shown in this table.

Field	Value
Name	Potential Rating
Status	Active
Introduction	Any

5. Click **Next** to open the Edit Questionnaire Contents page.

Entering Questionnaire Contents

1. On the Edit Questionnaire Contents page, complete the fields, as shown in this table.

Field	Value
Section Order	Sequential
Section Presentation	No Sections
Page Layout	1 Column
Maximum Number of Questions per Page	Blank

2. In the Sections section, click Create to open the Create Section dialog box.
3. Complete the fields, as shown in this table. Use the default values unless otherwise indicated.

Field	Value
Name	Section 1
Description	Any
Question Order	Vertical

4. Click **OK** to return to the Edit Questionnaire Contents page.
5. In the Sections section, in the Section 1 row, complete the fields, as shown in this table.

Field	Value
Question Order	Vertical
Response Order	Vertical

Creating Questions

1. In the Sections section, select **Section 1**.
2. In the Section 1: Questions section, click **Create** to open the Add Questions dialog box.
3. In the Questions section, in the **Question** field, enter **This person is a long-term thinker.**
4. In the Response section, in the **Presentation** field, select **Radio Button List**.
5. Click **Preview** to open the Preview dialog box.
6. Click **OK** to return to the Add Questions dialog box.
7. Click **Save** to return to the Edit Questionnaire Contents page.
8. Repeat steps 2 through 7 to create seven additional questions, using the questions and presentation type shown in the table.

Question Text	Presentation
This person has the ability to lead others through influence, and not just authority	Radio Button List
This person is a creative problem solver	Radio Button List
This person thrives on new challenges and delivers results	Radio Button List
This person is a good fit within our culture	Radio Button List
This person has an effective network; both internally and externally	Radio Button List
This person is self-aware, and strives for both personal and professional development	Radio Button List

Question Text	Presentation
This person recognizes and leverages the potential in others	Radio Button List

9. Click **Next** to open the Edit Questionnaire Review page.
10. Click the **Preview** button to open the Preview Potential Rating dialog box.
11. Click **OK** to return to the Edit Questionnaire Review page.
12. Click **Save and Close**.

Related Topics

- Potential Assessment: Explained
- Configuring a Potential Assessment: Points to Consider
- Rating Potential Using the Potential Assessment: How It Is Calculated

6 Talent Review Tasks and Notes

Talent Review Tasks

As a facilitator, reviewer, or a Talent Review super user, you can create, assign, and manage tasks for action items arising from a talent review.

Manage talent review meetings and the associated tasks from the Talent Review work area.

- Facilitators and Talent Review super users need to select **My Client Groups** > **Talent Review** .
- Reviewers need to select **My Team** > **Talent Review** .

Create and Assign Tasks

You can create and assign tasks in these areas:

- **Talent Review dashboard**: Select any person in the review population and add a task. The person to whom you add the task is automatically the **Associated Worker**, and the person's manager is the **Assignee**. But you can change this.
- **Tasks page**: Assign a task to any person you have access to; you aren't restricted to assigning tasks to meeting participants or the review population

In addition to a subject and description, you define the task attributes shown in this table.

Task Detail	Description
Associated Worker	The person for whom the task is added.
Assignees	One or more workers who perform the task. **Note:** The person's manager is the default assignee.
Owners	People who manage the task. The meeting facilitator or Talent Review super user is the task owner by default, but you can add more owners. Owners need not be meeting facilitators, but if the task owners can't access the Tasks page, they may not be able to manage the task.
Task Type	The category of the task, such as Preparation and Presentation. Task type values exist in the HRT_ TASK_TYPE lookup. You can add values to suit your business requirements.
Due Date	Date by when assignees need to complete the task. The default date is one year from the current date.
Priority	Level of urgency for the task, such as High, Medium, or Low. Priority values exist in the HRT_TASK_ PRIORITY lookup. You can add values to suit your business requirements.

Task Detail	Description
Percentage Complete	The completion percentage of the task. Owners update the field as the assignee progresses on the task.
Status	**Assigned** or **Completed**.
Start Date	Date when work begins for the task.
End Date	Date when the task is complete.

Edit Tasks

You can edit tasks only on the Tasks page and not on the Talent Review meeting dashboard. You can edit any task field, and reassign and delete tasks. If a task has multiple owners or assignees, then all can view any changes made by one of them.

View Task History

You can view all tasks for all current and past meetings for an associated worker on the Tasks page.

1. In the Tasks section, select the associated worker row.
2. From the Actions menu, select **View History**.

Related Topics

- Profile Management Lookups

Overview of Alerts for Talent Review Tasks

Facilitators or reviewers can assign tasks to managers and HR specialists when conducting or preparing a Talent Review meeting. Task assignees can complete their tasks on time if they receive these notifications:

- Notifications for tasks assigned to them or that they now own
- Notifications for tasks that are due

Alerts for Talent Review Tasks

As an administrator, use the **Talent Review Tasks Alert** template in Alerts Composer to configure notifications related to Talent Review tasks. It includes these alert templates:

- **Notification for New Task Owner**: Enable to send a notification to task owners for each task of a Talent Review meeting that they're added as an owner.
- **Notification for New Task Assignee**: Enable to send task assignees a notification for each task of a Talent Review meeting that they're assigned.
- **Notification of Aggregated Tasks for Owner**: Enable to send a notification to new owners about all tasks of a Talent Review meeting in which they have been added as an owner in the specified number of days.

- **Notification of Aggregated Tasks for Assignee**: Enable to send a notification to new assignees of all tasks of a Talent Review meeting that they have been assigned in the specified number of days.
- **Reminder Notification for Task Due**: Enable to send a notification to assignees that a task is due in the specified number of days.

> **Note:** All these alerts are disabled by default.

Related Topics

- Alerts Composer

Notify Owners and Assignees about Talent Review Meeting Tasks

As an administrator, you can configure alerts to send individual or aggregate notifications to managers and HR specialists when they're assigned a new task for a Talent Review meeting or made the task owner.

Note that for existing tasks, when an HR specialist or a reviewer adds a person as an owner or an assignee, notifications are sent only if the task isn't complete. Also remember that if an employee is both an owner and an assignee for a task, the employee gets 2 notifications.

Send Individual Task Notifications to New Task Owners and Assignees

Your organization may want to notify employees every time the employee is assigned a task or made an owner. Here's how you configure this:

1. Search for and open the **Talent Review Tasks Alert** template in Alerts Composer.
2. Ensure that it's enabled.
3. Enable these alert templates:
   - Notification for New Task Owner
   - Notification for New Task Assignee
4. Click **Save and Close**.

Send Aggregated Notification of Tasks to Owners and Assignees

Your organization may not want to send a notification to employees every time they're added as an owner or assignee to a task associated with a Talent Review meeting. In this case, do these steps:

1. Configure alerts to send an aggregated notification of tasks for a meeting.
2. Run the **Send Notification for Talent Review Tasks** process.

   > **Note:** To run the **Send Notification for Talent Review Tasks** process, you need to have the **Run Global HR Processes** (**PER_RUN_HR_PROCESSES_PRIV**) function security privilege.

To configure alerts to send an aggregated notification of tasks for a meeting, do these steps:

1. Go to **Tools** > **Alerts Composer** .

2. Search for and select the **Talent Review Tasks Alert** template.
3. Ensure that it's enabled.
4. To send an aggregate notification to task owners:
   a. Disable the **Notification for New Task Owner** template.
   b. Enable the **Notification of Aggregated Tasks for Owner** template.
5. To send an aggregate notification to task assignees:
   a. Disable the **Notification for New Task Assignee** template.
   b. Enable the **Notification of Aggregated Tasks for Assignee** template.
6. Click **Save and Close**.

After you configure the alerts template, you need to run the **Send Notification for Talent Review Tasks** process regularly to let employees know about all tasks that they're assigned or own for a Talent Review meeting.

1. Go to **Tools** > **Scheduled Processes** .
2. Search for and run the **Send Notification for Talent Review Tasks** process.
3. Specify the number of days in the past that the process needs to check for new task assignees or owners.
4. Schedule the process according to your organization's needs.
5. Submit the process.

When the process completes, you can check these details in the log file:

- Person identifier of the employees who were notified and their role for the task
- Meeting with which the task is associated
- Number of notifications sent

Note that if employees are made an owner or an assignee for tasks of more than one meeting in the specified days, they receive separate notifications for each meeting.

Related Topics
- Alerts Composer
- Submit Scheduled Processes and Process Sets

Remind Assignees When Talent Review Tasks Are Due

Your organization may want to send a reminder to task assignees before the tasks are due. This helps the assignees to prioritize work and complete tasks. To send task reminders, as administrators, you need to do these steps:

1. Configure the **Talent Review Tasks Alert** template.
2. Run the **Send Reminder for Talent Review Tasks That Are Due** process.

> **Note:** You can run this process only if you have the **Run Global HR Processes** (**PER_RUN_HR_PROCESSES_PRIV**) function security privilege.

Remember that task owners aren't notified about tasks that are due.

Configure Alerts to Send Task Reminders to Task Assignees

Do these steps to configure alerts to send reminders to task assignees:

1. Go to **Tools** > **Alerts Composer** .
2. Search for and select the **Talent Review Tasks Alert** template.
3. Ensure that it's enabled.
4. Ensure that the **Reminder Notification for Task Due** template is enabled.
5. Click **Save and Close**.

Run the Send Reminder for Talent Review Tasks That Are Due Process

After you configure the alerts template, you need to run the **Send Reminder for Talent Review Tasks That Are Due** process regularly to let task assignees know about tasks that they need to complete for a Talent Review meeting.

1. Go to **Tools** > **Scheduled Processes** .
2. Search for and run the **Send Reminder for Talent Review Tasks That Are Due** process.
3. Specify the number of days before the task due date that the process needs to check for.
4. Schedule the process according to your organization's needs.
5. Submit the process.

When the process completes, you can check these details in the log file:

- Person identifier of the employees who were notified
- Task due date
- Meeting with which the task is associated
- Task title
- Number of notifications sent

Related Topics

- Alerts Composer
- Submit Scheduled Processes and Process Sets

Talent Review Notes

You can create notes for workers in the review population of talent review meetings. You can also create notes about the meeting.

- Facilitators need to select **My Client Groups** > **Talent Review** .
- Reviewers need to select **My Team** > **Talent Review** .

To manage notes, select the **View Notes** option from the Actions menu of a meeting.

Notes use the Feedback feature that's available in person spotlight and person smart navigation. When you view the feedback for a person, you can identify the notes that were created in a talent review meeting by the name of the meeting that's displayed in the note.

Create Notes

You can create notes for both the meeting and the workers in the review population.

- On the meeting dashboard, select a worker in the review population and click **Add Notes**.
- On the Notes page that opens when you select the **View Notes** option from the Actions menu of a meeting, you can add notes in these ways:
  - To add a note about the meeting, in the Meeting Notes section, click **Add**.
  - To add a note for a worker:
    i. Click the **Notes** link in the worker row.
    ii. In the Notes section, click **Add**.
- On the Prepare Review Content page, to add a note for a worker in the review population, do this:
  a. Select the worker row.
  b. From the Actions menu, select **View Notes**.
  c. In the Notes section, click **Add**.

When you create a note, you need to specify who can see the note. The visibility settings that you see depend on what your administrator has configured for Talent Review using the Feedback Visibility task. This table shows the options that are generally available to indicate the note visibility in Talent Review.

> **Note:** Meeting facilitators can see the notes created for a Talent Review meeting only when they open the meeting. When they're in the meeting, they can see any meeting note added for all workers in the review population even if they don't have data access to all workers. But they can't see the meeting note on the Feedback page in person spotlight if they don't have access to the worker.

Visibility Setting	Who Can See the Note
Everyone	Any person in the organization. People who aren't participants in the meeting can view the note in the person spotlight page.
Managers Only	Managers in the hierarchy of the worker for whom the note is created and the meeting facilitators.
Managers and <Worker Name>	Managers in the hierarchy of the worker, the meeting facilitators, and the worker for whom the note is created. The worker can view the note in the person spotlight.
Only Me	Only the author of the note. However, if the facilitator creates the note on the dashboard during the actual meeting, the participants can see it when the meeting is conducted.
Only worker and me	Only the author of the note and the worker for whom the note is created.

View History

Facilitators can view all notes for all meetings for the members of the review population, including those created by reviewers.

1. Select the **View Notes** option from the Actions menu of a meeting.
2. Click the **Notes** link in the worker row.
3. Select a meeting to view the notes created for that meeting.

Create Reports

You can create reports for notes using Oracle Transaction Business Intelligence (OTBI).

7 Succession Management

Succession Management

You can use succession management to create succession plans for replacing key employees.

These are the advantages of using succession plans:

- Ensure a smooth transition to key jobs and positions.
- Identify workers who are ready now, or who can become ready by developing the necessary skills, for jobs and positions that are likely to become vacant.
- Plan the career development of candidates.

You manage succession plans in the Succession Plans work area. Select **My Client Groups** > **Succession Plans** .

Plan Types

Select from these succession plan types:

- **Incumbent**: Use this plan type to replace a specific person.
- **Job**: Use this plan type to identify candidates for a job, such as Business Analyst or Sales Representative.
- **Position**: Use this plan type to identify candidates for a position, such as Senior Vice President for Sales or Assistant Marketing Manager.

Plan Access

To access the Succession Plans work area, you need to have the Succession Plan Management duty role. To create a succession plan, you need to have the Create Succession Plan for Worker duty role. The HR specialist job role has these duty roles by default.

Managers can use these options to create succession plans:

- **Create Succession Plan** action for a direct or indirect report in **My Team** > **Career Overview**
- **Add** button in the Succession Plans section of Succession Planning tab on person spotlight
- **Create Succession Plan** Quick Action available in My Team

A succession plan can be a private plan. Only the named owners can access private succession plans.

Only these users can manage a nonprivate succession plan:

- A plan owner. Whoever creates or edits the plan can select the plan owners. Remember to specify at least one owner for a private succession plan.
- A person who has access to the named or inferred incumbent of the plan. Any person who holds the job or position for which the succession plan is created is an inferred incumbent.
- A super user. An administrator can create a custom super user role and assign this role to any user. It's a good idea to make at least one person in your organization a super user.

Plan Incumbents

You can view the incumbents who currently have the same job or position as defined in Job and Position type succession plans. The succession plan attributes such as business unit and department if specified determine the incumbents who have the same position or job. You can see the incumbent information on these pages:

- Succession Overview
- Succession Planning tab of person spotlight
- Incumbents section of the succession plan

> **Note:** You can see only the incumbents that you have access to.

Plan Candidates

Succession plans can have multiple owners from different organizations. So you can include candidates from multiple organizations in succession plans.

You can add candidates to a succession plan in these ways:

- Search for employees that you can access and add them as candidates.
- Add external candidates.
- Use Best-Fit feature to find candidates who match the job or position requirements.

  > **Note:** The Best-Fit feature isn't available on mobile devices.

- Add talent pool members.

You can see these details for each candidate in the Candidates section of a succession plan:

- Date when they were added as a candidate to the plan
- Readiness information
- Status

You can also see the current job title for internal candidates.

You can view these counts for candidates who are also a candidate in other succession plans:

- The total number of plans in which the person is a candidate
- The number of plans that you can access in which the person is a candidate

Click the count link to view the corresponding list of other succession plans in which the person is a candidate.

By default, you can see only the count for the number of plans that you can access. You can't see the count that shows the total number of plans the person is a candidate on. Your administrator can however use Transaction Design Studio to show this count.

> **Note:** You can identify the external candidates in a succession plan.

To find more information about an internal candidate, click the candidate name. The Succession Planning tab in person spotlight for that candidate opens where you can see these details:

- The succession plans created for that person that you can access
- The succession plans in which the person is a candidate that you can access
- The talent pools in which the person is a member and which you can access
- Risk of Loss, Impact of Loss, and Job Criticality details

Here's how you can add internal candidates to a succession plan when you aren't in the Succession Plans work area:

- Navigate to **My Team** or **My Client Groups**. Use the **Add to Succession Plan** Quick Action. Select a person and add them to a selected succession plan.
- Navigate to **My Team** > **Career Overview** . Use the **Add to Succession Plan** action for the person who you want to add as a candidate.
- Select a person from the review population of a Talent Review meeting and add them as a candidate to any succession plan associated with the meeting.

You can create or edit external candidates in the External Candidates section of the Succession Overview page. When creating an external candidate, you need to specify the last name. The other fields such as first name, job title, e-mail, and phone are optional.

Note: You can select only these succession plans when you try to add candidates:

- Plans for which you're a named owner
- Plans in which you have access to the named or inferred incumbent of the plan

Candidate Attributes

You can use these attributes to specify which of your candidates on a succession plan are most capable of filling a vacant job:

- **Readiness**: This indicates how soon a person can take up the job or position. You select a readiness level based on these factors:
  - Your knowledge of the candidate
  - How well the candidate's current competencies match the skills of the job or position associated with the plan
- **Candidate Ranking**: This indicates the order of preference for a succession plan candidate to fill the job associated with the plan when it becomes vacant. You can rank candidates across the entire plan, or you can rank candidates within a readiness category. You can have multiple candidates with the same ranking across readiness categories.
- **Interim Successor**: This indicates that the candidate can't be considered as an actual prospect but can perform the duties of the incumbent, or for the job or position, until an actual successor is identified.

By seeing the readiness levels of all candidates in a plan, you can determine the bench strength for the job or position and your organization. For example, if no candidate is likely to be ready in the next 2 years, the bench strength is poor. You can add other candidates in this case.

Talent Pools

You can add candidates in a succession plan to an existing talent pool to manage candidate development. The development goals in a talent pool can prepare candidates for the relevant job or position.

Related Topics

- Examples of Creating Succession Plans
- How Managers Can Work With Succession Plans
- Examples of Access to Nonprivate Succession Plans
- Best-Fit Analysis

How Inferred Incumbents of Succession Plans Determine Plan Access

Any person who holds the job or position for which the succession plan is created is an inferred incumbent.

In the automatic plan access method, only the following users can access nonprivate succession plans:

- The named owners of the plan
- Employees who have access to the named or inferred plan incumbents

To determine plan access, the inferred incumbent information for **Job** and **Position** type succession plans is stored in the succession plan incumbent table. This table is automatically updated whenever a new succession plan is created or when a succession plan is modified. The Succession Plan Incumbents process also updates this table when scheduled.

Attributes Considered to Determine Plan Incumbents

You can refine your succession planning by specifying additional attributes. These attributes are taken into consideration to determine the plan incumbents to include in the succession plan incumbent table. This table indicates the attributes that are considered to determine the incumbents for **Job** and **Position** type succession plans.

Plan Type	Attributes Considered
Job	Business Unit, Job Department, and Job Grade
Position	Business Unit, Department

So, if you specify the job department as **Sales** for the **Director** job of a **Job** type succession plan, only suitable employees from the **Sales** department are included as incumbents in the succession plan incumbent table. Employees from other departments won't be included as plan incumbents.

Succession Plan Incumbents Process

Employee movement, such as changes in job roles or transfers, can also affect plan access. For example, if an employee is transferred to another department and reports to a new manager, the former manager's access to the plans in which the employee is a named or an inferred incumbent should be revoked. Instead, the current manager should now be given access to the plans in which the employee is a named or an inferred incumbent. To update the succession plan incumbent table for these changes, a user with an implementor or administrator role should schedule the Succession Plan Incumbents process.

You can schedule the Succession Plan Incumbents process daily, weekly, and so on, based on the frequency of changes to your organizational structure. For example, if new employees are only inducted monthly and if your organization's attrition rate isn't high, you can schedule the Succession Plan Incumbents process on a monthly basis.

To run the Succession Plan Incumbents process:

1. On the Scheduled Processes Overview page, click **Schedule New Process**.
2. In the Schedule New Process dialog box, from the **Name** list, select the **Succession Plan Incumbents** process, and click **OK**.
3. Optionally, in the Process Details dialog box, change the process schedule to one that's appropriate for your organization and define notifications.

   Note: By default, the Succession Plan Incumbents process is scheduled as soon as possible.

4. In the Process Details dialog box, click **Submit**.

Related Topics

- Overview of Scheduled Processes
- Submit Scheduled Processes and Process Sets

Succession Management Lookups

This topic identifies common lookups for the Succession Management functional area. You can update the lookup that has an extensible configuration level as appropriate to suit your enterprise requirements. You manage the succession management lookups by using the **Manage Succession Management Lookups** task in the Setup and Maintenance work area.

Succession Management Lookups

The following table describes the succession management lookups.

Lookup Type	Description	Configuration Level
HRM_READINESS_CATEGORY	The estimated time before a candidate is ready to move into a job or position, such as ready now, ready in 1-2 years, and ready in 3-4 years. You must add lookups or you're limited to the seeded values **Ready now** and **No readiness available**.	Extensible
HRM_SUCC_CAND_STATUS	The status of the succession plan candidate: • **Active**: The employee is an active candidate for the plan.	System

Lookup Type	Description	Configuration Level
	• **Inactive**: The employee is no longer considered a plan candidate.	
HRM_SUCC_PLAN_STATUS	The status of the succession plan: • **Active**: The succession plan is still needed and is valid. • **Inactive**: The succession plan is no longer needed.	System
HRM_SUCC_PLAN_TYPE	The type of the succession plan: • **Incumbent**: The succession plan is created to replace a specific employee. • **Job**: The succession plan is created for a particular job role, for example, Systems Analyst. • **Position**: The succession plan is created for a particular position, for example, Executive Vice President-Sales.	System

Descriptive Flexfields for Succession Management

To add company-defined attributes, for example additional information about succession plans or candidates, use descriptive flexfields for an Oracle Fusion Succession Management entity. You can use descriptive flexfields to define validation and display properties.

Defining Descriptive Flexfield Segments

Use the Manage Descriptive Flexfields task to define a segment for a descriptive flexfield for the succession management business process. You can add more information related to these succession management entities, such as the succession plan details and candidates.

Two descriptive flexfields are available in the succession management business process.

Descriptive Flexfield	Description
HRM_PLANS	Fields for succession plan details that you enter appear in the Additional Information section in these locations: • Create Succession Plan: Enter Details page • Succession Plans tab in the Succession Planning work area, in the Details section
HRM_PLAN_CANDIDATES	Fields for candidate details that appear on the Create Succession Plan: Select Candidates page in the Additional Information column.

Related Topics

- Overview of Descriptive Flexfields
- Overview of Flexfields

FAQs

What happens if I remove a readiness category lookup?

If the level is in use for succession plan candidates or talent pool members, their readiness level changes to **No readiness available**. Plan or pool owners can select a different readiness level for affected workers.

How can I set a default plan type or control the order of plan types in the succession plan type list?

To control the display order of the **Plan Type** list of values, modify the values in the **Display Sequence** column of the **HRM_SUCC_PLAN_TYPE** lookup codes. Search for the **HRM_SUCC_PLAN_TYPE** lookup in the Manage Succession Management Lookups page. In the **Plan Type** list of values, the options are arranged in ascending order of their **Display Sequence** value. Set the **Display Sequence** value of the default **Plan Type** option to **1**. For example, if you often create succession plans of **Position** type, you can set its **Display Sequence** value to **1**.

> **Tip:** If you use only one plan type, set its **Display Sequence** value to **1**. Then use Oracle Page Composer to configure the **Plan Type** field as a read-only field.

How can I show incumbents for existing Job and Position type succession plans?

You need to run the **Succession Plan Incumbents** process at least once to show incumbents for existing **Job** and **Position** type succession plans.

How can I hide the Incumbents section and the incumbents listed on the Succession Overview page?

As administrators use Transaction Design Studio to hide the Incumbents section and the incumbents listed on the Succession Overview page.

1. Enable a sandbox and then edit your pages at the Site level.
2. Open HCM Experience Design Studio.
3. Select the Transaction Design Studio tab.

4. From the **Action** list, select **Succession Plans**.
5. Add a rule.
6. Enter the basic details.
7. From the **Data Source** list in the Available Attributes section, select **Plan Info**.
8. Set the value of the **Incumbents** attribute to **Not visible**.
9. Click **Save and Close**.

How can I hide the option to add talent pool members as succession plan candidates?

The option to add talent pool members as succession plan candidates is available by default. But as an administrator, you can hide this using Transaction Design Studio.

1. Enable a sandbox and then edit your pages at the Site level.
2. Open HCM Experience Design Studio.
3. Select the Transaction Design Studio tab.
4. From the **Action** list, select **Succession Plans**.
5. Add a rule.
6. Enter the basic details.
7. From the **Data Source** list in the Available Attributes section, select **Plan Info**.
8. Set the value of the **Add Talent Pool Members** attribute to **Not visible**.
9. Click **Save and Close**.

Succession Management Alerts

How You Configure Alerts for Succession Plans

As an administrator, you may want to alert plan owners about assignment changes of candidates or incumbents of a succession plan. These alerts can help plan owners decide if they need to update the succession plans. For example, if a candidate moves to a role that's different from the plan role, the plan owner can remove that candidate and add other candidates to the succession plan after receiving the alert notification.

Succession Plan Alerts Templates

Use the **Succession Plan Assignment Change Alert** templates in Alerts Composer to configure alerts for succession plans. You can configure alerts for these assignment changes:

- A candidate's job changes to the job specified in the succession plan.
- A candidate moves to a job that's different from the job specified in the succession plan.
- The plan incumbent moves to a different role.
- A candidate moves to a position that's different from the position specified in the succession plan.
- A candidate's position changes to the position specified in the succession plan.

- A candidate moves to a role different from the plan incumbent's role.
- A candidate moves to a job that's the same as the plan incumbent's job.

Note: By default, all the succession plan related alerts are disabled

The succession plans alert template is extensible. This table lists the actions that you can do with the template.

Action	Can Do?
Disable the delivered alerts.	Yes
Change the text of the subject line and the message in the alert.	Yes
Change the expressions used in the subject line or message.	No
Delete the delivered template.	No
Change the template name or the communication method.	No

Note that though you can add new templates in Alert Composer for succession plans, these new templates won't trigger any notifications.

Related Topics

- Alerts Composer

How You Send Succession Alerts on Role Change Effective Date

Your organization may want to notify plan owners about incumbent and candidate role changes after they become effective. This enables succession plan owners to modify succession plans according to the current roles of the incumbent or candidates. You need to run the **Notify Plan Owners About Candidate and Incumbent Assignment Changes That Are Now Effective** process for this. Note that to run this process, you need to have a role that inherits the **Run Global HR Processes** function security privilege.

After You Run the Process

Here's what happens after the **Notify Plan Owners About Candidate and Incumbent Assignment Changes That Are Now Effective** process runs successfully:

- Owners receive notifications on the day these role changes become effective if the process is run on a daily basis:

- Plan incumbent moves to a different role
- A candidate moves to the plan role
- A candidate moves to a role that's different from the plan role

> **Note:** Owners receive notifications only if all these conditions are true:
> - Alerts are enabled using the **Succession Plan Assignment Change Alert** templates in Alerts Composer.
> - Alerts are enabled in the Alerts section of the succession plan.
> - Notifications are enabled for the owners in the Owners section of the succession plan.

- When owners view a succession plan, they see banners for the effective role changes of incumbents and candidates.
- Processed notification records for the incumbent and candidate role changes that are older than 90 days are deleted.

Related Topics

- Submit Scheduled Processes and Process Sets

Succession Management Alerts FAQ

How can I hide the Alerts section in a succession plan?

You use Transaction Design Studio to hide the Alerts section in a succession plan and the check boxes in the section.

1. Enable a sandbox and then edit your pages at the Site level.
2. Open HCM Experience Design Studio.
3. Select the Transaction Design Studio tab.
4. From the **Action** list, select **Succession Plans**.
5. Add a rule.
6. Enter the basic details.
7. From the **Data Source** list in the Available Attributes section, select **Plan Info**.
8. To hide the Alerts section, set the **Alerts** attribute value to **Not visible**.
9. To hide the check boxes that control alerts for succession plans, set these attributes to **Not visible**.
   - Send alerts when candidates move to roles that are different from the plan role
   - Send alerts when candidates move to the plan role
   - Send alerts when the incumbent changes roles
10. Click **Save and Close**.

Succession Plan Deep Links

Overview of Succession Plan Deep Links

You can use deep links to navigate directly to the succession plan pages. You can also embed succession plan deep links in reports or other third party applications and edit or open specific succession plans. Remember that you need to have access to the Succession Overview page to use the succession plan deep links.

Deep Links for Navigation

You can find the succession plan related deep links on the Deep Links page. Use only the deep links listed in this table for navigating to a succession plan page.

Deep Link	Navigates To
Responsive Succession Overview	Succession Overview
Responsive Create Succession Plan	Create Succession Plan

The **Edit Succession Plan** deep link requires the succession plan ID as a parameter. So, we recommend that you don't use the **Edit Succession Plan** deep link to navigate to a succession plan page.

Deep Link for Editing Succession Plan

Use the standard deep link URL listed in this table to edit a succession plan based on your security access.

URL Type	URL
Standard Deep Link URL	`https://<hostname>/fscmUI/faces/deeplink?objType=SUCCESSION_PLAN&action=EDIT&objKey=pPlanId=@{PLAN_ID}`

Note that you need to pass the succession plan ID as a parameter to open the corresponding succession plan. Remember that you need to have access to the succession plan that you're trying to edit. Also what you can edit on the succession plan page depends on the type of owner you're for the plan. An owner of **Administrator** type can perform all actions on the succession plan. But an owner of **Candidate Manager** type can't perform certain actions such as adding plan owners.

This table describes the expected behavior when you try to use the edit succession plan deep link.

User's Access Level	Expected Behavior
You have access to the Succession Overview page. You have the privilege to edit a succession plan.	You can edit the succession plan. When you save or cancel your changes, you will go to the Succession Overview page.
You have access to the Succession Overview page. But you don't have the privilege to edit a succession plan.	You will go to the Succession Overview page.
You don't have access to the Succession Overview page. But you have the privilege to edit a succession plan.	You will see a blank page.
You don't have access to the Succession Overview page. You don't have the privilege to edit a succession plan.	You will see a blank page.

Related Topics

- Deep Links

Embed the Edit Succession Plan Deep Link in an Analysis

This example shows how to embed the edit succession plan deep link in an Oracle Transactional Business Intelligence (OTBI) analysis.

This table summarizes key decisions for this scenario.

Decisions to Consider	This Example
What type of URL should I embed?	Standard Deep Link URL
For which column should I add an interaction?	Plan ID

To edit a succession plan directly from an OTBI analysis:

1. Create an analysis that includes the **Plan ID** as a column.

2. Edit the analysis.
3. Add a drill-down link for the **Plan ID** column.
4. Save the analysis.

Add a Drill-Down Link

1. Edit an existing analysis that has the **Plan ID** attribute as a column.
2. Go to the **Criteria** tab.
3. In the **Plan ID** column, click **Settings** > **Column Properties** .
4. Click the **Interaction** tab.
5. Select the values indicated in this table.

Field	Value
Primary Interaction	Default (Drill)
Value	Action Links

6. Click **Add Action Link**.
   You see the New Action Link dialog box.
7. In the **Link Text** field, type **Edit Plan**.
8. Click the **Create New Action** icon.
9. Select **Navigate to a Web Page**.
   You see the Create New Action dialog box.
10. Enter URL in this format:
    `https://<hostname>/fscmUI/faces/deeplink?objType=SUCCESSION_PLAN&action=EDIT&objKey=pPlanId=@{PLAN_ID}`
11. Click **Define Parameters**.
12. Add a new parameter.
13. In the third row, specify the values shown in this table.

Column	Value
Name	`PLAN_ID`
Prompt	Any suitable value, say **Plan ID**
Value	**Column Value** and then select the **Plan ID** column

14. Select the **Hidden** check box for all the rows.
15. Clear the **Optional** check box for all the rows.
16. Click **Options**.
17. In the Action Options dialog box, select the **Open In New Window** check box.
18. Click **OK** to close the Action Options dialog box.
19. Click **OK** to close the Create New Action dialog box.

20. Click **OK** to close the New Action Link dialog box.
21. In the Column Properties dialog box of the **Plan ID** column, click the **Data Format** tab.
22. Select the **Override Default Data Format** check box and then specify the value for **Treat Number As** field as **Number**.

    Note: You need to override the default data format only for the **Plan ID** column.

23. Click **OK** to close the Column Properties dialog box.

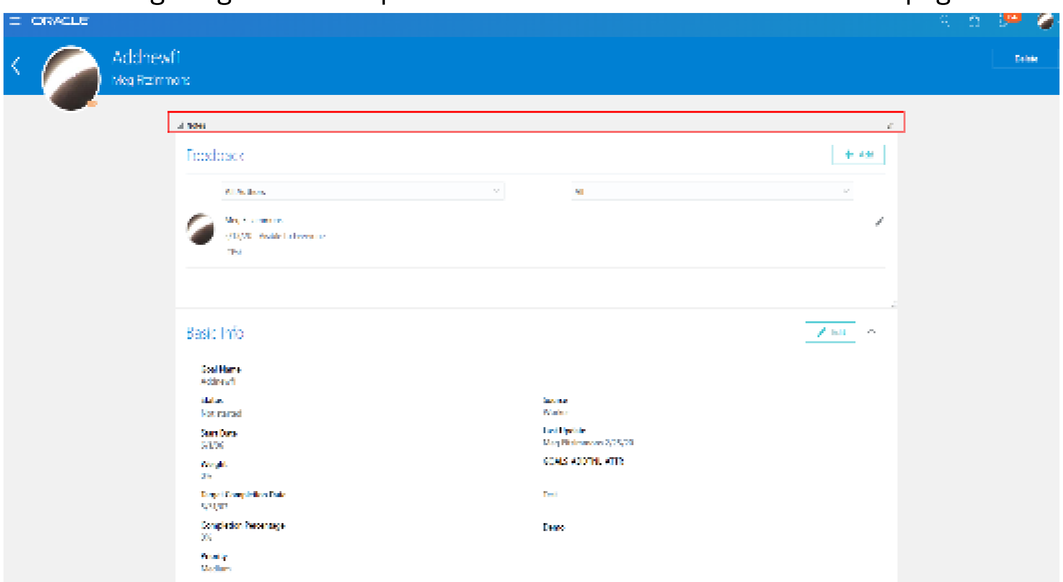
Succession Plan Notes

Contextual Notes in Application Pages

Enhance Talent Management application pages using the Notes resource catalog component for persons and objects using Oracle Page Composer. The Notes feature is similar to the Feedback feature in employee's Person Spotlight and Performance Document. The Contextual Notes is an extension of the existing Anytime Feedback feature.

You can embed the Notes component on persons and objects using Oracle Page Composer. The Notes component appears with the title, **Feedback** or **Notes**, based on the component configuration, Person Notes and Object Notes.

The following image shows the person notes embedded in the Goal Details page:



You can create and share notes about employees by configuring the Notes resource catalog component in the following Talent Management scenarios:

- Notes for an employee in the context of an employee's performance goal
- Notes for an employee in the context of an employee's development goal
- Notes for an employee in the context of an employee's career development
- Notes when you explore roles in the context of role details page

You can create and share object notes by configuring the Notes resource catalog component in the following Talent Management scenarios:

- Notes for a talent review meeting
- Notes for a succession plan
- Notes for a talent pool

Related Topics

Add an Object Note to a Succession Plan

Succession plan owners and other HR specialists want to add a note to a succession plan. They also want to restrict the visibility of the notes to only themselves as the notes may contain confidential information. As an application implementor, here's what you need to do.

This table summarizes the decisions that must be made.

Decisions to Consider	Who Makes the Decision	In This Example
Which Notes component can I add to a succession plan?	Application implementor	Object notes
Should I change the default visibility setting of the object Notes component?	Plan owners and other HR specialists who can access the plan	Yes. Must change the default **Everyone** visibility setting to **Only Me**.

This worked example describes these tasks that need to be done to add the Notes resource catalog component to a responsive succession plan page:

1. Add the Notes resource catalog component to a succession plan.
2. Create notes for a succession plan.

Before You Add the Notes Component

1. Sign in the application as a user with configuration privileges.
2. Activate a sandbox that has Page Composer tool enabled.

Add a Notes Component

1. Open a responsive succession plan page.
2. On the Settings and Actions menu, click **Edit Pages**.
3. Ensure that the **Edit Layer** is **Site**.
4. Select the **Structure** tab.
5. Select the region where you want to add the note.
6. In the Source window, select the **panelGroupLayout** indicated for the page region:
   - **Plan Info section**: Select the **panelGroupLayout** that encloses all the existing **panelCollectionEdit** components.
   - **Other regions**: Select the **panelGroupLayout** that's at a level lower than the **FacetWrapper** level.

7. In the Source window, click the **Add** icon.
8. In the Add Content dialog box, click **Add** adjacent to Notes.
9. Close the Add Content dialog box.
10. In the Source window, select the Notes component and edit its properties.
11. In the Component Property dialog box, configure the contextual parameters as shown in this table.

Parameter	Expression
Object Type	`SUCCESSION_PLAN_NOTE`
Object ID	`#{bindings.PlanId.inputValue}`

12. Configure the display options.
13. Click **Apply**.
14. Click **OK**.
15. Click **Close** to stop editing the page.
16. Publish the sand box.

Create a Note

After the application implementor adds the notes component to a succession plan, it's available in all plans.

A plan owner or an HR Specialist who can access the succession plan can create a note about the succession plan.

1. Navigate to the Succession Plans overview page.
2. Edit the plan for which you want to create a note.
3. Click the Notes component.
4. In the Notes page, click **Add**.
5. From the **Who can see my note** list, select **Only Me**.
6. Add the notes text.
7. Save the note.

Related Topics

- Add and Hide Components Using Page Composer

Succession Management Integrations

How Succession Plans, Talent Pools, and Talent Reviews Work Together

Succession plans, talent pools, and talent review meetings together support the development of selected workers to meet enterprise goals or fill key roles.

This table shows how you as an HR specialist can access these work areas.

Work Area	Navigation
Succession Plans	**My Client Groups** > **Succession Plans**
Talent Pools	**My Client Groups** > **Talent Pools**
Talent Review	**My Client Groups** > **Talent Review**

Succession Plans with Talent Pools

You can select members from talent pools that you own and add them as candidates to succession plans for which you are a candidate manager. This way, you can enhance your succession planning by selecting appropriate candidates for a specific job or position.

For example, your current sales director plans to retire after a year. You can plan for the succession in this way:

1. Create a succession plan for the Sales Director job.
2. Create a talent pool of sales managers.
3. Assign development goals to this talent pool to groom the sales managers for the Sales Director job.
4. Edit the Sales Director succession plan. Add selected managers from the sales managers' talent pool as succession plan candidates.

Succession Plans and Talent Pools with Talent Review Meetings

You can use succession plans and talent pools with Talent Review meetings in these ways:

- When you set up a talent review meeting, you can associate succession plans and talent pools that you can access with the meeting.
- When you create a talent review meeting, you can add members of a talent pool that you can access to the review population of the meeting. This way you can discuss the potential of the talent pool members and rate them during talent review meetings.
- When you conduct the talent review meeting, you can add reviewees to the succession plans and talent pools associated with the meeting. You can also create new succession plans and talent pools from the meeting dashboard.

> **Note:** A succession plans super user can access all succession plans. Similarly, a talent pools super user can access all talent pools.

Related Topics

- Talent Review
- Succession Management
- Talent Pools

Configure a Succession Readiness Event to Trigger Checklist Tasks

This example shows how to use the condition builder to configure the **Succession Readiness** checklist event. Let's assume you want to assign these tasks as an administrator to managers when a candidate is ready to move to the role associated with a succession plan:

- Create training plans for the candidate.
- Add development goals for the candidate.

You need to do these tasks to configure the **Succession Readiness** checklist event:

1. Create a succession readiness checklist template.
2. Configure the **Succession Readiness** event.
3. Add tasks for the manager.

Create a Succession Readiness Checklist Template

1. In Setup and Maintenance, go to the **Checklist Templates** task.

   > **Tip:** You can also use the **Checklist Templates** quick action available in My Client Groups.

2. Create a checklist template.
3. On the General tab, specify values as indicated in this table.

Field	Value
Name	Succession Readiness
Status	Active
Category	A suitable category. For example, **Talent Management**.

4. Click **Save**.

Configure the Succession Readiness Event

1. Click the Actions and Events tab.
2. In the Configure Events section, click **Add**.
3. Select **Succession Readiness** in the **Name** list of values.
4. Click **Edit Condition** to display the Condition Builder.
5. Click **Create Group**.

6. Select the values indicated in this table.

Condition Column	Value to Select
Attribute	Candidate Readiness
Operator	Equals
Operand Type	Constant
Operand Value	Ready Now

7. Click **OK** to close the Condition Builder.
8. Click **Save**.

Add Tasks for the Manager

1. Click the Tasks tab.
2. Click **Add Task** to add a task.
3. On the Details sub tab, specify values as indicated in this table.

Field	Value
Name	Create Training Plan
Status	Active
Sequence	1
Performer	Line Manager
Owner	Line Manager
Task Type	Manual Task

4. Click **Save and Close**.
5. Click **Add Task** to add the second task.

6. On the Details sub tab, specify values as indicated in this table.

Field	Value
Name	Add Development Goals
Status	Active
Sequence	2
Required	Select the check box.
Performer	Line Manager
Owner	Line Manager
Task Type	Application Task
Application Task	Add Development Goal

7. Click **Save and Close** to return to the Tasks tab.
8. Click **Save and Close**.

Related Topics

- How You Configure Events in Checklists

8 Talent Pools

Talent Pools

Talent pools are groups used by organizations to categorize people based on their performance, potential, or functional area. For example, an organization can group people based on their potential as Early Talent, Promising Talent, and High Potential.

A person can be a member of more than one talent pool. For example, an employee can be a member of both Promising Talent and Mid-Management talent pools.

Uses

Your organization can use talent pools for these purposes:

- **Track groups of employees with similar characteristics**: You can plan the career development of employees and monitor their progress by grouping them into a talent pool. For example, you can group employees as campus hires or leadership trainees.
- **Plan successors**: You can add selected candidates in a succession plan as members of a talent pool. This will help to groom talent pool members to replace people in key jobs and positions.
- **Roll up talent review populations**: During a talent review, facilitators can create a talent pool and add members from the review population. Facilitators can include the talent pool with other review meetings and include members from that review population. Later, while creating a talent review meeting, facilitators can add the talent pool members to the review population and evaluate their performance.

Pool Access

If you have the appropriate security privileges, you can access talent pools in these ways:

- Go To **My Client Groups** > **Talent Pools** .
- **Talent Pool Quick Actions**: Select **My Client Groups** > **Show More** to access these Quick Actions:
  - **Create Talent Pool**: Use this to create talent pools.
  - **Add to Talent Pool**: Use this to add people who report to you as members of talent pools that you own or have access to.
- **Talent Pool Deep Links**: Go to **Tools** > **Deep Links** and search for these deep links:
  - **Responsive Talent Pools Overview**: Takes you to the Talent Pools page
  - **Responsive Create Talent Pool**: Takes you to the Create Talent Pool page
- Action in Career Overview page
  a. Select **My Team** > **Career Overview** .
  b. Locate the person to add to the talent pool.
  c. From the Actions menu, select **Add to Talent Pool**.

- **Talent Review work area**: Select **My Client Groups** > **Talent Review** to create a talent pool while you're conducting a meeting and associate it with a talent review meeting.

Pool Details

You need to specify these details for a talent pool:

- **Name**: Enter a name that uniquely identifies or describes the pool.
- **Status**: By default all talent pools are active. You can change the status to inactive if you don't want the talent pool to be added to a succession plan or talent review meeting.

The person who creates the talent pool is added by default as the owner of the pool. But you can select and add other owners.

You can also specify these attributes to define the scope of the talent pool:

- Job
- Grade
- Job profile
- Job family
- Department
- Business unit
- Position

> **Note:** These attributes aren't available by default. Your administrator needs to use Transaction Design Studio to show these attributes.

Members

You can add talent pool members in any of these ways:

- Search for and select employees.
- Use the Best-Fit feature to add members to a talent pool.

  On the Find Best Fit page, you select a model profile, and specify the priority for each content section. By default, the best-fit analysis results show all profiles that have 90% match or greater than the selected source profile. But you can change the percentage of match that you want.

  > **Note:** The Best-Fit feature isn't available on mobile devices.

- Add members from an analysis.

  > **Note:** You can see the option to add talent pool members from an analysis only if your administrator has specified the file path in the **Default Reports Folder for Selecting Talent Pool Members** profile option.

For each member of the talent pool, you can see these details:

- Status

- Date they were added as a member

You can also identify members who have inactive assignments.

> **Tip:** Did you know that for each member in the pool, you can record your assessment of the risk and impact of the worker leaving the enterprise? You can't see these attributes by default. Your administrator needs to use Transaction Design Studio to show these attributes.

Talent Pool Goals

If you're using Career Development, talent pool owners can add development goals to the talent pool. These goals appear in the development plan of each member of the talent pool.

Talent Pools Super User

You may want to create a talent pools super user who can access all talent pools in your organization without being a named owner. This ensures that someone can manage the talent pools in your organization even if the named owners aren't available.

Here's what the talent pools super user can do:

- Create a talent pool.
- Delete any talent pool.
- Set any talent pool as inactive.
- Manage pool members and owners.
- Add development goals for pool members.
- View profile related data such as Risk of Loss, Impact of Loss, or mobility of pool members based on their profiles data security if they have been made visible.
- Report on all talent pools across the organization.

Related Topics

- How Succession Plans, Talent Pools, and Talent Reviews Work Together
- How You Use Development Goals in Talent Pools
- Guidelines for Using Page Composer

Descriptive Flexfields for Talent Pools

To add company-defined attributes, for example additional information about talent pools or talent pool members, use descriptive flexfields for the talent pools entity.

Defining Descriptive Flexfield Segments

Use the Manage Descriptive Flexfields task to define a segment for a descriptive flexfield for talent pools. You can add more information related to these talent entities, such as the talent pool details.

There are two descriptive flexfields available for talent pools.

Descriptive Flexfield	Description
HRT_POOLS_B	Fields for talent pool details that you enter in the Additional Information section on the Create Talent Pool: Enter Details page.
HRT_POOL_MEMBERS	Fields for member details that appear on the Create Talent Pool: Select Members page in the Additional Information column.

Related Topics

- Overview of Descriptive Flexfields
- Overview of Flexfields

Overview of Talent Pool Deep Links

You can use deep links to navigate directly to the talent pool pages. You can also embed talent pool deep links in reports or other third party applications and edit or open specific talent pools. Remember that you need to have access to the Succession Overview page to use the talent pool deep links.

Deep Links for Navigation

You can find the talent pool related deep links on the Deep Links page. Use only the deep links listed in this table for navigating to a talent pool page.

Deep Link	Navigates To
Responsive Talent Pools Overview	Talent Pools page
Responsive Create Talent Pool	Create Talent pool page

The Edit Talent pool deep link requires the talent pool ID as a parameter. So we recommend that you don't use this deep link to navigate to a talent pool page.

Deep Links for Editing Talent pool Pages

Use the standard deep link URL listed in the table to edit talent pool pages.

URL Type	URL
Standard Deep Link URL	`https://<hostname>/fscmUI/faces/deeplink?objType=TALENT_POOL&action=EDIT&objKey=pPoolId=@{POOL_ID}`

Note that you need to pass the talent pool ID as a parameter to open the corresponding talent pool page. Also remember that you need to have access to the talent pool that you're trying to edit.

This table describes the expected behavior when you try to use the edit talent pool deep link.

User's Access Level	Expected Behavior
You have access to the Succession Overview page. You have the privilege to edit a talent pool.	You can edit the talent pool. When you save or cancel your changes, you will go to the Succession Overview page.
You have access to the Succession Overview page. But you don't have the privilege to edit a talent pool.	You will see a blank page.
You don't have access to the Succession Overview page. But you have the privilege to edit a talent pool.	You will see a blank page.
You don't have access to the Succession Overview page. You don't have the privilege to edit a talent pool.	You will see a blank page.

Related Topics

- Deep Links

Embed the Edit Talent Pool Deep Link in an Analysis

This example shows how to embed the edit talent pool deep link in an Oracle Transactional Business Intelligence (OTBI) analysis.

This table summarizes key decisions for this scenario.

Decisions to Consider	This Example
What type of URL should I embed?	Standard Deep Link URL
For which column should I add an interaction?	Pool ID

To edit a talent pool directly from an OTBI analysis:

1. Create an analysis that includes the **Pool ID** as a column.
2. Edit the analysis.
3. Add a drill-down link for the **Pool ID** column.
4. Save the analysis.

Add a Drill-Down Link

1. Edit an existing analysis that has the **Pool ID** attribute as a column.
2. Go to the **Criteria** tab.
3. In the **Pool ID** column, click **Settings** > **Column Properties** .
4. Click the **Interaction** tab.
5. Select the values indicated in this table.

Field	Value
Primary Interaction	Default (Drill)
Value	Action Links

6. Click **Add Action Link**.

   You see the New Action Link dialog box.
7. In the **Link Text** field, type **Edit Pool**.
8. Click the **Create New Action** icon.
9. Select **Navigate to a Web Page**.

   You see the Create New Action dialog box.
10. Enter URL in this format:

```
https://<hostname>/fscmUI/faces/deeplink?objType=SUCCESSION_PLAN&action=EDIT&objKey=pPoolId=@{POOL_ID}
```

11. Click **Define Parameters**.
12. Add a new parameter.
13. In the third row, specify the values shown in this table.

Column	Value
Name	`POOL_ID`
Prompt	Any suitable value, say **Pool ID**
Value	**Column Value** and then select the **Pool ID** column

14. Select the **Hidden** check box for all the rows.

15. Clear the **Optional** check box for all the rows.
16. Click **Options**.
17. In the Action Options dialog box, select the **Open In New Window** check box.
18. Click **OK** to close the Action Options dialog box.
19. Click **OK** to close the Create New Action dialog box.
20. Click **OK** to close the New Action Link dialog box.
21. In the Column Properties dialog box of the **Pool ID** column, click the **Data Format** tab.
22. Select the **Override Default Data Format** check box and then specify the value for **Treat Number As** field as **Number**.

    Note: You need to override the default data format only for the **Pool ID** column.

23. Click **OK** to close the Column Properties dialog box.

9 Personalization Using Transaction Design Studio

Use Transaction Design Studio to Configure Field Displays

Use the Transaction Design Studio (TDS) to configure transactions and pages for responsive applications. TDS is available within the HCM Experience Design Studio. You can control the visibility of attributes that are displayed either as **Delivered** or **Enabled**, and the availability of fields and sections of a transaction based on the user's role, person's business unit, or legal employer.

By default, the responsive pages display the frequently used attributes and hide the less frequently used attributes. Use Page Composer to personalize the responsive pages and display the attributes and tabs delivered within the feature.

Here's how you start HCM Experience Design Studio:

1. Sign in to the application as Human Capital Management Application Administrator with Access HCM Page Configurator (HRC_ACCESS_HCM_TRANSACTION_CONFIGURATOR_PRIV) privilege. This privilege provides you access to TDS in HCM Experience Design Studio.
2. Enable a sandbox to compose data for configuring business objects. On the Home page, click the **HCM Experience Design Studio** quick action under the **My Client Groups** tab.
3. Under **Settings and Actions**, click **Edit Pages** .
4. Select the site layer and click **OK**.

Related Topics

- Overview of Page Modification

How You Configure Talent Review Pages Using Transaction Design Studio

Use Transaction Design Studio (TDS) to create rules to configure Talent Review pages. You can include or hide sections and fields as needed by your organization.

Actions

This table shows the actions that you can use to configure Talent Review pages and the page for which the action applies.

Action	Page
Prepare Review Content	Prepare Review Content

ORACLE

Action	Page
Talent Review Notes	Notes

Did you know that you can create multiple rules for an action? But remember that you can have only one active rule for any action at a time.

Prepare Review Content Action

To control the attributes that meeting reviewers can see while preparing review content, create a rule for the **Prepare Review Content** action in TDS. You can specify a role criteria for the rules that you create using this action.

You can hide or display these attributes in the Page Attributes section:

- The photo of the employee being reviewed
- Data submission deadline
- Data validity guideline
- The **Display** list of values used to filter the employees listed
- Meeting date
- Meeting instructions
- **View Notes** action for the employee in the Ratings section

In the Available Attributes section, you can hide or display the name of the employee's manager.

Talent Review Notes Action

The Notes page of a Talent Review meeting has two sections: Meeting Notes and Review Population Notes. To hide or display these sections of the Notes page, create a rule for the **Talent Review Notes** action in TDS and then specify the visibility for the corresponding attributes. You can specify a role criteria for the rules that you create using this action.

Related Topics

- HCM Experience Design Studio

How You Configure Succession Plan Pages Using Transaction Design Studio

Use the **Succession Plans** action in Transaction Design Studio to create rules to configure Succession Management pages. When you create rules using this action, you can do these tasks:

- Specify a role criteria.
- Hide or show fields.
- Mark some fields as required to be filled.

For example, your organization may not want private succession plans. You can create a rule for the **Succession Plans** action and then hide the **Private** check box.

Succession Plans Action

When you create a rule, you select the data source and then configure the attributes.

This table lists the attributes for the **Plan Info** data source.

Attribute	Field or Section on Succession Plan Page	Make Required/ Not Required	Make Visible/Not Visible
Add Talent Pool Members	**Talent Pool Members** option in the **Add** menu	No	Yes
Add to Talent Pool	Check boxes and Add to Talent Pool button for adding selected candidates as talent pool members	No	Yes
Alerts	Alerts section	No	Yes
Banner for Incumbent Changing Role	The banner shown in the Plan Info section when the plan incumbent's role changes **Note:** Applies only for **Incumbent** type succession plans	No	Yes
Best-Fit Candidates	Option to select Best-Fit candidates in the Add menu	No	Yes
Business Unit	Business unit for which the succession plan is created	Yes	Yes
Created By	Created By **Note:** This field isn't visible by default.	No	Yes
Creation Date	Creation Date **Note:** This field isn't visible by default.	No	Yes
Department	Department for which the succession plan is created	Yes	Yes
Description	Description	Yes	Yes

Attribute	Field or Section on Succession Plan Page	Make Required/ Not Required	Make Visible/Not Visible
Estimated Remaining Months	**Estimated Remaining Months** field for the plan incumbent **Note:** • Applies only for **Incumbent** type succession plans • This field isn't visible by default.	Yes	Yes
External Candidate	Menu option for adding external candidates	No	Yes
Impact of Loss	**Impact of Loss** field for the plan incumbent **Note:** • Applies only for **Incumbent** type succession plans • This field isn't visible by default.	Yes **Note:** Only users who can edit the impact of loss value see the **Required** indicator.	Yes
Incumbent Department	Department of the succession plan's incumbent **Note:** Applies only for **Incumbent** type succession plans	No	Yes
Incumbent Job	Job of the succession plan's incumbent **Note:** Applies only for **Incumbent** type succession plans	No	Yes
Incumbents	Incumbents section of the succession plan	No	Yes
Job Grade	Job grade for which the succession plan is created	Yes	Yes
Plan Info Descriptive Flexfields	Descriptive flexfields in the Plan Info section	No	Yes

Attribute	Field or Section on Succession Plan Page	Make Required/ Not Required	Make Visible/Not Visible
	Note: These descriptive flexfields aren't visible by default.		
Privacy	**Private** check box	No	Yes
Reason for Departure	**Reason for Departure** field for the plan incumbent **Note:** • Applies only for **Incumbent** type succession plans • This field isn't visible by default.	Yes	Yes
Risk of Loss	**Risk of Loss** field for the plan incumbent **Note:** • Applies only for **Incumbent** type succession plans • This field isn't visible by default.	Yes **Note:** Only users who can edit the risk of loss value see the **Required** indicator.	Yes
Send alerts when candidates move to roles that are different from the plan role	Check box in the Alerts section	No	Yes
Send alerts when candidates move to the plan role	Check box in the Alerts section	No	Yes
Send alerts when the incumbent changes roles	Check box in the Alerts section	No	Yes

To configure the Candidates section of the succession plan, select the **Candidates** data source. This table lists the attributes for the **Candidates** data source.

Attribute	Field or Section on Succession Plan Page	Make Required/ Not Required	Make Visible/Not Visible
All Other Plans	Count of all other succession plans that the person is also a candidate in **Note:** This field isn't visible by default.	No	Yes
All Other Plans Link	Count link that opens a page that lists all other succession plans that the person is also a candidate in	No	Yes
Banner for Candidate Changing Role	Banner shown for a candidate when the candidate's role changes to a role different from the plan role	No	Yes
Banner for Candidate Moving to Incumbent Role	Banner shown for a candidate when the candidate's role changes to the incumbent's role	No	Yes
Impact of Loss	**Impact of Loss** field for the candidate **Note:** This field isn't visible by default.	Yes **Note:** Only users who can edit the impact of loss value see the **Required** indicator.	Yes
Interim Successor	A label that identifies the candidate as an interim successor	No	Yes
Job	Candidate's job	No	Yes
Other Accessible Plans	Count of all other accessible succession plans the person is a candidate in	No	Yes
Other Accessible Plans Link	Count link that opens a page that lists all other accessible succession plans that the person is also a candidate in	No	Yes
Plan Candidates Descriptive Flexfields	Descriptive flexfields of the Candidates section of the succession plan	No	Yes

Attribute	Field or Section on Succession Plan Page	Make Required/ Not Required	Make Visible/Not Visible
	Note: These descriptive flexfields aren't visible by default.		
Ranking	Candidate's ranking	Yes	Yes
Readiness	Candidate's readiness level	Yes	Yes
Risk of Loss	**Risk of Loss** field for the candidate **Note:** This field isn't visible by default.	Yes **Note:** Only users who can edit the risk of loss value see the **Required** indicator.	Yes
Status	Candidate's status	No	Yes
Willing to Relocate	Candidate's willingness to relocate **Note:** This field isn't visible by default.	No	Yes

Related Topics

- HCM Experience Design Studio

How You Configure Talent Pool Pages Using Transaction Design Studio

Use the **Talent Pools** action in Transaction Design Studio (TDS) to create rules to configure Talent Pool pages as needed by your organization. When you create rules using this action, you can do these configurations:

- Specify the role criteria.
- Show or hide fields.
- Mark some fields as required to be filled.

When you create a rule for the **Talent Pools** action, in the Available Attributes section, you select the data source and then configure the attributes.

Pool Info Data Source Attributes

You select the **Pool Info** data source to configure the Pool Info and Development Goals sections of the talent pool.

This table lists the attributes for the **Pool Info** data source.

Attribute	Field on Talent Pool Page	Make Required/ Not Required	Make Visible/Not Visible
Add Development Goal	Add button for adding a development goal to the talent pool	No	Yes
Best-Fit Members	Best-Fit Members option in the Add menu of the Members section	No	Yes
Business Unit	Business unit for which the talent pool is created **Note:** This field isn't visible by default.	Yes	Yes
Department	Department for which the talent pool is created **Note:** This field isn't visible by default.	Yes	Yes
Description	Description	Yes	Yes
Development Goals Section	The section in the talent pool for adding or viewing development goals	No	Yes
Job	Job for the talent pool **Note:** This field isn't visible by default.	Yes	Yes
Job Family	Job family for which the talent pool is created **Note:** This field isn't visible by default.	Yes	Yes

Attribute	Field on Talent Pool Page	Make Required/ Not Required	Make Visible/Not Visible
Job Grade	Job grade for which the talent pool is created **Note:** This field isn't visible by default.	Yes	Yes
Pool Info Descriptive Flexfields	Descriptive flexfields in the Pool Info section of the talent pool **Note:** These flexfields aren't visible by default.	No	Yes
Position	Position **Note:** This field isn't visible by default.	Yes	Yes
Remove Development Goal	Remove icon for a development goal	No	Yes

Members Data Source Attributes

You select the **Members** data source in the Available Attributes section to configure the Members section of the talent pool page.

This table lists the attributes for the **Members** data source.

Attribute	Field on Talent Pool Page	Make Required/ Not Required	Make Visible/Not Visible
Impact of Loss	Impact of Loss **Note:** This field isn't visible by default.	Yes	Yes
Job	Member's job	No	Yes
Member Since	Field that shows the date the member was added to the talent pool	No	Yes

Attribute	Field on Talent Pool Page	Make Required/ Not Required	Make Visible/Not Visible
Pool Members Descriptive Flexfields	Descriptive flexfields in the Members section of the talent pool **Note:** These flexfields aren't visible by default.	No	Yes
Risk of Loss	Risk of Loss **Note:** This field isn't visible by default.	Yes	Yes
Status	Member's status	No	Yes
Willing to Relocate	Member's willingness to relocate **Note:** This field isn't visible by default.	No	Yes

Pool Member List Data Source Attributes

You select the **Pool Member List** data source in the Available Attributes section to configure the Members section of the Add from Talent Pool page. This page opens when candidate managers select the **Talent Pool Members** option in the **Add** menu of the Candidates section of a succession plan.

This table lists the attributes for the **Pool Member List** data source. You can set the value of these attributes to **Visible** or **Not visible** according to your organization's requirements.

Attribute	Field shown on Add from Talent Pool Page
Business Unit	Business unit of the member
Grade	Member's grade
Manager	Manager of the member
Member Since	The date the member was added to the talent pool **Note:** This field isn't visible by default.
Status	Member's status

Attribute	Field shown on Add from Talent Pool Page

Related Topics

- HCM Experience Design Studio