PeopleSoft HCM 9.2: PeopleSoft Human Resources Plan Careers and Successions

May 2025

Documentation Accessibility

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

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit https://docs.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit https://docs.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Contents

Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the Oracle Help Center. The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see Configuring Context-Sensitive Help Using the Hosted Online Help Website.

Locally Installed PeopleSoft Online Help

If you're setting up an on-premises PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the Oracle Software Delivery Cloud.

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment, and the documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

To configure the context-sensitive help for your PeopleSoft applications to use a locally installed online help website, see Configuring Context-Sensitive Help Using a Locally Installed Online Help Website.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the Oracle Help Center. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals

- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	***Description***
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For **Alt+W,** hold down the **Alt** key while you press the **W** key.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Typographical Convention	*Description*
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)

- E&G (Education and Government)

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help.
- Managing hosted Online Help.
- Managing locally installed PeopleSoft Online Help.

PeopleSoft HCM Related Links

Oracle Help Center

PeopleSoft Online Help Home

PeopleSoft Information Portal

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

PeopleSoft Business Process Maps (Microsoft Visio format)

HCM Abbreviations

PeopleSoft Spotlight Series

Contact Us

Send your suggestions to psoft-infodev_us@oracle.com.

Please include the applications update image or PeopleTools release that you're using.

Follow Us

Icon	*Link*
	Watch PeopleSoft on YouTube
	Follow @PeopleSoft_Info on X.
	Read PeopleSoft Blogs
	Connect with PeopleSoft on LinkedIn

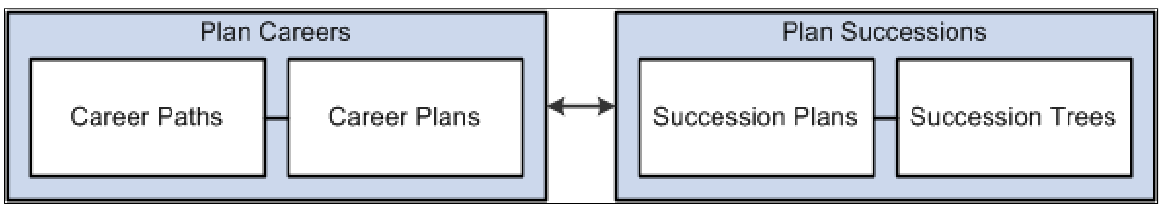
Chapter 1

Getting Started with Plan Careers and Successions

Plan Careers and Successions Overview

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

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



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

Plan Careers and Plan Successions Business Processes

Plan Careers and Successions provides these business processes:

- Manage career plans.
- Manage succession plans.

This documentation covers these business processes in the business process topics in PeopleSoft Human Resources Plan Careers and Successions.

Plan Careers and Successions Integrations

Plan Careers and Successions integrates with these PeopleSoft applications:

- HCM applications.
- Other PeopleSoft applications.

- Third-party applications.

This documentation discusses integration considerations in the implementation topics in this PeopleSoft Human Resources Plan Careers and Successions.

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

Plan Careers and Successions Implementation

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

Other Sources of Information

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

Refer to the *PeopleSoft HCM 9.2 - Reorganization of Component Interface Permissions* (Doc ID 2342162.1) MOS posting for a list of system-delivered CIs and their usage, the mapping of CIs and associated permission lists, and the mapping of CI permission lists and user roles.

See the product documentation for *PeopleTools: Setup Manager*.

Chapter 2

Planning Careers

Understanding Plan Careers

This topic discusses:

- Plan careers
- (USF) Plan careers

Plan Careers

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

To implement the Plan Careers business process:

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

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

Integrations

The Plan Careers business process integrates with:

- The Manage Profiles business process in HR.

  See “Understanding Profile Management” (PeopleSoft Human Resources Manage Profiles).

- The ePerformance business process.

  See “ePerformance Integrations” (PeopleSoft ePerformance)

- The Administer Training business process in HR.

  See Setting Up Training Programs.

(USF) Plan Careers

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

Once you create a career plan, the system:

1. Routes the plan along the agency's path of review and approval.

2. Tracks costs and activities associated with the plan.

3. Generates the IDP output form.

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

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

Career Plan Tracking

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

- Creating a career plan.

- Submitting it as a request.

- Giving reviews and approvals.

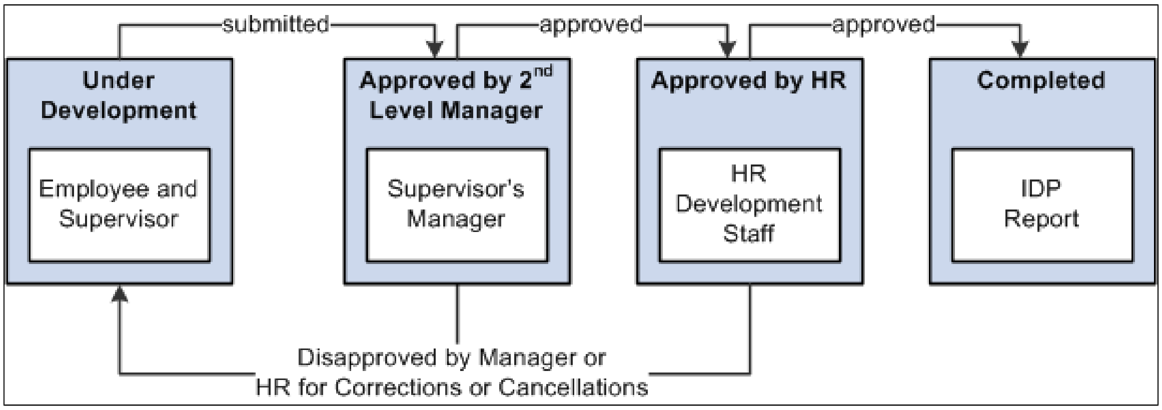
- Completing an authorized career plan.

- Producing an IDP.

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

Career Plan Approval Process

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



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

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

Prerequisites

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

1. Set up HCM basic data, such as department codes, business units and geographic locations.
2. Set up HR job data for employees.
3. (optional) Set up job and employee profiles.
4. (optional) Set up training programs for employees.

Related Links

“Setting Up Implementation Defaults” (Application Fundamentals)
“Defining Job Subfunction and Job Function Codes” (Application Fundamentals)
“Tracking Workforce Contracts” (PeopleSoft Human Resources Administer Workforce)

Setting Up HR Job Data

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

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

See “Human Resources Administer Workforce Overview” (PeopleSoft Human Resources Administer Workforce).

See “Human Resources Administer Workforce Implementation” (PeopleSoft Human Resources Administer Workforce).

Setting Up Profiles

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

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

Profiles are discussed in *PeopleSoft Manage Profiles.*

See “Manage Profiles Overview” (PeopleSoft Human Resources Manage Profiles).

See Career Strength/Develop Areas Page.

Setting Up Training Programs

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

See “Setting Up Courses” (PeopleSoft Human Resources Administer Training).

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

See Career Training Plan Page.

Creating Career Paths

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

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

Understanding Career Paths

Set up default career paths for key job codes or for all job codes. Default career paths enable you to Create a hierarchy or network of jobs.

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

Career Move Levels

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

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

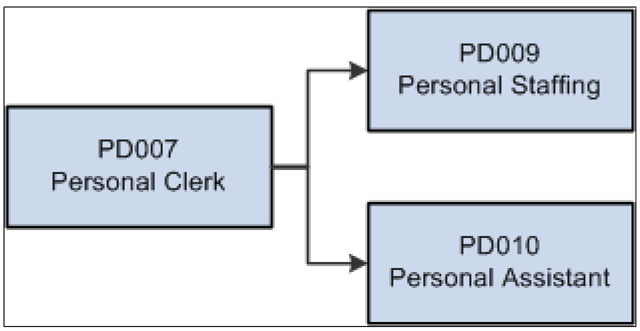
This table lists three career moves:

Career-Move Level	***Job Code***	***Position***	
	Current job	PD007	Personnel Clerk GS-0203
1	First move from current job	PD010	Personnel Assistant GS-0203-06

Career-Move Level	Job Code	Position	
2	Second move from current job	PD101	Personnel Staffing Specialist GS-0212-09
3	Third move from current job	PD107	Personnel Officer GS-0201-13

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

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



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

Pages Used to Create Career Paths

Page Name	Definition Name	Usage
Geographic Preference Page	GEOG_PREF_TBL	Define geographic areas for job relocation in career planning components.
Career Path Table Page	CAREER_PATH_TBL	Define default career paths for job codes.

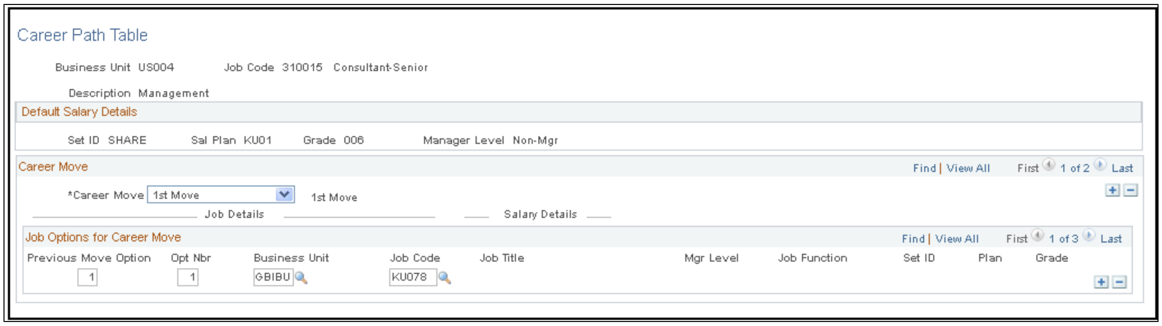
Career Path Table Page

Use the Career Path Table page (CAREER_PATH_TBL) to define default career paths for job codes.

Navigation:

Set Up HCM > **Product Related** > **Workforce Development** > **Career Planning** > **Career Path Table** > **Career Path Table**

This example illustrates the fields and controls on the Career Path Table page. You can find definitions for the fields and controls later on this page.



Default Salary Details

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

Career Move

Field or Control	***Description***
Career Move	Select a career move level. *1st Move* defines the first move from the selected job code, and *9th Move* is the last move. You can include multiple job codes for any career move to reflect moves at the same management level and moves up the management hierarchy.
Previous Move Option	Identifies the previous move option number for the current movement, only when the previous movement has more than one option.
Opt Nbr (option number)	Enter a number if there is more than one job code option for the selected career-move level. Use the option number to sort the job codes.
Job Code	Select the job code for the career move level.

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

Creating Career Plans

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

This topic provides an overview of career plans and discusses how to enter employee job, location, and availability preferences and career plans related tasks.

Pages Used to Create Career Plans

Page Name	***Definition Name***	***Usage***
Career Plan Page	CAREER_PLAN1	Enter employee preferences for jobs and geographic locations; indicate availability to move into new positions.
Career Path Page	CAREER_PLAN2	Define an employee's career path; modify a default career path; configure a job progression.
Current Career Position Descr (current career position description) Page	CAREER_POSN_SEC	View a description of the position selected on the Create Career Plan - Career Path page.
Current Career Job Descr (current career job description) Page	CAREER_JOBCD_SEC	View a description of the job code selected on the Create Career Plan - Career Path page.
(USF) Print Individual Development Plan (IDP) Actions Page	GVT_CAR_PIDP_SEC	Submit the career plan for approval; print the completed plan.
(USF) Federal Potential Future Positions Page	GVT_CAR_PLN2_SEC	Add further information about the career path specified on the Career Plan - Career Path page.
Career Ranking and Potential Page	CAREER_PLAN3	Show how employees compare to their peers and indicate their potential.
Career Goals Page	CAREER_PLAN4	Enter short and long-term goals for employees.
Career Mentoring Page	CAREER_PLAN5	Assign career mentors.
Federal Coaching/Mentor Information Page	GVT_CAR_PLN5_SEC	Add further information about the career goal specified on the employee's Career Mentoring page.
Career Strength/Develop Areas Page	CAREER_PLAN6	Record and evaluate an employee's career strengths and developmental areas.

Page Name	*Definition Name*	*Usage*
Career Training Plan Page	CAREER_PLAN7	Enter or update a training program for the selected employee; use or modify the default training program for the employee job code.
Career Development Plan Page	CAREER_PLAN8	Help employees improve in developmental areas before their next performance review or career planning topic.
Update Development Plan Page	HR_CP_DEVELOP	Click to have the system compare the employee's current person profile against the job code or position profile associated with the focus movement.
(USF) Federal Career Plan Information Page	GVT_CAR_PLN8_SEC	Add further information about the career developmental goal specified on the Career Development Plan page.

Understanding Career Plans

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

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

Recording Input From Multiple Sources

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

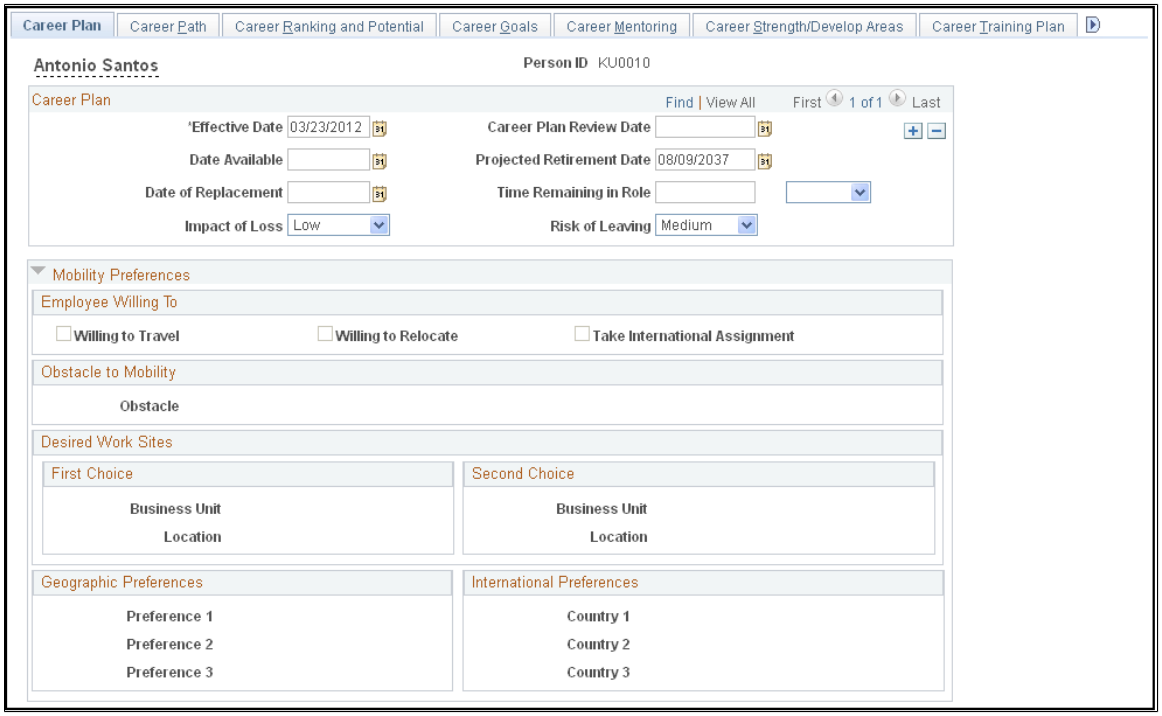
Career Plan Page

Use the Career Plan page (CAREER_PLAN1) to enter employee preferences for jobs and geographic locations; indicate availability to move into new positions.

Navigation:

Workforce Development > **Career Planning** > **Prepare Evaluation/Career Plan** > **Manage Career Plan** > **Career Plan**

This example illustrates the fields and controls on the Career Plan page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Projected Retirement Date	This field automatically populates with the date on which the employee turns 65. If that is not the employee's actual retirement date, enter the correct date.
Date of Replacement	Enter the scheduled date of arrival for the person replacing the current employee.
Time Remaining in Role and [time period]	Enter the amount of time remaining in the employee's current position, and select the unit of measure, months or years.
Impact of Loss	Select the impact to the organization if this employee leaves their current position. Values are: *High, Medium,* and *Low.*
Risk of Leaving	Select the overall risk of this employee leaving his or her current position. Values are: *High, Medium,* and *Low.*
Generate IDP	This button appears for U.S. Federal users only. Click to display the Print Individual Development Plan (IDP) Actions page, where you submit the career plan for approval and print the completed plan.

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

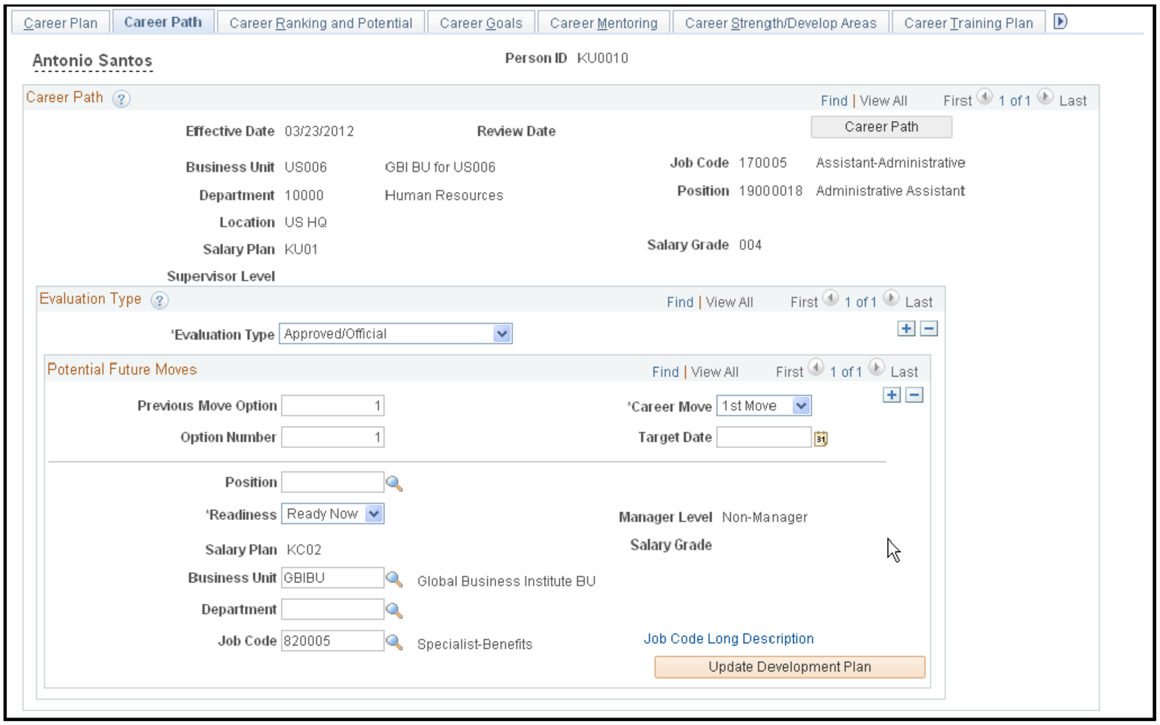
Career Path Page

Use the Career Path page (CAREER_PLAN2) to define an employee's career path; modify a default career path; configure a job progression.

Navigation:

Workforce Development > **Career Planning** > **Prepare Evaluation/Career Plan** > **Manage Career Plan** > **Career Path**

This example illustrates the fields and controls on the Career Path page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Career Path	Click to create a career path based on the default career path for the employee's job code. If a career path is defined for that job code, the system completes most of the information in the **Potential Future Positions** scroll area. If the employee's path differs from the default path, modify the fields as required. Once you save the plan, the **Career Path** button is unavailable. However, each time you create a new career plan for an employee, the system makes the button available, and you can use the default path for the new plan. See Setting Up Default Career Paths for information about creating default career paths. **Note:** The system uses the date (career plan date) to determine the employee's job code. If the employee has changed jobs since the career plan date, the default career path is based on the previous job code. To ensure that the career plan is based on an employee's current job, create a new career plan whenever an employee changes job, and set the effective date to match the effective date on the Job Data page.

Evaluation Type

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

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

Potential Future Moves

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

Field or Control	*Description*
Career Move	Select the career move to define. *1st Move* is the first step in the career path. It defines the job that the employee will move to from the current job and when the employee will be ready for that job. You can define up to nine moves. *9th Move* is the final step in the employee's career path. It defines the ninth job move from the current job.
Option Number	If you decide to include more than one job code in a career-move level, insert an option number to sort the job codes in the preferred order.
Position	If you're driving part or all of HR by position, select a position number from the available options. When you move out of this field, the system completes the **Business Unit, Department** and **Job Code** fields. It also displays the job title, salary plan, grade, manager level, and function associated with this position. If you use partial position management and decide not to use a position in this career move, delete the position number.
Readiness	Select an estimate of the employee's readiness for such a move from these options: *1−2 Yrs:* (1−2 years) The employee will be ready for the move within the next two years. *3−5 Yrs:* (3−5 years) The employee will be ready for the move in three to five years. *Emergency:* The employee is overdue for a job move and needs to move as soon as possible. *Ready Now:* The employee is ready for the move now. *Retirement:* The employee will not move to another position after this; for example, those who are nearing retirement age. The system uses this information in Plan Successions to show blockages (succession candidates who are blocked from advancement).
Federal Data	This link only appears if you are a U.S. Federal user. Click to display the Federal Potential Positions page, where you enter further information about the potential career move.

Field or Control	*Description*
Department	If you know it, select a department for the job. This field is optional. You create departments in the Department table. The setID determines the departments that you see.
Job Code	Select the job code for the career move from the available options. When you select a job code and move out of the field, the system displays the associated job title, salary plan, grade, manager level, and function. You use the Job Code table to create job codes.
Update Development Plan	Click to have the system compare the employee's current person profile against the job code or position profile associated with the focus movement. The system identifies competency deltas and other profile topics for insertion on the Career Development Plan page as follows: • Competencies and other rated items with a lower rate than required by the job profile are inserted. • Required job profile items for which there is no rating in the employee profile are inserted. • Person profile items that have multiple ratings where any of those ratings are lower than required in the job profile are inserted. After the identified competencies and other items are inserted into the career development plan, the system opens the Career Development Plan page. This enables the user to update any related information, such as the estimated completion date, and so on.

Update Development Plan Page

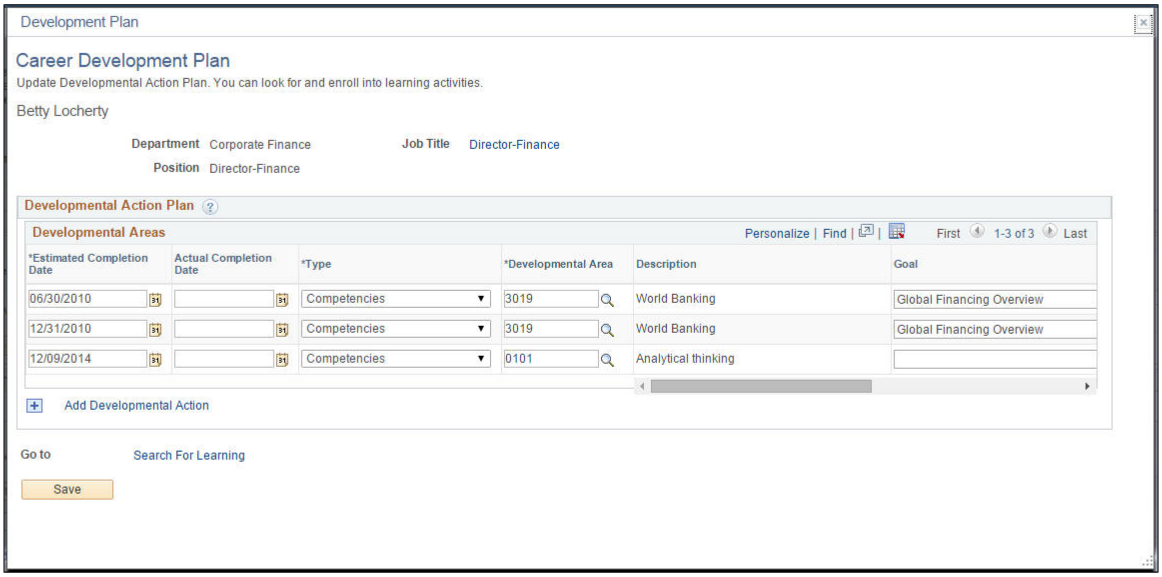
Use Update Development Plan page (HR_CP_DEVELOP) to compare the employee's current person profile against the job code or position profile associated with the focus movement.

Navigation:

Workforce Development > **Career Planning** > **Prepare Evaluation/Career Plan** > **Manage Career Plan**

After selecting the career plan, select **Update Development Plan** button on the screen, the Update Development Plan page appears.

This screenshot represents the fields and controls of Update Development Plan page.



Print Individual Development Plan (IDP) Actions Page

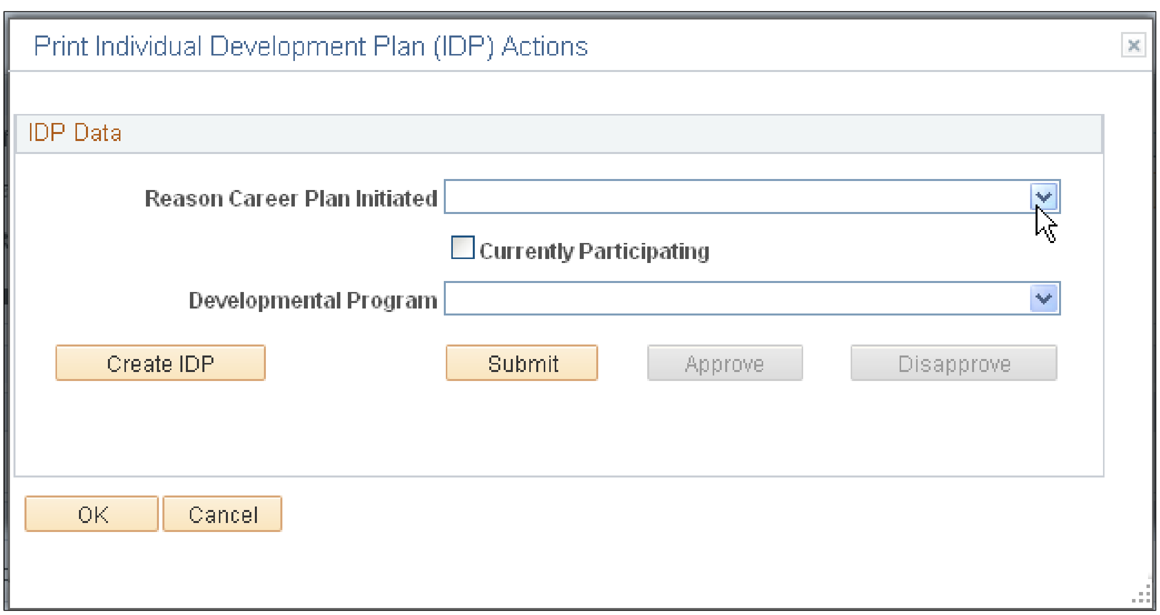
Use the (USF) Print Individual Development Plan (IDP) Actions page (GVT_CAR_PIDP_SEC) to submit the career plan for approval; print the completed plan.

Navigation:

Workforce Development > **Career Planning** > **Prepare Evaluation/Career Plan** > **Manage Career Plan** > **Career Plan**

Click the **Generate IDP** link.

This example illustrates the fields and controls on the Print Individual Development Plan (IDP) Actions page. You can find definitions for the fields and controls later on this page.



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

Federal Potential Future Positions Page

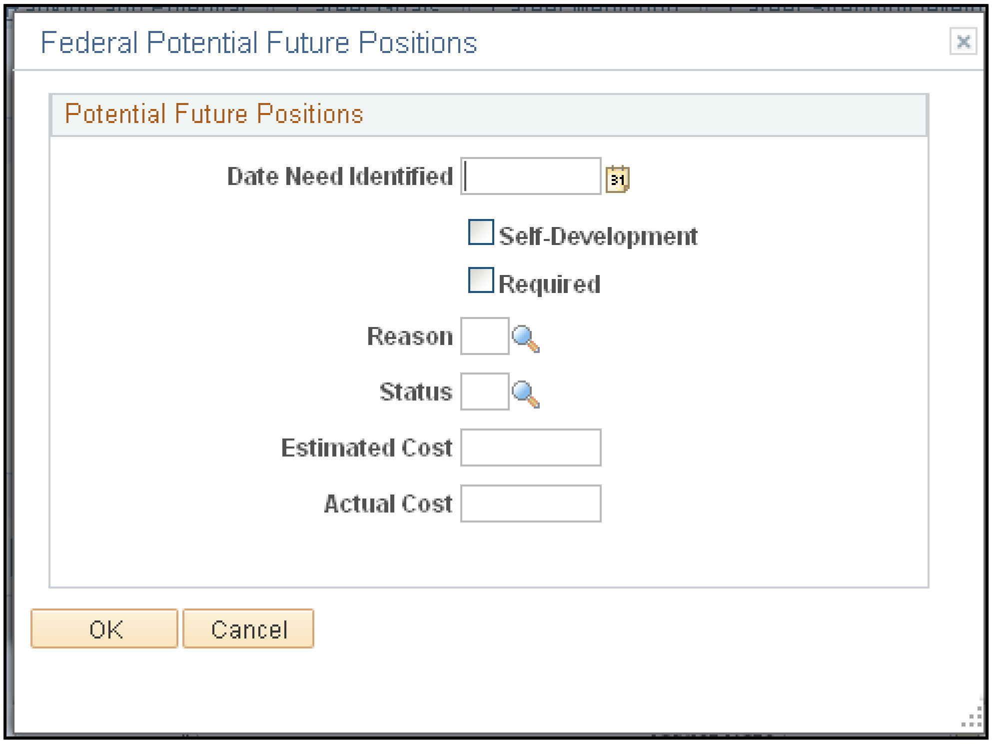
Use the (USF) Federal Potential Future Positions page (GVT_CAR_PLN2_SEC) to add further information about the career path specified on the Career Plan - Career Path page.

Navigation:

Workforce Development > **Career Planning** > **Prepare Evaluation/Career Plan** > **Manage Career Plan** > **Career Path**

Click the **Federal Data** link.

This example illustrates the fields and controls on the Federal Potential Future Positions page. You can find definitions for the fields and controls later on this page.



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

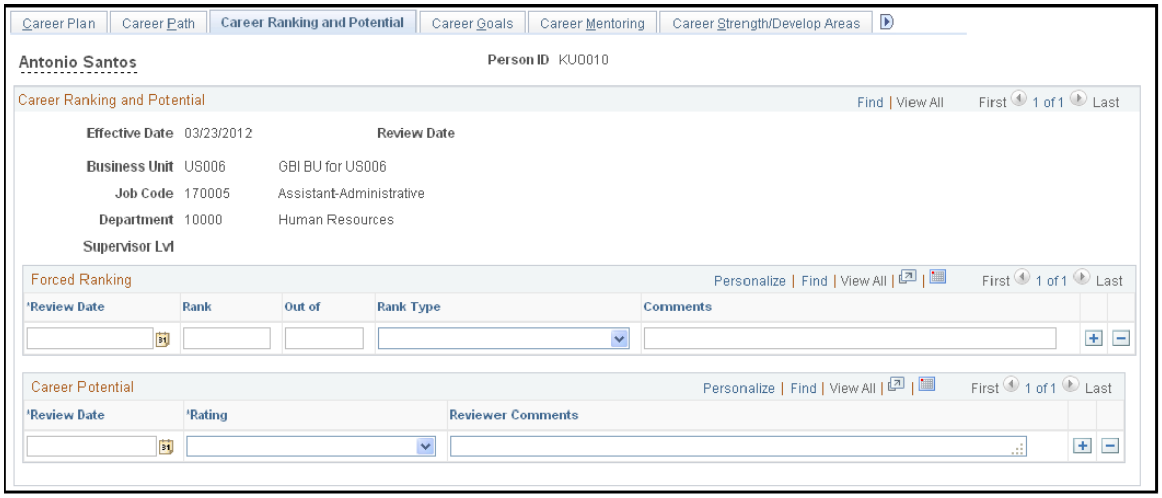
Career Ranking and Potential Page

Use the Career Ranking and Potential page (CAREER_PLAN3) to show how employees compare to their peers and indicate their potential.

Navigation:

Workforce Development > **Career Planning** > **Prepare Evaluation/Career Plan** > **Manage Career Plan** > **Career Ranking and Potential**

This example illustrates the fields and controls on the Career Ranking and Potential page. You can find definitions for the fields and controls later on this page.



Enter rankings of different types to get a better cross-topic of employee skills and promotability.

Forced Ranking

Field or Control	***Description***
Out of	Enter the total number of people against whom the employee has been ranked.

Career Potential

Field or Control	***Description***
Rating	Delivered ratings include *Currently Well Placed, High Potential Candidate, Lateral Transfer, Officer Potential,* and *Promotable.*

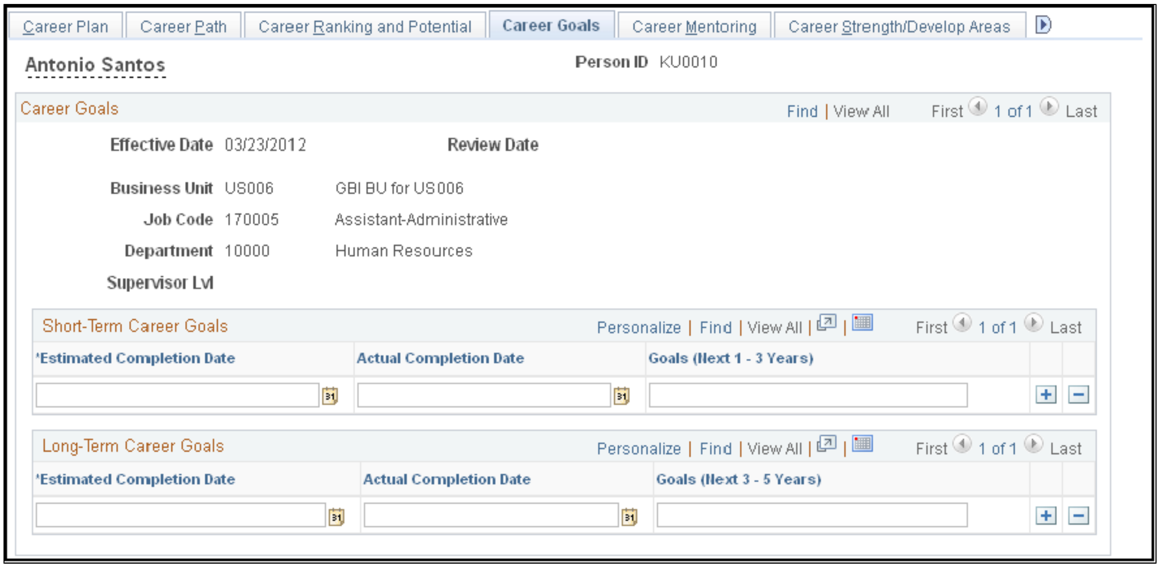
Career Goals Page

Use the Career Goals page (CAREER_PLAN4) to enter short and long-term goals for employees.

Navigation:

Workforce Development > **Career Planning** > **Prepare Evaluation/Career Plan** > **Manage Career Plan** > **Career Goals**

This example illustrates the fields and controls on the Career Goals page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Import Short-Term Goals	This button is for U.S. Federal users only. Click this button to import goals from the employee's most recent appraisal.
Actual Completion Date	Enter the actual completion date when the employee achieves the goal.
Goals (Next 1 - 3 Years)	Enter short-term goals in this field. If you are tracking employee reviews in HR, use the short-term goals entered here as the basis for short-term goals and objectives in employee reviews.
Import Long-Term Goals	This button is for U.S. Federal users only. Click this button to import goals from the employee's most recent appraisal.
Goals (3 - 5 Years)	Enter long-term goals in this field. If you are tracking employee reviews in HR, use the long-term goals entered here as the basis for long-term goals and objectives in employee reviews.

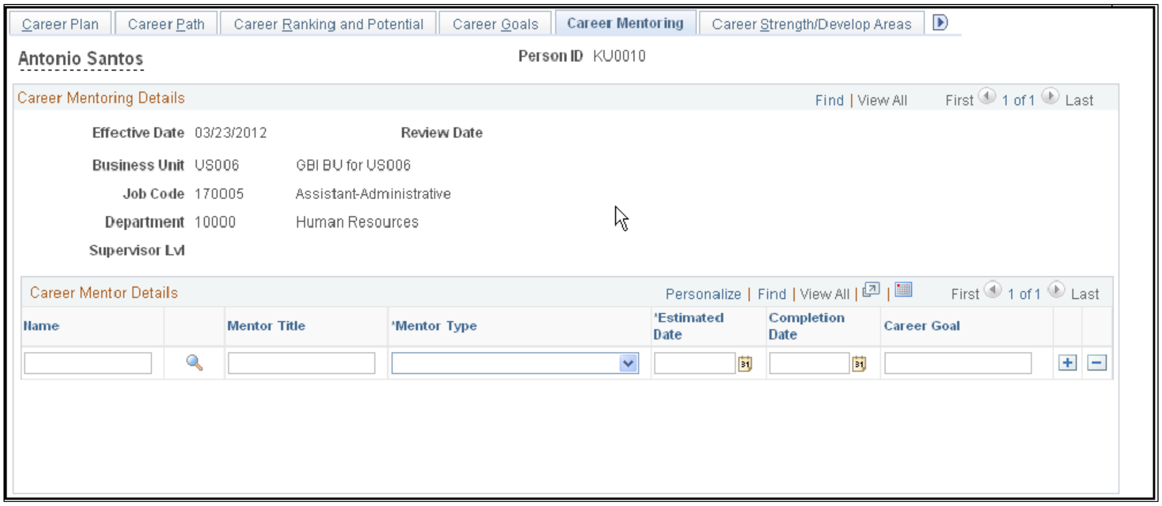
Career Mentoring Page

Use the Career Mentoring page (CAREER_PLAN5) to assign career mentors.

Navigation:

Workforce Development > **Career Planning** > **Prepare Evaluation/Career Plan** > **Manage Career Plan** > **Career Mentoring**

This example illustrates the fields and controls on the Career Mentoring page. You can find definitions for the fields and controls later on this page.



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

Field or Control	***Description***
Name	Enter the name of the employee's mentor.
Mentor Type	Select the type of mentor from the list.
Estimated Date	Enter the expected date of completion for this mentoring activity.
Completion Date	When complete, enter the completion date.
Career Goal	Enter the career goal for the employee to achieve through this mentor.

Federal Coaching/Mentor Information Page

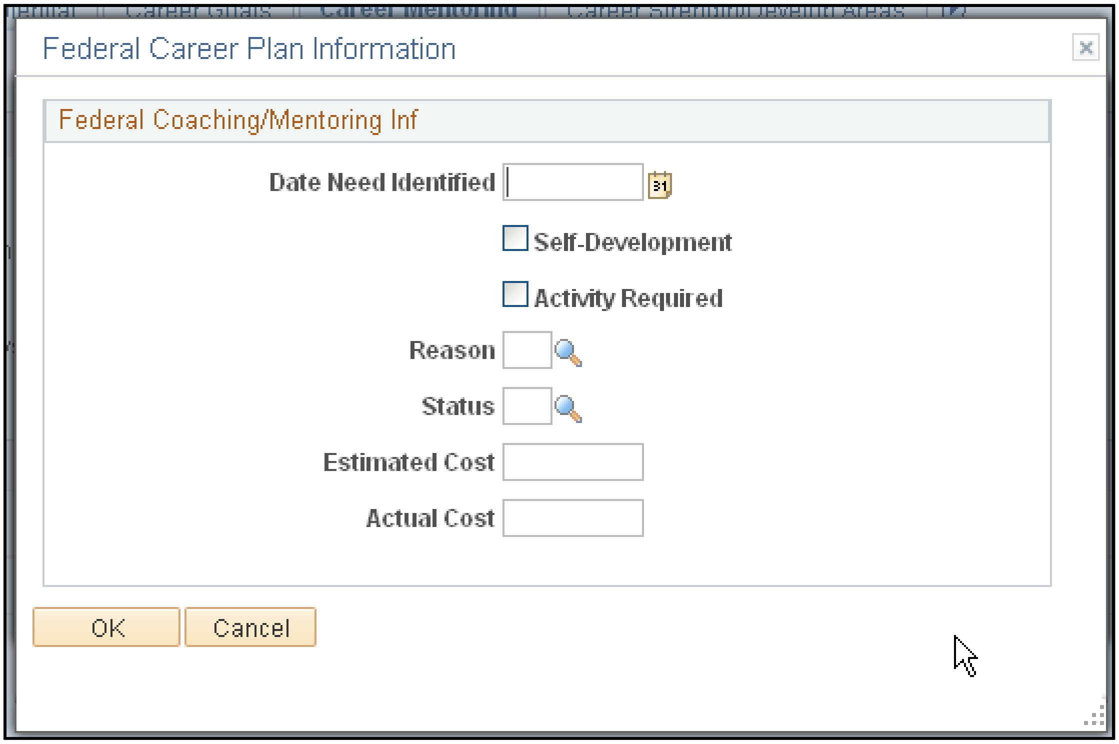
Use the Federal Coaching/Mentor Information page (GVT_CAR_PLN5_SEC) to add further information about the career goal specified on the employee's Career Mentoring page.

Navigation:

Workforce Development > **Career Planning** > **Prepare Evaluation/Career Plan** > **Manage Career Plan** > **Career Mentoring**

Click the **Federal Data** button.

This example illustrates the fields and controls on the Federal Coaching/Mentor Information page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Date Need Identified	Enter the date that the goal was agreed to.
Self-Development	Select if this is part of the employee's self-development. This indicates that the employee is paying the costs for this activity.
Activity Required	Select if the activity is mandatory.

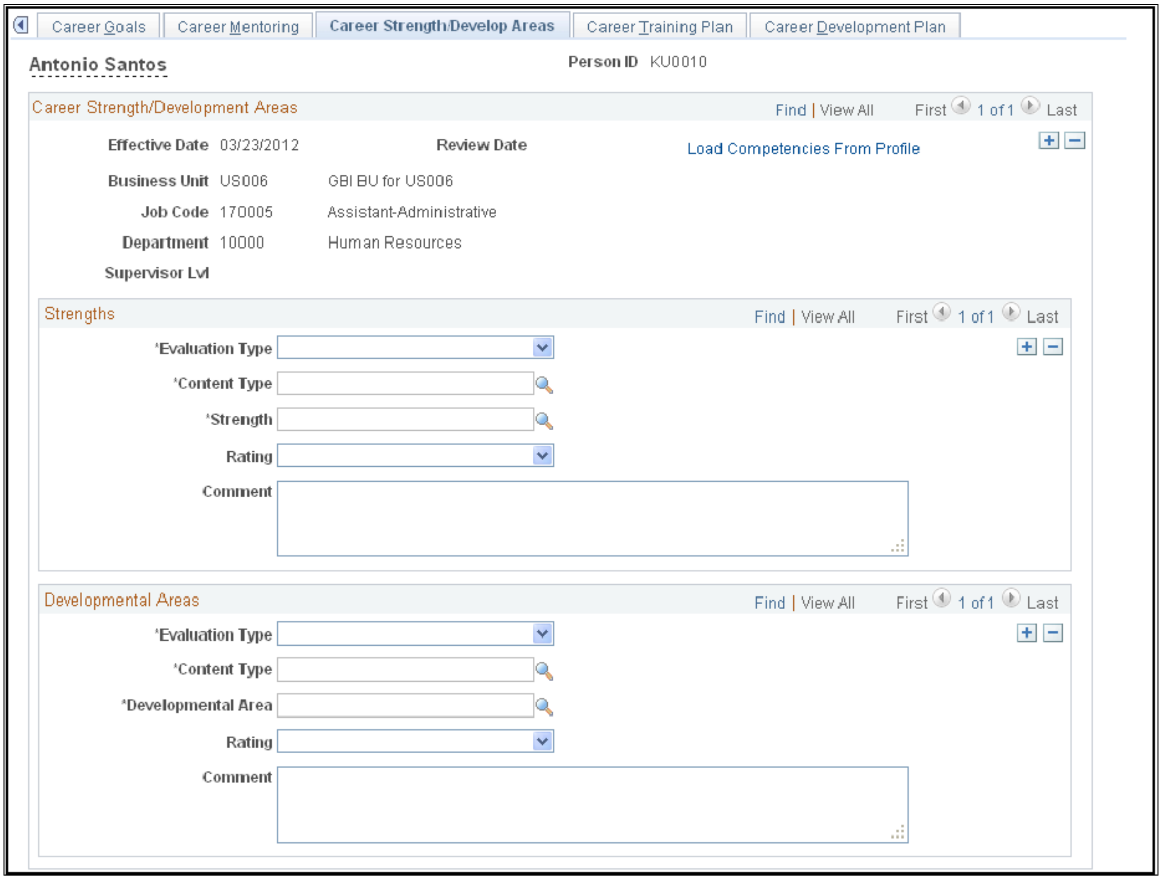
Career Strength/Develop Areas Page

Use the Career Strength/Develop Areas page (CAREER_PLAN6) to record and evaluate an employee's career strengths and developmental areas.

Navigation:

Workforce Development > **Career Planning** > **Prepare Evaluation/Career Plan** > **Manage Career Plan** > **Career Strength/Develop Areas**

This example illustrates the fields and controls on the Career Strength/Develop Areas page. You can find definitions for the fields and controls later on this page.



Strengths

Field or Control	***Description***
Content Type	Select a content type related with the Strengths/Developmental Areas according with the content types available from Profile Management. The available content types are limited by the content types indicated on the Career Planning - Profile Set Up page.
Strength	Select the strength to evaluate from the list of competencies. Competencies are defined in the content catalog that is part of the Manage Profiles business process.
Rating	Select the rating that best matches the employee's level of proficiency for the selected competency.

Developmental Areas

Field or Control	***Description***
Developmental Area	Select a competency that is a developmental area for the employee.
Rating	Select the rating that best matches the employee's level of proficiency for the selected competency.

Related Links

“Understanding the Content Catalog” (PeopleSoft Human Resources Manage Profiles)

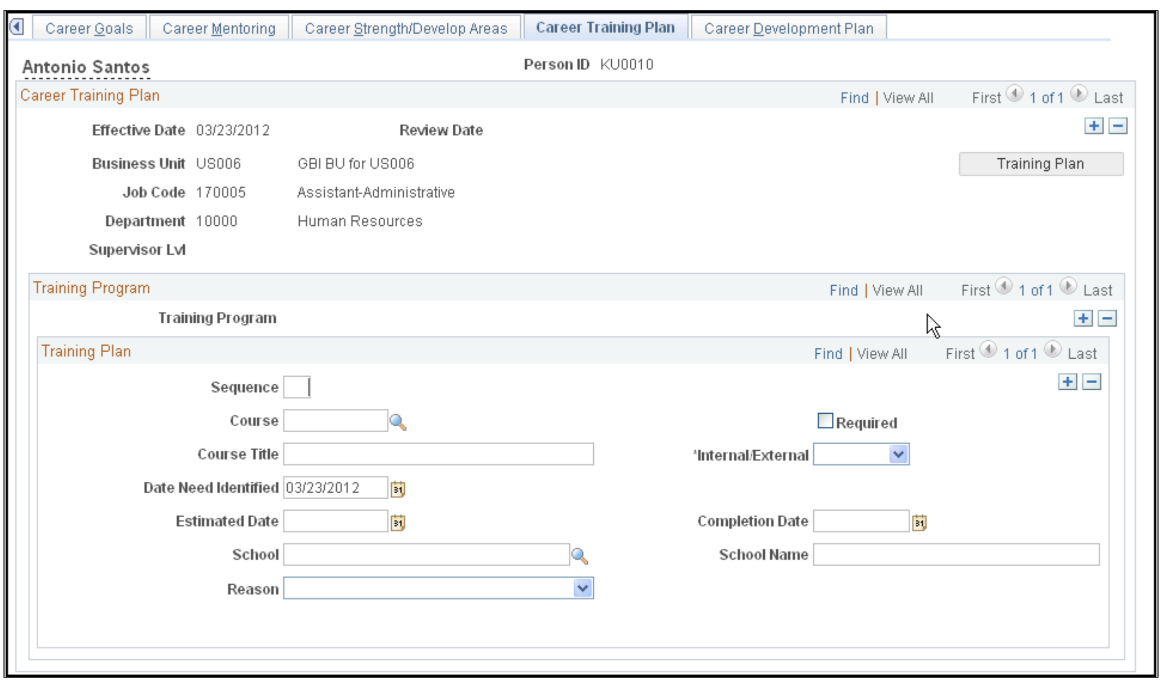
Career Training Plan Page

Use the Career Training Plan page (CAREER_PLAN7) to enter or update a training program for the selected employee; use or modify the default training program for the employee job code.

Navigation:

Workforce Development > Career Planning > Prepare Evaluation/Career Plan > Manage Career Plan > Career Training Plan

This example illustrates the fields and controls on the Career Training Plan page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Training Plan	You create default training programs in the Training Program table and tie them to job codes in the Job Code table. If a training plan has been established for the job code displayed on this page, when you click the **Training Plan** button, the system populates the fields in the **Training Plan** scroll area with the information from the training program. If the employee's training plan differs from the default plan, modify the fields as required. After you save the plan, this button is unavailable. However, each time you create a new career plan for an employee, this button is available and you can choose to use the default for the new plan. **Note:** The system uses the effective date (career plan date) to determine the employee's job code. If the employee has changed jobs since the career plan date, the default training plan is based on the previous job code. To ensure that the training plan is based on an employee's current job, create a new career plan whenever an employee changes job and set the effective date to match the effective date on the Job Data page.

Training Program

Field or Control	*Description*
Training Program	Displays the training program name, if the employee's training plan is based on a predefined training program.

Training Plan

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

Field or Control	***Description***
Completion Date	If the training course has been scheduled in Administer Training, the system will display the end date of the course in this field when the status changes to *Completed.* If you are tracking a training course that is not handled in Administer Training, enter the actual completion date when the employee completes the course or training.
Course	Select a course code from the list of available options. When you exit this field, the system enters the course title, the internal and external value, the school code, and the school name for the course. The system makes the fields unavailable; you can't change this information. If you've entered a course code and decide that you don't want to use it after all, delete the selection. When you exit this field, the system makes the other fields available.
Course Title	If you selected a course code, the system supplies the course title and makes this field unavailable. If the course is not in the course table, enter the course title.
Required	Select this check box if the course is mandatory.
Internal/External	If you selected a course code, the system completes this field and makes it unavailable. If you left the **Course** field cleared, select one of these options: *Internal:* If the course is held in-house. *External:* If an external vendor administers the course.
Date Need Identified	The system automatically populates this field with the career plan date, which you can change if necessary.
School	If the course is *External,* select a school code, which you define in the school table. If the school isn't in the school table, leave this field cleared and complete the school **Name** field. When you select a course that is *Internal,* the system makes the **School** field unavailable.
Name	If you selected a school code, the system enters the school name and makes this field unavailable. If the school isn't in the school table, enter the school name.

Field or Control	*Description*
Search for Learning	If you have PeopleSoft Learning Management installed, click this link to access the Request Training Enrollment page.

USF fields

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

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

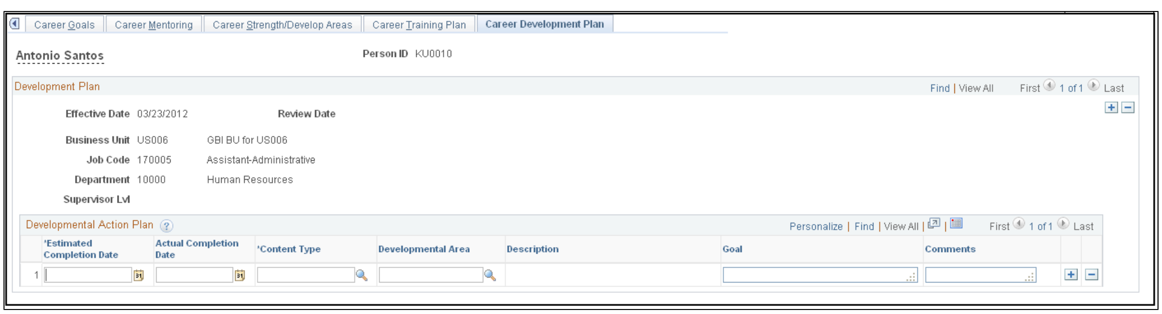
Career Development Plan Page

Use the Career Development Plan page (CAREER_PLAN8) to help employees improve in developmental areas before their next performance review or career planning topic.

Navigation:

Workforce Development > **Career Planning** > **Prepare Evaluation/Career Plan** > **Manage Career Plan** > **Career Development Plan**

This example illustrates the fields and controls on the Career Development Plan page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Content Type	Select the content type related to the developmental area. The available content types are limited by the content types specified on the Career Planning - Profile Set Up page.
Developmental Area	Select a developmental area based on the selected content type. You cannot select a value for the developmental area until you select a content type.

Federal Career Plan Information Page

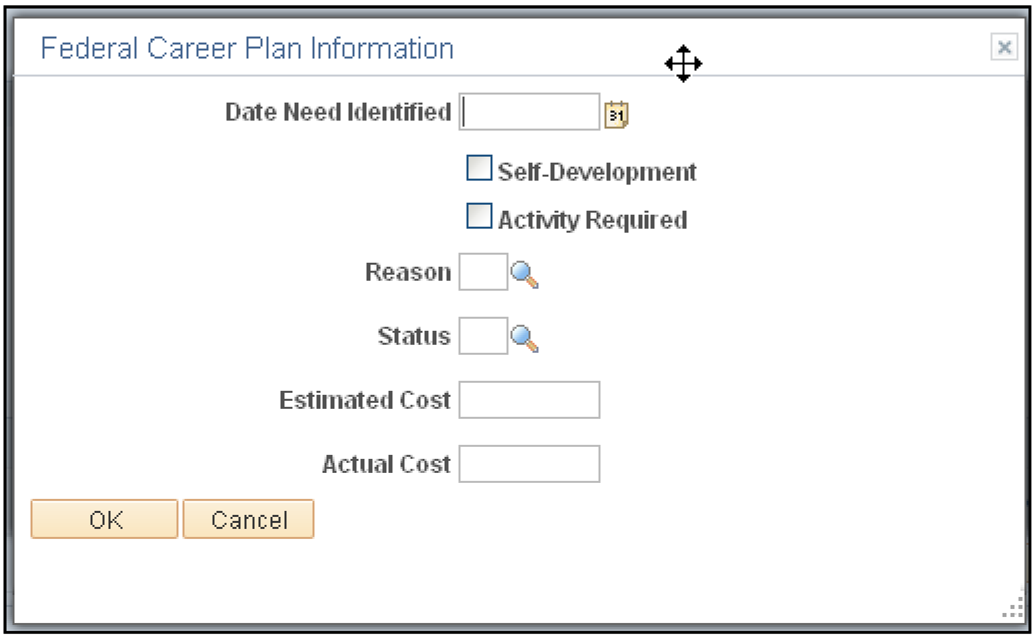
Use the (USF) Federal Career Plan Information page (GVT_CAR_PLN8_SEC) to add further information about the career developmental goal specified on the Career Development Plan page.

Navigation:

Workforce Development > **Career Planning** > **Prepare Evaluation/Career Plan** > **Manage Career Plan** > **Career Development Plan**

Click the **Federal** button.

This example illustrates the fields and controls on the Federal Career Plan Information page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Date Need Identified	Enter the date that the goal was agreed to.
Self-Development	If this is part of the employee's self-development activities, select this check box. This indicates that the employee is paying the costs for this activity.

(USF) Approving the Career Plan

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

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

To begin the approval process:

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

To open the worklist:

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

To approve a career plan request:

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

To approve a career path request:

1. Open the worklist.

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

To approve a career mentoring request:

1. Open the worklist.

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

To approve a career training plan request:

1. Open the worklist.

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

Reviewing Employee Career Data

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

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

- View employee job paths.
- View summary information.

Understanding Employee Career Data

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

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

Pages Used to Review Employee Career Data

Page Name	***Definition Name***	***Usage***
Reviewing Employee Career Data	EMPLOYEE_SUMMARY1	View employee current job, employment, and personal data.
Career Assignments Page	CAREER_SUMMARY	View employee job paths through an organization.
Immediate Family Page	IMMEDIATE_FAMILY	View employee dependent and beneficiary information.
Compensation Page	COMP_SUMMARY	View summary compensation information.
Training Page	TRN_STUDNT_CRS_SUM	View summary training information.

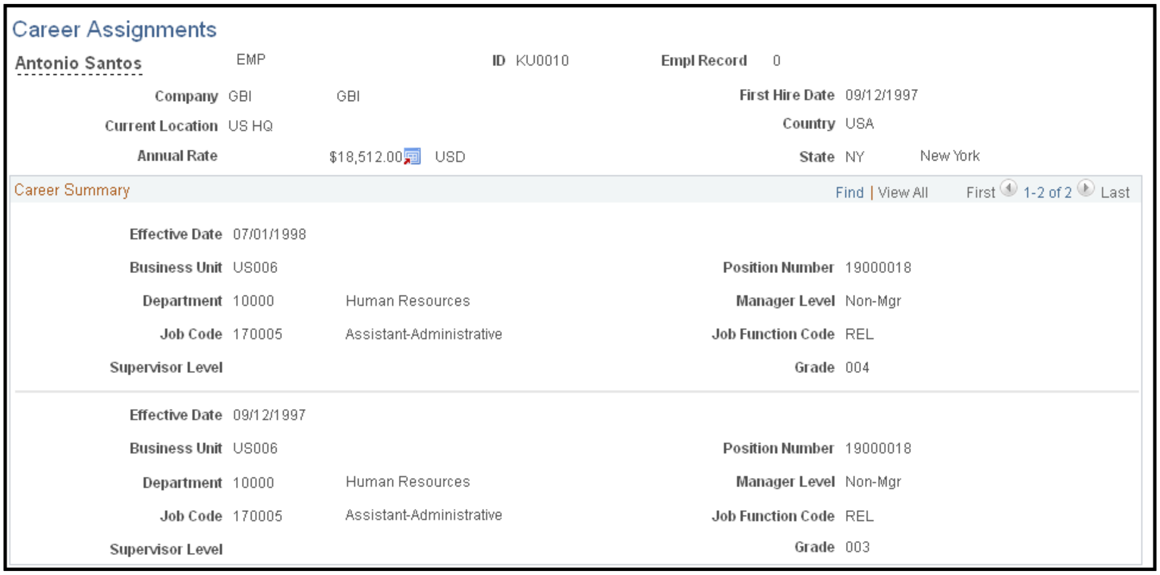
Career Assignments Page

Use the Career Assignments page (CAREER_SUMMARY) to review employee job status and job history.

Navigation:

- **Organizational Development** > **Succession Planning** > **Review Career Summaries** > **Career Assignments**
- **Organizational Development** > **Succession Planning USF** > **Review Career Summary Info** > **Career Assignments**

This example illustrates the fields and controls on the Career Assignments page. You can find definitions for the fields and controls later on this page.



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

Reviewing Career Progression

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

Understanding the Career Progression Chart

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

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

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

Complete the following prerequisites to perform the actions listed above:

- Define a career path on the Career Path page.

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

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

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

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

Page Used to View the Career Progression Chart

Page Name	***Definition Name***	***Usage***
Career Progression Chart Page	HR_CP_ADM_CHART	View career paths and non-person profile summaries in order to perform a competency gap/fit analysis.

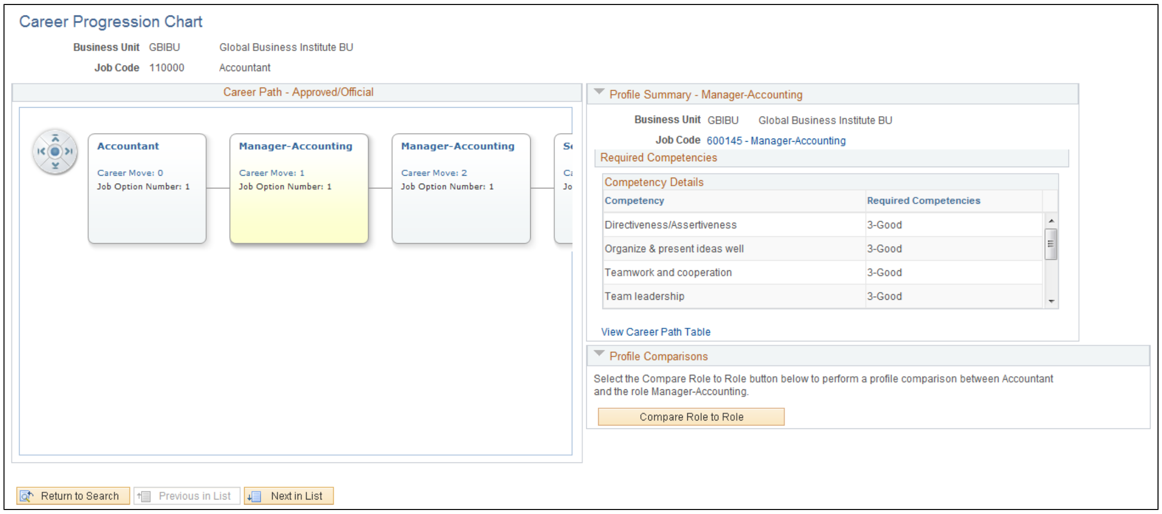
Career Progression Chart Page

Use the Career Progression Chart page (HR_CP_ADM_CHART) to view career paths and non-person profile summaries in order to perform a competency gap/fit analysis.

Navigation:

- **Workforce Development** > **Career Planning** > **Prepare Evaluation/Career Plan** > **Career Progression Chart**
- **Manager Self Service** > **Career Planning** > **Career Progression Chart**
- **Self Service** > **Career Planning** > **Career Progression Chart**
- Click the **Career Progression Chart** link on various career planning pages.

This example illustrates the fields and controls on the Career Progression Chart page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Career Path - Approved/Official	This region displays up to three career path evaluation types defined on the Self-Service Career Planning page or the Career Planning page: • The approved and official career path as defined on the Career Planning page. • A manager-agreed career path as defined on the Self-Service Career Planning page for Manager and Employee Self-Service. • A personal career path as defined on the Self-Service Career Planning page for Employee Self-Service. Each job code in the chart is referred to as a node. Selecting a node makes that node the current node, which affects the content in the **Profile Summary** region.
Profile Summary	Displays a summary of data for a job code. The contents of this region are associated with a focus node in the **Career Path** region.

Field or Control	*Description*
Compare Role to Role or **Compare Myself to Role** or **Compare Employe to Role**	Click to initiate a Profile Manager-based competency gap/fit comparison process, using the job code that is the Focus of the chart, displayed in the **Profile Summary** region, as the source for basing the comparison. The system displays the comparison results in a Match Results window. When accessing the Career Progression Chart page from the Self–Service pages, the **Compare Myself to Role** button initiates a comparison process. When accessing the Career Progression Chart page from the Manager Self–Service pages, the **Compare Employe to Role** button initiates a comparison process. The Profile system initiates the Management Person to Role Match process for the current employee and the job associated with the focus node in the **Career Path** region. When an HR administrator accesses the Career Progression Chart page from the Prepare Evaluation/Career Plan pages, the **Compare Role to Role** button initiates a side-by-side competency comparison between the selected job code or position and any job code selected in the career path. The displayed competencies are taken from the non-person profile for each job code. **Note:** If the selected employee or the selected job code do not have defined profiles, the system will not initiate the comparison process.

Running Career Reports

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

Pages Used to Run Career Reports

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

Page Name	***Definition Name***	***Usage***
Key Job Code - Incumbents Page	HR_SUCC_METRICS3	Identify key job codes and the career plan of any incumbents for those job codes.
Individual Career Training Page	RUNCTL_CAR002	Run the Career Plan Training Path (CARTRAIN) report.
Individual Development Plan Page	RUN_FGHR022	Run the Individual Development Plan (FGHR022) report.

Career Details by Population Page

Use the Career Details by Population page (HR_SUCC_METRICS1) to create reports that display various career planning employee metrics.

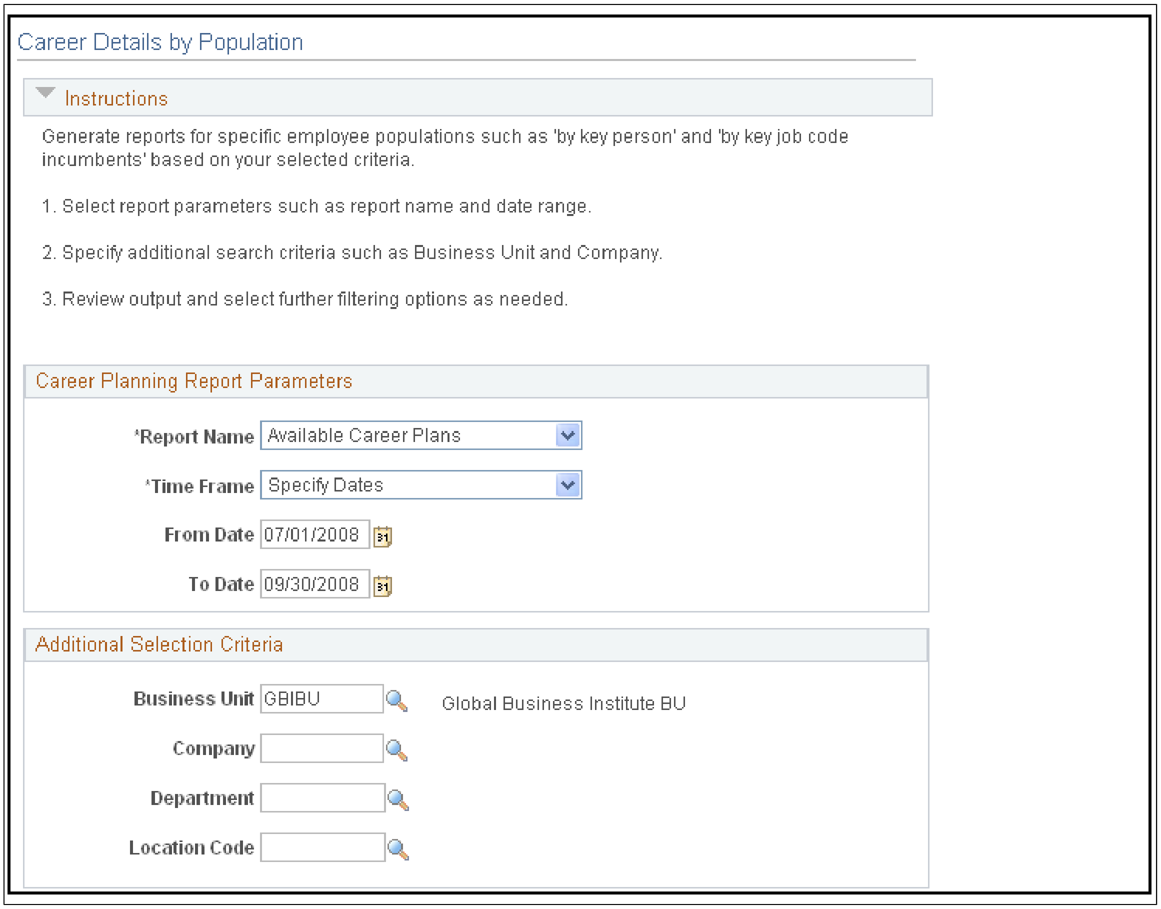
You can create report pages that you can view online that display various career planning employee metrics. Using the Career Details by Population page, you can view the following information:

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

Navigation:

Workforce Development > **Career Planning** > **Reports** > **Employee Career Plan Matrix**

This example illustrates the fields and controls on the Career Details by Population page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Report Name	Select the type of report to display. Values are: *Available Career Plans, Career Potential,* and *Key Job Codes - Incumbents*
Time Frame	Specify the time span that the report includes. Values are: *Full History, Last 1 Month, Last 12 Months, Last 3 Months, Last 6 Months, Specify Dates*. You must select *Specify Dates* in the **Time Frame** field in order to display **From Date** and **To Date**fields.

Available Career Plans Page

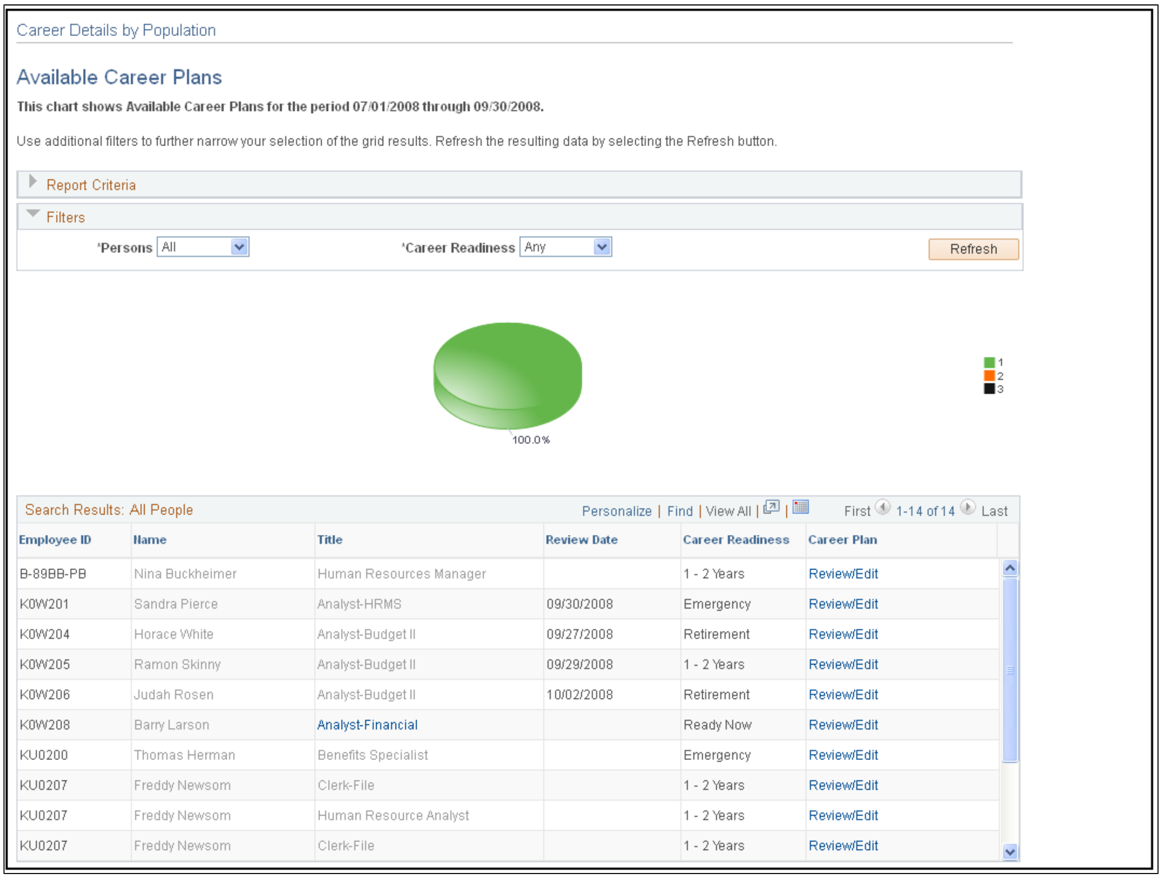
Use the Available Career Plans page (HR_SUCC_METRICS3) to view the status of career plans for employees.

This enables the organization to define activities and strategies based on the career plan readiness for employees.

Navigation:

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

This example illustrates the fields and controls on the Available Career Plans page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Review Date	Displays the last review date from the employee's current career plan. If the person does not have a career plan, this field is empty.
Career Readiness	Displays the readiness value indicated for the employee's current career plan. If the person does not have a career plan, this field is empty. **Note:** The readiness value is from the first move, 1st option. It is possible to have multiple options, but for these metrics, the system uses the most probable move.
Career Plan	Click on a link in this column to view or create the career plan for a specific EmplID. The *View* option applies to people with existing career plans. The *Create* option applies to people without existing career plans.

Career Potential in Available Career Plans

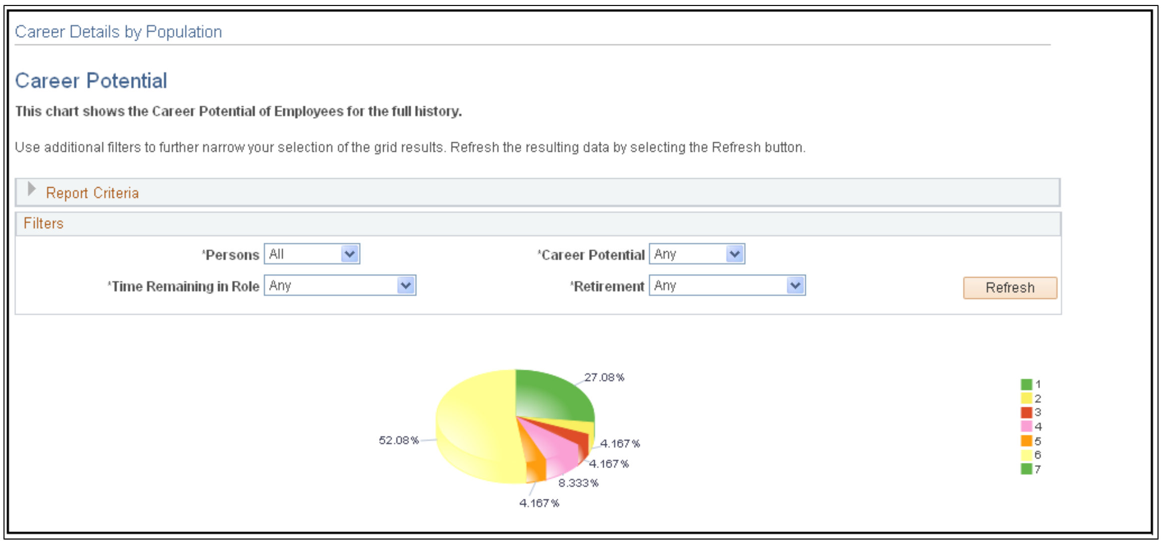
Use the Career Potential page to identify employees based on their defined potential, when those employees will retire, and how long they have been in their current role.

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

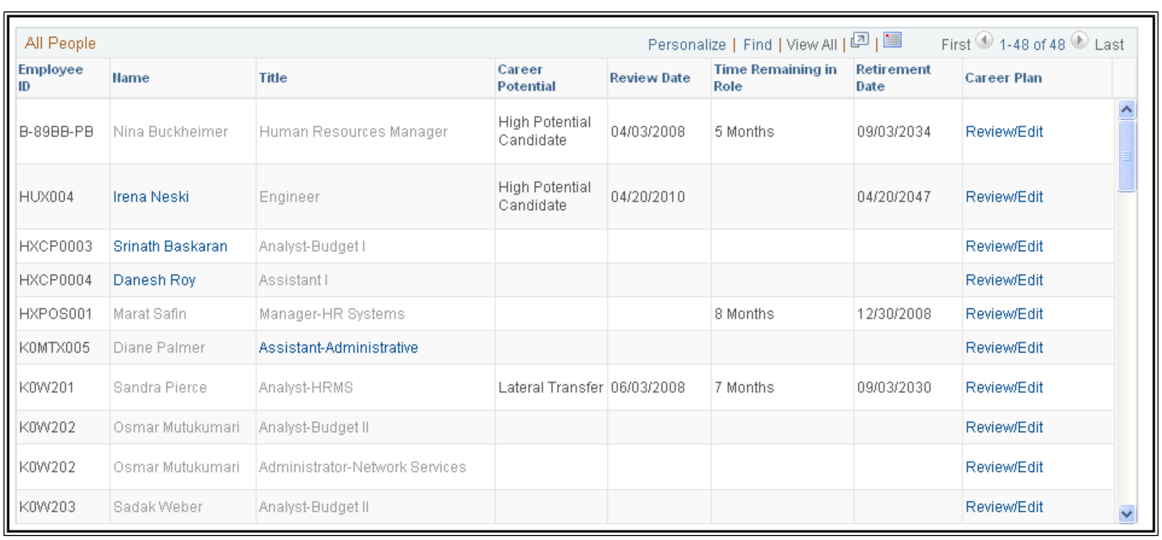
Navigation:

Select *Career Potential* on the Career Details by Population page and click the **Run Report** button

This example illustrates the fields and controls on the Career Potential page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Career Potential page (2 of 2). You can find definitions for the fields and controls later on this page.



Employee ID	Name	Title	Career Potential	Review Date	Time Remaining in Role	Retirement Date	Career Plan
B-89BB-PB	Nina Buckheimer	Human Resources Manager	High Potential Candidate	04/03/2008	5 Months	09/03/2034	Review/Edit
HUX004	Irena Neski	Engineer	High Potential Candidate	04/20/2010		04/20/2047	Review/Edit
HXCP0003	Srinath Baskaran	Analyst-Budget I					Review/Edit
HXCP0004	Danesh Roy	Assistant I					Review/Edit
HXPOS001	Marat Safin	Manager-HR Systems			8 Months	12/30/2008	Review/Edit
K0MTX005	Diane Palmer	Assistant-Administrative					Review/Edit
K0W201	Sandra Pierce	Analyst-HRMS	Lateral Transfer	06/03/2008	7 Months	09/03/2030	Review/Edit
K0W202	Osmar Mutukumari	Analyst-Budget II					Review/Edit
K0W202	Osmar Mutukumari	Administrator-Network Services					Review/Edit
K0W203	Sadak Weber	Analyst-Budget II					Review/Edit

Field or Control	***Description***
Career Potential	Displays the career potential value from the person's current career plan. If the person does not have a career plan, this field is empty.
Time Remaining in Role	Displays the amount of time remaining in the employee's current role, or job, from the Career Plan page.
Retirement Date	Displays the retirement date from the person's current career plan. If the person does not have a career plan, this field is empty.

Key Job Code - Incumbents in Available Career Plans

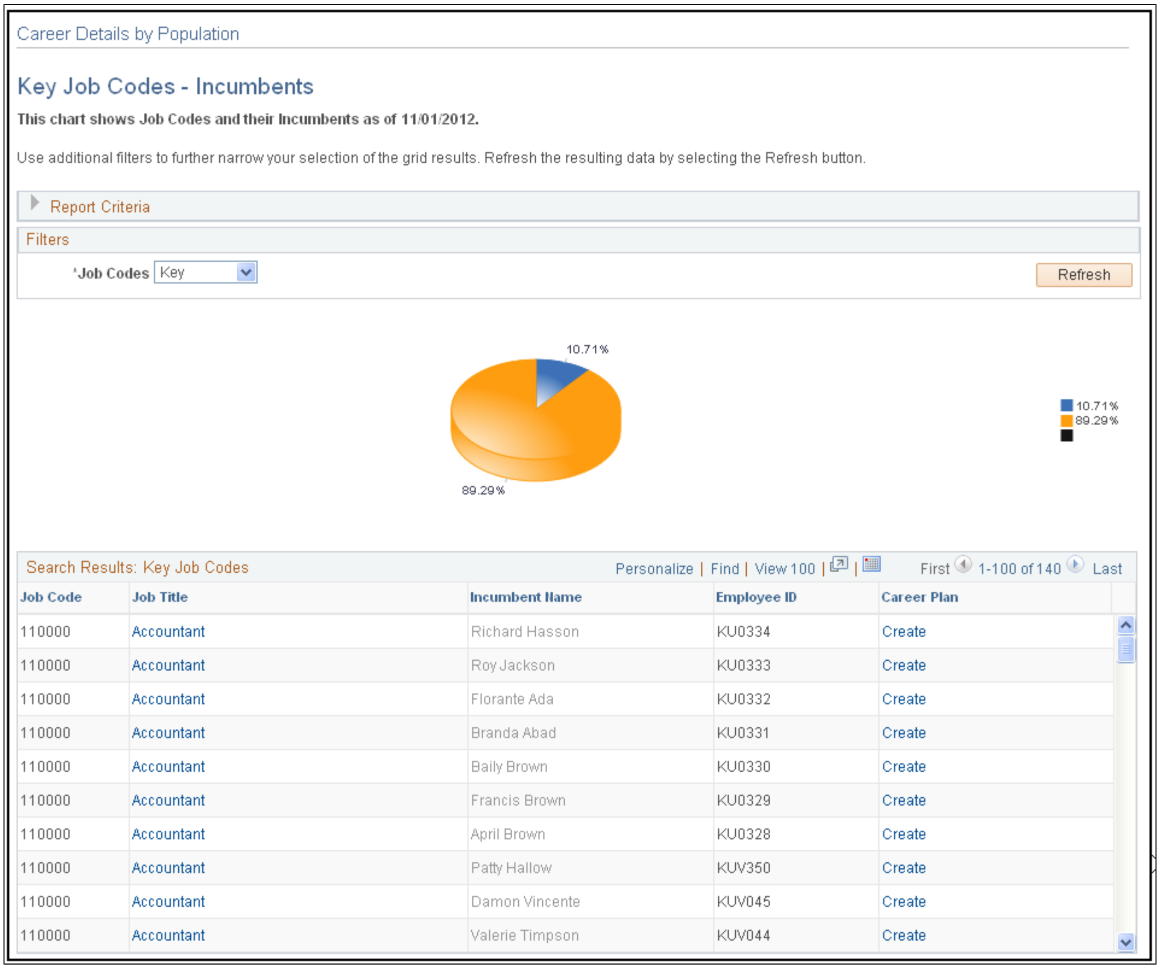
Use the Key Job Code - Incumbents page to identify key job codes and the career plan of any incumbents for those job codes.

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

Navigation:

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

This example illustrates the fields and controls on the Key Job Code - Incumbents page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Job Title	Displays the job title from the Job Data table.
Incumbent Name	Displays the name of the person in the corresponding job code.

(FRA) Rating Employees

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

Rating employees is discussed in *PeopleSoft HR Manage French Public Sector.*

Related Links

"Understanding Employee Ratings" (PeopleSoft Human Resources Manage French Public Sector)

Managing Career Planning Self-Service

This topic provides an overview of career planning self service transactions, and discusses how to define employee self service profiles.

Understanding Career Planning Self Service

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

If you have PeopleSoft Enterprise Learning Management installed, several of the Career Planning Self Service pages use a **Search for Learning** link to enable you to access the Request Training Enrollment page.

Self Service Pages Used to Manage Career Plans

Page Name	***Definition Name***	***Usage***
My Profile Page	JPM_JP_PROFL2_EMP	Enables employees to view and update their own profile data.
Career Path Page	HR_CP_PATH	Define an employee's career path; modify a default career path; configure a job progression.
Career Goals Page	HR_CP_GOALS	Enter short and long-term goals for employees.
Career Mentoring Page	HR_CP_MENTOR	Assign career mentors.
Career Strength/Developmental Areas Page	HR_CP_DVLP_AREA	Record and evaluate an employee's career strengths and developmental areas.
Career Training Plan Page	HR_CP_TRAINING	Enter or update a training program for the selected employee; use or modify the default training program for the employee job code.
Career Development Plan Page	HR_CP_DEVELOP	Help employees improve in developmental areas before their next performance review or career planning topic.

Page Name	**Definition Name**	**Usage**
My Internal Resume Page	HR_CP_RESUME	Enables employees to select specific items to be included in an internal resume and create a personal resume for internal use.
Career Progression Chart Page	HR_CP_PRO_CHART	View career paths and non-person profile summaries in order to perform a competency gap/fit analysis.
Manage Career Plans Component	HR_CP_MANAGER	Enables managers to perform career planning activities for their direct reports.

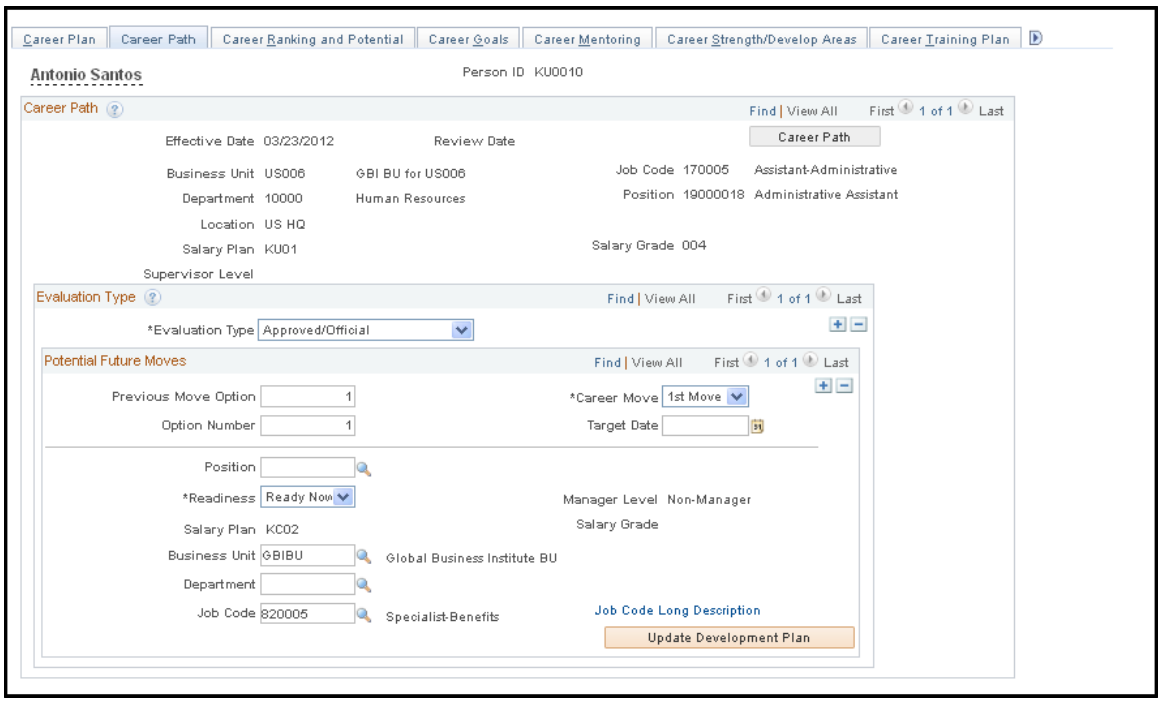
Career Path Page

Use the Career Path page (HR_CP_PATH) to define an employee's own career path; modify a default career path; configure a job progression.

Navigation:

Self Service > **Career Planning** > **Career Path**

This example illustrates the fields and controls on the Career Path page. You can find definitions for the fields and controls later on this page.



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

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

Field or Control	***Description***
Update Development Plan	Click to insert developmental areas into the your Career Development Plan based on the selected movement rows. The system inserts deltas for competencies and other profile topics as follows: • Employee competencies and other rated items with a lower rate than required by the job profile. • Required items on the job profile that are not in the employee's profile. • Items in the person profile that have more than one rating, and any of the ratings for that item are lower than required in the job profile. For example, ratings for language items such as Understanding, Reading, and Speaking. Once the identified competencies and other items are inserted into the Career Development Plan, the system opens the Career Development Plan page so that you can update related information about the inserted items, such as the Estimated Completion Date, and so on.
Populate Career Path	When only one row exists in the career path for your next interested job, click the **Populate Career Path** button to select the interested job row as a basis for inserting the position's career path from the Career Path table into your career path.
Private Path	Select to prevent managers from viewing the personal career path.
Details	Click an icon in this column to open the Career Move Details page. The Career Move Details page provides more information about the career move, specially for Military and federal data users.

My Internal Resume Page

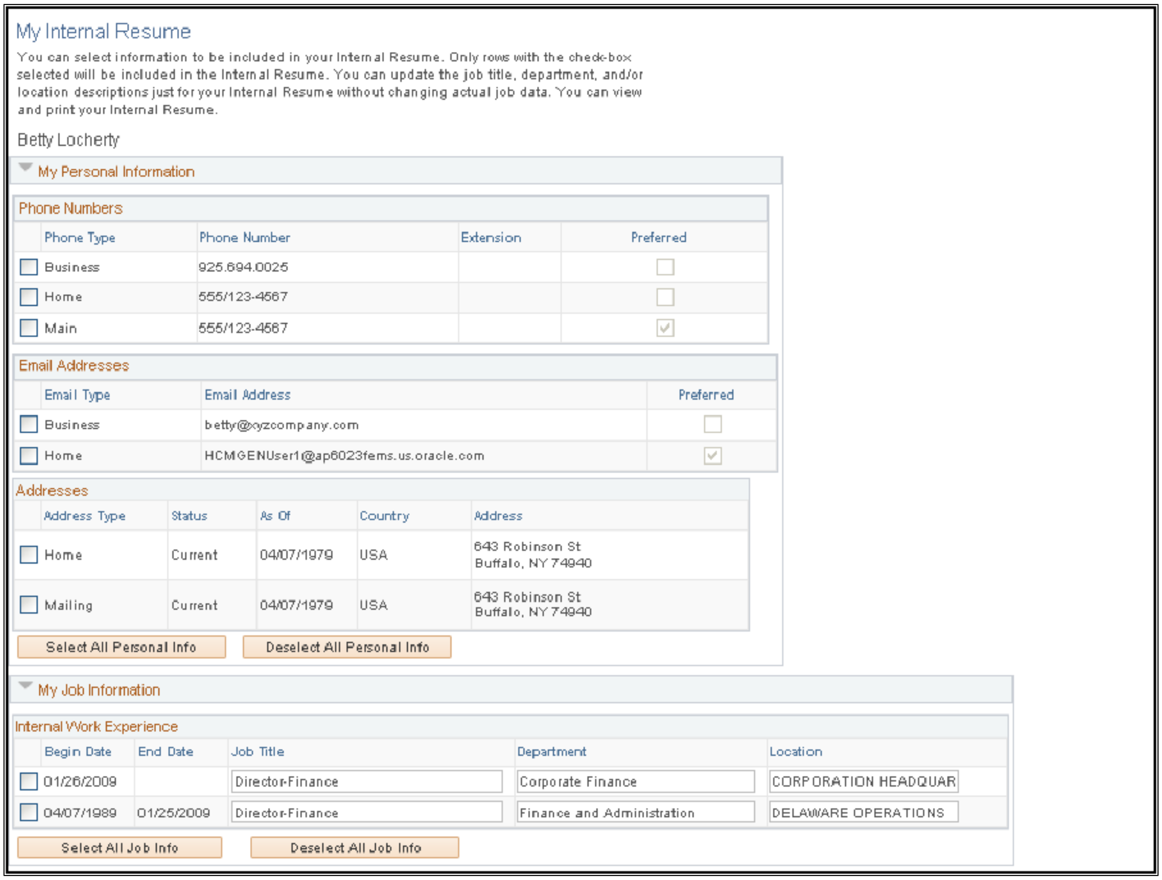
Use the My Internal Resume page (HR_CP_RESUME) to enable employees to select specific items to be included in an internal resume and create a personal resume for internal use.

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

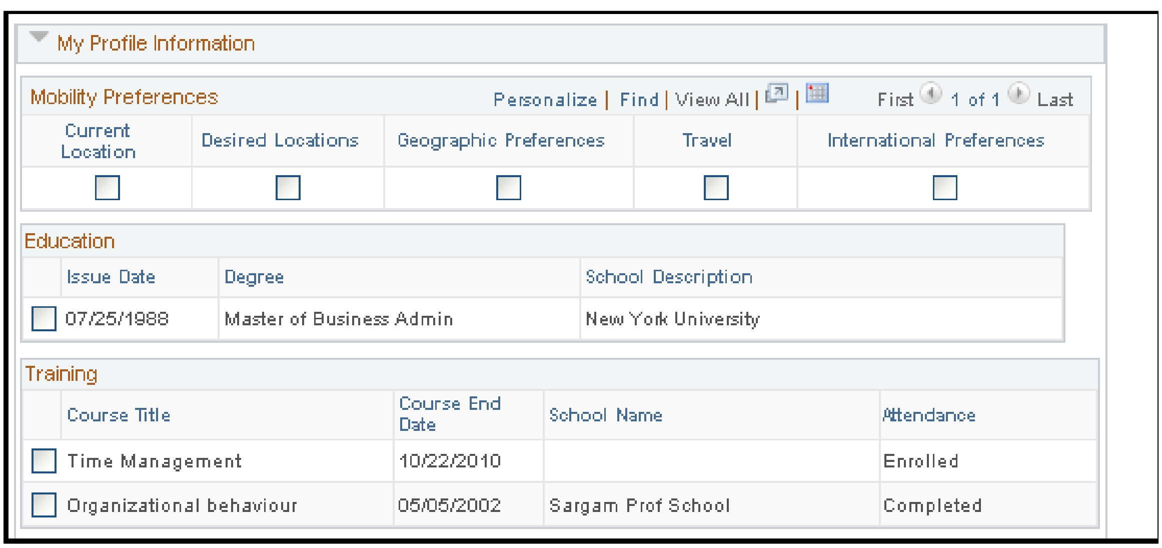
Navigation:

Self Service > **Career Planning** > **My Internal Resume**

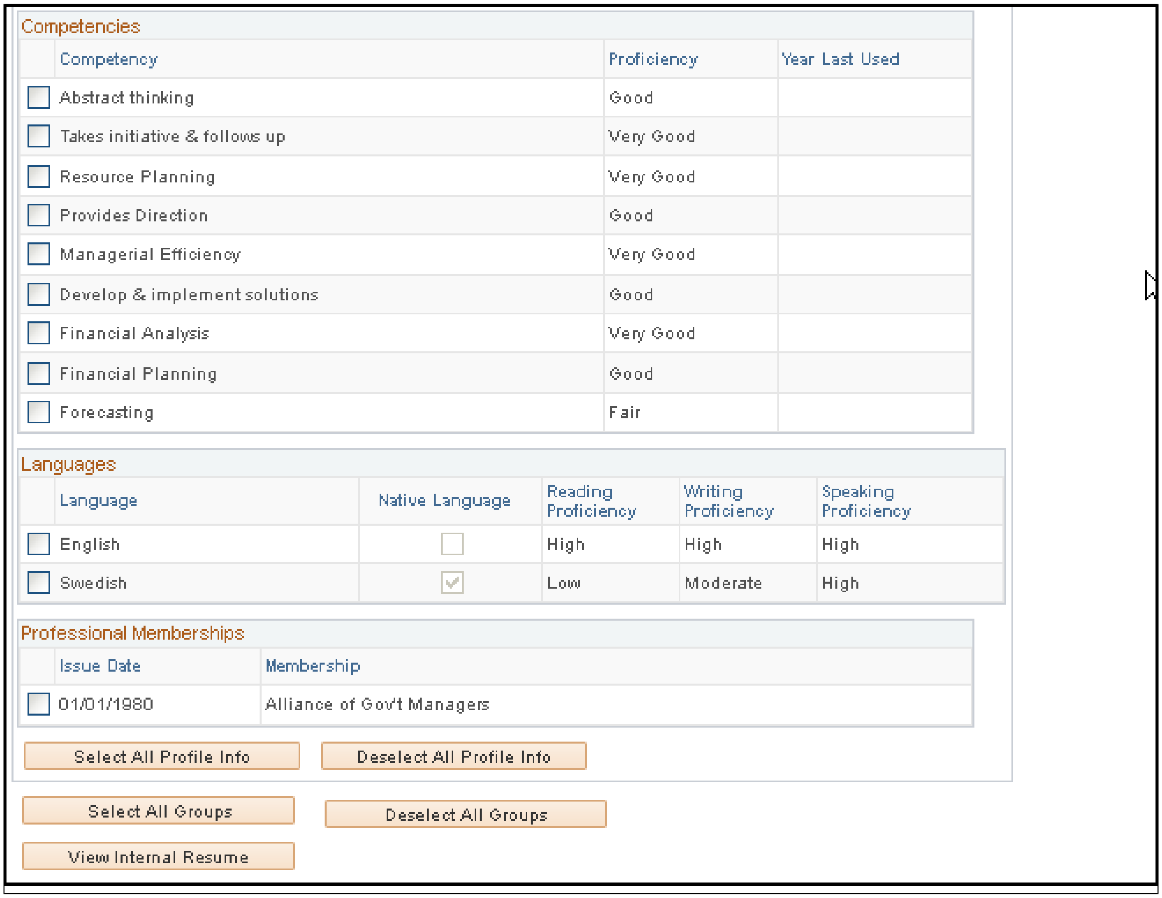
This example illustrates the fields and controls on the My Internal Resume page (1 of 3). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the My Internal Resume page (2 of 3). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the My Internal Resume page (3 of 3). You can find definitions for the fields and controls later on this page.



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

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

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

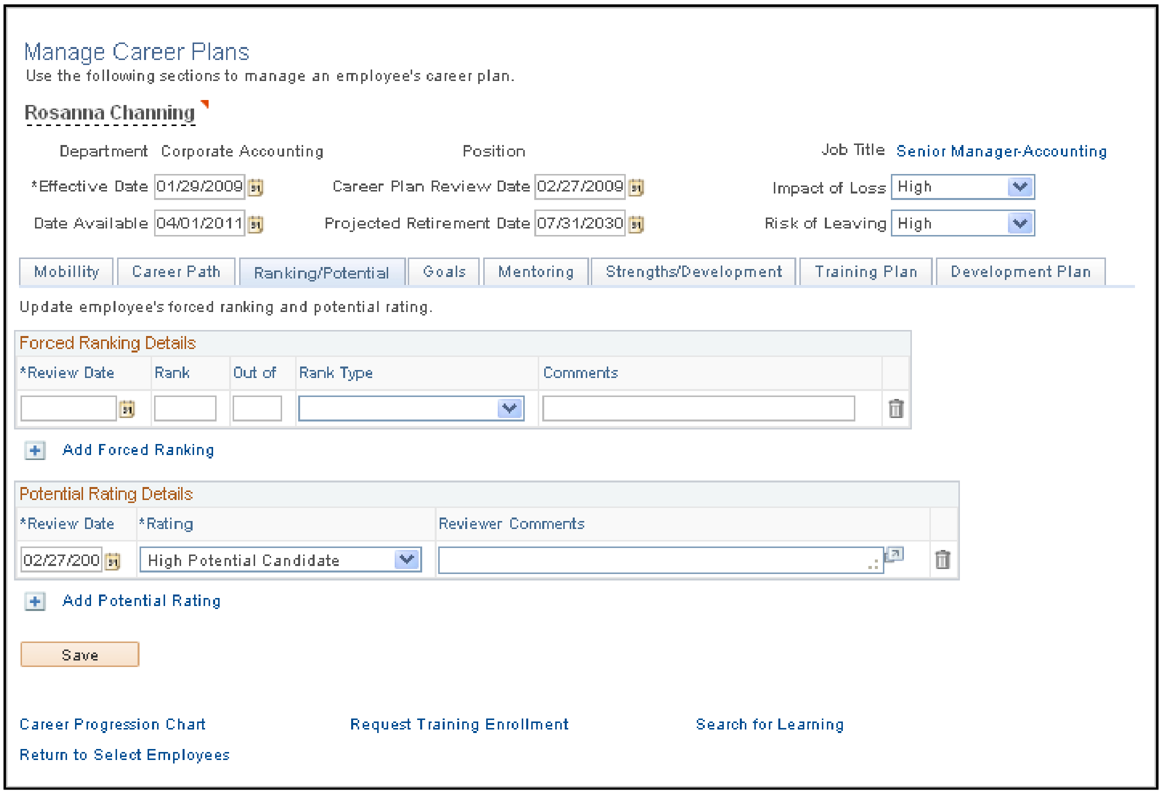
Manage Career Plans Component

Use the Manage Career Plan component (HR_CP_MANAGER) to perform career planning activities for their direct reports. The manager can view direct mobility preferences, Career Path, Update employees potential rating, Short Term and Long-Term Goals, Strength, Development Area Details, Mentors details, Training Plan and Developmental Action Plans

Navigation:

Manager Self Service > **Career Planning** > **Manage Career Plans** > **Manage Career Plans** > **Manage Career Plans**

This example illustrates the Manage Career Plans component.



The integration of Career Planning and ePerformance provides managers easy access to employees' performance data from career plans, as well as employees' career planning data from performance documents. From the Manage Career Plans page, a manager can click a link at the bottom of the page to transfer to the current performance document of the employee. Similarly, a manager can click a link from the Career Plan Summary section of a performance document to open the Manage Career Plans page and update career plan data for an employee. For more information, refer "Understanding ePerformance and Career and Succession Planning Integration" (PeopleSoft ePerformance)

Chapter 3

Planning Successions

Understanding Plan Successions

This topic discusses:

- Plan successions
- (USF) Plan successions

Plan Successions

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

To implement the Plan Successions business process:

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

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

Integrations

The Plan Successions business process integrates with:

- The Manage Profiles business process in HR.

  See “Manage Profiles Overview” (PeopleSoft Human Resources Manage Profiles)
- The Plan Careers business process in HR.

  See Setting Up Career Plans.
- The Manage Positions business process in HR.

  See Defining Key Positions, Identifying Potential Candidates.
- PeopleSoft Talent Acquisition Manager.

  See Identifying Potential Candidates.

(USF) Plan Successions

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

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

The Succession Planning USF components are discussed in (USF) Plan Successions as well as *PeopleSoft HR Manage Profiles* and *PeopleSoft HR Manage Positions.*

Prerequisites

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

1. Set up HCM core data.
2. Set up HR job data.
3. Define key positions.
4. Define key job codes.
5. Identify key employees.
6. (optional) Set up profiles.
7. (optional) Set up career plans.
8. Identify potential candidates.

Setting Up HCM Core Data

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

See "Setting Up Implementation Defaults" (Application Fundamentals).

Setting Up Job Data

The HR job data required for the Plan Successions business process is discussed in *PeopleSoft HR Administer Workforce.*

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

See "Understanding Job Data" (PeopleSoft Human Resources Administer Workforce).

Defining Key Positions

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

See “Maintaining Position Data” (PeopleSoft Human Resources Manage Positions).

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

Defining Key Job Codes

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

See “Classifying Jobs” (Application Fundamentals).

Identifying Key Employees

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

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

See “Viewing Worker Job History” (PeopleSoft Human Resources Administer Workforce).

Setting Up Profiles

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

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

See “Manage Profiles Overview” (PeopleSoft Human Resources Manage Profiles).

Setting Up Career Plans

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

See Creating Career Plans.

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

See Candidates Page.

Reviewing Career Summaries

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

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

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

See Creating Career Paths.

See “Understanding the Process of Updating Person and Job Information” (PeopleSoft Human Resources Administer Workforce).

Identifying Potential Candidates

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

See “Understanding the Search and Compare Profiles Process” (PeopleSoft Human Resources Manage Profiles).

Recruiting External Candidates

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

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

Setting Up Succession Planning

This topic describes how to define the Succession Planning default values and defining succession planning default values.

Pages Used to Set Up Succession Planning

Page Name	***Definition Name***	***Usage***
Succession Planning Setup Page	HR_SP_DEFAULT	Define Succession Planning setup and default information, such as the use of Profile Manager profile types, and rating box associations.
Defining Ratings Boxes Page	HR_RATINGS_BOX_CFG	Define ratings boxes, or matrices, to graphically represent employee rating assignments, such as a 9-Box for *performance versus potential,* which you can use in succession plans or talent pools to assess employees in relation to other employees.
Map Ratings Page	HR_RB_MAP_RATINGS	Map the performance and career potential ratings to succession planning rating box ratings. Since multiple rating models can be used in performance processes, the system supports the mapping of multiple rating models to one Rating Box ID.

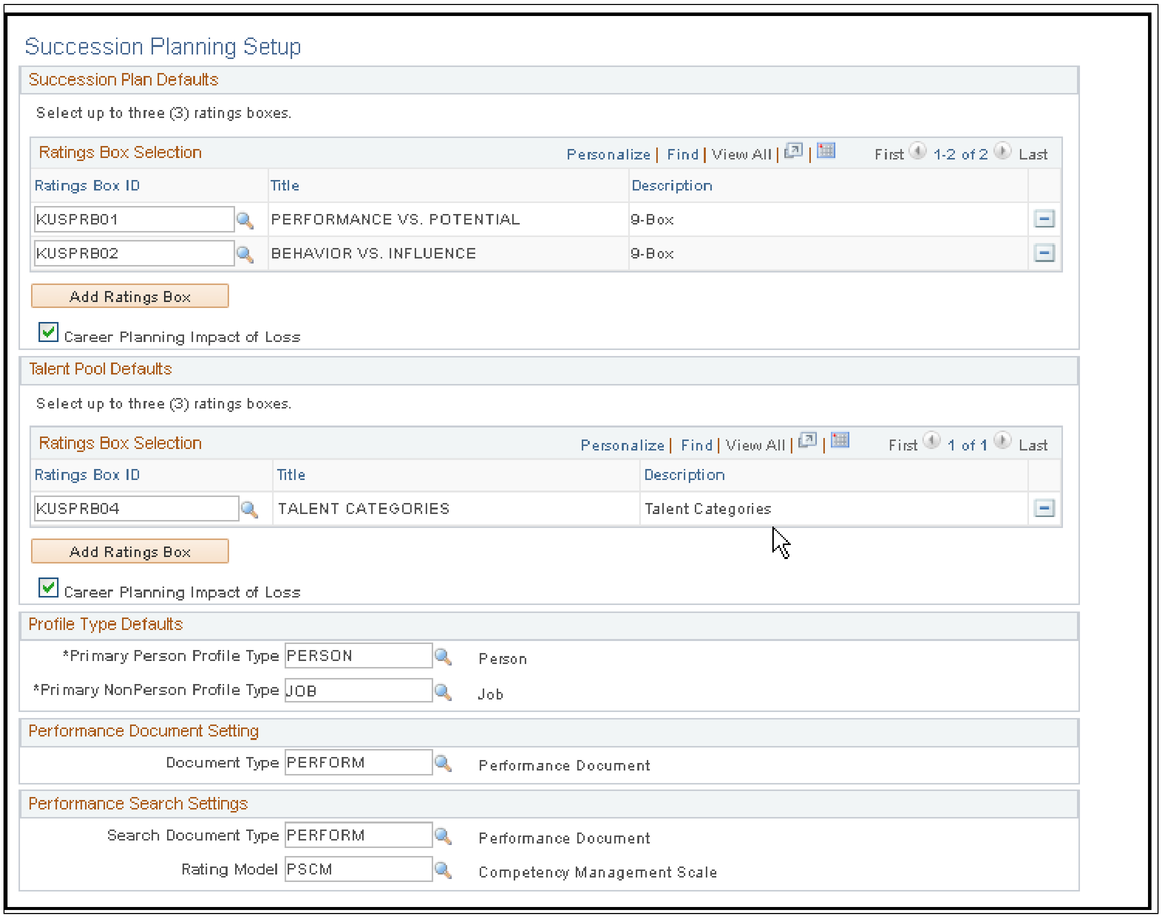
Succession Planning Setup Page

Use the Succession Planning Setup page (HR_SP_DEFAULT) to define Succession Planning setup and default information, such as the use of Profile Manager profile types, and rating box associations.

Navigation:

Set Up HCM > **Product Related** > **Organizational Development** > **Succession Planning Setup**

This example illustrates the fields and controls on the Succession Planning Setup page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Ratings Box ID	Select up to three ratings boxes to use for all succession plan and talent pool records. Any ratings box specified in the Succession Plan or Talent Pool region can be edited through the Ratings Box page in the Succession Plan or Talent Pool components. You can select from any Rating Box IDs defined on the Configure Rating Box page.
Career Planning Impact of Loss	Select to indicate that a Career Planning-based Impact of Loss value defined for an employee will default in the Impact of Loss field on the succession plan record or talent pool record if the employee is selected as a succession candidate or talent pool member.
Document Type	Define the PeopleSoft ePerformance document type to link to from all Performance document links in the succession planning application, including the Succession 360 page and the Talent Pool page. Select from the defined document types used for appraisal processing through PeopleSoft ePerformance.

Field or Control	*Description*
Search Document Type	Define the PeopleSoft ePerformance document type and rating model the system uses when searching for succession candidates or talent pool members by the Overall Performance Rating search option. Select from the defined document types used for appraisal processing through PeopleSoft ePerformance.
Rating Model	Select from the defined rating models associated with the document type specified in the **Document Type** field.

Defining Ratings Boxes Page

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

Navigation:

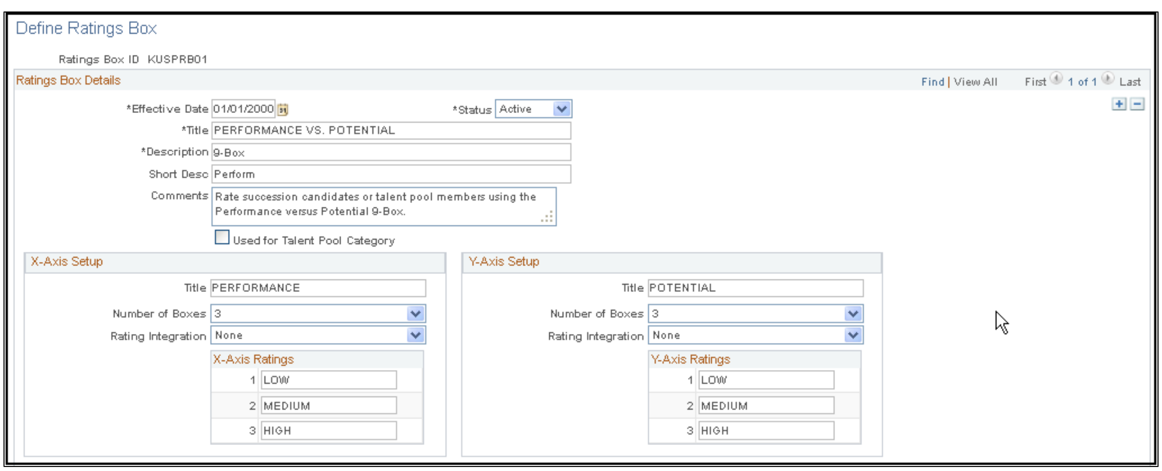
Set Up HCM > **Product Related** > **Organizational Development** > **Define Ratings Box** > **Define Ratings Box**

You can use ratings boxes in succession plans or talent pools to assess employees in relation to other employees.

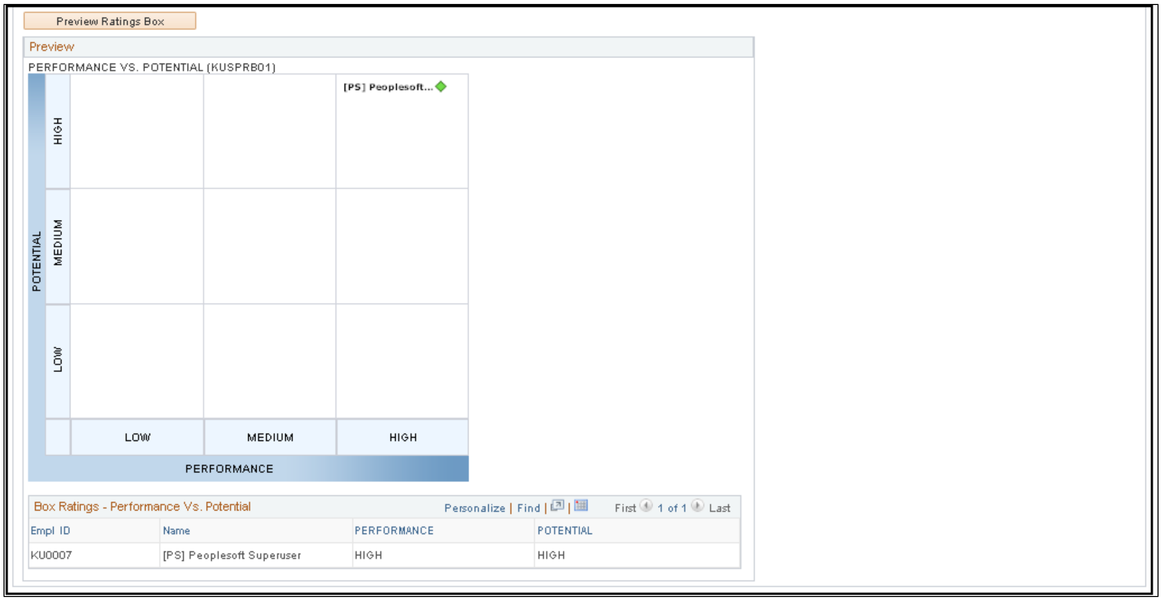
A conventional ratings box matrix is usually a 9-box, which is three boxes across and three boxes vertically. However, you can define ratings boxes as large as five boxes by five boxes. There is no limit to the number of ratings boxes you can define.

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

This example illustrates the fields and controls on the Define Ratings Box page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Define Ratings Box page (2 of 2). You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Used for Talent Pool Category	Select to indicate that the values in the X-Axis Ratings region are used to define talent categories.
X–Axis Box Number and **Y–Axis Box Number**	Select the number of boxes to display along each axis of the ratings box grid. Values are: *2, 3, 4,* and *5.* The **Y–Axis Box Number** field is not available if you select the **Used for Talent Pool Category** check box.

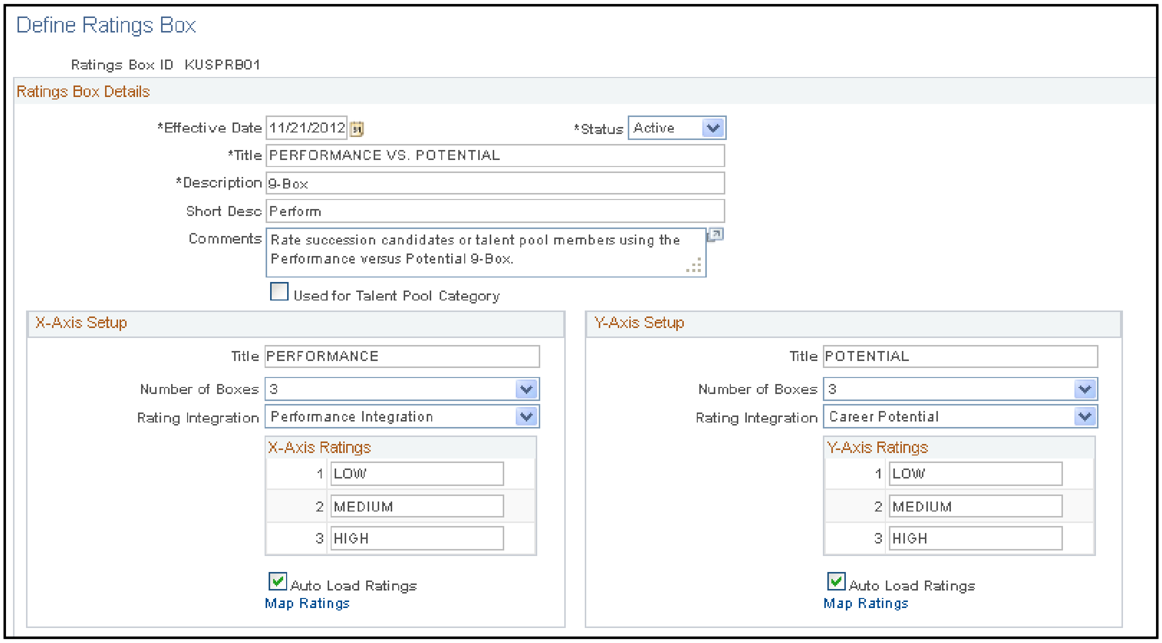
Setting up Integrated Rating Boxes

The integration with ePerformance supports the defaulting of ePerformance ratings into the rating box functionality in Succession Planning. When Performance Integration is selected as the rating integration for an axis setup in the ratings box definition, you can map each rating within the specified rating model to a rating value that is defined on the ratings box definition (for example, HIGH, MEDIUM and LOW for an axis with three boxes. At runtime, the system collects each candidate's performance rating from his or her latest completed performance document, maps the performance rating to the associated axis rating based on the mapping, and displays the candidate on the rating box appropriately.

The system also supports the defaulting of career potential ratings into the rating box functionality."

Integration with ePerformance supports the facility of using Map Rating link, which facilitates the ratings from a Rating Model or the Translate Table for the Potential value to map to Rating Box Ratings. To integrate the ePerformance rating and the career potential rating, the Rating Integration field on the Rating Box must be set as either Performance or Career Potential. If Rating Integration values are set, a Map Ratings link displays and the link opens the map rating page.

This example illustrates the fields and controls on the Define Rating Box page with Integration. You can find definitions for the fields and controls later on this page.



Term	***Definition***
Title	Enter the title of the axis.
Number of Boxes	Select the number of boxes to display along each axis of the ratings box grid. Values are: *2, 3, 4,* and *5.* The **Y–Axis Box Number** field is not available if you select the **Used for Talent Pool Category** check box.
Rating Integration	Select the rating integration represented by the axis. Values are:. *None* (default) *Career Potential* *Performance Rating* If either *Career Potential* or *Performance Rating* is selected, the **Auto Load Ratings** field and **Map Ratings** link are displayed.
Auto Load Ratings	Select to control Auto Loading of ratings in Succession Panning Rating Box pages. The checkbox is enabled when the Rating Integration field is set to either Performance Rating or Career Potential.

Term	*Definition*
Map Ratings	Click to access the Map Ratings page where you can map the rating box ratings to the appropriate rating models for the axis. This link is displayed if either *Career Potential* or *Performance Rating* is selected in the **Rating Integration** field. Map the performance and career potential ratings to succession planning rating box ratings. Since multiple rating models can be used in performance processes, the system supports the mapping of multiple rating models to one Rating Box ID.

Creating Succession Plans

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

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

This topic discusses how to enter succession plan data and select candidate relating tasks.

Pages Used to Create Succession Plans

Page Name	*Definition Name*	*Usage*
Succession Plan Page	SUCCESSION_PLAN1	Enter plan details such as effective date, plan status, and projected vacancy date. Review incumbent job and career plan details.
Candidates Page	SUCCESSION_PLAN2	Search and compare employee profiles to identify potential candidates.
Entering Succession Rating Page	SUCCESSION_RATINGS	Rate successors using configurable X-Y matrices, or 9-boxes. Use ratings boxes to track custom-defined criteria such as performance, potential, readiness, and so on.
Slate Page	SUCCESSION_SLATE	View the finalized list of candidates slated to replace the incumbent in a succession plan. Link to defined succession plan records for any of the candidates to help determine any blocked scenarios.

Succession Plan Page

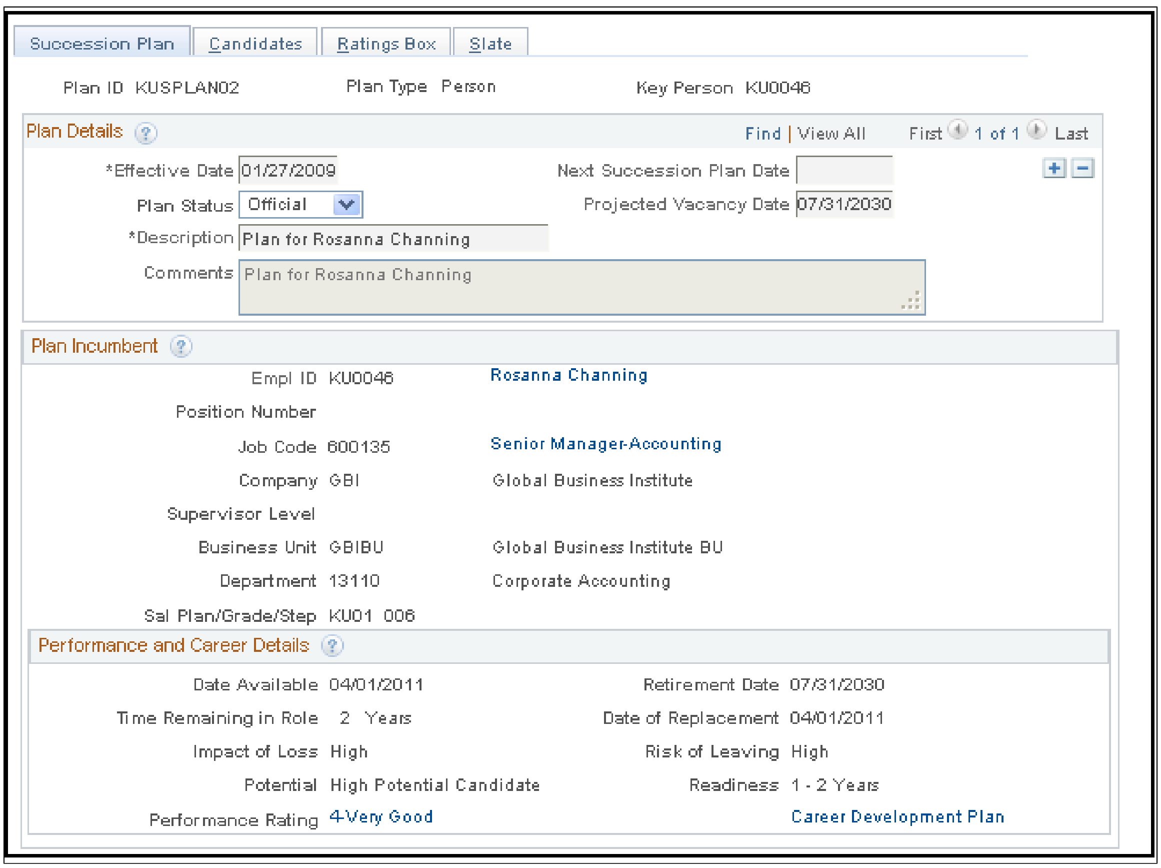
Use the Succession Plan page (SUCCESSION_PLAN1) to enter plan details such as effective date, plan status, and projected vacancy date.

Review incumbent job and career plan details.

Navigation:

- **Organizational Development** > **Succession Planning** > **Create Succession Plan** > **Succession Plan**
- **Organizational Development** > **Succession Planning USF** > **Create Succession Plan** > **Succession Plan**
- **Organizational Development** > **Succession Planning** > **Maintain Succession Plans** > **Succession Plan**

This example illustrates the fields and controls on the Succession Plan - Succession Plan page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Projected Vacancy Date	If the incumbent has a career plan in HR, the projected vacancy date is the retirement date indicated in their career plan. Otherwise, enter a date in this field.

Field or Control	*Description*
Plan Status	Select among the options Draft, Inactive and Official: • **Draft**: The succession plan will be in draft and the administrator can edit this version as needed. • **Inactive**: The plan is inactive and will not be visible. • **Official**: The succession plan is final and cannot edit further.
Performance Rating	Display the Overall Summary Rating found on each performance document. This field provides a link on the performance rating to the performance document. **Note:** The Performance document link is only available if you have the appropriate ePerformance roles and associated permission lists to view performance documents.

Candidates Page

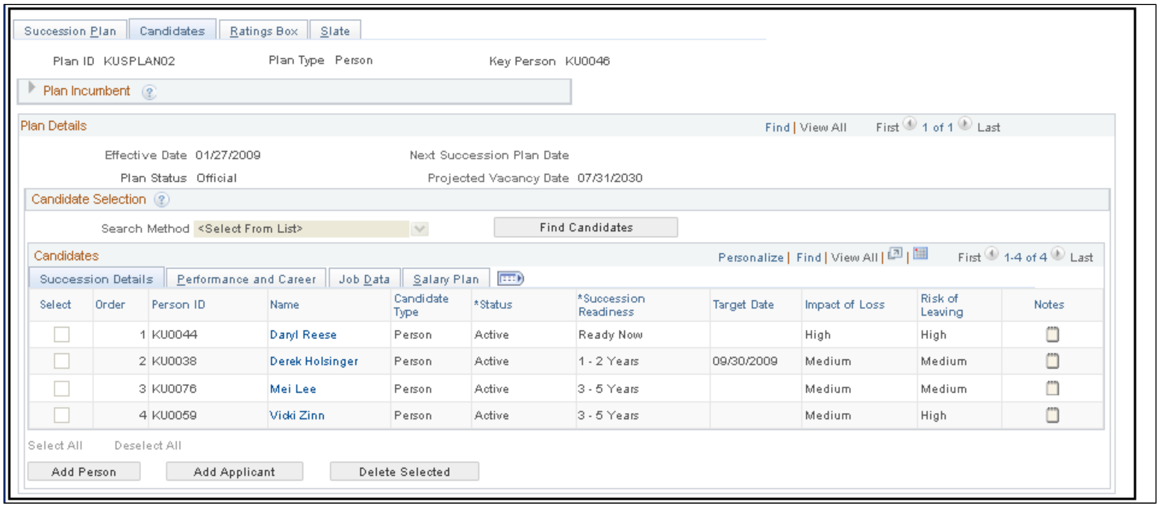
Use the Candidates page (SUCCESSION_PLAN2) to search and compare employee profiles to identify potential candidates.

Navigation:

- **Organizational Development** > **Succession Planning** > **Create Succession Plan** > **Candidates**
- **Organizational Development** > **Succession Planning USF** > **Create Succession Plan** > **Candidates**
- **Organizational Development** > **Succession Planning** > **Maintain Succession Plans** > **Candidates**

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

This example illustrates the fields and controls on the Succession Plan - Candidates page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Search Method	Select the search method the system uses to search for candidates for this succession plan. The search method options differ depending on the Plan Type: Position, Job Code or Person. Different search methods change the appearance of the **Candidates** region of the page to enable you to locate succession plan candidates based on specific criteria.
Find Candidates	Click to search for succession candidates based on the search method selected. If you want to add additional candidates manually, enter new data rows and select the candidate's employee ID. The system displays a message indicating that the process is unavailable if the search indexes for Job Profile Management have not been created.

Candidates

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

Field or Control	***Description***
Order	Enter a succession order for each candidate. Assign the number 1 to indicate that a candidate is the first choice in the list. Proceed in descending order. When you save the succession plan, the candidates appear in order of rank. **Note:** You rank the candidates and save the information before viewing candidates on the Succession Plan - Slate page, where you view the hierarchy of successors to a candidate, job code or position.
Name	Click to open the Profile Manager-based Person Profile page, if available, for the selected individual.
Candidate Type	Indicates whether the candidate is an applicant for the succession plan. The field displays *Applicant* when you add the candidate manually using the **Add Applicant** button. The field displays *Person* when you add the candidate manually using the **Add Person** button, or if the candidate was retrieved using any of the search methods.
Status	Select the status of the individual within the succession plan. Select *Active* or *Inactive.*
Succession Readiness	Select the readiness level for an individual in the succession plan. Select from the following values: • *1−2 Yrs* (1−2 years) The employee will be ready for the position change within the next two years. • *3−5 Yrs* (3−5 years) The employee will be ready for the position change in three to five years. • *Emergency* The individual is ready to step in to the role/job/position in case of an emergency vacancy, but may not be the most suitable successor long-term. • *Ready Now* This indicates that this employee is in the highest level of readiness.

Field or Control	***Description***
Target Date	Enter the date when you expect the candidate to move into the selected position.
Impact of Loss	Specify the impact losing this employee would have on the organizations goals. Values are *Low, Medium,* or *High.*
Notes	Click to open the Notepad page in order to document notes for any successor or talent pool candidate.

Performance and Career

Click the Performance and Career tab in the **Candidates** region.

Field or Control	***Description***
Compare Profiles	Click to access the Compare Profiles - Match Results page.
Performance Rating	Displays the performance rating of the employee’s most currently completed performance document. Click the link to access the corresponding performance document in ePerformance.
Career Development Plan	Click to open the Career Development plan page for the selected individual.

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

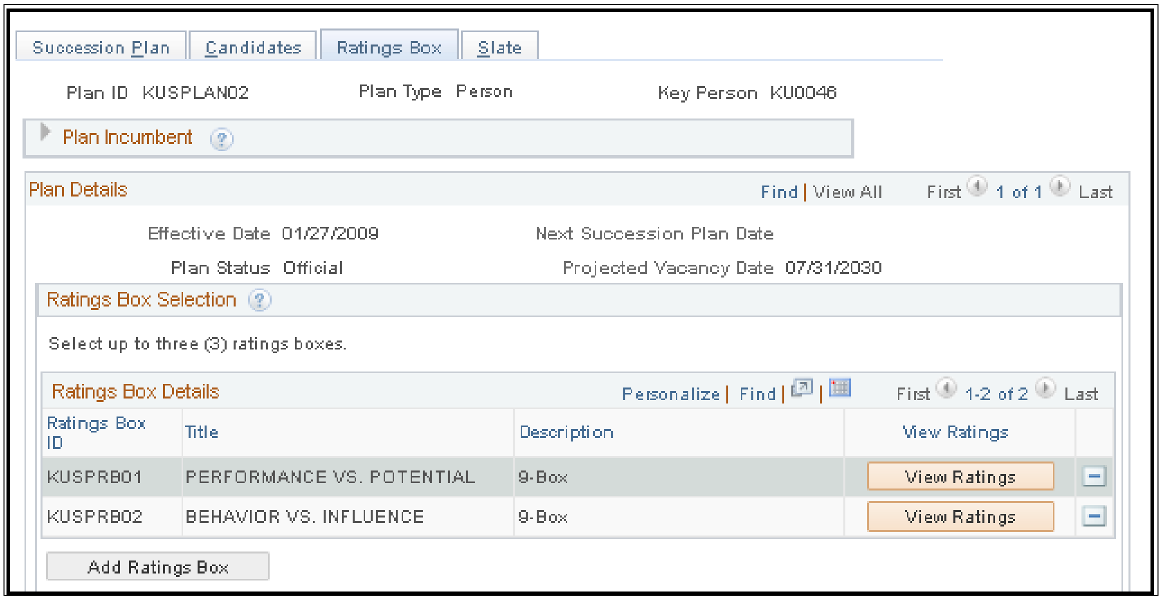
Entering Succession Rating Page

Use the Ratings Box page (SUCCESSION_RATINGS) to rate successors using configurable X-Y matrices, or 9-boxes.

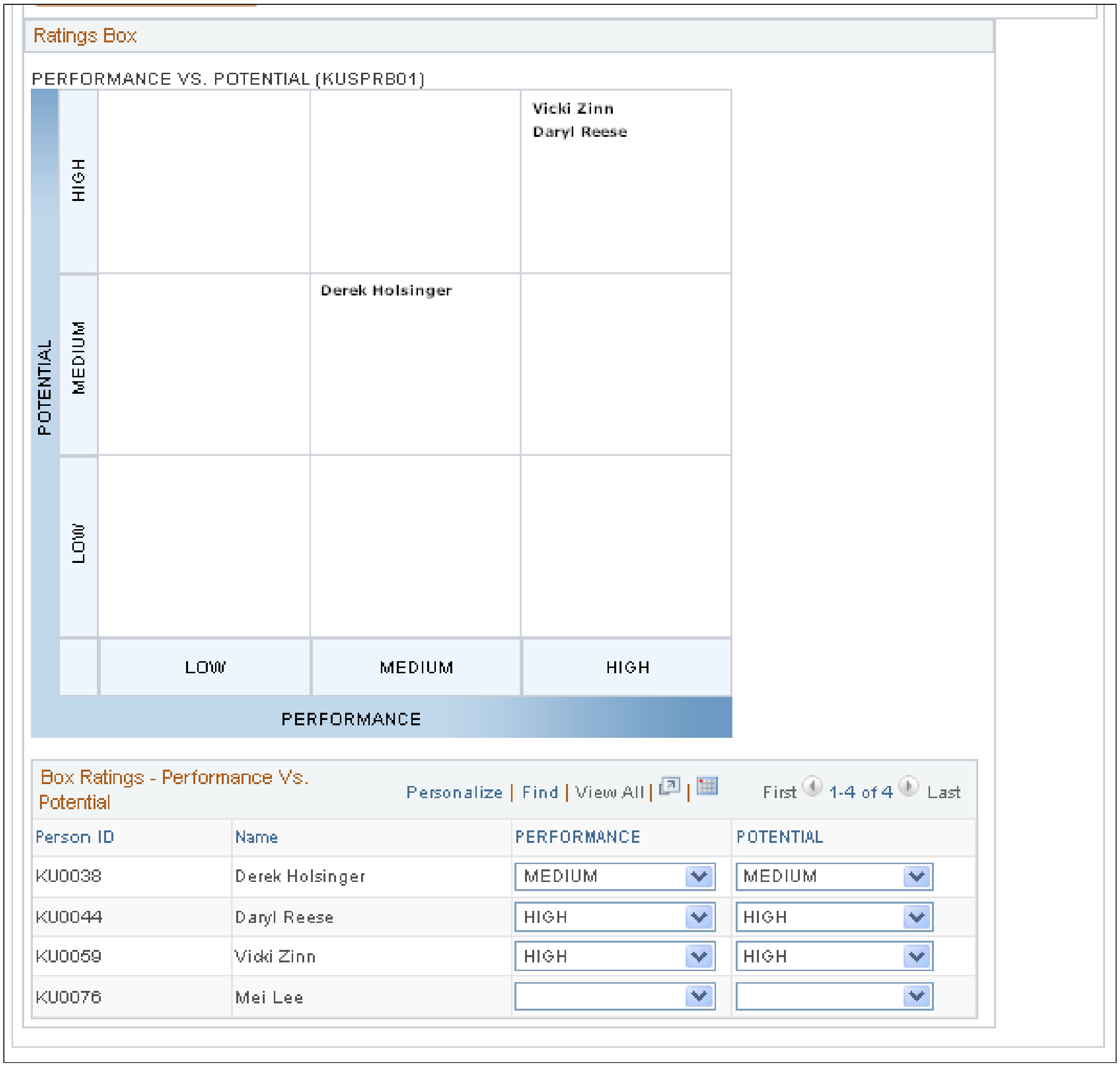
Navigation:

- **Organizational Development** > **Succession Planning** > **Create Succession Plan** > **Ratings Box**
- **Organizational Development** > **Succession Planning USF** > **Create Succession Plan** > **Ratings Box**
- **Organizational Development** > **Succession Planning** > **Maintain Succession Plans** > **Ratings Box**

This example illustrates the fields and controls on the Succession Plan - Ratings Box page (1 of 2) for an Auto Load Ratings flag. You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Succession Plan - Ratings Box page (2 of 2). You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
View Ratings	Click to view the Ratings Box chart on this page using the candidates and ratings specified in Box Ratings region of this page.
Add Ratings Box	Click to add additional ratings box charts to this succession plan.

Note: You can rate successors using configurable X-Y grids for ratings boxes, or 9-boxes. Use ratings boxes to track custom-defined criteria such as performance, potential, readiness, and so on.
If the status of any succession candidate or talent pool member is changed from active to inactive and the employee has been rated in a ratings box, then the employee or applicant is automatically removed from all rating boxes.
If the Auto Load Ratings are not enabled and there are many candidates in the succession plan, then the field of Performance and Potential will be blank. You can manually designate the rating or change the rating by selecting the appropriate rating in the drop-down box. You can select the checkboxes and load the mapped ratings at any point in time.

From this page, you can manually select the ratings or the ratings can be defaulted from the employees performance rating in ePerformance, the career potential rating in Career Planning, or both. When the administrator adds a new succession plan and selects the View Ratings button on the Rating Box page, the system checks if the Auto Load Ratings field on the Succession Planning setup page is enabled for the rating box. If the option is selected, the system finds the appropriate ratings from Career Planning and ePerformance, maps those ratings, and populates the Box Ratings in the grid. This auto load process is enabled each time when a new candidate is added to an existing Succession Plan.

Use ratings boxes to track custom-defined criteria such as performance, potential, readiness, and so on.

Box Ratings

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

Slate Page

Use the Slate page (SUCCESSION_SLATE) to view the finalized list of candidates slated to replace the incumbent in a succession plan.

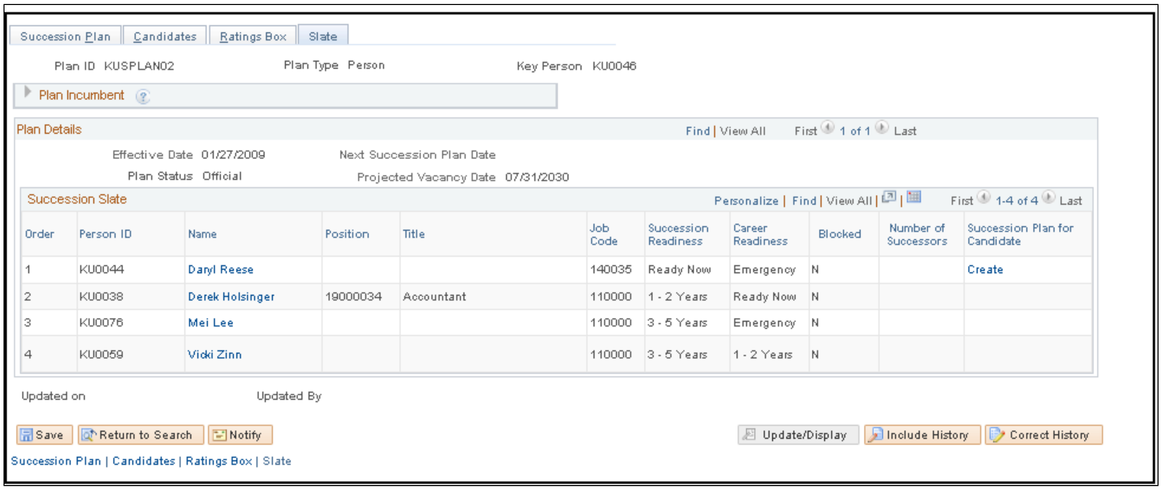
The Succession Planning business process enables you to manage the slate of candidates. Create successor order, successor plan status (active or inactive), and successor rating box assignments. The Slate page enables you to view the roster of candidates that you manage on the other pages in the Succession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

Link to defined succession plan records for any of the candidates to help determine any blocked scenarios.

Navigation:

- **Organizational Development** > **Succession Planning** > **Create Succession Plan** > **Slate**
- **Organizational Development** > **Succession Planning USF** > **Create Succession Plan** > **Slate**
- **Organizational Development** > **Succession Planning** > **Maintain Succession Plans** > **Slate**

This example illustrates the fields and controls on the Succession Plan - Slate page. You can find definitions for the fields and controls later on this page.



Succession Slate

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

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

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

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

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

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

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

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

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

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

Managing Talent Pools

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

Understanding Talent Pools

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

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

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

Pages Used to Create Talent Pools

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

Define Talent Pool Categories Page

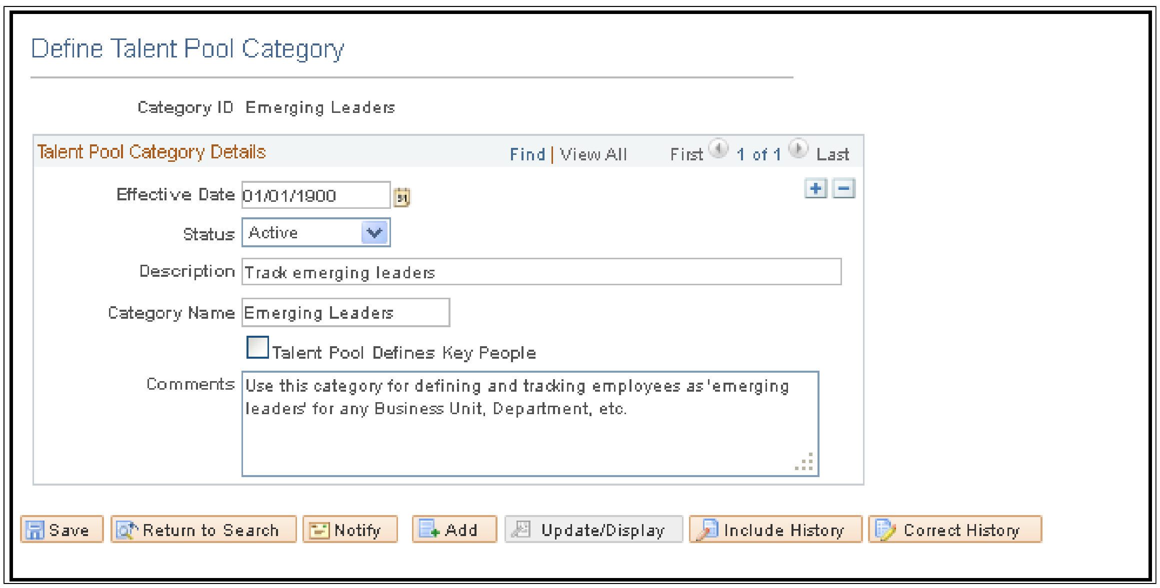
Use the Define Talent Pool Categories page (HR_TPOOL_CATEGORY) to define talent pool categories.

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

Navigation:

Set Up HCM > **Product Related** > **Organizational Development** > **Define Talent Pool Categories**

This example illustrates the fields and controls on the Define Talent Pool Categories page. You can find definitions for the fields and controls later on this page.



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

Managing Talent Pools Page

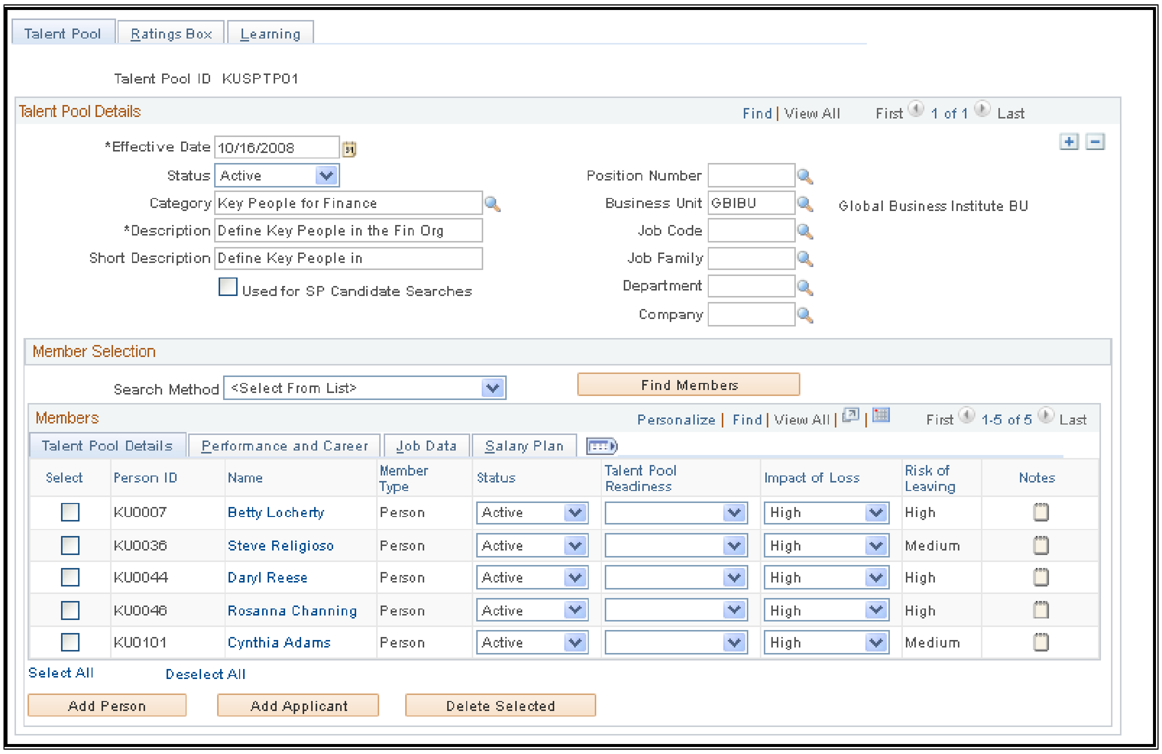
Use the Manage Talent Pools - Talent Pool page (HR_TPOOL_DEF) to search for and edit existing talent pools.

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

Navigation:

Organizational Development > **Succession Planning** > **Manage Talent Pools** > **Talent Pool**

This example illustrates the fields and controls on the Manage Talent Pools - Talent Pool page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Category	Select the talent pool category for this talent pool. Select from the values defined on the Talent Pool Categories page.
Used for SP Candidate Searches (used for succession planning candidate searches)	Select to specify that this talent pool can be used for succession plan searches. You must associate the talent pool with a rating box defined for use with succession candidate search filters in order to search the talent pool through the Talent Pool ID field for Talent Category-based searches.
Search Method	Select the search method the system uses to search for members to include in the talent pool. Different search methods change the appearance of the **Member Selection** region of the page to enable you to locate potential talent pool members based on specific criteria.

Talent Pool Details Tab

Field or Control	***Description***
Name	Click to open the Person Profile page for the selected individual.
Status	Select the status of the individual within the talent pool. Select *Active* or *Inactive.*
Talent Pool Readiness	Select the readiness level for an individual in the talent pool. Select from the following values: • *1−2 Yrs* (1−2 years) The employee will be ready for the position change within the next two years. • *3−5 Yrs* (3−5 years) The employee will be ready for the position change in three to five years. • *Emergency* The employee is overdue for a job move and needs to move as soon as possible. • *Ready Now* The employee is ready for the move now. • *Retirement* The employee will not move to another position after his or her current position. For example, because an employee is nearing retirement age.
Impact of Loss	Specify the impact losing this employee would have on the organizations goals. The Plan Careers business process provides this value if you select the Career Planning Impact of Loss field on the Succession Planning Setup page. You can override the value on this page. Values are: *Low, Medium,* or *High.*
Notes	Click to open the Notepad page in order to document notes for any talent pool member.

Performance and Career Tab

Field or Control	***Description***
Compare Profiles	Click to access the Compare Profiles - Match Results page.
Performance Rating	Displays the performance rating of the employee's most currently completed performance document. Click the link to access the corresponding performance document in ePerformance. **Note:** The Performance document link is only available if you have the appropriate ePerformance roles and associated permission lists to view performance documents.
Career Development Plan	Click to open the Career Development plan page for the selected individual, if available.

Job Data Tab

Field or Control	***Description***
Job Summary	Click to open the Workforce Job Summary page.

Talent Pools - Ratings Box Page

Use the Manage Talent Pools - Ratings Box page (HR_TPOOL_RATINGS) to rate successors using configurable X-Y matrices, or 9-boxes.

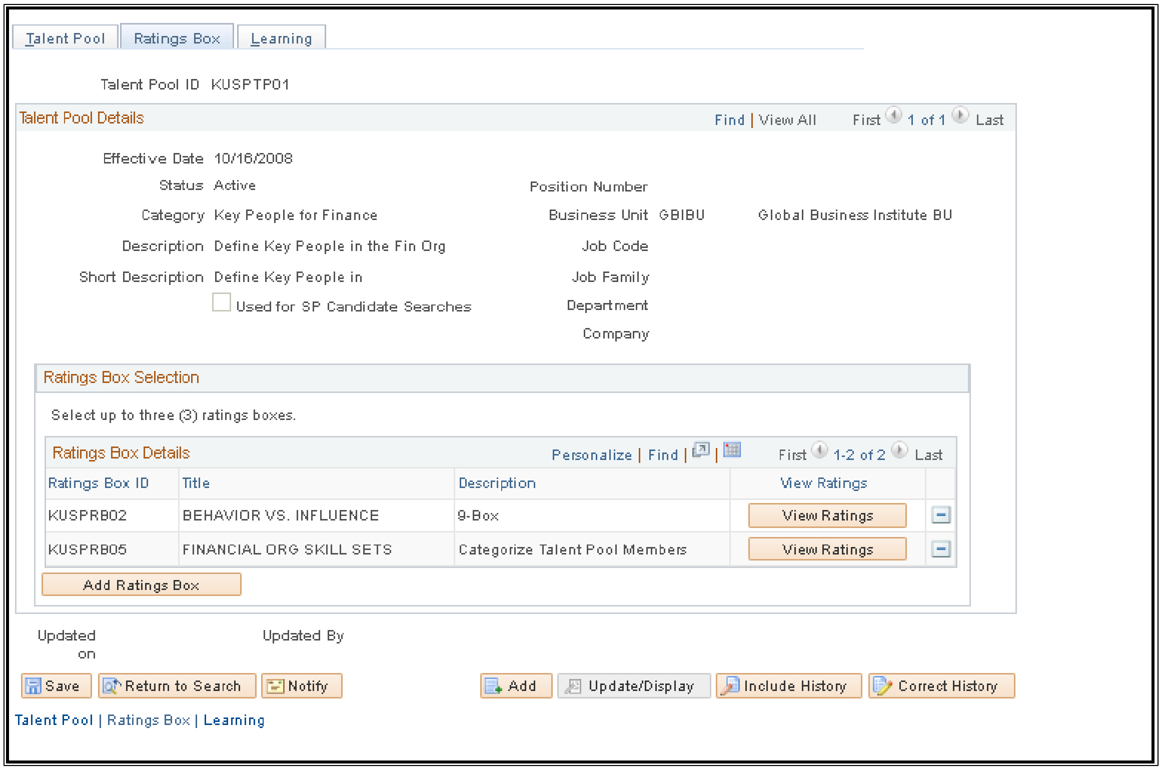
Your organization's administrators can use a ratings box, configurable X-Y grids, to place individuals into different quadrants of the ratings box in order to track user-defined criteria such as the performance, potential, and readiness, of the talent pool members.

Use ratings boxes to track custom-defined criteria such as performance, potential, readiness, and so on.

Navigation:

Organizational Development > **Succession Planning** > **Manage Talent Pools** > **Ratings Box**

This example illustrates the fields and controls on the Manage Talent Pools - Ratings Box page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
View Ratings	Click to view the selected ratings box for this talent pool.
Add Ratings Box	Click to add additional ratings box charts for this talent pool.

Manage Talent Pools - Learning Page

Use the Manage Talent Pools - Learning page (HR_TP_LRN_PRG) to associate learning programs or a list of coursework for a specific talent pool through integration with Enterprise Learning Management.

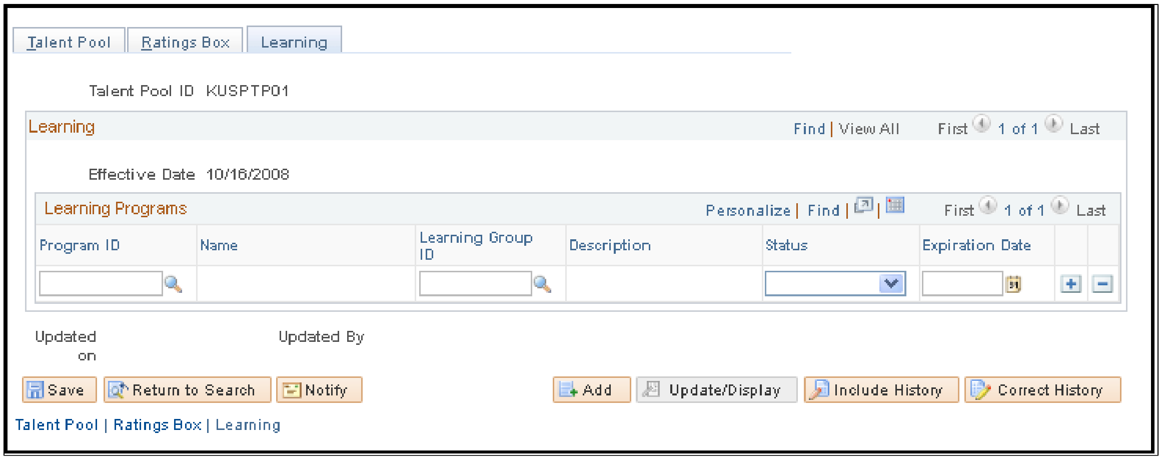
You can associate learning programs or a list of coursework for a specific talent pool through integration with Enterprise Learning Management. If a talent pool member has an active pool status, the system adds the learning program to the talent pool members' Learning Plan page (LM_LEARNING_HM) in Enterprise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

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

Navigation:

Organizational Development > **Succession Planning** > **Manage Talent Pools** > **Learning**

This example illustrates the fields and controls on the Manage Talent Pools - Learning page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Program ID	Select the learning program to associate with the talent pool
Learning Group ID	Select the learning group for the specified Program ID.

Managing Succession Trees

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

Building Succession Trees

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

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

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

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

See *PeopleTools 8.52: PeopleSoft Tree Manager*

See “Creating Organization Charts” (Application Fundamentals).

Determining Security Access

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

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

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

See *PeopleTools 8.52: Security Administration*

Adding and Viewing Details in Succession Trees

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

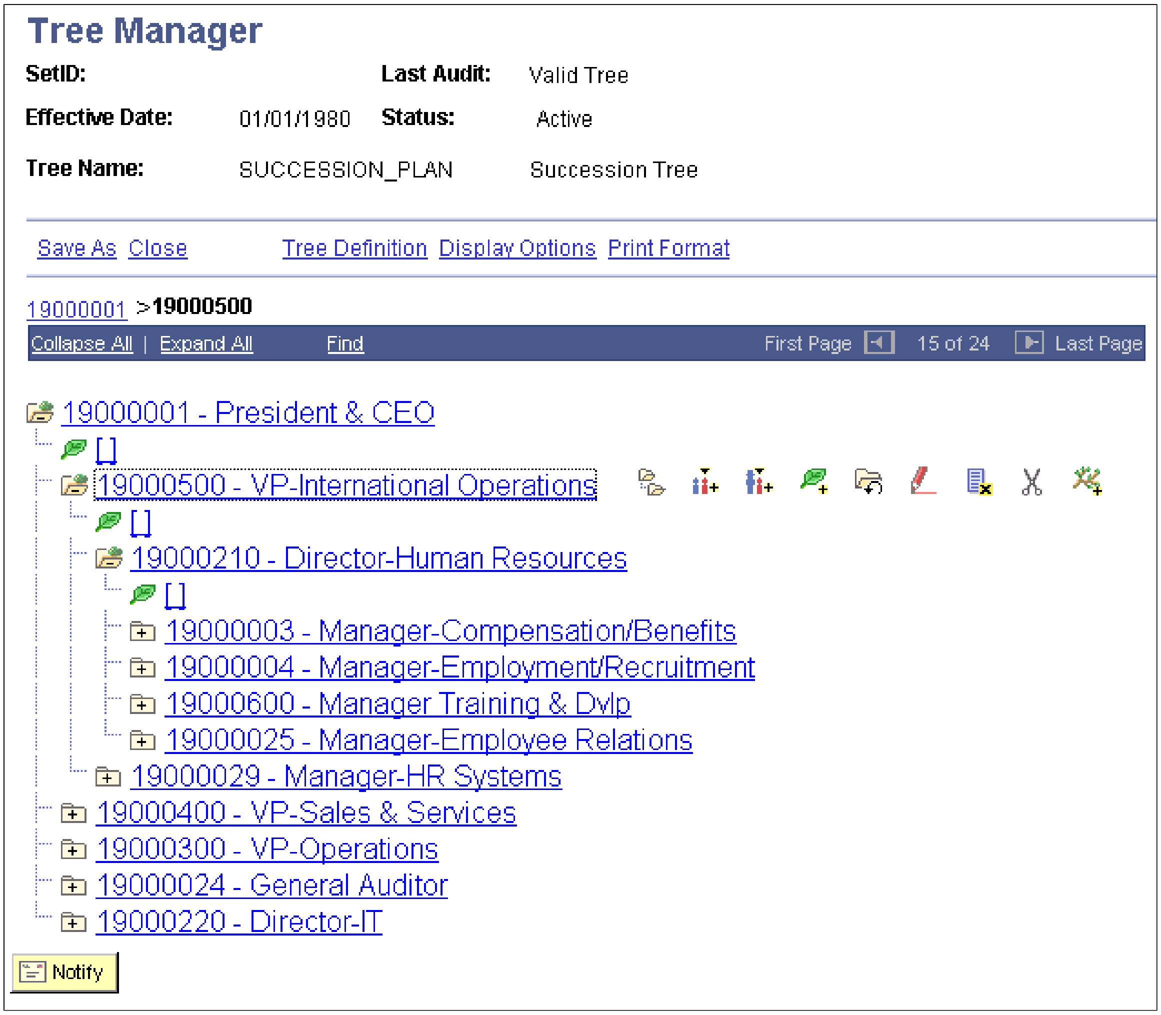
See *PeopleTools 8.52: PeopleSoft Tree Manager*

Viewing Details in Succession Trees

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

This diagram illustrates a succession tree:

This example illustrates the fields and controls on the Illustration of a succession tree. You can find definitions for the fields and controls later on this page.



Adding Details in Succession Trees

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

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

To add a detail to succession tree:

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

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

To hide the details in a succession tree:

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

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

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

Managing Succession Plans

This topic provides an overview of Succession 360° and discusses how to configure the related setup.

Pages Used to Manage Succession 360°

Page Name	***Definition Name***	***Usage***
Succession 360° Setup - Search Setup Page	HR_VT_SETUP1_SRCH	Define the default search criteria and page layout for the Succession 360° page.
Succession 360° Org Chart Page	HR_VT_SETUP1	Define organizational chart hierarchies for the Succession 360° page.
Succession 360° Setup - Profile Content Page	HR_VT_SETUP2	Define profile content for the Succession 360° page.
Succession 360° Setup - Legend Page	HR_VT_SETUP3	Configure icons and color values for the Succession Readiness Legend used on the Succession 360° page.
Succession 360 Page	HR_VT_DASHBOARD	Visually review and manage a person or role within the context of the organization.

Understanding Succession 360°

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

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

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

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

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

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

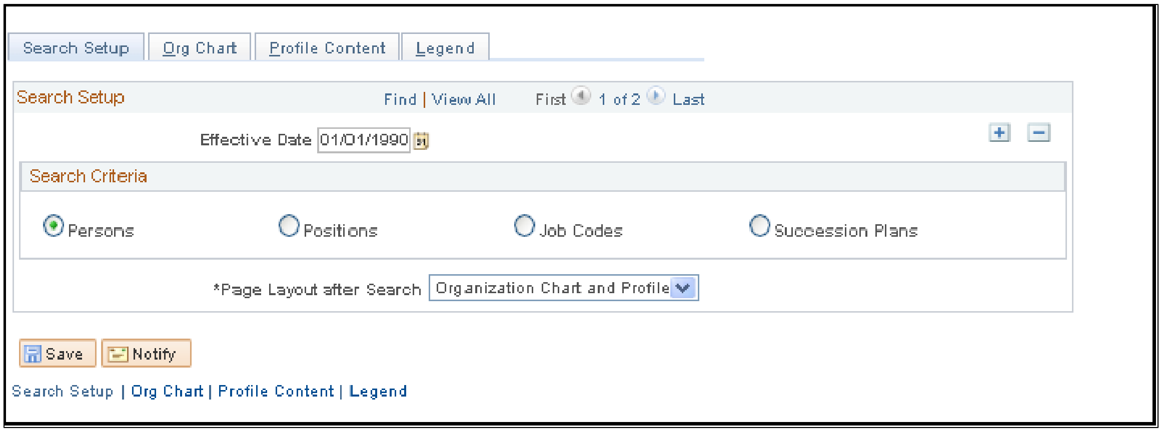
Succession 360° Setup - Search Setup Page

Use the Succession 360° Setup - Search Setup page (HR_VT_SETUP1_SRCH) to define the default search criteria and page layout for the Succession 360° page.

Navigation:

Set Up HCM > **Product Related** > **Organizational Development** > **Succession 360° Setup** > **Search Setup**

This example illustrates the fields and controls on the Succession 360° Setup - Search Setup page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Persons	Select to specify a person search as the default search method on the Succession 360° page. This enables users to perform a search for persons in the system that may or may not be associated with a succession plan. The search returns any person to whom the user has security access. When you select this option, the system uses the person-based hierarchy setup information, defined on the Org Chart page, for rendering the chart on the Succession 360° page
Positions	Select to specify a position search as the default search method on the Succession 360° page. This enables users to perform a search for positions in the system that may or may not be associated with a succession plan. The search returns any position to which the user has security access. When you select this option, the system uses the position-based hierarchy setup information for rendering the chart on the Succession 360° page. If full or partial position management is not installed, then this search option is not displayed.
Job Codes	Select to specify a job code search as the default search method on the Succession 360° page. This enables users to perform a search for job codes in the system that may or may not be associated with a succession plan. The search returns any job code to which the user has security access. When you select this option, the system uses the job code-based hierarchy setup information for rendering the chart on the Succession 360° page.
Succession Plans	Select to specify a succession plan search as the default search method on the Succession 360° page. This enables users to perform a search for existing succession plans in the system. The search returns any succession plan to which the user has security access.

Field or Control	***Description***
Page Layout after Search	Select the default layout of the Succession 360° page after the user performs a search. Values are: *Organization Chart and Profile, Organization Chart Maximized,* or *Profile Only.*

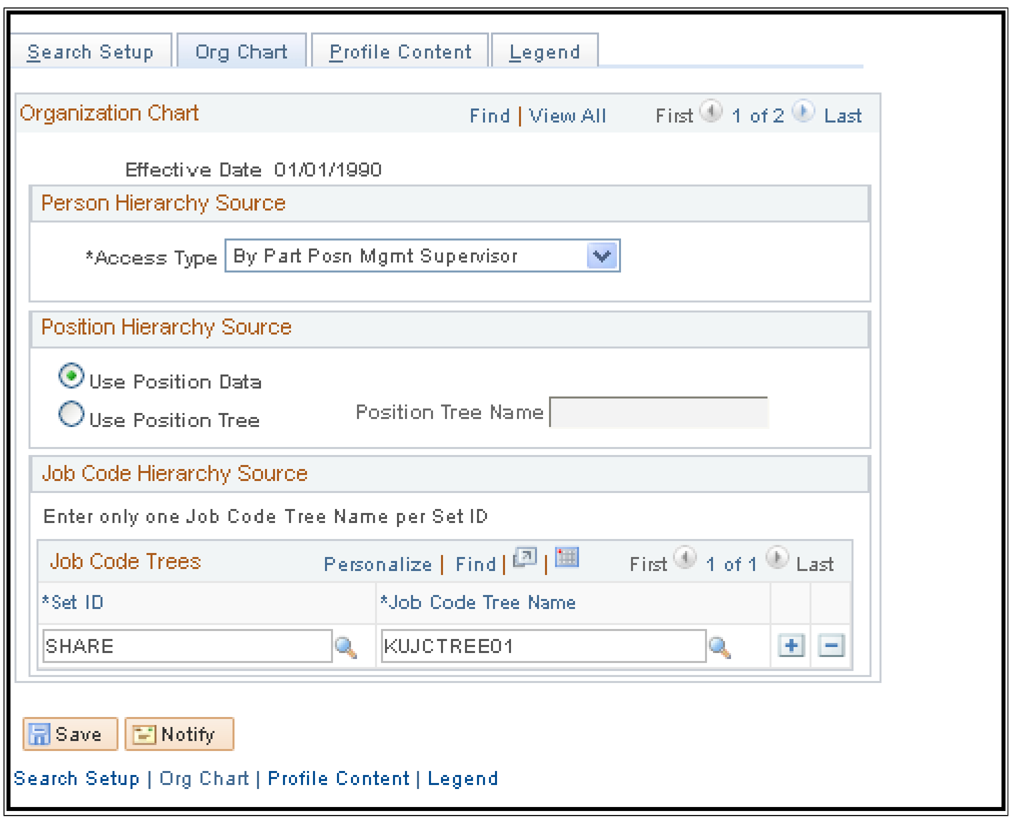
Succession 360° Org Chart Page

Use the Succession 360° Setup - Org Chart page (HR_VT_SETUP1) to define organizational chart hierarchies for the Succession 360° page.

Navigation:

Set Up HCM > **Product Related** > **Organizational Development** > **Succession 360° Setup** > **Org Chart**

This example illustrates the fields and controls on the Succession 360° Setup - Org Chart page. You can find definitions for the fields and controls later on this page.



Person Hierarchy Source

Field or Control	*Description*
Access Type	Select the reporting access type from which the person-based chart hierarchy on the Succession 360° page is derived. Values are: • *By Department Manager ID* Select this value to display the hierarchy based on information in the Manager ID field on the Department Profile page. • *By Dept Security Tree* Select to display the hierarchy using information from the department security tree. • *By Part Posn Mgmt Supervisor* (by partial position management supervisor) Select to display the hierarchy by both the **Reports To** and the **Supervisor ID** fields on the Work Location page. This is designed for the organizations that use partial position management. The system searches for reporting relationships based on Report To first, and then Supervisor ID. • *By Reports to Position,* Select to display the hierarchy based on information in the **Reports To** field on the Work Location page. • *By Supervisor ID* Select to define the reporting relationship based on information in the **Supervisor ID** field on the Work Location page in Job Data.

Position Hierarchy Source

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

Job Code Hierarchy Source

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

Succession 360° Setup - Profile Content Page

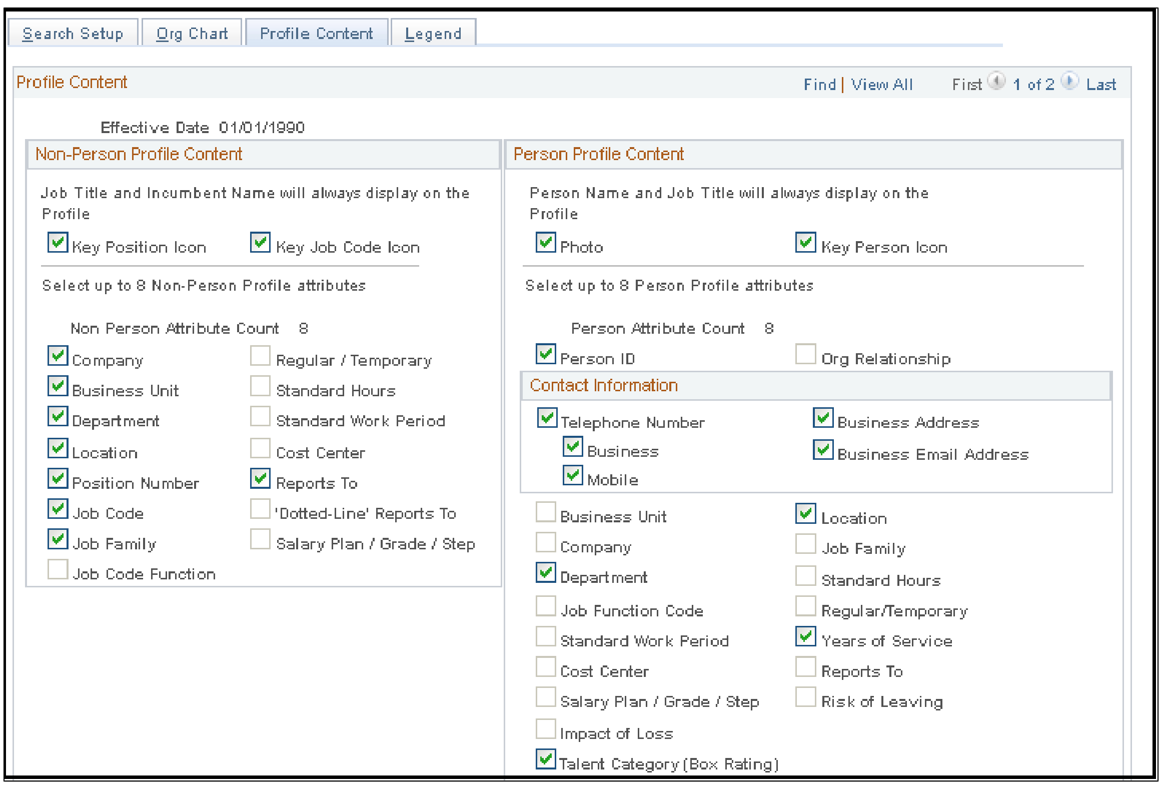
Use the Succession 360° Setup - Profile Content page (HR_VT_SETUP2) to define profile content for the Succession 360° page.

Navigation:

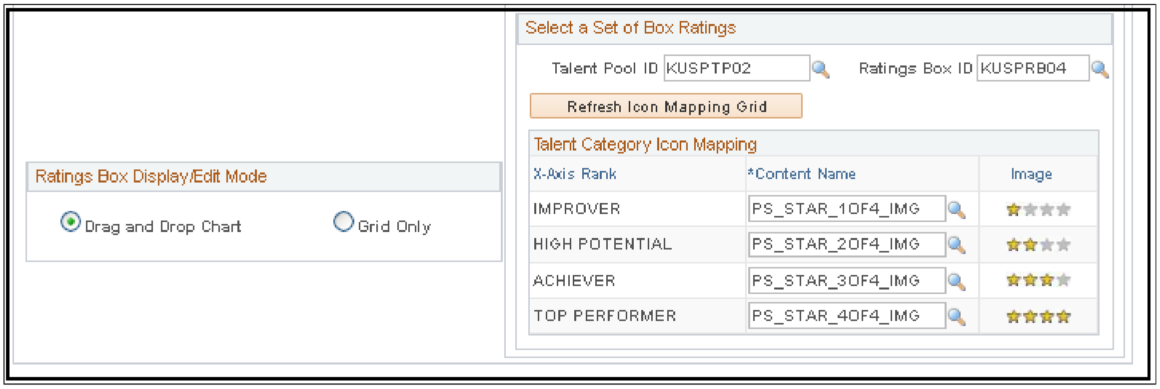
Set Up HCM > **Product Related** > **Organizational Development** > **Succession 360° Setup** > **Profile Content**

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

This example illustrates the fields and controls on the Succession 360° Setup - Profile Content page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Succession 360° Setup - Profile Content page (2 of 2). You can find definitions for the fields and controls later on this page.



Non-Person Profile Content

Field or Control	***Description***
Key Position Icon	Select to display an icon on the Succession 360° page for any position defined as a key position using Position Management. The icon is visible in the Org Chart Node, Slate Node and Non-Person Profile topics of the Succession 360° page.
Key Job Code Icon	Select to display an icon on the Succession 360° page if the job code is defined as a key job code using the job code table. The icon is visible in the Org Chart Node, Slate Node and Person Profile topics of the Succession 360° page.

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

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

Person Profile Content

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

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

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

Talent Category Icon Mapping

Field or Control	Description
X-Axis Rank	Displays the box rating labels defined in the X-axis for the specified Rating Box ID. The maximum numbers of displayed ratings is five. This area displays the box rating labels in reverse order. For example, the first row in the Talent Category Icon Mapping region displays the box 5 label on the X-axis The second row displays the box 4 label on the X-axis, and so on.
Content Name	Specify pre-configured talent category icon names.
Image	Displays the image associated with the value specified in the **Content Name** field. Five pre-configured icons are delivered and used as the default Talent Category icons.

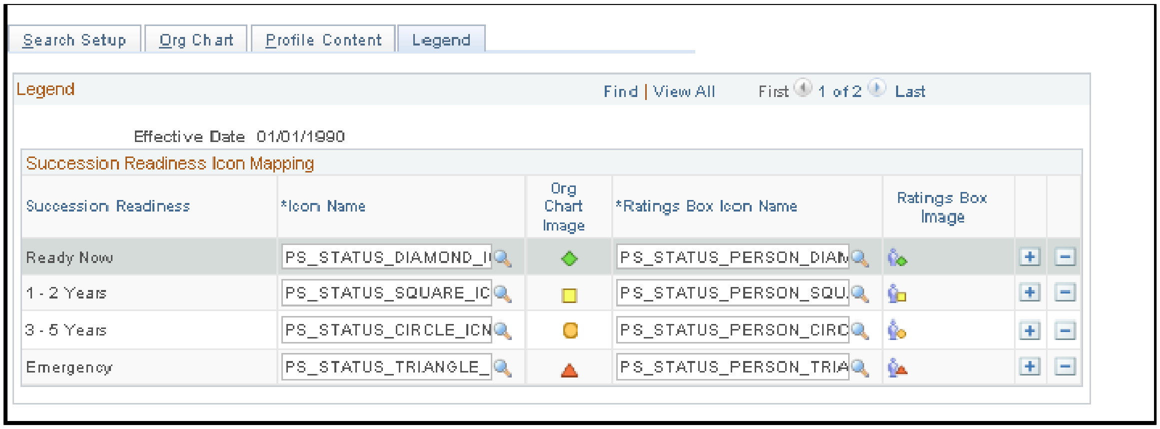
Succession 360° Setup - Legend Page

Use the Succession 360° Setup - Legend page (HR_VT_SETUP3) to configure icons and color values for the Succession Readiness Legend used on the Succession 360° page.

Navigation:

Set Up HCM > Product Related > Organizational Development > Succession 360° Setup > Legend

This example illustrates the fields and controls on the Succession 360° Setup - Legend page. You can find definitions for the fields and controls later on this page.



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

Field or Control	***Description***
Succession Readiness	Displays the current system defined succession readiness translate values. Values are: *Now, 1-2 years, 3-5 years,* and *Emergency.*
Icon Name	For each value in the **Succession Readiness** column, specify the name of the icon image to display in the organizational chart, Succession Readiness legend, and Successors Details.
Ratings Box Icon Name	For each value in the **Succession Readiness** column, specify the name of the icon image to display in the Ratings Box.
Org Chart Image and **Ratings Box Image**	Displays the image associated with the specified values in the**Icon Name** and **Ratings Box Icon Name**fields.

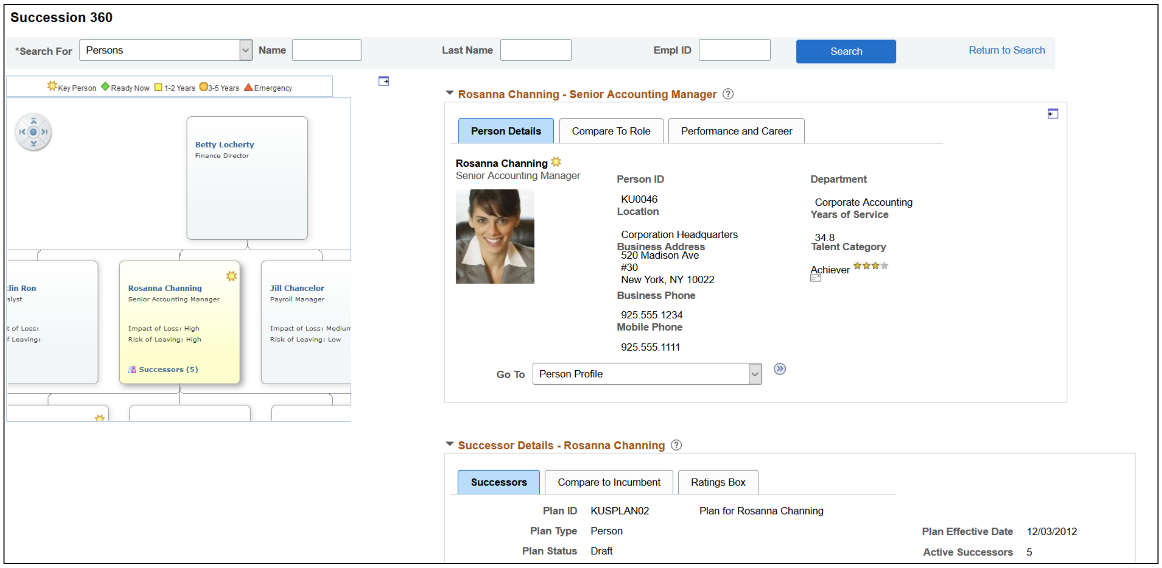
Succession 360 Page

Use the Succession 360 page (HR_VT_DASHBOARD) to visually review and manage a person or role within the context of the organization.

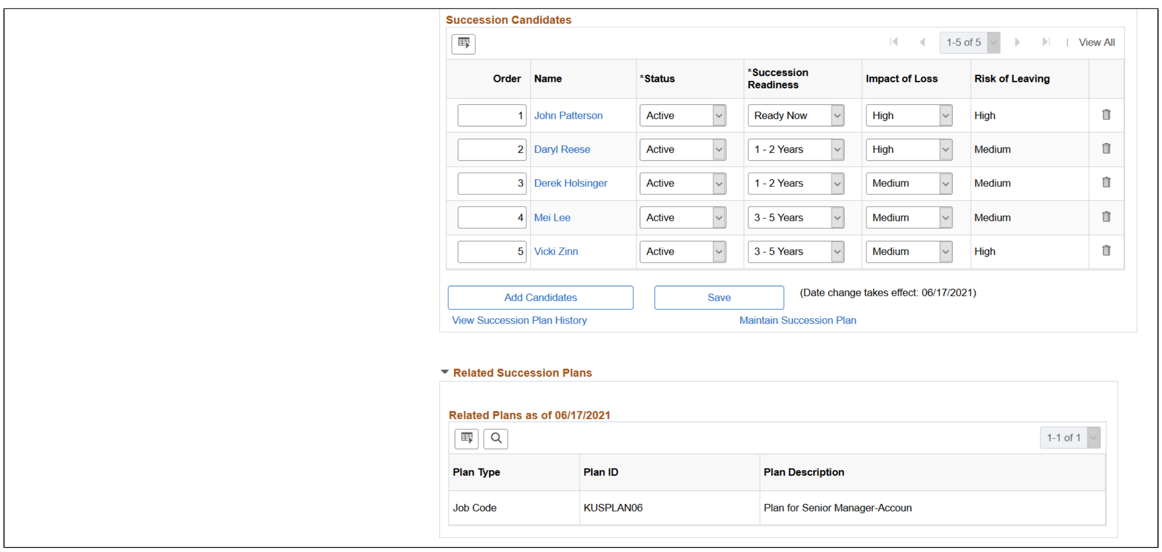
Navigation:

- **Organizational Development > Succession Planning > Succession 360°**
- **Manager Self Service > Succession Planning > My Succession 360°**

This example illustrates the fields and controls on the Succession 360 page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Succession 360 page (2 of 2). You can find definitions for the fields and controls later on this page.



The Succession 360 page has two primary topics:

- An organization chart or reporting hierarchy.

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

- A profile view.

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

Organization Chart or Reporting Hierarchy

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

- Person-based

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

- Position-based

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

- Job code-based

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

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

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

Profile View - Person-based

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

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

- Person Details

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

Field or Control	*Description*
Go To	Select the detailed career or profile page you want to access and click the Transfer icon to access the desired page. For the selected employee, select from the following pages: • Select *Career Development Plan* to go to the Career Development Plan page. • Select *Career Path* to go to the Career Path page. • Select *Person Profile* to go to the Profile Manager Person Profile page. • Select *Performance Document* to go to the Maintain Performance Documents page. **Note:** The Performance document link is only available if you have the appropriate ePerformance roles and associated permission lists to view performance documents.
(Transfer icon)	Click the Transfer icon to access the selected page in the **Go To** field.

- Compare to Role

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

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

    See “Understanding Setting Up Search and Compare Profiles” (PeopleSoft Human Resources Manage Profiles).

- Career

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

Profile View - Position or Job Code-based

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

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

- Details

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

- Required Competencies

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

- Incumbents

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

Field or Control	***Description***
Compare Incumbent to Role	Select an employee from the displayed list and click to perform a Profile Manager-based comparison between the selected incumbent and the current role. The results display a side-by-side comparison of the incumbent's qualification content topics, if defined in Profile Manager, with those of the current job or role, if defined in Profile Manager. If there are no defined profiles for the employee or role, the system displays a message indicating that the process is unavailable. See “Setting Up Searches” (PeopleSoft Human Resources Manage Profiles).
View Career Detail	Select an incumbent from the displayed list and click to displays a summary of future career moves and career history for the selected incumbent.

Successor Details

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

- Successors

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

- Compare to Incumbent or Compare to Role

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

See "Setting Up Searches" (PeopleSoft Human Resources Manage Profiles).

- Ratings Box

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

Related Succession Plans

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

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

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

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

Reviewing Career Summaries

This topic lists the pages used to review career summaries.

Pages Used to Review Career Summaries

Page Name	***Definition Name***	***Navigation***	***Usage***
Career Assignments	CAREER_SUMMARY	• **Organizational Development** > **Succession Planning** > **Review Career Summaries** > **Career Assignments** • **Organizational Development** > **Succession Planning USF** > **Review Career Summary Info** > **Career Assignments**	Review employee job status and job history.

Page Name	*Definition Name*	*Navigation*	*Usage*
Compensation	COMP_SUMMARY	• **Organizational Development > Succession Planning > Review Career Summaries > Compensation** • **Organizational Development > Succession Planning USF > Review Career Summary Info > Compensation**	Review employee compensation history.
Training	TRN_STUDNT_CRS_SUM	• **Organizational Development > Succession Planning > Review Career Summaries > Training** • **Organizational Development > Succession Planning USF > Review Career Summary Info > Training**	Review employee training history.

Running Succession Reports

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

Understanding Succession Reports

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

Key Person/Job Codes/Positions

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

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

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

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

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

Talent Pool Readiness

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

Talent Pool Ratings Box Assignments

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

Pages Used to Run Succession Reports

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

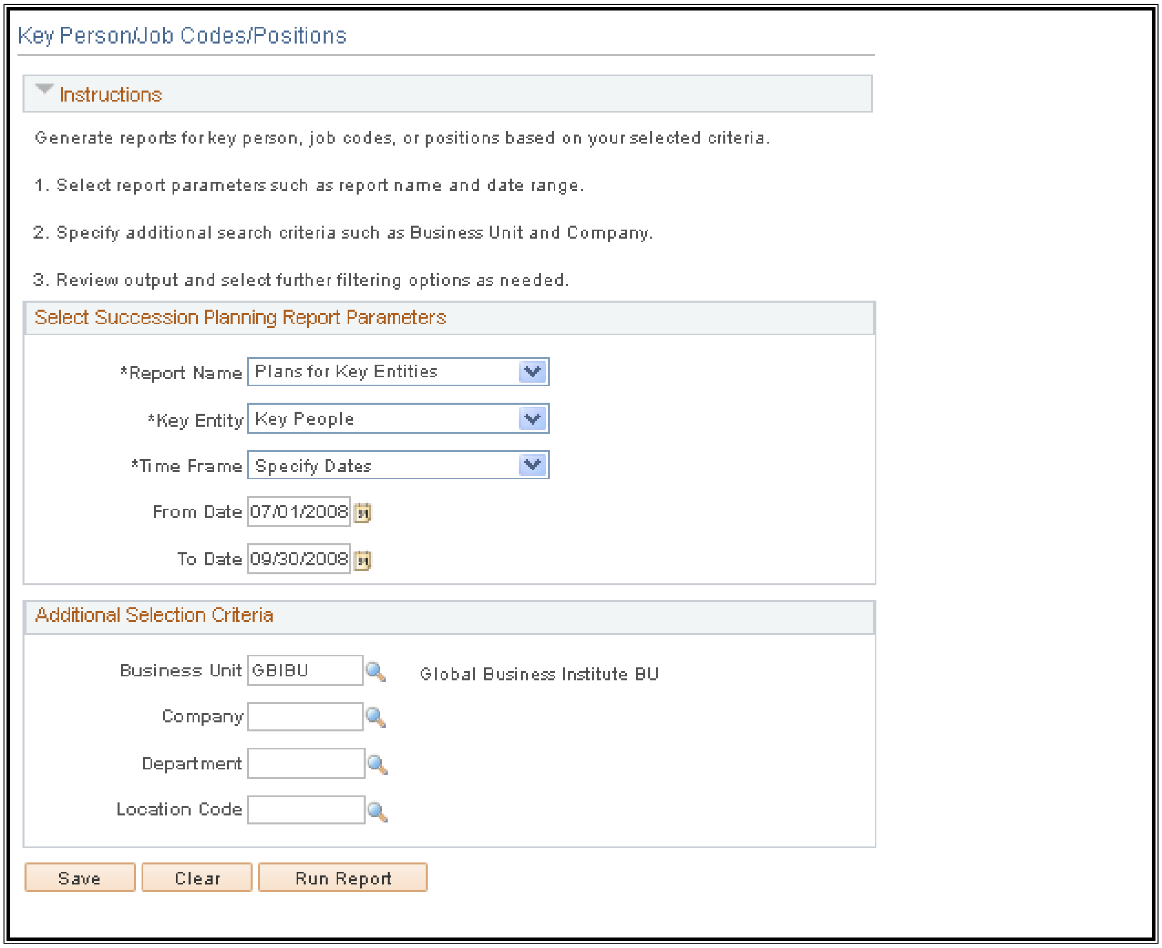
Key Person/Job Codes/Positions Page

Use the Key Person/Job Codes/Positions page (HR_SUCC_METRICS1) to view candidates for hierarchical-based succession planning, and identify key entities that require succession plans.

Navigation:

Succession Planning > Reports > Person/Job Code Position Rpt > Key Person/Job Codes/ Positions

This example illustrates the fields and controls on the Key Person/Job Codes/Positions page. You can find definitions for the fields and controls later on this page.

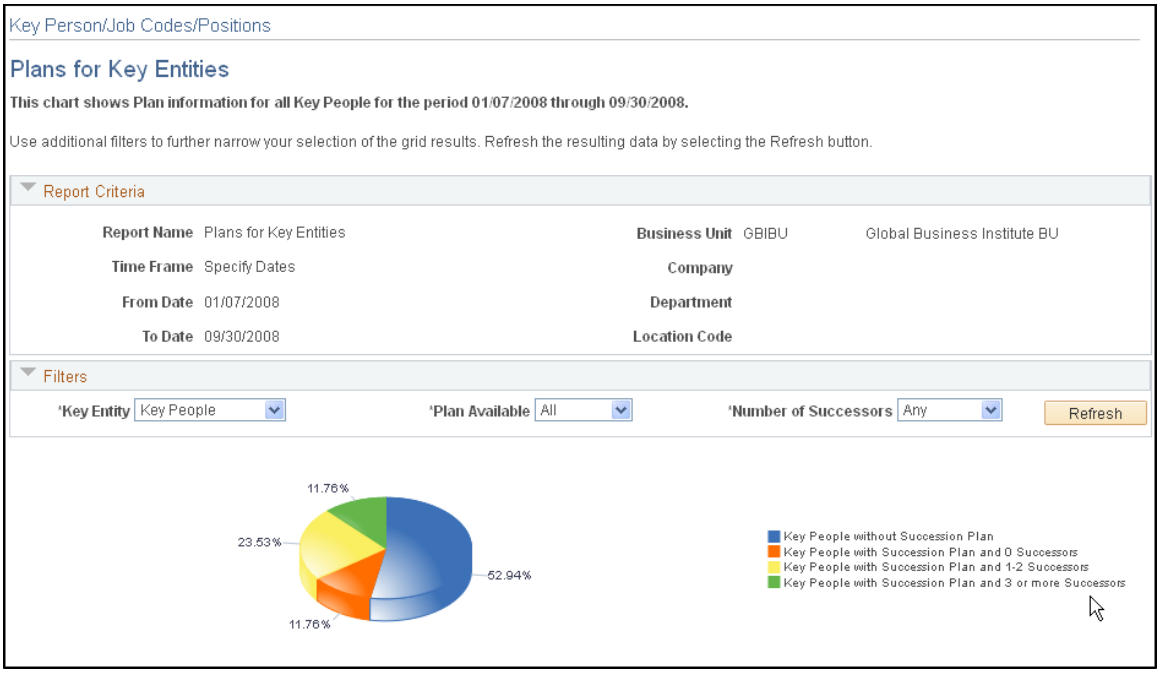


Field or Control	Description
Report Name	Select the type of report to view. Values are *Plans for Key Entities, Projected Vacancy for Key People,* and *Risk of Leaving for Key People.*

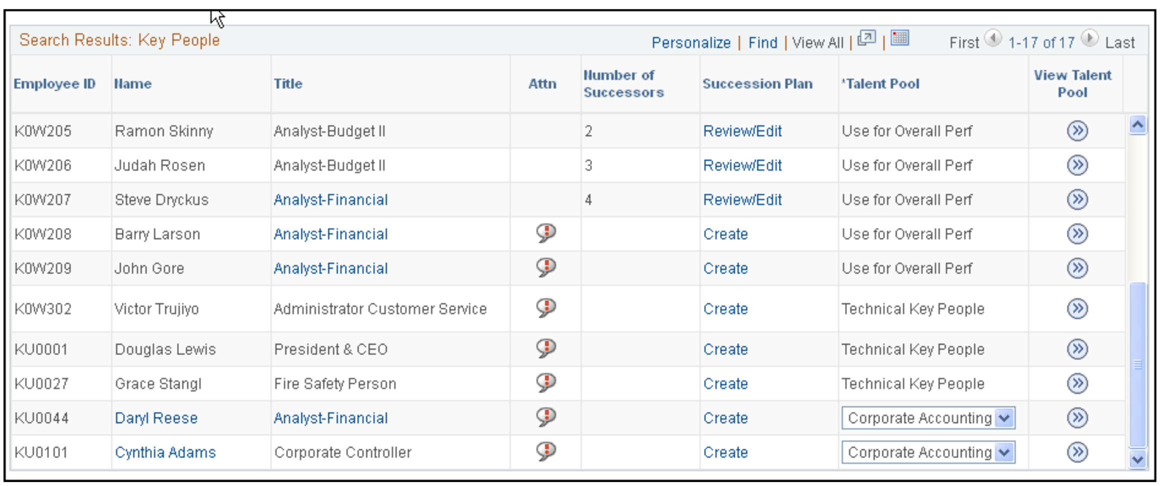
Plans for Key Entities

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

This example illustrates the fields and controls on the Plans for Key Entities page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Plans for Key Entities page (2 of 2). You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Key Entity	Select to display the key people, key job codes, or key positions in the chart on this page.
Plan Available	Select the basic status of succession plans for the specified key entities. Values are *All, Yes,* and *No.*

Field or Control	Description
Number of Successors	Select to track the number of successors for the specified key entities. Values are *Any, 1-2, 3 or more.*
Attn (attention)	Displays an exclamation point when the number of successors is zero, otherwise this field is blank.
Number of Successors	Displays the number of possible successors for the key entity as of the dates specified for this report. If the key entity does not have a succession plan, this field is blank.
Succession Plan	Click a link in this column to create, review, or edit the succession plan for the key entity.
Talent Pool	This column displays a description of the talent pools associated with the key person, based on the report date. When a key person belongs to more than one talent pool, select the desired talent pool from a list. This column only displays for the Key People results set. The column is not displayed when the search is based on Key Job Codes or Key Positions since only people can be part of a talent pool.
Go	Click an icon in this row to display details of the selected talent pool. If there is more than one value in the **Talent Pool** field, you must select a talent pool before clicking on this icon. This column only displays for the Key People results set. The column is not displayed when the search is based on Key Job Codes or Key Positions since only people can be part of a talent pool.

Succession Planning Self-Service

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

- View Succession Plans.
- View Person Profile Summaries.
- View successors and succession readiness levels, risk of leaving and impact of loss.

- Re-rank successors.
- Activate and deactivate successors.
- Compare an employee's person profile with their current role's profile.
- Compare a successors' profile to a succession plan's incumbent, job code or position
- Edit successor rating box assignments.

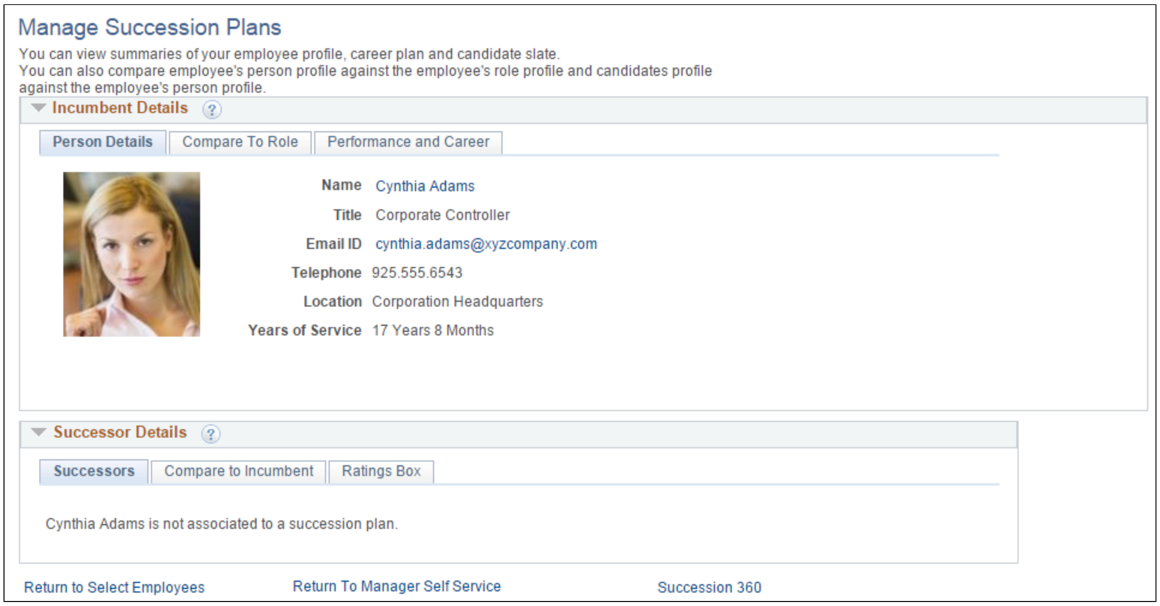
Self Service Pages Used in Succession Planning

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

Manage Succession Plans Page

Use the Manage Succession Plans (HR_SUCC_PLN_MGR) page to review or edit plan details such as effective date, plan status, and projected vacancy date. The page is also used to review incumbent job and career plan details.

This example illustrates the fields and controls of the Manage Succession Plans Page.



Chapter 4

Using the Fluid User Interface for Career and Succession Planning

Using the Fluid User Interface for Career and Succession Planning

This topic discusses how administrators use the PeopleSoft Fluid User Interface to plan career and succession. Fluid career and planning succession provides you with access to perform career and succession-related transactions.

Pages Used to View the Career and Succession Planning the Using Fluid User Interface

Page Name	***Definition Name***	***Usage***
Career and Succession Planning Tile	_AUTOGEN_NAVCOLL_7 (cref for the tile)	Access a collection of Career and Succession Planning talent administration components.
Person Profile Page Setting Up Job Data	JPM_PERSON_PROFILE	Search the existing person profile, create new and update it.
Key Positions Defining Key Positions	POSITION_DATA	Create position hierarchies (which are required for successions plans).
Position Profiles	JPM_NON_PERS_PROFL	Create profiles for key employees and roles.
Career Path Career Path Page	HR_CP_PATH	Define an employee's career path; modify a default career path; configure a job progression.
Career Progression Chart	HR_CP_ADM_CHART	View career paths and non-person profile summaries in order to perform a competency gap/fit analysis.
Manage Career Plan Manage Career Plans Component	CAREER_PLAN	Perform career planning activities for the respective managers direct reports.

Page Name	***Definition Name***	***Usage***
Create Succession Plan Succession Plan Page	HR_CREATE_SUCC_PLN	Enter plan details such as effective date, plan status, and projected vacancy date.
Maintain Succession Plans	SUCCESSION_PLAN	Enter any information you have and click Search. Leave fields blank for a list of all values.
Managing Talent Pools Page	HR_TPOOL_DEF	Search for and edit existing talent pools.
Succession 360 Page	HR_VT_DASHBOARD	Search, review and manage a person or role within the context of the organization.
Manage Talent Pools - Learning Page	HR_TPOOL_DEF	Search for and edit existing talent pools,

Career and Succession Planning Tile

The Talent administrators use the Career and Succession Planning tile to access a collection of Career and Succession Planning components.

Navigation:

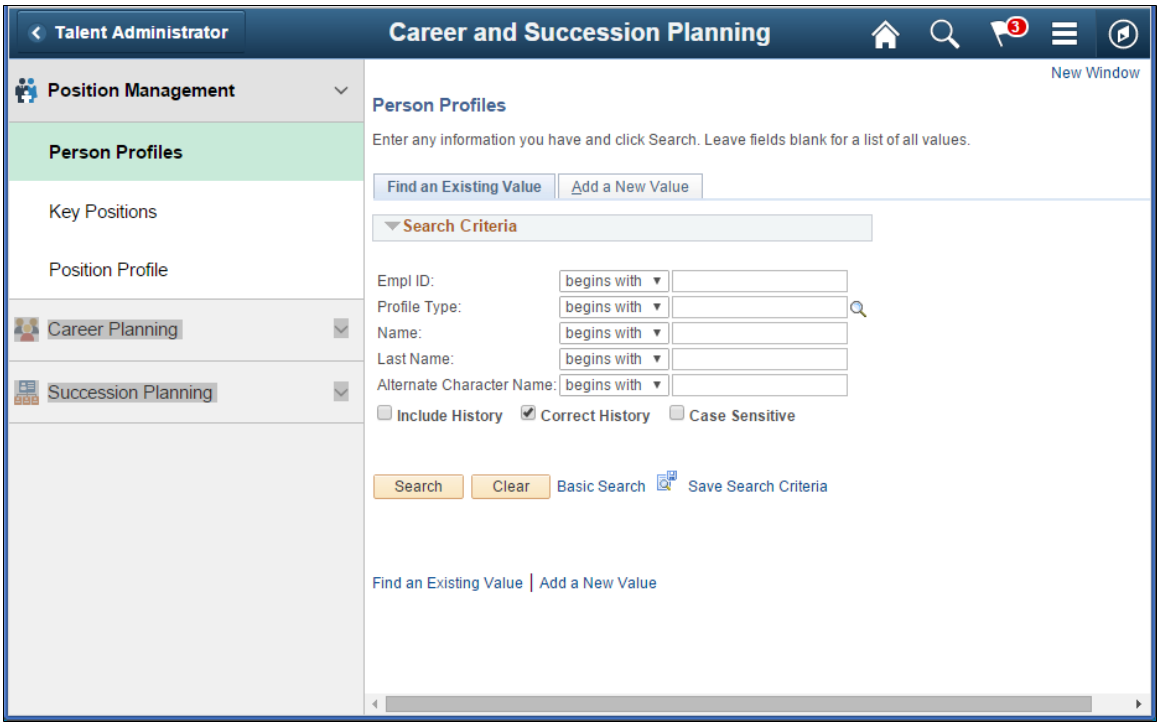
The Career and Succession planning tile is delivered as part or the Talent Administration home page, but the location can change if you change the delivered home pages or if administrators personalize their home pages

This example illustrates the Career and Succession Planning tile for the tablet.

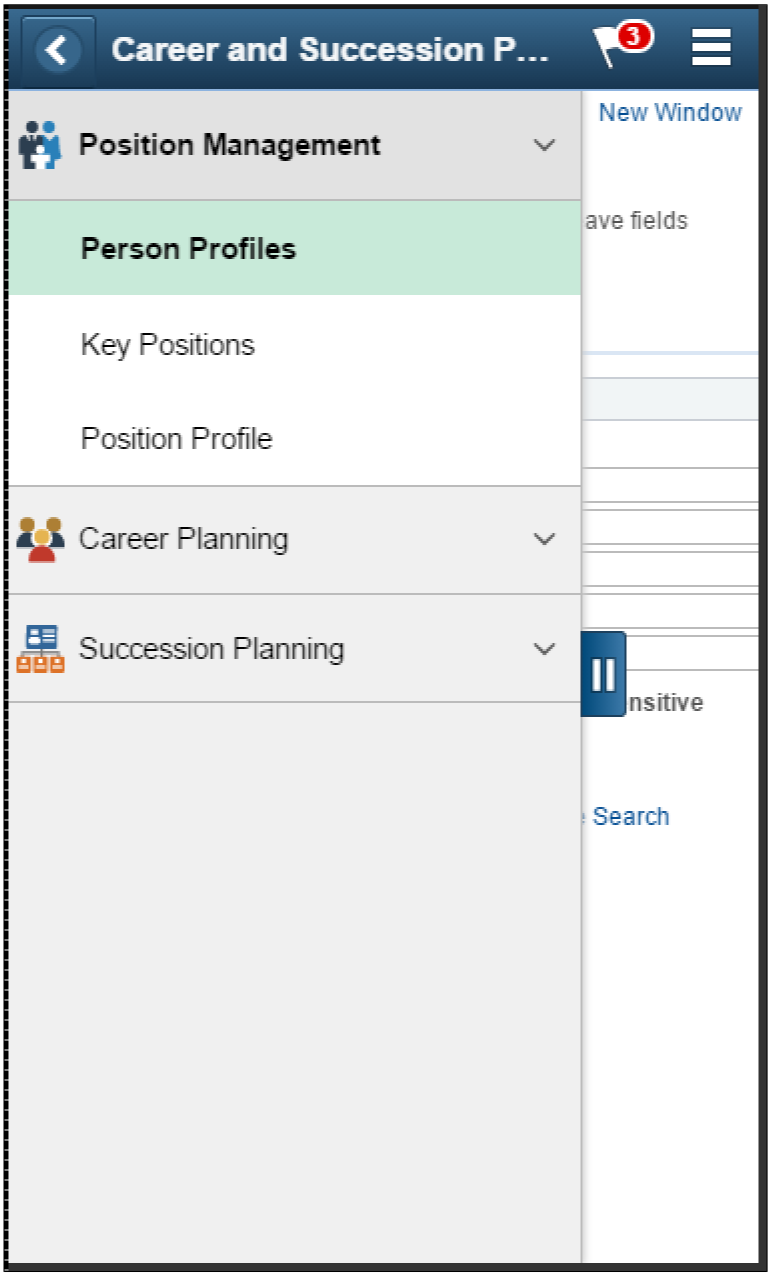
This example illustrates the Career and Succession Planning tile for the smartphone.

Click the Career and Succession Planning tile to access the Career and Succession Planning application start page.

This example illustrates the Career and Succession Planning application start page for the tablet.



This example illustrates the Career and Succession Planning application start page for the smartphone.



This application start page is a navigation collection that enables administrators to access frequently-used Career and Succession Planning components from one location. The left panel of this page lists the components collected under three categories:

- Position Management
- Career Planning
- Succession Planning

The right panel displays the component selected in the left panel.

