Oracle Fusion Cloud Talent Management

How do I conduct a Talent Review meeting in Redwood?

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Conduct a Talent Review Meeting

As a facilitator or a Talent Review super user, you use the Talent Review dashboard to conduct talent review meetings.

1. Go to **My Client Groups** > **Talent Review**.

   You can see the **Talent Review Meetings** page.

   > **Note:** Because of the default filters, you can only see meetings scheduled in the previous 3 months that haven't started or are in progress on the overview page. You can clear the filters to view more meetings that you have access to.

2. Locate the meeting that you want to conduct.
3. From the **Actions** menu, select **Conduct Meeting**.

   > **Note:** You can conduct the Talent Review meeting only on or after the meeting date.

4. If there are multiple views, select a dashboard view.

   The members of the review population are placed in boxes of the Talent Review meeting dashboard based on the latest ratings assigned to them. You can see members of the review population only if their assignment is associated with their manager for the duration of the meeting. Note that you can't see members who have an inactive primary assignment or whose profile has been inactivated on the dashboard. You can switch between the graph view and the table view.
5. Select the **Holding Area** button to view the holding area of the meeting dashboard. Here, you can see these persons:
   - Employees who aren't rated by their managers
   - Employees who are rated using nonstandard rating models

   You can drag and drop members from the holding area to the dashboard and back.
6. *Apply filters* to focus on specific review population members.
7. Find a specific member.
   a. Select the **Open Configuration** icon.
   b. In the **Find review population members** panel, search for and select the member you want to view.
8. To view more details about a member of the review population, hover over their name.
9. In the graph view of the meeting dashboard, *use display options* to highlight segments of the review population.
10. *View prior ratings* of the review population members.

    > **Note:** You can't perform these actions while you view the prior ratings:
    > - Update the ratings or move workers from their current box position.
    > - Use display options.

11. After discussion with the participants, assign ratings to the members.
    - In the graph view, move a review population member to the box that represents their current rating.
    - In the table view, select the current rating in the grid cell and add comments to justify the rating.
12. Perform *actions on the members*.

    Note: The actions displayed depends on the template configuration.

13. Associate succession plans that you can access with the meeting if it has been enabled in the meeting template.
    a. Select the **Plans and Pools** button.
    b. On the **Succession Plans** tab, add a succession plan or create 1.
    c. Add review population members to the associated succession plans based on the discussions in the meeting.
14. Associate talent pools that you can access with the meeting if it has been enabled in the meeting template.
    a. Select the **Plans and Pools** button.
    b. On the **Talent Pools** tab, add a talent pool or create 1.
    c. Add review population members to the associated talent pools based on the discussions in the meeting.
15. If you have any follow-up tasks for the review population members, add tasks for them.
16. Submit the ratings.

Results:

The talent profiles of the members of the review population are updated with the rating changes. The **Meeting Submission Date** value is set to the current date. The meeting status changes to **Complete** and you can no longer update ratings. If the meeting template is configured to run a scheduled process when you submit the meeting, a message appears with the process number. You can check the status of the submission process using the Scheduled Processes task.

Graph and Table Views of the Talent Review Meeting Dashboard

When conducting a Talent Review meeting, as facilitators you can alternate between the graph and table views of the dashboard.

Differences Between the Graph and Table Views

Areas of Difference	Graph View	Table View
Representation of members of review population	Graphical	Tabular
Display order of workers	Alphabetic order within each box	Alphabetic order of the entire review population **Note:** You can sort to show workers according to job, location, manager, and other criteria.

Areas of Difference	Graph View	Table View
Holding Area	A separate region. You can move workers to and from the box chart to the holding area.	Not a separate region. Workers in the holding area appear with an icon by their names.
Display Options	Available	Not available

How You Filter and Find Workers on the Talent Review Meeting Dashboard

When conducting a meeting, you may want to focus on a particular subset of the review population, such as selected managers, worker location, or job. Use population filters to see specific subsets of the review population.

The filters that you see on the meeting dashboard are those selected in the template used for the meeting.

Here are some of the ways in which you can filter the review population:

- **Subordinate Level**: Select this filter to show people in the selected levels below the business leader.
  - **Level 1**: This shows only the direct reports of the business leader.
  - **Level 2**: This shows the indirect reports of the business leader.
  - **Level 3**: This shows workers who report to managers in level 2.

  > **Note:** People in the review population who aren't part of the business leader's organization aren't filtered using the subordinate level filter.

- **Competency**: If you have upgraded to Enhanced Talent Profile, you can see multiple competency sections for filtering the talent review meeting. You can see both the section and the competency names. Note that you can see only the competencies that have HRMS (Human Resources) subscribed sections.
- **Management Level**: Select this filter to show only people at the specified management level.
- **Reporting Relationship**: Use this filter to filter the review population by the reporting relationship they have with their managers. You can view this filter only if these conditions are met:
  - Matrix managers are included in the meeting.
  - You selected a manager who has dotted line reports included in the meeting in the **Managers** filter.

Apart from using filters, you can enter a worker's name in the field above the box chart to locate the worker in the meeting dashboard.

Use Display Options

Use display options to highlight members of the review population.

1. On the meeting dashboard, select the **Open Configuration** icon.

2. On the **Display options** tab, you can select to view the display options for 1 of the demographic factors and up to 2 talent ratings.

   You can see a legend in the **Display options** tab for the selected display options. The highlight colors or the icons used for the talent ratings depends on the preferred colors and icons selected in the meeting template. If no preferred colors or icons were selected in the template, then the colors and icons are randomly used.

3. In the **Identification** section, select the appropriate checkboxes to view the photos and names of the members of the review population.
4. You can opt to view the summary per box of the chart or across boxes.
5. Select **Restore Defaults** to clear the selections made.

View Prior Ratings

As a facilitator, while conducting a Talent Review meeting, you can compare the current ratings of the review population with their recent ratings from previously completed meetings.

Before you start

You can view the prior ratings of review population members only if both these conditions are met:

- A rating exists within the specified date range from a previously completed talent review meeting.
- The rating model is the same for the rating type used in the current and prior meetings. For example, the rating model for performance must be the same for both the current and prior meetings.

View Prior Ratings in Chart View

1. On the meeting dashboard, select the **Open Configuration** icon.
2. Go to the **Prior Ratings** tab.

   You can see the most recent prior rating of the review population from previously completed meetings that are within the prior rating date range. You can see a legend for each of the rating value and the count of members who had that rating.
3. Select the eye icon of a rating to view only members who were assigned that rating.

View Prior Ratings in Table View

Select the **View Prior Ratings** button to view the prior ratings of the members of the review population.

> **Tip:** Select the **View Current Ratings** button to view the current ratings of the members of the review population.

Actions for Talent Review Members

When conducting a Talent Review meeting, you can do some actions for the members of the review population.

You can perform some actions on multiple members and some only on a single member.

- To perform actions on multiple members, select the members and then from the **Actions** menu select the action.
- To perform actions for a single member, select the member and then click the right mouse button to view the actions menu.

Note: The actions displayed on the meeting dashboard depends on the template configuration.

This table describes the actions that you can do on a talent review meeting dashboard.

Action	What You Do	Action For a Single Worker	In Actions Menu	Comments
View Potential Assessment	View the most recent potential assessment ratings saved or submitted by reviewers.	Yes	Yes	• Facilitators can only view the ratings and the comments entered by the reviewers. They can't edit the responses and comments. • If a reviewer has saved or submitted multiple potential assessments for a member of the review population, then the facilitator will see only the most recent responses and comments. • If multiple reviewers have completed a potential assessment for a member of the review population, then the facilitator will see only the most recently saved or submitted assessment regardless of who submitted it.
Print Profile	Print the talent profile information.	Yes	Yes	The print output will include only the content sections that you have access to.
Print All Profiles	Prints the talent profiles of all the workers in the dashboard.	No	Yes	The print output will include only the worker's profile and content sections that you have access to.
Move Within Matrix	Move the selected workers to the holding area or to another box in the box chart.	Yes	Yes	To move workers to another box, specify the new ratings.

Action	What You Do	Action For a Single Worker	In Actions Menu	Comments
Add Task	Add a task for the selected worker.	Yes	No	The selected worker becomes the associated worker and the worker's manager the default assignee for the task. You're added as the default owner of the task. But you can change these values.
Add Note	Add a note for the selected worker.	Yes	No	You can specify who can see the note added.
Add to Succession Plan	Add the selected workers to a succession plan associated with the meeting.	Yes	Yes	You can add workers only to succession plans that you have access to.
Add to Talent Pool	Add the selected workers to a talent pool associated with the meeting.	Yes	No	You can add workers only to talent pools that you have access to.
Add Development Goal	Add a development goal for the selected worker.	Yes	No	NA
Add Performance Goal	Add a performance goal for the selected worker.	Yes	No	When a primary goal plan is active, the performance goal that's added is automatically added to the primary goal plan of the selected review period.

Add Tasks for Review Population Members

As a facilitator or a Talent Review super user, you can add, assign, and manage tasks for review population members based on the action items arising from a talent review.

Add Task in Graph View

1. Locate the review population member in the box chart.
2. Right-click and select the **Add Task** action.

   You can see the **Add tasks** panel.
3. Select **Add**.
4. Enter *task details*.

5. Add assignees. These are persons who need to perform the task.

   Note: The person's manager is the default assignee.

6. Add owners. These are persons who manage the task.

   Note: You are added as the task owner by default. But you can make someone else in your organization the owner. Owners need not be meeting facilitators, but they need to have permissions to manage the task.

7. Save your changes.

Add Task in Table View

1. Locate the team member's row in the grid.
2. Select the task count in the **Tasks** column.

   You can see the **Tasks** page.
3. Select **Add Tasks**.
4. Add *task details*.
5. Add assignees. These are persons who need to perform the task.

   Note: The person's manager is the default assignee.

6. Add owners. These are persons who manage the task.

   Note: You are added as the task owner by default. But you can make someone else in your organization the owner. Owners need not be meeting facilitators, but they need to have permissions to manage the task.

7. Save your changes.

Task Details

You need to specify these details for the tasks added for members of the review population.

Field	Description
Subject	What the task is about.
Percentage Complete	Completion percentage
Start Date	Date when the team member starts working on the task.
End Date	Date when the team member completes working on the task.
Due Date	Date by when assignees need to complete the task. The default date is one year from the current date.
Priority	Level of urgency for the task, such as **High**, **Medium**, or **Low**. Priority values are specified in the HRT_TASK_PRIORITY lookup. Your administrators can add values according to the business requirements.
Status	**Assigned** or **Completed**.
Task Type	The category of the task, such as **Preparation** and **Presentation**. Task type values are specified in the HRT_TASK_TYPE lookup. Your administrators can add values according to the business requirements.
Description	A suitable description that explains the task.

Add Notes for Review Population Members

As a facilitator or a Talent Review super user, you can add notes about review population members and indicate who can see the notes.

Add Note in Graph View

1. Locate the review population member in the box chart.
2. Right-click and select the **Add Note** action.

   You can see the **Add notes** panel.
3. Select **Add Note**.
4. In the **New note** subpanel, enter your note and indicate who can see the note.
5. Select **Create**.
6. Close the **Add notes** panel.