Oracle Talent Management Cloud
Implementing Talent Review and Succession Management
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Preface

This preface introduces information sources that can help you use the application.

Using Oracle Applications

Using Applications Help

Use help icons 🔄 to access help in the application. If you don’t see any help icons on your page, click your user image or name in the global header and select Show Help Icons. Not all pages have help icons. You can also access Oracle Applications Help.

Watch: This video tutorial shows you how to find help and use help features.

You can also read Using Applications Help.

Additional Resources

- **Community**: Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.

- **Guides and Videos**: Go to the Oracle Help Center to find guides and videos.

- **Training**: Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
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<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td><strong>monospace</strong></td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
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Documentation Accessibility

For information about Oracle’s commitment to accessibility, visit the Oracle Accessibility Program website.

Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.
Contacting Oracle

Access to Oracle Support
Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

Comments and Suggestions
Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 Introduction

Implementing Talent Review and Succession Management: Overview

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

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

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

This topic:

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

Prerequisites

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

- HCM Base
- Talent Management Base

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

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

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

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

Related Topics

- Planning Your Implementation: Procedure
- Oracle Applications Cloud Using Functional Setup Manager

Implementing Talent Review and Succession Management

Guide Structure: Explained

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

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

- Introduction
- Talent Review
- Succession Management
- Talent Pools
Introduction

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<td>An overview of Oracle Fusion Talent Review and description of how it integrates with other applications</td>
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<td>Talent Review Profile Options and Descriptive Flexfields</td>
<td>Manage Talent Review Profile Option Values</td>
<td>Describes the consequences of setting up the talent review profile option and defining a segment for a descriptive flexfield for Talent Review</td>
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<td>Manage Talent Review Descriptive Flexfields</td>
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<td>Talent Review Templates</td>
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<td>Talent Review Tasks and Notes</td>
<td>Manage Talent Review Lookups</td>
<td>Provides an overview of talent review tasks and notes and how to use them</td>
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<td>Succession Management</td>
<td>Manage Succession Management Lookups</td>
<td>Provides an overview of succession management, integrations with other applications, lookups, and descriptive flexfields</td>
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## Talent Pools

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<td>Talent Pools</td>
<td>Manage Descriptive Flexfields</td>
<td>Provides an overview of talent pools and descriptive flexfields</td>
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2 Talent Review Overview and Integrations

Talent Review: Explained

The talent review process involves one or more talent review meetings. Its purpose is to evaluate trends, assess strengths, and address areas of risk for the organization. This topic summarizes the activities that occur before and during talent review meetings. Manage the process in the Talent Review work area. Select My Client Groups > Talent Review.

The talent review meeting participants, typically managers in the relevant organization, review worker profile, performance, goals, and compensation data. Data from each meeting is retained automatically for use in future meetings. You can use this data to compare worker progress between talent review processes.

The human resource (HR) specialist (or other HR business partner), organizational business leader, managers, or any other assigned meeting facilitator manage the meetings.

Calibration of Worker Ratings

As a meeting participant, you can review relative positioning of workers and calibrate their ratings to give a clear picture of worker strengths and weaknesses. You view the ratings on an n-box, a box chart matrix, for the following ratings:

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

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

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

You can also update data, such as competencies and degrees, in the Details dialog box that you open from the Talent Review dashboard.

Organizational and Individual Review

You can review worker ratings for any level of the organization. For example, you can review workers in an organization as a single group. Alternatively, you can filter workers by job, location, or other categories. You can view an individual’s data, including performance and potential ratings, experience, education, licenses, certifications, and willingness to relocate.
Evaluate Risk and Impact of Loss

Compare the risk of loss and impact of loss ratings provided by participants for workers to ensure workers in key positions can be retained. Managers can use the data to develop development plans or incentives for valuable workers who are likely to leave or whose loss would be significant.

Compensation

You can configure talent reviews to review current compensation for workers, including salary, last increase, and stock options.

Worker Goals

You can view current worker goals. You can also:

- Create performance goals for worker performance evaluations.
- Create development goals for worker development plans.

Workers and managers can manage these goals. Goals that you create in a talent review appear automatically in worker profiles. They don’t appear in the goal library.

Notes and Tasks

You can create tasks and associated notes to address issues that participants identify for a talent review. You can also create tasks for workers whose risk or impact of loss ratings are high. You track tasks to completion using the Manage Notes and Tasks page.

Talent Pools and Succession Plans

You can review talent pools and succession plans that the talent review includes. You can move workers to talent pools and succession plans, and update the readiness levels of workers in succession plans. You can also create talent pools and succession plans.

Related Topics

- Succession Management: Explained
- Succession Plans, Talent Pools, and Talent Reviews: How They Work Together
- Talent Pools: Explained

Talent Review Life Cycle: Explained

The life cycle of a talent review includes tasks from creating the meeting template through conducting the review meeting to managing notes and tasks created for the meeting. This topic summarizes key stages in the talent review and identifies responsibilities. Manage talent reviews in the Talent Review work area. Select My Client Groups > Talent Review.
The following figure shows the life cycle of the talent review.

Creating the Meeting Template
The human resource (HR) specialist creates a talent review template in the Setup and Maintenance work area. Multiple talent reviews can use a single template. The template controls:

- The size of the review population
- Whether the review includes succession plans and talent pools
- The box-chart matrix options and default presentation
- The data available to meeting participants
- The actions that participants can perform
Creating and Scheduling a Meeting

Meeting facilitators, who must have the HR specialist role, create talent review meetings. They:

- Select a talent review template and schedule the meeting.
- Select the content available for reviewers to prepare before the meeting, from the options specified in the talent review template.
- Select meeting participants and designate them as either reviewers or participants.
- Identify the review population.

A meeting can have multiple facilitators, any of whom can perform the facilitator tasks. Reviewers can rate workers before the meeting, and attend the meeting. Participants attend the meeting and can provide feedback about worker ratings during the meeting.

Preparing and Submitting Content

Reviewers submit content for their direct and indirect reports before the meeting. The content can include ratings for the following profile data:

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

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

The facilitator can track content submission and notify reviewers when the deadline approaches. Workers for whom no one submitted current data appear in the meeting Holding Area, if it’s available.

Conducting the Talent Review Meeting

The facilitator starts the meeting in the Talent Review work area. During the meeting, participants provide information about what worker ratings should be. The facilitator then calibrates the ratings on the dashboard. The facilitator performs all actions during the meeting, as directed by the participants.

Depending on template options, the meeting participants can:

- View and update the meeting box chart.
- Review profile and compensation details of individual workers.
- Compare current data to that from previous meetings.
- Compare a worker to another worker or to a job profile.
- Access the organization chart of the organization under review.
- Assign performance and development goals to workers.
- Assign tasks to anyone in the organization.
Chapter 2
Talent Review Overview and Integrations

- Create notes for workers in the review population.
- Save the meeting or submit it to freeze the data.

Profile changes from a submitted meeting appear in the worker’s profile record. Goals, notes, and tasks are saved immediately. The meeting is also automatically saved periodically, and when participants perform actions outside the Talent Review work area.

Managing Notes and Tasks and Working on Goals
After the meeting, facilitators can manage and monitor notes and tasks, and review them for all workers for all meetings. Workers can access performance goals assigned to them from their goal management pages, and manage development goals from their career development pages.

Related Topics
- Talent Review Template: Explained
- Selecting Participants for a Talent Review: Points to Consider
- Preparing Content for a Talent Review Meeting: Explained

Talent Reviews: How They Work with Profiles, Goals, Performance Documents, and Compensation
Talent review templates control how talent reviews integrate with profiles, goals, performance documents, and compensation. This topic describes each of these integrations. Create talent review templates on the Manage Talent Review Templates page. In the Setup and Maintenance work area, use the following:

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

Profiles
Talent reviews place workers on a box chart according to their rating-level scores from their worker profiles. In the talent review template, you select from the following ratings and their associated rating models to set up the box chart:

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

The talent review template can include profile data from the worker Skills and Qualifications tab in the person spotlight, including competencies, degrees, languages, areas of expertise, and mobility rating.
The latest overall performance rating for a worker can come from the:

- Overall rating in the performance document
- Rating that a participant provides before the meeting
- Career Planning card

Latest overall competencies and goals ratings come from the Competencies and Goals sections of the most recent performance document. Alternatively, the Oracle Fusion Compensation Management business process can provide these ratings.

Latest worker profile data appears in the talent review. Updates made before and during the talent review meeting appear in the profile record, including the box label of selected views where the worker ends up. Instance qualifiers associate the updates with the talent review.

**Goals**

If Oracle Fusion Goal Management is available, talent review participants can view the review population’s current performance goals. If Oracle Fusion Career Development is available, they can review the review population’s development goals. Participants can create and assign new goals during the talent review meeting. They can also assign goals from the goal library.

Goals that participants create in a talent review don’t appear in the goal library. They appear in worker profiles as content items.

Workers and their managers can view assigned performance goals from their goal management pages and add performance goals to performance documents. They can view and manage assigned development goals from their career development pages.

**Performance Documents**

The template can enable participants to view and update overall worker competencies and overall goals ratings in the box chart. The ratings are the manager ratings from the Competencies and Goals sections in a performance document. The ratings are available if the performance template supports overall section ratings.

If the talent review template includes performance details, then participants can view the overall ratings and comments from the worker’s most recent performance evaluation. Participants can open the three most recent performance documents in the talent review.

**Compensation**

The talent review template can make worker compensation data, including salary, variable compensation, and stock grant information, available to view in the talent review meeting.

**Related Topics**

- Accessing Tasks to Update Existing Setup Data: Procedure

**FAQs**
How can I diagnose any issues with Oracle Fusion Talent Review data?

Run the Talent Review Integrity Validations test. In the global area of the Diagnostic Dashboard, select **Settings and Actions - Troubleshooting - Run Diagnostic Tests**. The test generates a report identifying invalid rows, which you can repair or remove.

The test validates that:

- Business groups are valid and exist.
- Foreign key attributes aren’t null.
- Row counts on setup tables are greater than zero.
3 Talent Review Profile Options and Descriptive Flexfields

Oracle Fusion Talent Review Profile Options

Set the profile option value for Oracle Fusion Talent Review to specify the folder to store analyses for selecting the review population for a meeting. When the facilitator selects the review population using the Add from Analyses feature, the application displays the list of analyses stored in the specified Oracle Transactional Business Intelligence (OTBI) folder location.

You set the profile value using the Manage Talent Review Profile Option Values task.

You can enter only one folder location. The profile value must start with a forward slash (/), but not end with a forward slash.

Tip: You can copy the folder path directly from OTBI by navigating to Properties for one of the analyses in the folder. You can copy the location that displays and paste it into the Profile Value field.

Default Reports Folder for Talent Review

This table shows the profile value that enables analyses to be stored for use to select the review population of a talent review meeting.

<table>
<thead>
<tr>
<th>Profile Option Code</th>
<th>Profile Display Name</th>
<th>Profile Value Default</th>
<th>Effect of Entering a Profile Value</th>
<th>Effect of Not Entering a Profile Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRR_DEFAULT_REPORT_FOLDER</td>
<td>Default Reports Folder for Talent Review</td>
<td>None</td>
<td>Enables HR specialists to add analyses to the specified folder, and use the analysis to add workers to the review population of a talent review meeting.</td>
<td>HR specialists can’t use analyses to add workers to the review population of a talent review.</td>
</tr>
</tbody>
</table>

Related Topics

- Selecting the Review Population for a Talent Review: Points to Consider
- Profile Options: Overview

Descriptive Flexfields for Oracle Fusion Talent Review

To add company-defined attributes, for example the size of a meeting, use descriptive flexfields for an Oracle Fusion Talent Review entity. You can use descriptive flexfields to define validation and display properties.
Defining Descriptive Flexfield Segments

Use the Manage Talent Review Descriptive Flexfields task to define a segment for a descriptive flexfield for Talent Review. You can add more information related to these Talent Review entities, such as the talent review template and pages on which you create meetings.

There are two descriptive flexfields available in Talent Review.

<table>
<thead>
<tr>
<th>Descriptive Flexfield</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRR_DASHBOARD_TMPLS_B</td>
<td>Fields for template details that appear in the top section of the Create Talent Review Template and Manage Talent Review Template pages.</td>
</tr>
<tr>
<td>HRR_MEETINGS</td>
<td>Fields for meeting details that appear at the bottom of the Create and Edit Talent Review Meeting: Enter Meeting Details pages.</td>
</tr>
</tbody>
</table>

Related Topics

- Descriptive Flexfields: Explained
- Flexfields: Overview
4 Talent Review Templates

Talent Review Template: Explained

The talent review template controls the layout of the box chart used to display worker ratings and other key aspects of talent review meetings. This topic describes those key aspects and helps you decide how many templates to create. An implementor creates a template, which is required to create a talent review meeting. A template can be used for multiple meetings.

You create talent review templates on the Manage Talent Review Templates page. Use the Configure Talent Review Dashboard Options task in the Setup and Maintenance work area.

Number of Templates

You need multiple templates if:

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

If you use a standard process throughout the enterprise, then you can use a single template.

Maximum Number of Records

The maximum number of records is the number of workers in the review population multiplied by the number of meetings available to view. You can view up to three meetings including the current meeting. For example, if you evaluate 500 workers and view two prior meetings, set the maximum number of records to at least 1500.

Succession Plans and Talent Pools

You specify whether meetings can include succession plans and talent pools. If yes, when the meeting facilitator creates the meeting, they can add any plans or pools they own. The plans and pool appear on the meeting dashboard. Facilitators can add candidates to plans and members to pools. During the meeting facilitators can create plans and pools and add candidates and members to plans and pools. If succession plans and talent pools aren’t enabled, no plans or pools appear on the meeting dashboard or can be added.

The settings also govern actions on the participant view of the dashboard available on the Prepare Review Content page. Participants can add workers to plans and pools they own. They can also create plans and pools.

Color Scheme

You can optionally select the color scheme to display on the box chart. The color scheme provides a visual cue of the progress of worker ratings. For the Blue and white or Red and green color schemes, one color starts at the bottom left and becomes fainter as it approaches the center of the box chart. The other color starts fainter in the center and darkens as
it approaches the upper right of the box chart. For the Grayscale option, the gray gets progressively darker from the bottom left of the box chart matrix to the upper right.

> Note: The option to select a color scheme isn't available if you have enabled the redesigned dashboard.

**Submission Process Threshold**

Enter the number of workers in the review population above which a scheduled process starts automatically to update ratings when the facilitator submits the meeting. Upon submitting the meeting, a message appears informing the facilitator of the process job number. The facilitator can use the Scheduled Processes task to track the status. If you enter no threshold number, when the facilitator submits the meeting, the ratings are updated to the worker profiles without a scheduled process.

**Box Chart Matrix Options**

To configure the box chart matrix that appears on the Talent Review dashboard, you:

- Select ratings from the available list to use in the box chart.
- Specify the rating model used for each rating.
- Select the default view that appears when the Talent Review dashboard is opened.
- Configure labels for each rating, which appear on the box chart and the table view.
- Select which views to submit to the worker profile to indicate which box the worker is assigned to.

For box charts using two rating models, the number of rating categories in the rating models you selected determines the box-chart dimensions. For example, one rating model combination may deliver a nine-box configuration and another a six-box configuration. For box charts using one rating, you select the dimensions and the rating levels to populate each box.

When creating a meeting from the template, the facilitator can specify which of these ratings are available for participants to view and rate on the Prepare Review Content page.

**Data Options Selection**

You can:

- Include filters that group workers in the meeting box chart according to values such as job and location.
- Control whether meeting participants can review worker performance evaluation, goal, profile, and compensation information.
- Decide which actions participants can perform, such as adding goals, using the Holding Area, and assessing potential.
- Specify the diversity-related information, such as ethnicity, gender, and age, available to participants.

**Related Topics**

- Talent Reviews: How They Work with Profiles, Goals, Performance Documents, and Compensation
- Talent Review Life Cycle: Explained
- Succession Plans, Talent Pools, and Talent Reviews: How They Work Together
Selecting Box Chart Matrix Options for the Talent Review Template: Critical Choices

You configure the box chart matrix in the talent review template to determine the ratings that participants can review and the box chart views on the Talent Review dashboard. To display the ratings, you must add the ratings to either an XY view, with two ratings as axes, or a single rating view, with one rating. You create talent review templates on the Manage Talent Review Templates page. In the Setup and Maintenance work area, use the following:

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

Rating

You select the rating types to use in the box chart to review and rate workers. The ratings you select also appear in the table view of the box chart. The available rating types are:

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

Overall Competencies and Goals Ratings

The overall competencies and overall goals ratings originate from their respective sections in the performance document when they're configured to allow section ratings. Otherwise, you can update those ratings only in the talent review meeting.

Talent Score

The talent score is useful to differentiate and score workers based on factors beyond performance and potential. These might include readiness, ability to mentor, learning agility, or whatever criteria your enterprise uses to rate workers beyond their performance and potential. The talent score is optional in the talent review.

Displayed Labels

The label appears on the box chart matrix for the rating when it's used as an axis in the box chart. It also appears on the table view of the box chart that displays the ratings and additional information used in the meeting.
Rating Models
Select a rating model for each rating. You must select the rating model used for the rating type elsewhere in Talent Management to:

- Enable worker profile data to appear in the meeting
- Display the updated ratings for the meeting wherever the ratings appear throughout the application
- Compare the ratings to those from previous meetings when using the Show progress function that you enable when creating a meeting

Workers who were rated using a different rating model, or for whom no ratings exist, don’t appear on the box chart, but in the Holding Area of the talent review. These could include, for example, a worker who recently transferred from one organization that uses one performance rating model to another organization that uses a different performance rating model.

*Note:* You must set up rating models in Oracle Fusion Profile Management to make them available for the talent review.

Box Chart Dimensions
The rating models used for the ratings you add as a view determines the dimensions and number of boxes in the box chart.

For ratings used as axes in the XY view, the number of rating categories contained in the rating models determines the number of boxes in the chart and the dimension. For example, if you map a performance rating model with two rating categories to the X-axis, and a potential rating model with three categories to the Y-axis, then the box chart contains six boxes (2 x 3). The box chart is two boxes wide (the performance rating model) and three boxes tall (the potential rating model).

*Note:* The rating models you select as the axes of an XY view must contain rating categories. If the rating models you select don’t have rating categories, the box chart doesn’t appear because the dimensions can’t be determined.

For a single rating view, you select the number of rows and columns to determine the dimensions of the box chart.

Select Available Ratings
Select Select Available Ratings to make the rating type available to use in a view in the box chart. Talent review meeting creators can also select the rating to appear in the box chart view available to reviewers from the Prepare Review Content page.

*Note:* Selecting Select Available Ratings for the risk of loss and impact of loss rating models affects only the box chart view. This action has no impact on whether you can select the ratings as analytic options in the template. As analytic options, the ratings appear in the details displayed for each worker, and on the box chart matrix with different colors or shapes to distinguish each worker’s rating. You can update the ratings in the box chart without using the analytic option.

Box Chart Views
In the Box Chart Views section, you add and configure the available views, using the ratings you selected in the Box Chart Matrix section.
Add Views
You can configure multiple unique box chart views to display worker ratings. In the meeting, participants can update worker
ratings for the rating types you specify as views in the box chart. You can add two types of views:
  • XY View, which uses two separate ratings as the axes
  • Single Rating View, which uses one rating as the lone measure in the view

When you create multiple views, participants can switch from one view to another to review and update different ratings.

Set as Default
You specify the default view for the meeting. You can switch between views during the meeting.

Submit Box Assignment
When you select **Submit Box Assignment** for a view, the label of the box where the worker is located:
  • Appears in the table view of the box chart as the Box Assignment
  • Updates in the worker profile

You must select one XY view and one single rating view, if both exist. If you don’t use one or the other view types, select a
view for the type you added.

Box Configuration
You must add a label for each box in the view:
  • For ratings used in the XY View, you can enter any label.
  • For ratings used in the Single Rating View, you select a value from the **Short Description** attribute of the rating
    levels contained in the rating model, along with the box chart dimensions. You can select from one to five rows and
    columns, up to a maximum of 25 (5 x 5) boxes in the box chart.

**Related Topics**
  • Accessing Tasks to Update Existing Setup Data: Procedure

**Talent Review Data Options: Points to Consider**
In the talent review meeting template, you specify the data and actions available to meeting facilitators and participants.
Meeting facilitators can override some of these decisions to restrict access to reviewers on the Prepare Review Content page
when creating a meeting. Create meeting review templates using the Configure Talent Review Dashboard Options task in the
Setup and Maintenance work area.

**Analytic Options**
The analytic options are risk of loss, impact of loss, and worker mobility. This information appears on the box chart matrix.
Facilitators and reviewers can select up to two of these values at one time during the meeting.
These options are available only if:

- Rating models exist for risk of loss and impact of loss.
- A mobility content type exists.

Predefined values exist for each of these options in profile management business process.

## Detail-on-Demand Options

The details-on-demand options appear on a worker’s person spotlight. The facilitator can open these options from the dashboard during the meeting. Meeting reviewers can also open the worker’s person spotlight from their view of the dashboard. The details show data for the individuals being reviewed. The table shows the effect of selecting the options.

<table>
<thead>
<tr>
<th>Detail-on-Demand Option</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Career Planning</td>
<td>View the Career Planning tab that shows careers of interest, career statement, worker and career preferences, succession plan membership, and talent ratings.</td>
</tr>
<tr>
<td>Compensation Plan Details</td>
<td>Participants can view worker compensation. The compensation management business process must be available.</td>
</tr>
<tr>
<td>Employment</td>
<td>View the Employment tab that displays worker job details and employment history.</td>
</tr>
<tr>
<td>Goals</td>
<td>Participants can view a worker’s current performance and development goals.</td>
</tr>
<tr>
<td>Performance Details</td>
<td>Participants can view the overall performance ratings from a worker’s three latest performance documents.</td>
</tr>
<tr>
<td>Profile Details</td>
<td>Participants can view worker profile data on the Skills and Qualifications tab.</td>
</tr>
<tr>
<td>Public Person</td>
<td>Participants can view the Public Person tab that displays information about the workers’ descriptions of themselves, their areas of expertise and interest, their managers and peers, feedback links, and more.</td>
</tr>
<tr>
<td>Succession Planning</td>
<td>Facilitators can view succession plans and talent pools that include the worker. They can also view any succession plans to replace the worker.</td>
</tr>
</tbody>
</table>

## Population Filters

You can allow participants to filter workers on the box chart by job, or competency, for example.

## Reviewers and Participants

Select **Reviewers and Participants** to enable facilitators and reviewers to display all managers in the review population hierarchy, even if they have no direct reports in the review population. All workers in the organization of selected reviewers and participants appear on the dashboard if they are part of the review population.
Subordinate Level
Select **Subordinate Level** to allow filtering to display only the selected levels below the business leader. People in the review population who are not part of the business leader’s organization aren’t filtered using the subordinate level filter.

Actions
Select the action options to appear in the Actions section of the talent review dashboard. The table describes the available actions.

<table>
<thead>
<tr>
<th>Action Options</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Notes</td>
<td>The facilitator can create notes. The facilitator can also manage notes created by the worker’s manager during the content preparation phase before the talent review, and capture notes during the meeting</td>
</tr>
<tr>
<td>Add Task</td>
<td>The facilitator can assign tasks to meeting participants and others. The tasks appear in the Manage Notes and Tasks task the facilitator uses after the meeting to follow up on assigned tasks.</td>
</tr>
<tr>
<td>Add Goal</td>
<td>The facilitator can assign performance or development goals from the goal library, or create goals. The goal management business process must be available to create performance goals. The career development business process must be available to create development goals.</td>
</tr>
<tr>
<td>Enable Holding Area</td>
<td>The Holding Area displays workers without ratings at the start of the meeting. During the meeting, participants can move workers to this area from the box chart. If you don’t enable the Holding Area, workers without ratings at the start of the meeting don’t appear in the review.</td>
</tr>
<tr>
<td>Enable Compare</td>
<td>Participants can compare a worker with other workers or a job profile.</td>
</tr>
<tr>
<td>Enable Organization Chart</td>
<td>Participants can view the organization chart of the organization under review.</td>
</tr>
<tr>
<td>Enable Potential Assessment</td>
<td>Before the meeting, reviewers answer potential-assessment questions on the Prepare Review Content page. The potential rating is calculated automatically based on the responses.</td>
</tr>
</tbody>
</table>

Color Code Options
Facilitators and participants can use color code options to highlight selected segments of the review population. They can show the average ratings for all workers within that option.

Related Topics
- Succession Plans, Talent Pools, and Talent Reviews: How They Work Together

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

Yes. On the Manage Talent Review Templates page, you can edit attributes including axis labels, default view, box labels, color scheme, and data options. You can’t edit the template name, owner, status, or selected rating models. Changes take effect when you next open the meeting.
Potential Assessment

Potential Assessment: Explained

The potential assessment is a questionnaire talent review meeting reviewers can use to rate the potential of workers prior to the meeting. Reviewers can use the potential assessment to decide a worker’s potential rating as an alternative to selecting a numeric value for the potential rating. The application calculates the potential rating based on reviewer responses to the detailed questions you create on the potential assessment to assess workers. Potential ratings are available to view during the meeting.

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

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

Potential Rating by Reviewers

On the Prepare Review Content page, the reviewer can:

- Answer the questions and use the calculated rating.
- Select a different rating.
- Complete the potential assessment again to calculate a new rating.

The rating updates the worker profile when the reviewer submits the Prepare Review Content page.

Elements that Determine Potential Rating

To calculate the potential rating, the potential assessment uses a combination of the:

- Total value of responses in the questionnaire as determined by the number of questions and the values for each response as set up in the Potential Assessment rating model
- Available ratings as determined by the Potential Rating Model.

Potential Assessment Configuration

You must configure the potential assessment before it is available to use in meetings. A predefined potential assessment questionnaire, named Potential Rating, exists in the Potential Rating folder. You must add questions to the questionnaire to make it valid. The responses you can associate with the question are those in the Potential Rating Model. The questionnaire is set up so eight questions are the optimal number, but you can add more or fewer questions.

You must also configure the Potential and Potential Assessment rating models to add or change rating levels or review points. You manage rating models on the Manage Profile Rating Models page. In the Setup and Maintenance work area, use the following:

- Offering: Workforce Development
Enabling the Potential Assessment
On the talent review template, you select whether to enable reviewers to access the potential assessment. You create talent review templates on the Manage Talent Review Templates page. In the Setup and Maintenance work area, use the following:

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

Related Topics
- Questionnaires: Explained
- Rating Models: Explained
- Accessing Tasks to Update Existing Setup Data: Procedure

Configuring a Potential Assessment: Points to Consider
You must configure a Potential Assessment questionnaire if you intend to configure the talent review template to let reviewers use it to rate potential it in a talent review. The Potential Assessment is not required for reviewers to select potential ratings. This topic describes adding sections and questions to the Potential Assessment, and selecting available response types and presentation. Use the Manage Potential Assessment task in the Setup and Maintenance work area.

Sections
You can add sections to differentiate by question type or other criteria. You must create at least one section.
For each section, you can enter specific instructions.

Questions and Responses
In a selected section, you can:
- Create new questions.
- Add questions from the Potential Assessment question library if the question was removed from a previous version of the Potential Assessment.

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

Available Responses
The responses are determined by the rating levels in the Potential Assessment rating model:
- The number of rating levels is the same as the number of potential responses.
- The text of the response is the short description value for the rating level.
• The value of each response is the numeric rating of the rating level.

Response Presentation
You can select one of the following types of response presentations:
  • Single Choice from List, which allows users to select a response from a list
  • Radio Button List

Number of Questions
The number of questions you add is determined by a combination of the:
  • Number of rating levels and numeric rating for each in the Potential Assessment rating model
  • Rating level and corresponding range of review points for each rating level in the Potential Rating Model

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

Number of Questions Examples
In this first example, by using the criteria in the table, you can determine that 8 is an appropriate number of questions to create to rate potential.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>8</td>
<td>1</td>
<td>1</td>
<td>0-13</td>
<td>1-Low</td>
</tr>
<tr>
<td>2</td>
<td>2</td>
<td>16</td>
<td>2</td>
<td>2</td>
<td>14-21</td>
<td>2-Medium</td>
</tr>
<tr>
<td>3</td>
<td>3</td>
<td>24</td>
<td>3</td>
<td>3</td>
<td>22-99</td>
<td>3-High</td>
</tr>
</tbody>
</table>

In this second example, the review points were changed for each level, so you can determine that 5 is an appropriate number of questions to create to rate potential.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>5</td>
<td>1</td>
<td>1</td>
<td>0-7</td>
<td>1-Low</td>
</tr>
<tr>
<td>2</td>
<td>2</td>
<td>10</td>
<td>2</td>
<td>2</td>
<td>8-12</td>
<td>2-Medium</td>
</tr>
<tr>
<td>3</td>
<td>3</td>
<td>15</td>
<td>3</td>
<td>3</td>
<td>13-99</td>
<td>3-High</td>
</tr>
</tbody>
</table>
Rating Potential Using the Potential Assessment: How It Is Calculated

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

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

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

Settings That Affect Potential Assessment

There are three configurations that affect the ranking score:

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

How Potential Rating Is Calculated

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

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

When the reviewer completes the potential assessment:

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

Example

In this example:

- The Potential Rating questionnaire contains eight questions.
The Potential Assessment rating model contains three rating levels, one for each possible response to the questions. Each rating level has a numeric rating. The responses and their numeric ratings are:

- Strongly Agree: 3
- Agree: 2
- Disagree: 1

The Potential Rating Model has three rating levels. The table shows the numeric ratings for each rating level in the Potential Rating Model, the short description that describes the rating level, the review points, and the points range for each level.

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

<table>
<thead>
<tr>
<th>Numeric Rating for Rating Level</th>
<th>Short Description</th>
<th>Review Points</th>
<th>Points Range: From Points</th>
<th>Points Range: To Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Low</td>
<td>1</td>
<td>0</td>
<td>13</td>
</tr>
<tr>
<td>2</td>
<td>Medium</td>
<td>2</td>
<td>14</td>
<td>20</td>
</tr>
<tr>
<td>3</td>
<td>High</td>
<td>3</td>
<td>21</td>
<td>99</td>
</tr>
</tbody>
</table>

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

**Related Topics**
- Accessing Tasks to Update Existing Setup Data: Procedure

## Configuring a Potential Assessment: Worked Example

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

The following table summarizes key decisions for this scenario.

<table>
<thead>
<tr>
<th>Decisions to Consider</th>
<th>In This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>How many sections?</td>
<td>One</td>
</tr>
<tr>
<td>How many questions should I create for the questionnaire?</td>
<td>Eight</td>
</tr>
</tbody>
</table>
Summary of the Tasks

Configure the Potential Assessment questionnaire.

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

Prerequisites

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

<table>
<thead>
<tr>
<th>Rating Level</th>
<th>Name and Short Description</th>
<th>Numeric Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>DISAGREE</td>
<td>Disagree</td>
<td>1</td>
</tr>
<tr>
<td>AGREE</td>
<td>Agree</td>
<td>2</td>
</tr>
<tr>
<td>STRONGLY_AGREE</td>
<td>Strongly Agree</td>
<td>3</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Rating Level</th>
<th>Name and Short Description</th>
<th>Review Points</th>
<th>Review Points From Points</th>
<th>Review Points To Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOW</td>
<td>Low</td>
<td>1</td>
<td>0</td>
<td>13</td>
</tr>
<tr>
<td>MEDIUM</td>
<td>Medium</td>
<td>2</td>
<td>14</td>
<td>20</td>
</tr>
<tr>
<td>HIGH</td>
<td>High</td>
<td>3</td>
<td>21</td>
<td>99</td>
</tr>
</tbody>
</table>

Entering Questionnaire Basic Information

1. In the Set Up and Maintenance work area, click Manage Potential Assessment to open the Manage Questionnaires page.
2. In the Search Results section, select Potential Rating and click Edit to open the Edit Questionnaire: Potential Rating dialog box.
3. Leave Update Existing Questionnaire selected and click OK to open the Edit Questionnaire Basic Information page.
4. On the Edit Questionnaire Basic Information page, complete the fields, as shown in this table.
Entering Questionnaire Contents

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Section Order</td>
<td>Sequential</td>
</tr>
<tr>
<td>Section Presentation</td>
<td>No Sections</td>
</tr>
<tr>
<td>Page Layout</td>
<td>1 Column</td>
</tr>
<tr>
<td>Maximum Number of Questions per Page</td>
<td>Blank</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Section 1</td>
</tr>
<tr>
<td>Description</td>
<td>Any</td>
</tr>
<tr>
<td>Question Order</td>
<td>Vertical</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Question Order</td>
<td>Vertical</td>
</tr>
<tr>
<td>Response Order</td>
<td>Vertical</td>
</tr>
</tbody>
</table>
Creating Questions

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

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

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

Talent Review Tasks: Explained

Talent review meeting facilitators can create, assign, and manage tasks for action items arising from a talent review. This topic describes administration details for task assignments. It also describes who can edit tasks, and where. Everyone who has access to the Manage Notes and Tasks page can view all tasks for the review population, including those from previous talent reviews.

Manage talent review meetings and the associated tasks from the Talent Review work area. Select My Client Groups > Talent Review.

Creating and Assigning Tasks

You can create and assign tasks on the Talent Review dashboard and Manage Notes and Tasks page.

When you create tasks, you must select an assignee. You can assign a task to anyone; you aren’t restricted to assigning tasks to meeting participants or the review population. You can select any one person in the review population as the associated worker. When you add a task to a selected worker on the Talent Review dashboard, the worker is automatically the Associated Worker, and the worker’s manager is the Assignee. You can change those roles when you create the task on the dashboard.

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

<table>
<thead>
<tr>
<th>Task Detail</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Associated Worker</td>
<td>The worker for whom the task assignee must perform some action.</td>
</tr>
<tr>
<td>Assignees</td>
<td>One or more workers who perform the task.</td>
</tr>
<tr>
<td>Owners</td>
<td>People who manage the task. The meeting facilitator is the task owner by default, but you can add more owners. Owners aren’t required to be meeting facilitators, but if the task owners can’t access to the Manage Notes and Tasks page, they may not be able to manage the task.</td>
</tr>
<tr>
<td>Task Type</td>
<td>Task category, such as Preparation, Presentation, and so on. Task type values exist in the HRT_TASK_TYPE lookup. You can add values to suit business requirements.</td>
</tr>
<tr>
<td>Due Date</td>
<td>Date by when assignees must complete the task. The default date is one year from the current date.</td>
</tr>
<tr>
<td>Priority</td>
<td>Level of urgency for the task, such as High, Medium, or Low. Priority values exist in the HRT_TASK_PRIORITY lookup. You can add values to suit business requirements.</td>
</tr>
<tr>
<td>Percentage Complete</td>
<td>The completion percentage of the task. Owners update the field as the assignee progresses on the task.</td>
</tr>
<tr>
<td>Status</td>
<td>Assigned or Completed. Once the status is Completed, all fields except Owners become read-only.</td>
</tr>
</tbody>
</table>
### Task Detail

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Start Date</strong></td>
<td>Date when work begins for the task.</td>
</tr>
<tr>
<td><strong>End Date</strong></td>
<td>Date when the task is completed.</td>
</tr>
</tbody>
</table>

### Editing Tasks

You can edit any task fields, and reassign and delete tasks. If a task has multiple owners or assignees, then any changes that one makes are seen by the others.

You can edit tasks on the Manage Notes and Tasks page. However, you can’t edit any existing tasks on the Talent Review meeting dashboard.

### Reviewing History

You can view all tasks for all current and past meetings for the members of the review population. Click the **History** button in the table to see all tasks for a worker. The history is available only for tasks with an associated worker.

### Exporting Tasks

To review all tasks for the meeting, you can export the tasks to a spreadsheet.

### Related Topics

- Profile Management Lookups: Explained

### Talent Review Notes: Explained

You can create notes for workers in the review population of talent review meetings in multiple talent review processes. Notes use the Feedback feature that is available in the person spotlight and person smart navigation.

### Notes and Feedback

Only notes created within the talent review business process appear there. However, all notes appear as feedback in the person spotlight and person smart navigation. Feedback that originates as a talent review note is designated as such in the Feedback dialog box.

### Note Management

You can manage notes in multiple locations:

- Facilitators create and manage notes on the Talent Review dashboard, in the person spotlight they access using the Show Details action, and on the Manage Notes and Tasks page. Select **My Client Groups > Talent Review**. Facilitators can see all notes created for the meeting.
• Reviewers create and manage notes for their direct and indirect reports on the Prepare Review Content page and on the reviewer dashboard view for a selected meeting before and after the meeting. Select **My Team > Talent Review**. Reviewers can see all notes created for the meeting for their direct and indirect reports.

**Note Creation and Editing**

You can edit all attributes of a note until you save it. After saving it, you can change the note text and visibility, but you can’t select a different worker.

**Security and Visibility**

Facilitators and reviewers can only create and view notes for people to whom they have security access. You also set the visibility for a note to determine who can see it. The table shows the visibility settings and who can see the note for each setting.

<table>
<thead>
<tr>
<th>Visibility Setting</th>
<th>Viewers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Everyone</td>
<td>A public note visible to any person in the organization. People who are not participants in the meeting can view the note in the person spotlight and the person smart navigation</td>
</tr>
<tr>
<td>Managers Only</td>
<td>Managers in the hierarchy of the worker about whom the Feedback is created</td>
</tr>
<tr>
<td>Managers and &lt;Worker Name&gt;</td>
<td>Managers in the hierarchy of the worker, and the worker who receives the feedback. The worker can view the note in the person spotlight and person smart navigation</td>
</tr>
<tr>
<td>Only Me</td>
<td>A private note created by a manager or worker about themselves or another person visible only to the author. However, if the facilitator creates it on the dashboard during the actual meeting, the note is visible to participants during the meeting</td>
</tr>
</tbody>
</table>

**Hide Notes and Feedback**

A person who receives a note or feedback and the HR specialist who has administrative oversight of the person can hide the note or feedback. The person who hides the note or feedback can unhide it, but no one else can unhide it. The note or feedback author can view it and see that it’s hidden.

**History**

On the Manage Notes and Tasks page, facilitators can view all notes for all meetings for the members of the review population, including those created by reviewers on the Prepare Review Content page. Click the **History** button in the table to see all notes for a worker.

**Reports**

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

**Related Topics**

- Feedback: Explained
Talent Review Tasks and Notes
7 Succession Management

Succession Management: Explained

Using succession management, you can create succession plans for replacing key personnel. Succession plans identify workers who are ready now, or who can become ready by developing the necessary skills, for jobs and positions that are likely to become vacant. Succession plans can ensure a smooth transition and help you to manage candidate development. You manage succession plans in the Succession Plans work area (My Client Groups > Succession Plans).

Succession Plan Type
You can create the following types of succession plans:

- Incumbent
- Job
- Position

Use the Incumbent plan type to replace a named individual. Use the other plan types to identify candidates for a job or position.

Candidates in Succession Plans
As the succession plan owner, you identify candidates for the relevant job or position. You can:

- Select named candidates.
- Use best-fit analysis to identify workers whose person profiles most closely match the job or position requirements.

Tip: You can also use the Add to Succession Plan Quick Action available in My Team and My Client Groups work areas to add a candidate to a succession plan.

You can open the person spotlight to view additional information about a candidate, such as person and employment information, goals, and performance ratings. On the Succession Plans page, you can open a candidate’s person spotlight from the sunburst diagram. Owners can also open a candidate’s person spotlight from the Select Candidates page.

Succession plans can have multiple owners from different organizations, so the plan can include candidates from multiple organizations.

Candidate Readiness
You can specify a candidate’s readiness to assume a job or position. For example, you can specify that a candidate is ready now. You select a readiness level based on your knowledge of the candidate and how well the candidate’s current competencies match the skills of the job or position associated with the plan.

You can use the Candidate Ranking and Interim Successor attributes to specify which of your candidates on a succession plan are most capable of filling a vacant job. Using candidate ranking, you can enter the order of preference for succession plan candidates to fill the job associated with the plan when it becomes vacant. You can have multiple candidates with the same ranking across readiness categories. For example, you can rank candidates across the entire plan, or you can rank candidates within a readiness category.
The readiness levels of all candidates in a plan determine the bench strength for the job or position and your organization. For example, if no candidate is likely to be ready in the next 2 years, the bench strength is poor. You can add candidates if this is the case.

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

**Succession Plans Access**
You manage succession plans in the Succession Plans work area or in a talent review meeting. To access the Succession Plans work area, owners must inherit the Succession Plan Management duty role. The HR specialist job role inherits this duty role by default. To manage a plan in the Succession Plans work area, you must be an owner of the plan or you must have access to the named or inferred incumbent of the plan. Whoever creates or edits the plan can select the plan owners. Any person who holds the job or position for which the succession plan is created is an inferred incumbent. For more information about roles and security, see the Oracle Human Capital Management Cloud Security Reference.

> **Note:** You can create a custom super user role and assign this role to any user. A super user can view and update all succession plans even if the super user is not named as an owner of the plan or does not have access to any of the named or inferred incumbents of the plans.

Managers can also create succession plans, or add workers to them, on the organization chart or from person smart navigation. Managers can also use the My Team Quick Actions to create a succession plan and add a candidate to a succession plan. When trying to add a candidate to a succession plan, managers can only view succession plans for which they are either the named owner or have access to the named or inferred incumbent.

On the Succession Planning page in person spotlight, managers can view:

- Succession plans for a direct or indirect report who is either an incumbent, or the job or position for the plan of that type is the same as that of the report. For example, if the direct report has the job Senior Manager, a job plan defined for the Senior Manager job appears on the Succession Planning page for that direct report.
- The number of succession plans in which their reports are candidates, if the manager is an owner of the plan, along with the plan names.

> **Note:** On the Succession Planning page in person spotlight, managers can only view plans in which they are a named owner or have access to the named or inferred incumbent.

Talent review meeting facilitators can make succession plans and talent pools available in the meeting when they create the meeting. During the meeting, facilitators can also create succession plans and edit existing plans to add candidates and specify their readiness. They can also view talent pools and add pool members to the plans.

> **Note:** Facilitators can associate the following private plans with a talent review meeting:
- Plans in which the facilitators are named owners
- Plans for which the facilitators are administrators or candidate managers
- Facilitators can associate only the following nonprivate plans with a meeting:
- Plans in which the facilitators are named owners
- Plans in which the facilitators have access to the named or inferred incumbent
Identifying Inferred Incumbents of Succession Plans: Explained

Any person who holds the job or position for which the succession plan is created is an inferred incumbent. In the automatic plan access method, only the following users can access nonprivate succession plans:

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

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

Succession Plan Incumbents Process

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

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

To run the Succession Plan Incumbents process:

2. In the Schedule New Process dialog box, from the Name list, select the Succession Plan Incumbents process, and click OK.
3. Optionally, in the Process Details dialog box, change the process schedule to one that is appropriate for your organization and define notifications.

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

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

Related Topics

- Scheduled Processes: Explained
Succession Plans, Talent Pools, and Talent Reviews: How They Work Together

Succession plans, talent pools, and talent review meetings together support the development of selected workers to meet enterprise goals or fill key roles. You manage succession plans and talent pools in the Succession Plans work area (My Client Groups > Succession Plans). You select succession plans and talent pools for a talent review meeting when you select the meeting content in the Talent Review work area (My Client Groups > Talent Review).

Talent Pools and Succession Plans
You can group workers in talent pools to manage their development, training, and other goals. Using succession plans, you can track the readiness of candidates for a specific job or position. You can use talent pools either with or without succession plans.

Talent Pools Without Succession Plans
Typically, you use talent pools without succession plans when worker development isn’t tied to a particular role. For example, you may create talent pools to track how high-potential workers are progressing. These workers may move into various roles at different rates.

Talent Pools with Succession Plans
You can use talent pools with succession plans to track the development of candidates for a specific job or position. When you add candidates to a succession plan, you can also add them to a talent pool. For example, you could create a talent pool of salespeople who could move into the sales director role. You assign development goals to this talent pool and track progress during annual talent review meetings. When the current sales director sets a retirement date, you use the succession management plan to identify a replacement.

Talent Review Meetings with Succession Plans and Talent Pools
When you set up a talent review meeting, you can associate succession plans and talent pools with the meeting. During the meeting, the selected talent pools and succession plans appear on the meeting dashboard. You can drag workers from the box chart matrix to a talent pool or succession plan. You can add workers to a succession plan or talent pool that is associated with the meeting. The workers must be members of the talent review meeting review population. The available plans and pools are those that the facilitators own.

You can also create talent pools and succession plans on the meeting dashboard and add workers to them.

Related Topics
- Talent Review: Explained
- Talent Pools: Explained
Succession Management Lookups: Explained

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

Succession Management Lookups

The following table describes the succession management lookups.

<table>
<thead>
<tr>
<th>Lookup Type</th>
<th>Description</th>
<th>Configuration Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRM_READINESS_CATEGORY</td>
<td>The estimated time before a candidate is ready to move into a job or position, such as ready now, ready in 1-2 years, and ready in 3-4 years. You must add lookups or you're limited to the seeded values Ready now and No readiness available.</td>
<td>Extensible</td>
</tr>
<tr>
<td>HRM_SUCC_CAND_STATUS</td>
<td>The status of the succession plan candidate:</td>
<td>System</td>
</tr>
<tr>
<td></td>
<td>• <strong>Active</strong>: The employee is an active candidate for the plan.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <strong>Inactive</strong>: The employee is no longer considered a plan candidate.</td>
<td></td>
</tr>
<tr>
<td>HRM_SUCC_PLAN_STATUS</td>
<td>The status of the succession plan:</td>
<td>System</td>
</tr>
<tr>
<td></td>
<td>• <strong>Active</strong>: The succession plan is still needed and is valid.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <strong>Inactive</strong>: The succession plan is no longer needed.</td>
<td></td>
</tr>
<tr>
<td>HRM_SUCC_PLAN_TYPE</td>
<td>The type of the succession plan:</td>
<td>System</td>
</tr>
<tr>
<td></td>
<td>• <strong>Incumbent</strong>: The succession plan is created to replace a specific employee.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <strong>Job</strong>: The succession plan is created for a particular job role, for example, Systems Analyst.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <strong>Position</strong>: The succession plan is created for a particular position, for example, Executive Vice President-Sales.</td>
<td></td>
</tr>
</tbody>
</table>
Descriptive Flexfields for Succession Management

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

Defining Descriptive Flexfield Segments

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

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

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

Related Topics

- Descriptive Flexfields: Explained
- Flexfields: Overview

Displaying Succession Candidate Card in Directory: Procedure

In Directory, the Succession Candidates section of a report shows the number of interim successors, the number of candidates who are immediately available, and the total number of candidates. By default, managers can’t view this section in the Directory. However, by using Oracle Page Composer, you can modify Directory to display this section.

Prerequisites

Perform the following tasks before you modify the Directory page using Oracle Page Composer:

1. Log in as a user who has access to editing pages.
2. Create a sandbox and set it to Active.
Displaying Succession Candidate Card

To display the Succession Candidates section in Directory, perform the following steps:

1. Navigate to Directory, search for a person, and click the View in Organization Chart icon to view that person’s hierarchy.
2. From the Setting and Actions menu, in the Administration section, select Edit Pages.
3. In the Edit column of the Edit Pages dialog box, select the level Site.
4. Select View > Source.
5. Select the entire Directory area.
6. In the confirmation dialog box displayed, click Edit.
7. In the source pane, select the region component.

Note: The location displayed must end with DirectoryMasterPF.jsff.

8. Right-click the component and select Edit.
9. Set the Show Succession Card property to #{true} using the expression builder.
10. Click Apply and then click OK.
12. Publish the sandbox.

Related Topics
- Configuring and Extending Applications

Contextual Notes in Application Pages: Explained

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

You can embed the Notes component on persons and objects using Oracle Page Composer. The Notes component appears with the title, Feedback or Notes, based on the component configuration, Person Notes and Object Notes.
The following image shows the person notes embedded in the Goal Details page:

![Goal Details Image]

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

- Notes for an employee in the context of an employee’s performance goal
- Notes for an employee in the context of a performance goal plan
- Notes for an employee in the context of a performance review period
- Notes for an employee in the context of an employee’s development goal
- Notes for an employee in the context of an employee’s career development

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

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

Related Topics

- For more information, see Implementing Contextual Notes in Oracle HCM Cloud Talent Management (2375556.1) on My Oracle Support at https://support.oracle.com
- For more information on Contextual Notes, see the Implementing Talent Management Base guide on Oracle Help Center
Adding an Object Note to a Succession Plan: Worked Example

This example describes how to add the notes resource catalog component to a succession plan.

Large and Associates is an organization that has more than 5000 employees across 10 countries. It manages business travel, meetings, and events for many companies and organizations. It has several key positions and succession planning is vital for ensuring its business continuity. HR specialists working in this organization want a Notes component to be part of their succession plans. They know that this will enable plan owners to add information about the plan, such as the necessary competencies of suitable successors or the compensation details of the job position. The HR specialists also want to restrict the visibility of the notes added only to the creator of the notes as the notes may contain confidential information. The application implementor is aware that it's sufficient to add the Notes component to any one succession plan to make it available in all succession plans. After plan owners add their notes for a succession plan, they can see it only within the succession plan.

The following table summarizes key decisions for this scenario.

<table>
<thead>
<tr>
<th>Decisions to Consider</th>
<th>In This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Which Notes component can I add to a succession plan?</td>
<td>Object notes</td>
</tr>
<tr>
<td>Should I change the default visibility setting of the object Notes component?</td>
<td>Yes. Must change the default Everyone visibility setting to Only Me.</td>
</tr>
</tbody>
</table>

This worked example includes details for the following tasks you must perform to add the Notes resource catalog component to a succession plan and use it:

1. Adding the Notes resource catalog component to a succession plan
2. Creating notes for a succession plan

Prerequisites

This worked example assumes that the following tasks are complete:

1. Sign in the application as a user with configuration privileges.
2. Activate a sandbox.

Adding a Note Component to a Succession Plan

1. In the Succession Planning work area, click the Succession Plans tab.
2. Select an active succession plan and click Edit.
3. On the Settings and Actions menu, click Edit Pages to open the Edit Pages dialog box.
4. In the Edit column, select the level Site.
5. Click Add Content.
6. Click the Add Content button that appears in the Change Layout section.
7. In the Add Content window, click **Add** for the Notes component.
8. Click **Close** to close the Add Content window.
9. Click the Edit wrench icon to configure the contextual parameters.
10. Enter the expression values only for the parameters given in the following table and leave the other fields blank.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Expression</th>
</tr>
</thead>
<tbody>
<tr>
<td>Object Type</td>
<td>LARGEASSOC_SUCCESION_PLAN</td>
</tr>
<tr>
<td>Object ID</td>
<td>#{bindings.PlanId.inputValue}</td>
</tr>
</tbody>
</table>

11. Configure the display options.
12. Click **Apply**.
13. Click **OK**.
14. Click **Close** to indicate that you have completed the Site level changes.
15. Click **Save and Close** to close the Edit Plan page.
16. Publish the sand box.

## Creating Notes

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

A plan owner can create multiple notes for the succession plan. To create a note, the plan owner must perform the following steps:

1. In the Succession Planning work area, click the Succession Plans tab.
2. Select the plan for which you want to create a note and click **Edit**.
3. Click the Notes link to open the Notes window.
4. Set the visibility of the notes to **Only Me**.
5. Add the notes text.
6. Click **Create Note**.
7. Click **Done** to close the Notes window.

**Related Topics**
- Configuring and Extending Applications
- Implementing Talent Management Base

## FAQs

**What happens if I remove a readiness category lookup?**

If the level is in use for succession plan candidates or talent pool members, their readiness level changes to **No readiness available**. Plan or pool owners can select a different readiness level for affected workers.
How can I set a default plan type or control the order of plan types in the succession plan type list?

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

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

Talent Pools: Explained

A talent pool is an identified group of workers. You use talent pools to manage the development of the pool members for particular purposes. For example, a talent pool can include future leaders of the organization. You can also include one or more talent pools in a succession plan to prepare pool members to fill a vacancy.

Talent Pool Examples

You can use talent pools, for example, to:

- Track potential candidates for succession plans:
  - Create talent pools to groom members as possible candidates to add to succession plans. The pool members may be suitable candidates for more than one succession plan. For example, you can maintain a talent pool of local managers, and add suitable pool members to a succession plan as candidates for the district general manager position.
  - Create a talent review meeting based on a talent pool specifically for planning successions. Managers nominate workers as succession candidates by adding them to a talent pool while preparing for, or during a typical talent review meeting. Then senior executives can schedule a talent review meeting with a review population created from that talent pool specifically to vet the nominated workers and assign them to succession plans as appropriate.

- Track groups: Track groups of workers with similar characteristics, such as campus hires, leadership trainees, or high potential workers.

- Roll up talent review populations: During a talent review, create a talent pool for high performing or high potential individuals. For the next talent review, add the talent pool members to the review population to evaluate these high performers against each other.

Talent Pool Access

You create and manage talent pools in the Succession Plans work area. Select My Client Groups > Succession Plans. You can also create talent pools from the Talent Review dashboard.

Talent pool owners can access and manage a talent pool if they have security privilege to access the Succession Plans work area or the Talent Review dashboard.

On the Succession Plans page in the person spotlight, managers can view the number and names of the talent pools they own in which their direct and indirect reports are members.

Talent Pool Details

You can enter criteria that define the scope of the talent pool. The available criteria are:

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

These values have no effect on pool processing.

You can also specify the talent pool status and identify one or more pool owners. If a talent pool is inactive, you can’t select it for use in succession plans and talent reviews.

**Talent Pool Members**

You can search and select workers to add to the talent pool. You can also use best-fit analysis to identify workers who match the criteria in a selected model profile. For each worker in the pool, you can record your assessment of the risk and impact of the worker leaving the enterprise. Select a worker name to open the person spotlight to view additional data about the worker, such as person and employment information, goals, and performance ratings.

**Talent Pool Goals**

If you’re using Oracle Fusion Career Development, talent pool owners can add development goals to the talent pool. These goals appear in the development plan of each member of the talent pool. The development intent of these goals are tagged as Organization.

**Related Topics**

• Using Development Goals in Talent Pools: Explained
• Succession Plans, Talent Pools, and Talent Reviews: How They Work Together
• Best Fit Algorithm Utilization as Provided in Oracle Fusion Profile Management (Doc ID 1600727.1)

**Descriptive Flexfields for Talent Pools**

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

**Defining Descriptive Flexfield Segments**

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

There are two descriptive flexfields available for talent pools.

<table>
<thead>
<tr>
<th>Descriptive Flexfield</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRT_POOLS_B</td>
<td>Fields for talent pool details that you enter in the Additional Information section on the Create Talent Pool: Enter Details page.</td>
</tr>
</tbody>
</table>
### Descriptive Flexfield | Description
---|---
HRT_POOL_MEMBERS | Fields for member details that appear on the Create Talent Pool: Select Members page in the Additional Information column.

**Related Topics**

- [Descriptive Flexfields: Explained](#)
- [Flexfields: Overview](#)
Glossary

**best-fit analysis**
A calculation of the best possible matches for a selected person or model profile.

**candidate**
In a succession plan, a person identified to fill a job or position or replace a named incumbent.

**candidate readiness**
In a succession plan, an assessment of when a candidate is ready for a specified job or position.

**competency**
Any measurable behavior required by an organization, job, or position that a person may demonstrate in the work context. A competency can be a piece of knowledge, a skill, an attitude, or an attribute.

**descriptive flexfield**
Expandable fields used for capturing additional descriptive information or attributes about an entity, such as a customer case. You may configure information collection and storage based on the context.

**development goal**
A goal that is geared toward facilitating the career growth of individuals so that they can perform better in their current job or prepare themselves for advancement.

**goal library**
A central repository of reusable goals maintained by the human resource specialist that managers and workers can copy to use for their own goals.

**holding area**
An area on the Talent Review dashboard to hold workers not rated by their managers, rated using nonstandard rating models, or removed from the box chart during the talent review meeting.
HR
Abbreviation for human resource.

impact of loss
A value assigned to a worker to rate the effect on the enterprise when the worker leaves.

instance qualifier set
A set of values that uniquely identifies multiple instances of the same profile item.

performance document
Online document used to evaluate a worker for a specific time period. The document contains the content on which the worker is evaluated, which could include goals, competencies, and questionnaires.

performance goal
A results-oriented goal, often using specific targets, to assess the level of a worker’s achievement.

person profile
A collection of skills, experience, qualifications, work preferences, and career planning information for a worker.

questionnaire
A set of questions presented in a specific order and format.

rating model
A scale used to measure the performance and proficiency of workers.

risk of loss
A value assigned to a worker to rate the likelihood of the worker leaving the enterprise.

succession plan
A plan that identifies candidates for a role or position or to succeed a named incumbent.

talent pool
A selected group of workers for whom you track training, readiness, or development.

talent pool member
A worker who is added to a talent pool.

talent review
A series of meetings where organization managers evaluate trends, assess strengths, and address areas of risk for the organization.
**talent review facilitator**
Human resource specialist who manages talent review meetings. A talent review meeting can have multiple facilitators.

**talent review participant**
Person who's invited to attend a talent review meeting.

**talent review reviewer**
Manager who updates profile content for direct and indirect reports before the talent review meeting.

**talent score**
An assessment of a worker's overall value to the enterprise using a company-defined rating model.