Oracle Fusion Cloud Talent Management

Using Talent Review and Succession Management

25A

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Contents

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1 Talent Review Overview

Talent Review

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

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

Talent Review Stakeholders

This image shows the stakeholders of a talent review meeting.
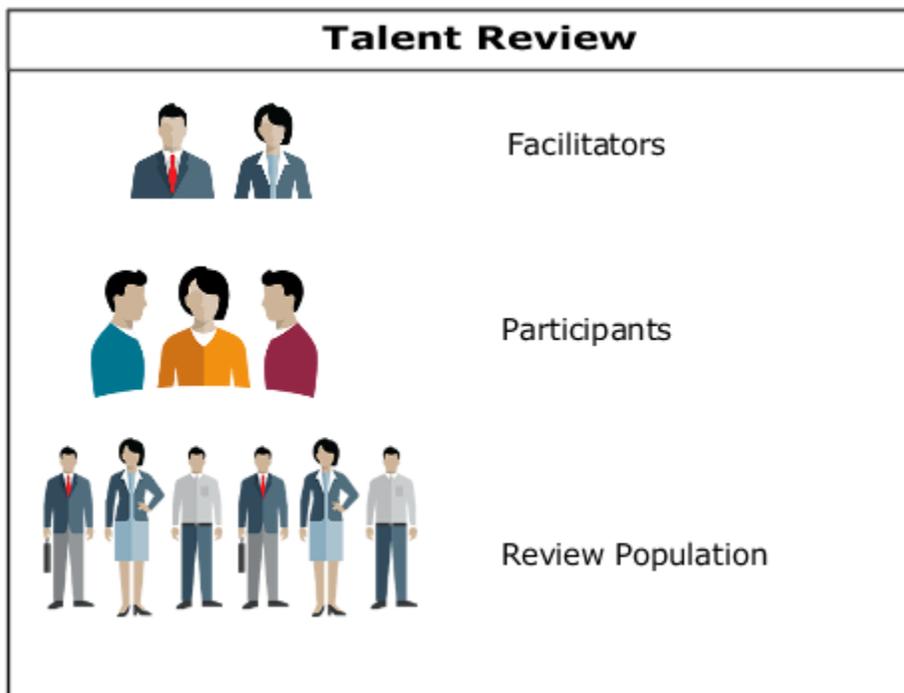
This table lists what facilitators and participants do in a talent review meeting.

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

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

Worker Ratings

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

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

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

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

Talent Review Deep Links

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

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

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

Related Topics

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

Talent Review Life Cycle

The talent review process includes tasks from creating the meeting template through conducting the review meeting to managing notes and tasks created for the meeting.

Manage talent reviews in the Talent Review work area. Select **My Client Groups** > **Talent Review**.

This image shows the different stages of the talent review process and identifies responsibilities.
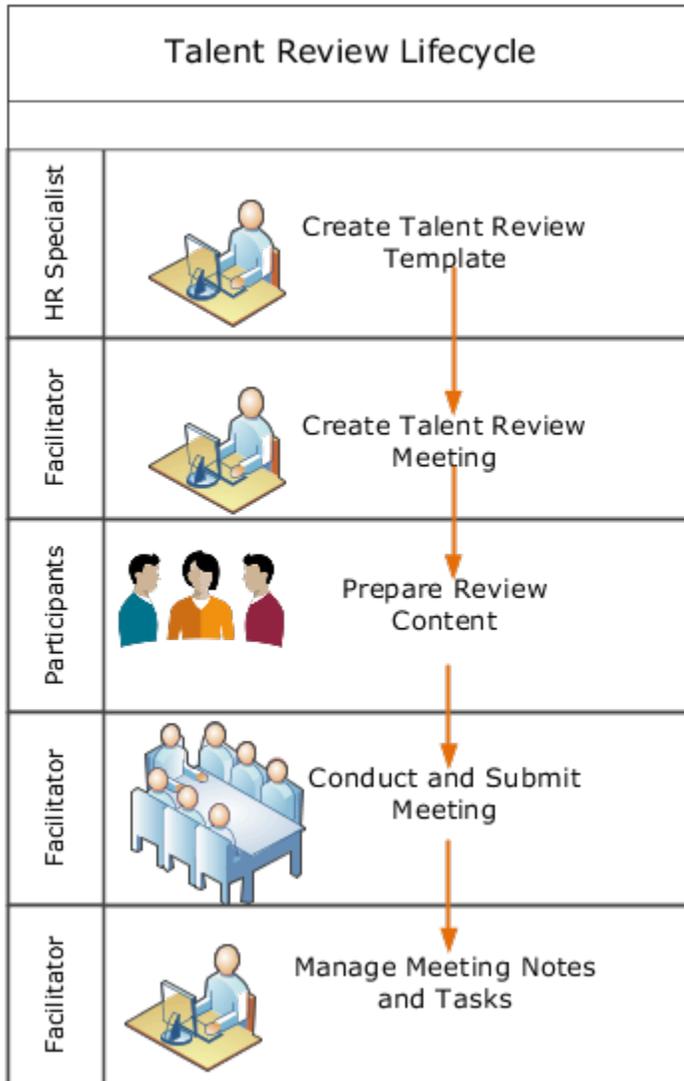
Let's now see what each stage involves.

Create Talent Review Template

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

- The size of the review population

- The box-chart matrix options and default presentation

- The data available to meeting participants

- The actions that participants can perform

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

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Create a Meeting

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

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

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

Prepare Review Content

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

- Performance

- Potential

- Overall competencies

- Overall goals

- Impact of loss

- Risk of loss

- Talent score

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

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

- **Talent review content preparation reminder notification**: Facilitators can send reminder notifications to reviewers when the submission deadline approaches.

- **Submit talent review meeting content notification**: Facilitators receive a notification when reviewers submit their ratings.

Conduct the Talent Review Meeting

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

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

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

- View and update the meeting box chart.

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

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- Compare current data to that from previous meetings.

- Compare a worker to another worker or to a job profile.

- Open the organization chart of the organization that's being reviewed.

- Add workers in the review population to talent pools or succession plans, if the pools and plans are included in the meeting template.

- Move workers in the review population from the box chart to the Holding Area or from the Holding Area to the box chart.

- Assign performance and development goals to workers.

- Assign tasks to anyone in the organization.

- Create notes for workers in the review population.

- Save the meeting or submit it to freeze the data.

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

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

- Goals, notes, and tasks are saved immediately.

- Workers can access performance goals assigned to them from their goal management pages, and manage development goals from their career development pages.

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

Manage Notes and Tasks

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

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

Sort Options for Talent Review Meetings

Use the sort options available on the Talent Review Meetings overview page to easily locate the meeting that you want to manage or prepare review content for. By default, you see meetings in the ascending order of their names.

Sort Options on Facilitator Overview Page

Facilitators can use these attributes to sort the meetings listed on their Talent Review Meetings overview page:

- **Meeting Name**: Ascending and descending order of their names
- **Meeting Date**: Latest to oldest or oldest to latest

- Meeting Status

- **Data Submission Deadline**: Latest to oldest or oldest to latest

- **Business Leader**: Ascending and descending order of business leader's name

- **Meeting Submission Date**: Latest to oldest or oldest to latest

Sort Options on Manager Overview Page

Managers can use these attributes to sort the meetings listed on their Talent Review Meetings overview page:

- **Meeting Name**: Ascending and descending order of their names

- **Meeting Date**: Latest to oldest or oldest to latest

- Meeting Status

- **Data Submission Deadline**: Latest to oldest or oldest to latest

- **Business Leader**: Ascending and descending order of business leader's name

- Data Submission Status

On both facilitator and manager overview pages, you can see meetings without any data submission deadline after meetings that have a deadline in alphabetical order of their names.

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

Talent review integrates with Profiles, Goals Management, and Performance Management. You use talent review templates to control this integration. Create talent review templates on the Manage Talent Review Templates page.

In the Setup and Maintenance work area, use the following:

- Offering: Workforce Development

- Functional Area: Talent Review

- Task: Configure Talent Review Dashboard Options

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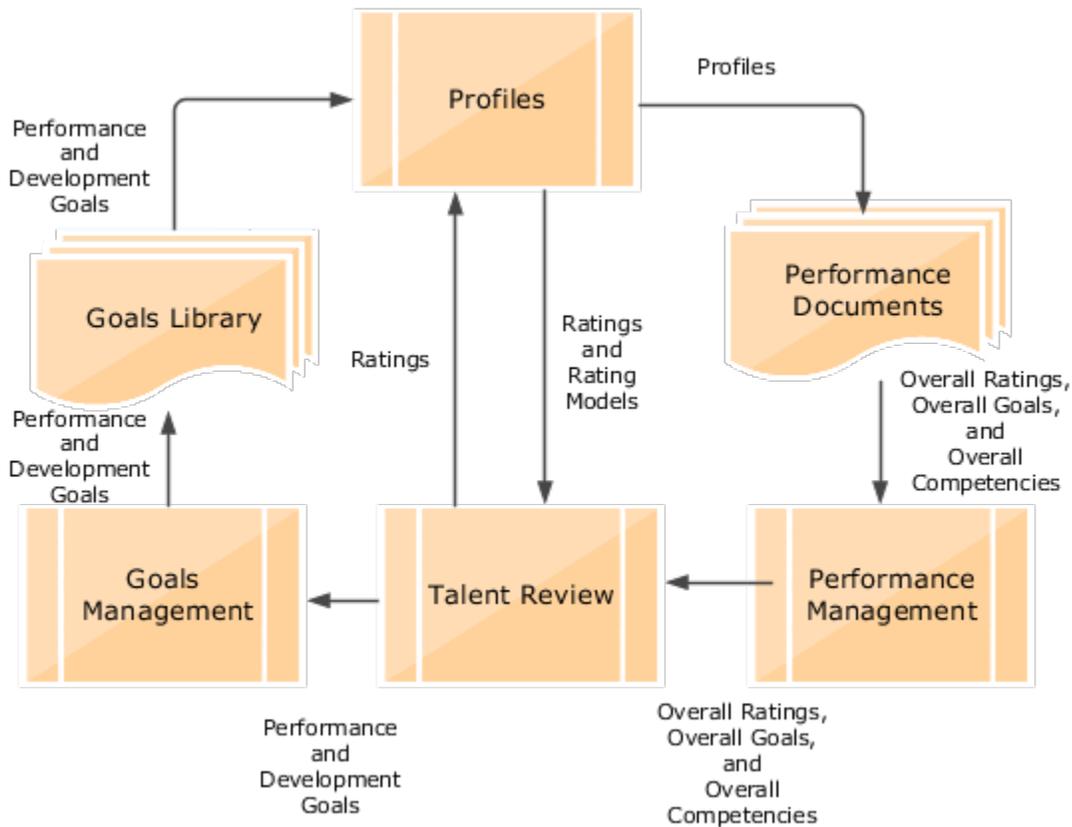
Talent Review and Profiles

You can include any of these delivered ratings and their associated rating models from Profiles in a Talent Review meeting template:

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

You can also use custom ratings created in Profiles Talent Review meeting template.

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

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

- Overall rating in the performance document

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

- Career Planning card

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

Talent Review and Goals

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

Talent Review and Performance Management

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

- Overall ratings

- Competencies and proficiency rating levels

- Competencies and goals section ratings

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

Related Topics
- Enhanced Talent Profiles
- Profile Management Components: How They Work Together
- Rating Models
- Goal Library

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2 Talent Profiles

Overview of Talent Profiles

Managers and HR specialists can maintain information within person profiles about the skills, qualifications, accomplishments, and career preferences of their workers. They can also maintain information in model profiles about the targeted skills and qualifications of the jobs and positions within the company.

Workers can manage their own careers by keeping their talent profiles current so that their skills, qualifications, accomplishments, and career preferences reflect their current performance and future career goals.

You manage a worker's talent profile on the worker's person spotlight. Depending on your role, to open a worker's person spotlight:

- Select **Directory** > **Directory**, search for the worker, and click the worker's name in the search results
- Select **My Team** > **My Team** and click the worker's name on the My Team page
- Select **My Team** > **Team Talent** and click the worker's name on the Team Talent page
- Select **My Team** > **Team Compensation** and click the worker's name on the Team Compensation page
- Open the person smart navigation window from application pages

This table lists the talent profile-related pages in person spotlight and their key features available to managers, HR specialists, and workers. Workers can open each page from the **Me** work area in the Navigator.

Pages	Features for Managers and HR Specialists	Features for Workers
Skills and Qualifications	- Use the competency gaps chart to compare the competencies of a worker to that of a job from the worker's interest list, to identify if the worker is a suitable candidate for the job or needs further training. - Review areas of expertise and other qualifications for workers.	- Use the competency gaps chart to compare their competencies to that of a job from their interest list, to identify whether they are suitable for a job or to identify training needs. - Identify areas of expertise, such as a specific software package. - Maintain competencies, degrees, and other accomplishments.
Career Planning	- Add jobs or positions to the interest lists of their workers. - Review career preference information for workers, such as job or job family of their next career move. - Review and edit talent ratings such as performance and potential of workers, and the risk and impact of losing them.	- Add jobs or positions to their interest lists. - View the suggestions list and determine whether to add any of the suggested jobs or positions to their interest list. - Identify career preferences such as the job or job family of their next career move.

Managing talent-profile information in job and position profiles includes both creating the job and position profiles based on profile types, and editing the profiles when business requirements change. Job and position profiles identify the required skills, degrees, qualifications, and work requirements for each job and position within your enterprise.

> **Note:** You must upgrade to enhanced talent profiles prior to HCM Cloud release 20B. In the enhanced talent profile feature, the display of the person profile and talent ratings has a more engaging and responsive interface design. The new user experience enables features to be presented on both mobile and web pages. The interfaces are simple, intuitive and are written in a more conversational language. The administration enhancements provide increased product performance and extensibility. The enhanced solution introduces content templates that represent the talent content (for example, Competencies, Certificates, Skills, and Awards) required to support the Oracle Talent Management Suite. Each content template includes unique attributes. These content templates can be used and reused to create the content sections necessary to capture talent data. The templates can be used to design both person and model talent profiles. Any relevant topics from this chapter have been updated and moved to My Oracle Support: Upgrading Oracle Fusion Profile Management (Doc ID 2421964.1).

Enhanced Talent Profiles

Enhanced Talent Profiles provides a framework for developing and managing talent profiles that meet your industry or organizational requirements. Profiles summarize the qualifications and skills of a person or a workforce structure such as a job or position.

For more information, see *Oracle Cloud HCM Profile Management*

Talent Profile Summary Report

The Talent Profile report provides talent-related information for an employee. This topic describes options that you can select when printing the report.

To print the report, select the Talent Profile task in the Person Management work area. On the **Skills and Qualifications** page, select **Actions** - **Print Profile**. Talent review meeting participants can also print the report for one or more employees from the Talent Review dashboard.

Compare Profiles and Find the Best Fit

Comparing Items

Use comparison to quickly identify and evaluate differences between items. Compare any person, job, and position items. For example, you can compare a person with another person or with a job profile.

You can compare items in the Profiles work area and on the talent review dashboard.

Selecting Items

The first item you select is the comparison base, and the items you select subsequently are secondary items. You can change the comparison base if required. The comparison displays the base item attributes, and indicates the differences between the attributes of the secondary items and the base items.

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Controlling Results

Data sets control which attributes are displayed for each item in the comparison. For example, you must select the School Education data set to display and compare a person's education details.

The information displayed in the comparison results is controlled by security access. For example, line managers can compare their direct reports and view their performance data in the comparison results. HR specialists can perform this comparison only if they have security access to the persons' performance information. You can change the effective date of comparison if you're either a line manager or an HR specialist.

Best-Fit Analysis

The best-fit analysis includes the review of all profiles of the match type required and calculation of the overall score compared to the source profile. The overall score appears in the Overall Fit column in the results section on the Find Best Fit page.

Employees, managers, and HR specialists can use the Best-Fit feature to match and compare profiles with the selected match criteria. The Best-Fit feature finds profiles that closely match the source profile (person or job). You can associate job name to job profile type, position name to position profile type, and organization name to organization profile type.

Best-Fit Analyses Types

The application supports the following four types of best-fit analyses:

- Person to Job: Using a person profile as the source profile, you can find the job that best fits a worker.

  Example: As a manager, use this tool to help a worker to identify job profiles for which the worker is best suited and decide the next career move.

- Person to Person: Using a person profile as the source profile, you can find the worker with skills that match that of a particular worker.

  Example: Your company is planning to launch new technology. As an HR specialist, you know a worker who has the required skill to use the new technology. To assess the scope of workers who need development in this particular skill, you can select the worker's profile. You can then use the Best-Fit feature to view a list of other workers who may come close to the skill requirements.

- Job to Job: Using a job profile as the source profile, you can find the job profile that closely matches a job profile.

  Example: As an HR specialist, you can use this tool to help locate jobs to identify areas for outplacement, training requirements, or areas of organizational strength.

- Job to Person: Using a job profile as the source profile, you can find the best-fit worker for a job.

  Example: As an HR specialist, you can use this tool to help locate the most qualified workers for a job opening within your company.

The Best-Fit Feature Accessibility

The roles, privileges, and application settings determine the ability for a user to perform a type of best-fit analysis. The following table shows the Best-Fit feature accessibility for the most commonly used profile types.

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Role	Can Perform Person to Job Analysis?	Can Perform Person to Person Analysis?	Can Perform Job to Job Analysis?	Can Perform Job to Person Analysis?
HR specialist	Yes	Yes	Yes	Yes
Manager	Yes (Limited to direct and dotted-line reports)	Yes	No	Yes
Worker	Yes	Yes (Limited to worker's own profile)	No	No

Filtering Best-Fit Results

By default, the best-fit analysis results show all profiles that have 90% match or greater than the selected source profile. You can further filter the results to show by overall fit or by number of profiles. The results section of the best-fit analysis also has the **Show Fit by Criteria** option. Use this option to view which content types displayed in results meet or exceed the specified criteria percentage.

Access the Best-Fit Feature as an HR Specialist

Depending on the privileges associated with the HR specialist role, they can find either the best-fit job or person for a person profile or the best-fit job or person for a job profile.

Finding the Best-fit Job or Person for a Person

HR specialists can find the best-fit job or person for a person by using one of the following navigation paths:

- From the Person Profiles page:

    a. Select **Navigator** > **My Client Groups** > **Profiles**.
    b. Click the Person Profiles tab, if not already selected, and search for the person profile.
    c. Select the profile in the Results section.
    d. From the Actions menu, click the corresponding link to find the best-fit job or person for the selected profile.

- From the Skills and Qualifications page:

    a. Select **Navigator** > **My Client Groups** > **Profiles**.
    b. Click the Person Profiles tab, if not already selected, and search for the person profile.
    c. Click the profile in the Results section to open the Skills and Qualifications page.
    d. In the Related Links panel, click the corresponding link to find the best-fit job or person for the selected profile.

- From the person smart navigation window:

    a. Click the More icon for a person on application pages to open the person smart navigation window.
    b. Select Talent Management and click the corresponding link to find the best-fit job or person for your report

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Finding the Best-fit Job or Person for a Job Profile

HR specialists can find the best-fit job or person for a job profile by using the Model Profiles page. This page includes all jobs and positions profiles associated with the job profile type.

To find the best-fit job or person for a job profile:

- From the Profiles page:
    a. Select **My Client Groups** > **Profiles**.
    b. Click the Model Profiles tab, search for the job name.
    c. Select the profile in the Results section.
    d. From the Actions menu, click the corresponding link to find the best-fit job or person for the selected profile.

- From the Select Candidates page when creating or editing a succession plan:
    a. Select **Navigator** > **My Client Groups** > **Succession Plans**.
    b. Click the Succession Plans tab, if not already selected.
    c. Click **Create** to create a plan, or select an existing plan and click **Edit** from the tab toolbar.
    d. Enter or edit the necessary details and click **Next** to open the Select Candidates page for the succession plan.
    e. On the page toolbar, click **Find Best Fit** to find the best fit person for a model profile and add the person as a candidate.

- From the Select Members page when creating or editing a talent pool:
    a. Select **Navigator** > **My Client Groups** > **Succession Plans**.
    b. Click the Talent Pools tab.
    c. Click **Create** to create a talent pool, or select an existing pool and click **Edit** from the tab toolbar.
    d. Enter or edit the necessary details and click **Next** to open the Select Members page for the succession plan.
    e. On the page toolbar, click **Find Best Fit** to find the best fit person for a job profile and add the person as a member.

Access the Best-Fit Feature as a Manager

Depending on the privileges assigned to the manager role, managers can find the best-fit job or person for a person.

Finding the Best-fit Job or Person for a Person

Managers can find the best-fit job or person for a person by using one of the following navigation paths:

- From the Team Talent page:
    a. Select **Navigator** > **My Team** > **Team Talent**.
    b. Click the link to a report. The Skills and Qualifications page of the report opens.
    c. In the Related Links panel, click the corresponding link to find the best-fit job or person for your report.

- From the My Team page:
    a. Select **Navigator** > **My Team** > **My Team**.

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    b. Click the link to a report. The Employment Information page of the report opens.

    c. Select **Actions** > **Talent Management** and then select the corresponding link to find the best-fit job or person for the selected profile.

- From the person smart navigation window:

    a. Click the More icon for a report on application pages to open the person smart navigation window.

    b. Select Talent Management and click the corresponding link to find the best-fit job or person for your report

Access the Best-Fit Feature as a Worker

Depending on the privileges assigned to the employee role, workers can find the best-fit job profile for their person profile or add the job profile to their careers of interest list.

> **Note:** As a worker, if you find the person best suited to your profile, by default, the search results display your profile.

Finding the Best-fit Job

Workers can use one of the following navigation paths to access the best-fit job feature:

- From the Skills and Qualifications page:

    a. Select **Navigator** > **Me** > **Skills and Qualifications**.

    b. In the Related Links panel, click **Find Best Fit Job**.

- From the person smart navigation window:

    a. Click the More icon for your name on application pages to open the person smart navigation window.

    b. Select Talent Management and click **Find Best Fit Job**.

By default, the Find Best Fit Job page displays results for job with overall fit greater than or equal to 90% criteria. You can modify the criteria to find the best-fit job for your role.

How Best-Fit is Calculated

The Best-Fit feature compares the selected profile content with that of target profiles to find a list of profiles that are the closest match. You find the best fit job or person using the best-fit feature accessible from application pages.

Example: As an HR specialist, you can use the Best-Fit feature to find the person best suited for a job. The initial best-fit analysis results include a list of the profiles with the highest percentage of matching qualities. You can further narrow down the results by changing the priority of content types or individual content items. You can then view the percentage match for each content type.

Considerations for How Best-Fit Is Calculated

The best-fit analysis considers content items of only these predefined content types:

- Competencies

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- Honors and awards
- Work requirements

    | **Note:** The work requirements content type does not have content items.

- Languages

    | **Note:** For languages, only the item Reading is considered in best-fit calculations.

- Degrees
- Memberships
- Licenses and certifications

You can use the Best-Fit feature to calculate the overall score for a target profile. The application calculates the overall best-fit score of the target profile with respect to the selected source profile based. The overall score is based on the individual score of each matching content item of the selected profile.

How the Overall Score in a Best-Fit Analysis is Calculated

The Best-Fit feature calculates the overall score for a target profile using an algorithm rule. The overall score appears in the Overall Fit column in the results section on the Find Best Fit page.

The algorithm for the best-fit analysis is automatically processed by the application.

The following image shows the best-fit algorithm rule.

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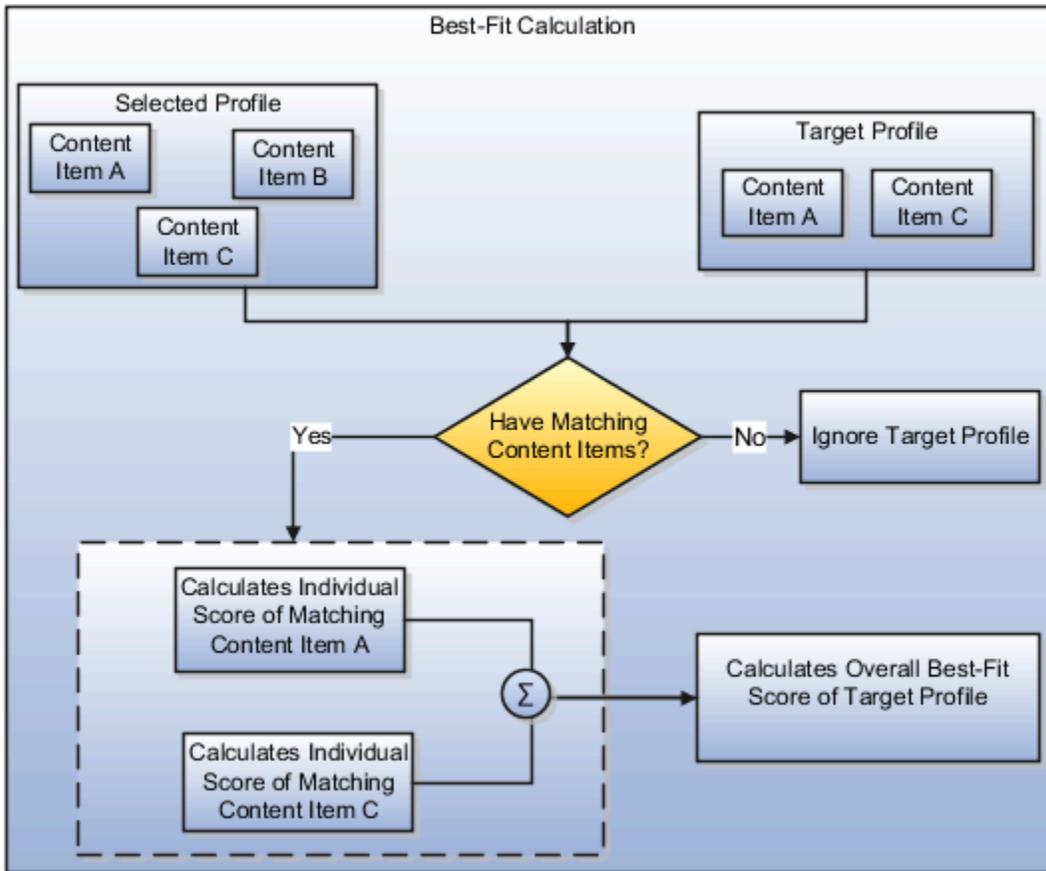
Selected Profile

The selected profile for which you want to find the profile that is the best-fit is source profile.

Target Profile

The target profile is the profile for which the overall score is calculated. The application compares the content items of the target profile with those of the source profile.

Individual Score

The individual score is the number assigned to each matching content item of the content types for which you specify the priority or importance. The individual score calculation algorithm depends on the best-fit analysis type.

Overall Score Calculation Rule

The overall score is the total of all individual scores of all matching content items. If the total of all individual scores includes decimals, then the application rounds off the total score to derive the overall score. The application rounds down the score if the decimal digit is less than 5. However, it increases the score by 1 if the decimal digit is 5 or more.

Examples:

- If the total score is 56.4, the overall score is 56.
- If the total score is 56.7, the overall score is 57.

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How the Individual Score for Person to Person, Job to Person, and Job to Job Analyses is Calculated

In best-fit analyses, each content item of the selected profile must match these target profiles: person to person; job to person; and job to job.

The individual score of each content item of the target profile is based on the priority set at the content type or content item level.

The following graphic shows how the individual score is calculated for each content of the selected profile that match with the target profile. The graphic is applicable for only person to person, job to person, and job to job analyses.

Individual Score Calculation for Person to Person, Job to Person, and Job to Job Analyses
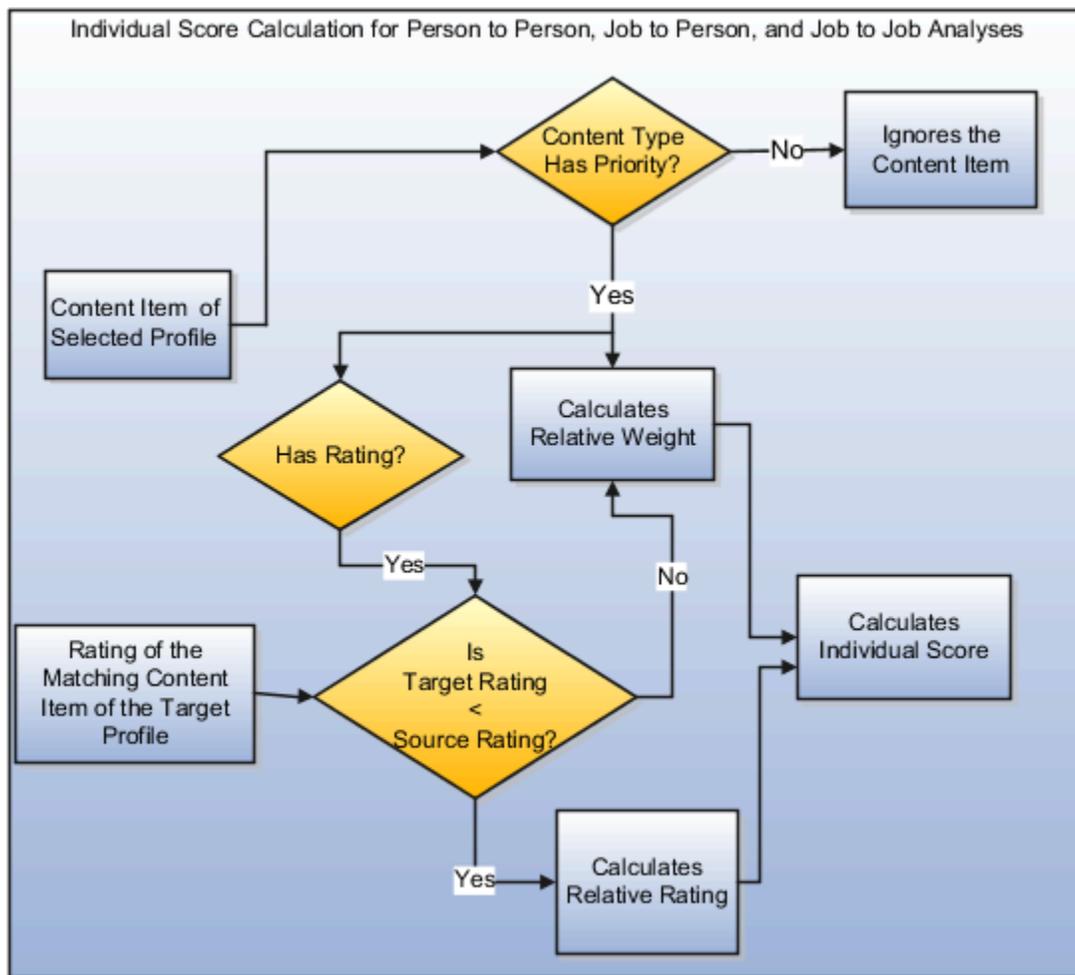
Deciding the Priority

The best-fit algorithm uses the priority assigned to the content type or content item of the selected profile. The priority is used to decide the overall score of the target profile. Depending on the analysis type, you select the priority on the Find Best Fit Person or on the Find Best Fit Job page. You can either select a common priority value for all content items within a content type or specify priority using details.

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To specify priority using details:

1. Select the **Priority Using Details** option on the Find Best Fit Person or Find Best Fit Job page.
2. Click the **Details** icon. The Best Fit Criteria page opens.
3. Specify the **Match** option for each content item within a content type. The value you select for the **Match** option is the priority value allocated at the content item level. The application calculates the individual score of each content item by considering the match value as the priority value for the content item.

Note: You can't use the **Priority Using Details** option for the Work Requirements content type. The priority for this content type is always specified at the content type level. The application considers only the Travel Domestically and Travel Internationally work requirements for best-fit calculations. The application calculates the individual score of the Work Requirements content type for a target profile as follows:

- If both travel requirements of the source and target profiles match, then the Individual Score = Relative Weight * 100.
- If only one travel requirement of the source and target profiles match, then the Individual Score = 0.5 * Relative Weight * 100.
- If none of the travel requirements of the source and target profiles match, then work requirements are ignored in best-fit calculations.

The priority of a content type is populated using the HRT_MATCH_IMPORTANCE lookup type values. Depending on the **Match** option value, the application calculates the score for each content item within a content type.

The following table illustrates the value of each priority level. These values are application-defined and can't be modified.

Priority Level	Value
None	0
Low	1
Medium	2
High	3
Important	4
Very Important	5
Priority Using Details	Match of content item

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Profile Ratings in Best-Fit Calculations

The overall score of a target profile also includes any ratings entered for the content items of the Competencies and Languages content types.

The Competencies content type uses the Proficiency rating model. The following table illustrates the default rating levels of the Proficiency Rating Model and corresponding value that application assigns to the rating level.

Rating Level	Value
Foundation	1
Intermediate	2
Skilled	3
Advanced	4
Expert	5

The Languages content type uses the Language Rating Model. The following table illustrates the default rating levels of the Language Rating Model and corresponding value that application assigns to the rating level.

Rating Level	Value
Low	1
Moderate	2
High	3

Relative Weight

The application calculates the relative weight of the content item for which you specify the priority at the content item or content type level. You specify the priority for the content types on the Best-Fit UI. The relative weight is the importance of a content item with respect to all the other content items in the source profile. The relative weight in the person to person, job to person, and job to job analyses is calculated only for the source profile content items. The relative weight is calculated using the following equation:

Relative Weight = Content item priority / Sum of all content items priorities

Example: The source profile content type has six content items for the Competencies content type and one content item for the Degrees content type. The priority is set at content type level. For the Competencies content type, the priority is set to Medium (2) and for the Degrees content type, it's set to Low (1). The relative weight for each content item:

- In the Competencies content type = 2 / (2 + 2 + 2 + 2 + 2 + 2 + 1) = 2 / 13 = 0.153846

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- In the Degrees content type = 1 / (2 + 2 + 2 + 2 + 2 + 2 + 1) = 1 / 13 = 0.076923

Relative Rating

If the content type with priority also has rating, the application calculates the relative rating of the content item associated with the content type. The relative rating is the rating of the content item in the target profile with respect to the source profile. The relative rating in the person to person, job to person, and job to job analyses is calculated using the following equation:

Relative Rating = Target Rating / Source Rating

Example: The rating level of a content item associated with the source and target profiles is 4 and 2 respectively. In this case, the relative rating for the content item in the target profile = 2 / 4 = 0.5.

> **Note:** The relative rating is considered in the individual score calculation only when the source rating is greater than or equal to the target rating.

Individual Score of a Content Item

The individual score of a content item is calculated according to the criteria and the corresponding equation discussed in the following table. The table is applicable for person to person, job to person, and job to job analyses only.

Content Type Has Rating?	Criteria	Equation
No	Not applicable	Individual score = Relative Weight * 100
Yes	Target Rating > or = Source Rating	Individual score = Relative Weight * 100
Yes	Target Rating < Source Rating	Individual score = Relative Rating * Relative Weight * 100

In the earlier table:

- Target Rating is the rating level associated with a content item of the target profile
- Source Rating is the rating level associated with a content item of the source profile
- Relative Weight = Content item priority / Sum of all content items priorities
- Relative Rating = Target Rating / Source Rating

Related Topics
- Rating Models

How the Individual Score for Person to Job Analysis is Calculated

In the person to job analysis, each content item of the target job profile must match the selected person profile. The individual score of each content item of the target job profile is based on the importance of the content item.

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The following graphic shows how the individual score is calculated for each content item of the target job profile. The content item must match with the corresponding content item in the selected person profile. The graphic is applicable only for the person to job analysis.
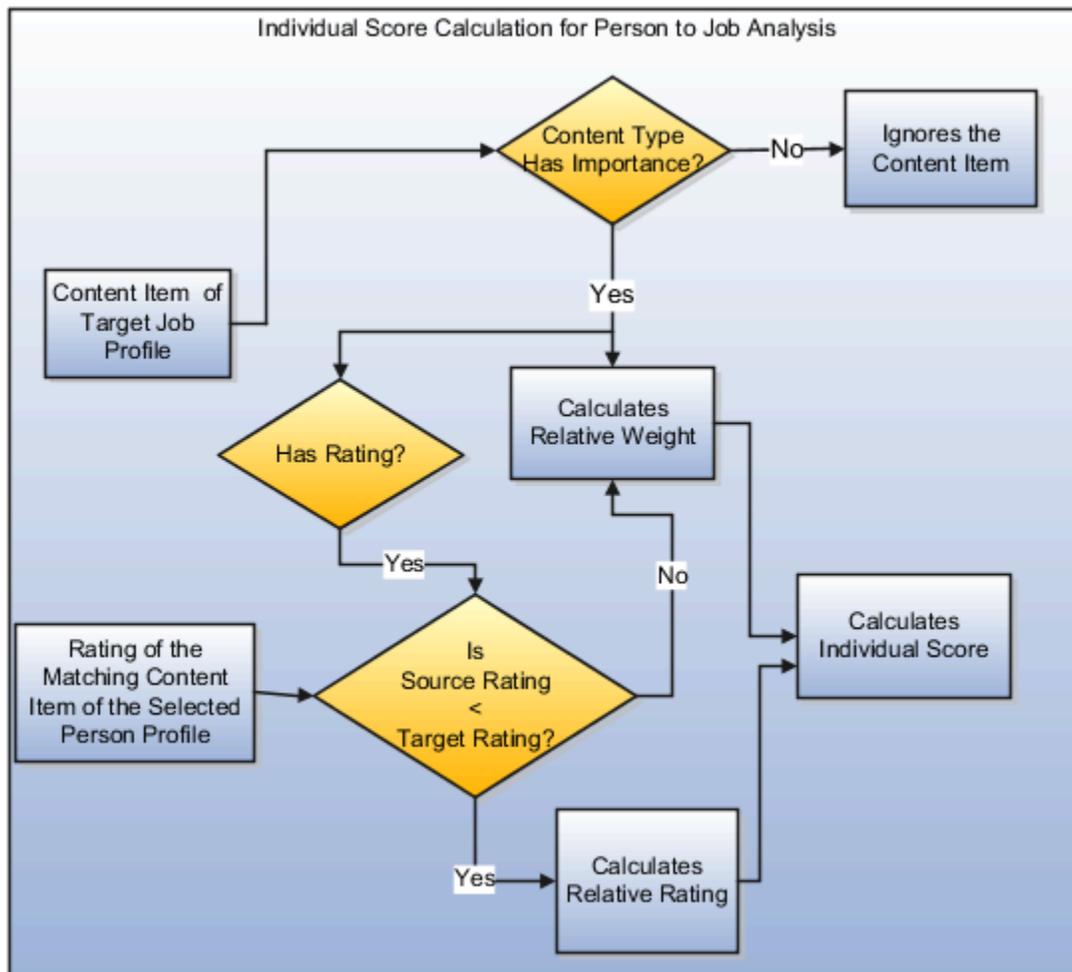
Verifying the Importance

When you do a person to job analysis, the best-fit algorithm utilizes the importance of all content associated with a target job to find the best-fit job for the selected person profile. The option to enter the priority for a person profile type is disabled on the UI.

Note: The importance for the Work Requirements content type is always specified at the content type level. The application considers only the work requirement properties Travel Domestically and Travel Internationally for best-fit calculations. The application calculates the individual score of the Work Requirements content type as follows:

- If both travel requirements of the source and target profiles match, then the Individual Score = Relative Weight * 100.

- If only one travel requirement of the source and target profiles match, then the Individual Score = 0.5 * Relative Weight * 100.

- If none of the travel requirements of the source and target profiles match, then work requirements are ignored in best-fit calculations.

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The importance of a content type is populated using the HRT_MATCH_IMPORTANCE lookup type values.

Profile Ratings in Best-Fit Calculations

Any ratings entered for the content items of the content type competencies and languages are also used in the calculation of the overall score of a target profile.

The Competencies content type uses the Proficiency rating model. The following table illustrates the default rating levels of the Proficiency Rating Model and corresponding value that application assigns to the rating level.

Rating Level	Value
Foundation	1
Intermediate	2
Skilled	3
Advanced	4
Expert	5

The Languages content type uses the Language Rating Model. The following table illustrates the default rating levels of the Language Rating Model and corresponding value that application assigns to the rating level.

Rating Level	Value
Low	1
Moderate	2
High	3

Relative Weight

The application calculates the relative weight of the content item for which the importance is specified at the content item or content type level. The relative weight is the importance of a content item of the job profile with respect to all the other content items in the job profile. The relative weight in the person to job analysis is calculated only for the target profile content items using the following equation:

Relative Weight = Content item priority / Sum of importance for all content items

Example: The target job profile has in all three content types Competencies, Degrees, and Languages. The Competencies content type has in all six content items, the Degrees content type has one content item, and the

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Languages content type has one content item. The target importance already specified for each content item in Competencies and Degrees is Medium (2) and for Languages is Low (1). The relative weight for each content item:

- In the Competencies content type = 2 / (2 + 2 + 2 + 2 + 2 + 2 + 2 + 1) = 2 / 15 = 0.133333

- In the Degrees content type = 1 / (2 + 2 + 2 + 2 + 2 + 2 + 2 + 1) = 2 / 15 = 0.133333

- In the Languages content type = 1 / (2 + 2 + 2 + 2 + 2 + 2 + 2 + 1) = 1 / 15 = 0.066667

Relative Rating

If the content type for which the importance is specified has a rating, the application calculates the relative rating of the content item associated with the content type. The relative rating is the rating of the content item in the source profile with respect to the target profile The relative rating in the person to job analysis is calculated using the following equation:

Relative Rating = Source Rating / Target Rating.

Example: The rating level of a content item associated with the source and target profiles is 2 and 4 respectively. In this case, the relative rating for the content item = 2 / 4 = 0.5.

> **Note:** The relative rating is considered in the individual score calculation only when the target rating is greater than or equal to the source rating.

Individual Score of a Content Item

The individual score of a content item is calculated according to the criteria and the corresponding equation discussed in the following table. The table is applicable for a person to job analysis only.

Content Type Has Rating?	Criteria	Equation
No	Not applicable	Individual score = Relative Weight * 100
Yes	Target Rating < Source Rating	Individual score = Relative Weight * 100
Yes	Target Rating > or = Source Rating	Individual score = Relative Rating * Relative Weight * 100

In the earlier table:

- Target Rating is the rating level associated with the content item of the target job profile

- Source Rating is the rating level associated with the content item of the source person profile

- Relative Weight = Content item priority / Sum of all content items priorities

- Relative Rating = Source Rating / Target Rating

Related Topics
- Rating Models

Examples of Best-Fit Analysis

Use the best-fit analysis to find the profiles that most closely match a selected profile. You select a person or job profile (job or position) as a source profile and use the Best-Fit feature to find profiles that best match the source profile.

The best-fit analysis results are based on how well the content items of a target profile match content items of the source profile.

Best-Fit Person Profile

As an HR specialist, you want to find the best-fit person profile for John.

John's person profile has the following content:

- Competencies as shown in the following table.

Competencies (Content Item)	Proficiency	Numeric Value of Rating
Action Oriented	Expert	5
Adapt Productively	Advanced	4
Communication	Expert	5

- Degrees:
    - Bachelor of Engineering
    - Master of Business Administration
- Language with details as shown in the following table.

Languages (Content Item)	Reading (Rating Value)	Writing (Rating Value)	Speaking (Rating Value)
English	Moderate (2)	Low (1)	High (3)

- Work Requirements:
    - Travel Domestically: No
    - Travel Internationally: No

You set the priority for the John's profile content on the best-fit person UI as illustrated in the following table and perform the Find Best Fit Person action on John's person profile.

Content	Priority (Numeric Value of the priority)
Competencies	Medium (2)
Honors and Awards	Medium (2)
Work Requirements	Medium (2)
Languages	Medium (2)
Degrees	Medium (2)
Licenses and Certifications	Medium (2)

In the results section, for an overall fit greater than 50%, the application displays the target person profile Alex.

Alex's person profile has the following content details:

- Competencies as shown in the following table.

Competencies (Content Item)	Proficiency	Numeric Value of Rating
Communication	Advanced	4
Problem Solving	Skilled	3

- Degrees:
    - Bachelor of Engineering
    - Diploma
- Languages as shown in the following table.

Languages (Content Item)	Reading (Rating Value)	Writing (Rating Value)	Speaking (Rating Value)
English	High (3)	Moderate (2)	Low (1)
French	Low (1)	Low (1)	Low (1)

- Work Requirements:
    - Travel Domestically: No
    - Travel Internationally: No

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For the best-fit calculation, the application considers the individual score of the following four content items of Alex's person profile that match with the content items of John's person profile:

- Competencies: Communication
- Degrees: Bachelor of Engineering
- Languages: English
- Work Requirements: Travel Domestically and Travel Internationally

The following table illustrates the overall score calculation of Alex's person profile.

Content	Source Priority	Source Rating	Target Rating	Relative Weight	Individual Score
Competencies (Communication)	2	5	4	0.1428571	11.428568
Degrees (Bachelor of Engineering)	2	Not applicable	Not applicable	0.1428571	14.28571
Languages (English)	2	2	3	0.1428571	14.28571
Work Requirements	2	Not applicable	Not applicable	0.1428571	14.28571
				Total Score	54.285698
				Overall Score	54

The overall score is calculated as follows:

- The source profile John has in all seven content items with the priority for all content items set to Medium (2) at the content type level. Therefore, the relative weight for each content item = (2 / 14) = 0.1428571 (where, Relative Weight= Content item priority/Sum of all content item priorities).

- The application calculates the individual score of the matching content using the appropriate equation as displayed in the following table.

Content	Criteria	Relative Rating	Individual Score Equation	Individual Score
Competencies (Communication)	Target Rating < Source Rating	Target Rating / Source Rating = 4 / 5	Individual Score = Relative Rating * Relative Weight *100	(4 / 5) * 0.1428571 * 100 = 11.428568
Degrees (Bachelor of Engineering)	Not applicable	Not applicable	Individual Score = Relative Weight * 100	0.1428571 * 100 = 14.28571

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Content	Criteria	Relative Rating	Individual Score Equation	Individual Score
Languages (English)	Target Rating > Source Rating	Not applicable	Individual Score = Relative Weight * 100	0.1428571 * 100 = 14.28571
Work Requirements	Both travel requirements, Travel Domestically and Travel Internationally, of source and target profiles matches.	Not applicable	Individual Score = Relative Weight * 100	0.1428571 * 100 = 14.28571

- The total score is the sum of all individual scores. Therefore, total score = 54.285698.
- The application rounds off the total score to the nearest whole number. Therefore, the overall score of the target profile is displayed as 54.

Best-Fit Job Profile

As an HR specialist, you want to find the best-fit job profile for the person profile for Beth.

Beth's person profile has the following content:

- Competencies as shown in the following table.

Competency (Content Item)	Proficiency	Numeric Value of Rating
Action Oriented	Intermediate	2
Communication	Intermediate	2
Leading People	Foundation	1
Working Globally	Intermediate	2

- Degrees: Technical Diploma
- Language as shown in the following table.

Language (Content Item)	Reading (Rating Value)	Writing (Rating Value)	Speaking (Rating Value)
English	Low (1)	Moderate (2)	Low (1)

- Memberships: ICAS

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You perform the Find Best Job action on Beth's person profile. In the results section, for an overall fit greater than 40%, the application displays the job profile Accountant.

> **Note:** In the person to job best-fit analysis, you can't set the priority on the best-fit job UI. Instead, the application considers the importance of the content items of the target job profile for best-fit calculations.

The target job profile Accountant has the following content types with the importance already specified for each content item or content type:

- Competencies as shown in the following table.

Competency (Content Item)	Proficiency (Numeric Value)	Importance (Numeric Value)
Action Oriented	Intermediate (2)	Medium (2)
Communication	Intermediate (2)	Medium (2)
Leading People	Intermediate (2)	Medium (2)
Working Globally	Intermediate (2)	Medium (2)
Analytical Skills	Intermediate (2)	Medium (2)
Embrace Change	Intermediate (2)	Medium (2)
Manage Risk	Intermediate (2)	Medium (2)
Market and Industry Knowledge	Intermediate (2)	Medium (2)
Resource Management	Intermediate (2)	Medium (2)

- Degrees as shown in the following table.

Content Item	Importance (Numeric Value)
Technical Diploma	Medium (2)

- Languages as shown in the following table.

Language (Content Item)	Reading (Rating Value)	Writing (Rating Value)	Speaking (Rating Value)	Importance
English	Low (1)	Low (1)	Medium (2)	Medium (2)

- Memberships

Content Item	Importance (Numeric Value)
ICAS	Medium (2)
CIMA	Medium (2)
ACCA	Medium (2)

- Work Requirements:

Requirements	Importance (Numeric Value)
Travel Domestically: No	Medium (2)
Travel Internationally: No	Medium (2)

For the best-fit calculation, the application considers the individual score of the following 7 content items of the job profile Accountant that match with the content items of Beth:

- Competencies: Action Oriented, Communication, Leading People, Working Globally
- Degrees: Technical Diploma
- Languages: English
- Memberships: ICAS

The following table illustrates the overall score calculation of the target job profile Accountant.

Content	Target Importance	Source Rating	Target Rating	Relative Weight	Individual Score
Competencies (Action Oriented)	2	2	2	0.066667	6.6667
Competencies (Communication)	2	2	2	0.066667	6.6667

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Content	Target Importance	Source Rating	Target Rating	Relative Weight	Individual Score
Competencies (Leading People)	2	1	2	0.066667	3.33335
Competencies (Working Globally)	2	2	2	0.066667	6.6667
Degrees (Technical Diploma)	2	Not applicable	Not applicable	0.066667	6.6667
Languages (English)	2	1	2	0.066667	6.6667
Memberships (ICAS)	2	Not applicable	Not applicable	0.066667	6.6667
				Total Score	43.3335
				Overall Score	43

The overall score is calculated as follows:

- The target job profile Accountant has in all 15 content items with the importance (or priority) for all content items at the content type level set to 2. Therefore, the relative weight for each content item = 2 / 30 = 0.066667 (where, Relative Weight = Content item importance / Sum of all content item importance).

- The application calculates the individual score of the matching content using the appropriate equation as displayed in the following table.

Content	Criteria	Relative Rating	Individual Score Equation	Individual Score
Competencies (Action Oriented)	Target Rating = Source Rating	Source Rating / Target Rating = 2 / 2	Individual Score = Relative Rating * Relative Weight * 100	(2 / 2) * 0.066667 * 100 = 6.6667
Competencies (Communication)	Target Rating = Source Rating	Source Rating / Target Rating = 2 / 2	Individual Score = Relative Rating * Relative Weight * 100	(2 / 2) * 0.066667 * 100 = 6.6667
Competencies (Leading People)	Target Rating > Source Rating	Source Rating / Target Rating = 1/ 2	Individual Score = Relative Rating * Relative Weight * 100	(1 / 2) * 0.066667 * 100 = 3.33335
Competencies (Working Globally)	Target Rating = Source Rating	Source Rating / Target Rating = 2 / 2	Individual Score = Relative Rating * Relative Weight * 100	(2 / 2) * 0.066667 * 100 = 6.6667

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Content	Criteria	Relative Rating	Individual Score Equation	Individual Score
Degrees (Technical Diploma)	Not applicable	Not applicable	Individual Score = Relative Weight * 100	0.066667 * 100 = 6.6667
Languages (English)	Not applicable	Not applicable	Individual Score = Relative Weight * 100	0.066667 * 100 = 6.6667
Memberships (ICAS)	Not applicable	Not applicable	Individual Score = Relative Weight * 100	0.066667 * 100 = 6.6667

- The total score is the sum of all individual scores. Therefore, total score = 43.3335.

- The application rounds off the total score to the nearest whole number. Therefore, the overall score of the target profile is displayed as 43.

Related Topics
- Rating Models

FAQs for Compare Profiles and Find the Best Fit

How are the differences between comparison attributes identified?

The differences are calculated between the attributes of the secondary items and the base item. Differences between numeric values are calculated and displayed; character differences are indicated using an icon.

When the data includes a range (competency ratings, for example), the comparison displays the differences from each end of the range. The comparison, however, doesn't display the differences for values that lie within the range. For example, consider that you're comparing the competency requirements of two job profiles. The competency requirement of the base job is between 2 and 4 and the secondary job is between 1 and 3. The comparison displays the difference between the minimum competency requirement of the secondary job (1) and the base job (2) as -1. The comparison doesn't display the difference between the maximum values because the maximum competency requirement of the secondary job (3) lies within the competency requirement of the base job (between 2 and 4).

How is risk of loss assessed?

Line managers and human resource specialists enter the risk of loss information in a person's profile manually, there is no automated risk assessment process.

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They evaluate the risk of workers changing jobs or leaving the enterprise and select the ratings.

Can I add additional data sets to the comparison?

No, you can only select from the list of data sets available for an item type.

What happens if I remove the comparison base?

The next item in the comparison is automatically designated as the comparison base and the differences from the new base item are indicated. Note that the comparison must always include a base item.

What's the difference between performing a best-fit analysis and comparing profiles?

Perform a best-fit analysis to find matching profiles for a specified profile using a wide variety of criteria. For example, use best-fit analysis to find the top five person profiles matching a job profile, based on competency requirements, language skills, and certifications.

Compare profiles to evaluate the similarities and differences between known profiles and identify the most suitable profiles. For example, compare the five person profiles identified by the best-fit analysis and identify the person most suited to the job.

To compare or perform a best-fit analysis, use the Compare action in the smart navigation.

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3 Talent Review Meeting Configuration

How You Configure Talent Review Meeting Details

You create talent review meetings to review workers in an organization.

1. Select **My Client Groups** > **Talent Review**.
2. On the Meetings Overview page, click **Add**.

You can see the Create Talent Review Meeting page. You specify the meeting details in the Meeting Info section.

This image shows the details that you need to specify for a Talent Review meeting.
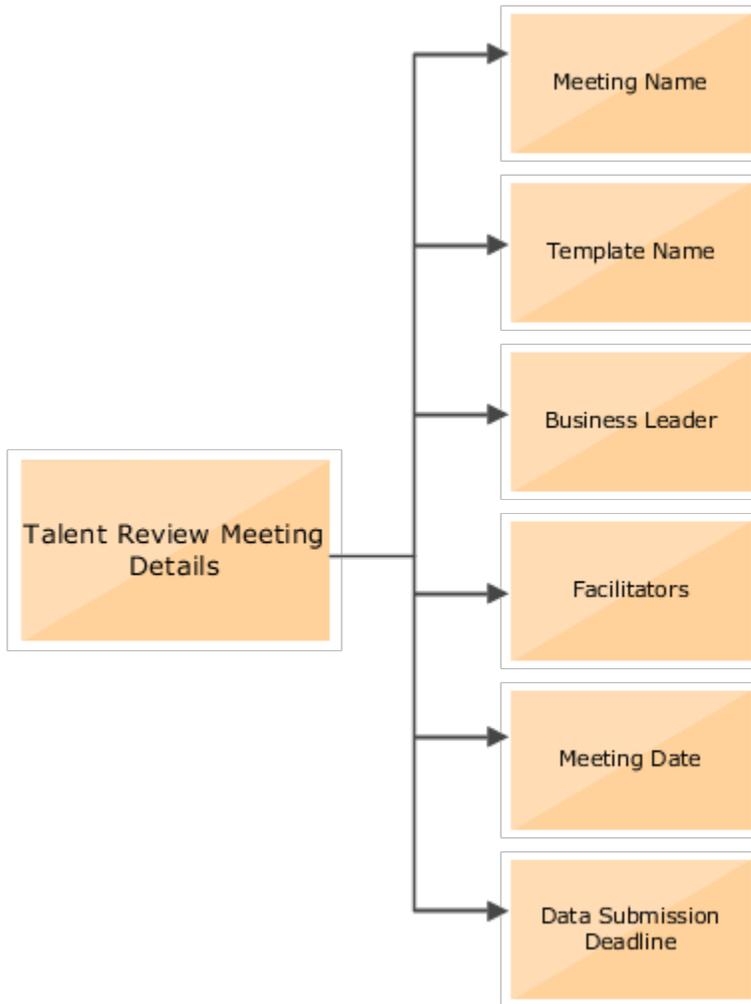
Meeting Name

Enter a meeting name in the **Talent Review Meeting** field. The name appears on the Talent Review meeting dashboard. It also identifies the meeting in searches and functions, such as viewing the history of notes and tasks.

Template Name

The template you select specifies these attributes of the meeting:

- Box chart views
- Rating models
- Actions
- Filters
- Potential assessment that reviewers can use to assess the members of the review population

The template also determines whether succession plans and talent pools can be used in the meeting.

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Business Leader

The business leader is the senior manager of the organization that's being reviewed. These are the effects of selecting the business leader of a meeting:

- The organization of the selected business leader appears automatically and can't be changed.

- The business leader is automatically added as a meeting participant.

  > **Note:** You can also select and add managers from other organizations as participants.

Facilitators

Facilitators are the HR specialists who conduct and manage the meeting. By default, the person creating the meeting is added as a facilitator. But you can select and add other facilitators. Only facilitators and Talent Review super users can conduct the meeting. It's a good idea to select more than one facilitator for a meeting. All facilitators can update meeting information and the data that's being reviewed.

Meeting Date

The meeting date indicates when the meeting is likely to start. Until the meeting start date, facilitators and Talent Review super users can open the meeting and only view the dashboard. Only on or after the meeting start date can the facilitators and Talent Review super users make any changes. When a facilitator or a Talent Review super user opens the meeting on the meeting date or later, the status changes to **In progress**.

Data Submission Deadline

The data submission deadline indicates the date until when reviewers can prepare and submit review content or worker data. The data submission deadline is according to the server time zone. So, if your reviewers are located in a different time zone, they need to submit the data before the deadline according to the server time zone and not their time zone. The data submission deadline is optional. If you don't enter a date, reviewers can update worker data until the meeting starts.

If the **Talent review content preparation reminder notification** is enabled, facilitators and Talent Review super users can send reminder notifications to reviewers when the submission deadline approaches.

Related Topics
- Guidelines for Selecting Participants for Talent Reviews
- How You Select the Review Population for a Talent Review Meeting
- Guidelines for Selecting Review Content for a Talent Review Meeting
- Can I duplicate a talent review meeting?

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Guidelines for Selecting Review Content for a Talent Review Meeting

After you have entered the meeting details for the talent review meeting, you select the review content that reviewers can use to rate the review population.

You specify these values in the Review Content section:

- Ratings for Reviewer

- Data validity guideline for the review

- Date range for prior ratings to compare with the current one

- Succession plans and talent pools to include in the meeting

Ratings for Reviewer

The ratings available in the meeting template are listed in the Select Ratings for Reviewer area. You can select the ratings that you want reviewers to view on the on the Prepare Review Content page. Ensure that reviewers have edit profile content section access security permissions to the ratings you select. You can view the same ratings on the meeting dashboard.

For example, consider that the meeting template has these ratings:

- Talent Score

- Performance

- Potential

- Impact of Loss

- Risk of Loss

- Overall Goals Rating

If you don't want the reviewers to rate the Risk of Loss and Overall Goals Rating, you don't need to select these. The reviewers won't see these ratings on the Prepare Review Content page.

If you have selected the Potential rating, you can also select the potential assessment questionnaire for the meeting. You need to enable potential assessment and then select the potential assessment questionnaire. By default, you see the questionnaire configured in the meeting template. But you can override this and select another active potential assessment questionnaire.

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Data Validity Guideline

From the **Data Validity Guideline** list, select the period within which the profile data of the review population must have been updated. This guideline helps to alert reviewers about any profile data for the review population that isn't current. When preparing review content, reviewers can see an icon on the Prepare Review Content page for ratings that were assigned before the period specified in the Data Validity Guideline. They can update these ratings to ensure that the ratings for the review population are current. The data validity is calculated back from the current date. For example, if you select the validity period as **Updated within previous month**, only profile ratings assigned or updated in the last month are considered to be current. Reviewers can see an icon for ratings that were updated before the previous month.

Prior Ratings Date Range

In the **Prior Ratings Start Date** and **Prior Ratings End Date** fields, indicate the date range in which you want to retrieve prior ratings of completed meetings. Only the most recent rating in the indicated date range is considered.

Succession Plans and Talent Pools

You can select existing succession plans and talent pools that you have access to. The selected plans and pools appear on the meeting dashboard. Reviewers can also see these plans and pools on the Prepare Review Content page if they have access to the plans and pools included in the meeting.

> **Note:** While conducting the meeting, facilitators can create additional succession plans and talent pools on the dashboard and add workers in the review population to those.

Related Topics

- How You Select the Review Population for a Talent Review Meeting
- How You Configure Talent Review Meeting Details
- Guidelines for Selecting Participants for Talent Reviews
- Content Section Access

Talent Review Prior Ratings

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

In the redesigned meeting dashboard, click **View Prior Rating** to do this. You can view the prior ratings only if both these conditions are met:

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

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Set Up Prior Rating

An administrator needs to do these tasks to enable the prior ratings feature in a Talent Review meeting:

1. While creating the meeting template, set up the ratings and rating models that appear in a talent review meeting. Use the Configure Talent Review Dashboard Options task in the Setup and Maintenance work area to do this.
2. While creating a meeting, specify the prior rating date range. Only meetings that were completed within this date range are considered for prior ratings.

Compare Ratings

You might want to assess the progress of workers in the review population or see the variations in their ratings. In the redesigned meeting dashboard, click **View Prior Rating**.

- You can see the most recent prior rating of the review population from previously completed meetings that are within the prior rating date range. For example, if a worker has a performance rating of 3 from a meeting in January 2021 and a rating of 4 from a meeting in July 2021, the worker's prior performance rating is 4.

- The prior position of the workers in the box chart is indicated by color codes in their current box location. For example, Lily Cox's current box position might be Expert Talent. But her most recent prior ratings might indicate that her previous box position was Solid Talent.

- In the Prior Ratings legend, you can see these counts:

  - The number of workers with no ratings in the previous meetings

  - The number of workers whose rating hasn't changed from the previous meetings

  - The number of workers who occupied a different box in the box chart of the previous meetings with their previous box label and color code.

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

- Apply Display options.

Guidelines for Selecting Participants for Talent Reviews

When creating a talent review meeting, after you select the review content, you need to select the review participants. The people you select as reviewers rate the workers in the review population. You select the participants in the Review Participants section.

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Review Participants

Typically, employees in an organization are reviewed by the managers of the organization. The participants in the talent review meeting are often the managers in the organization. You can also invite managers outside of the organization to participate. You can select at most 500 participants for a meeting.

The business leader is automatically added as a meeting participant and receives the same meeting notifications as other meeting reviewers.

You can also include matrix managers as meeting reviewers. To do this, select the **Include matrix managers as reviewers** check box. Note that matrix managers need to have edit profile content section access security permissions to rate their dotted line reports.

> **Note:** The setting you specify here for including matrix managers overrides the setting specified in the meeting template. You can select or clear the **Include matrix managers as reviewers** check box here irrespective of the setting specified in the meeting template.

After selecting and adding meeting participants, you can specify the participant type as one of these two types:

- **Reviewer**: Someone who rates the workers in the review population before the meeting. This is the default participant type. Meeting participants assigned the **Reviewer** role can grant access to other managers who are their direct reports to rate their direct and indirect reports.

- **Participant**: Someone who attends the meeting but can't rate the workers in the review population. They participate in the discussions about how to rate the workers in the review population.

> **Note:** You can't change the participant type of a business leader.

If **New meeting scheduled notification** is enabled and a facilitator submits the meeting configuration, the reviewers receive notifications to remind them all to prepare review content for the meeting. They get a link to the Prepare Review Content page, where they can make any updates.

Meeting Instructions

Did you know that you can add more information or comments for reviewers in the **Meeting Instructions** field? Reviewers can see the content added here on the Prepare Review Content page when they update worker ratings before the meeting.

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Related Topics

How You Select the Review Population for a Talent Review Meeting

When creating a talent review meeting, as a facilitator you need to select the review population. You can do this in the Population Selection section of the meeting configuration page.

You can use any one of these methods to find employees to add to the review population:

- Find by criteria.
- Find in talent pool.
- Find by analysis.

> **Note:** While adding employees, you can also select employees from organizations other than that of the business leader of the meeting.

Review the Selected Employees

You can review the employees who you added to the review population in the Review Population section of the meeting configuration page. After selecting the employees to add to the review population, click **Continue** to view the Review Population section.

You can search for specific workers in the existing review population. You can search for workers by their first name, last name, or both. You can see the workers who match the search term entered in the search results. You can initially see up to 25 workers, but you can load more.

You can remove employees who you don't want in the review population.

1. Select the employees who you want to remove.
2. Click **Remove**.

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Related Topics
- Guidelines for Selecting Participants for Talent Reviews
- Talent Review Profile Options

Find Review Population by Criteria

You can search employees to add to the review population by their name or their person number. You can also use an extensive list of filters to select employees.

1. Go to the Population Selection section of the meeting configuration page.
2. From the **Employees to Include** list, select **Find by criteria**.
3. Click **Show Filters**.
4. Specify search criteria.
   - When you specify a manager's name, you can also specify if you want to view all reports or only the direct reports of that manager.
   - If you have opted to include matrix managers, you can also select one or more reporting relationships to view employees who have the selected relationship with the manager. For example, if you select **David Steward** as the manager and only the **Project manager** reporting relationship, then you can view only employees who have **David Steward** as their project manager.
   - When you use the **Location** filter, you can see only locations identified as employee locations on the Location Details page.

     > **Tip:** When you create a location on the Location Details page, you can specify a location as an employee location by selecting **Yes** or **No** in the **Employee Location** field.

   - You can use the **Assignment Status** filter to view active and suspended employees.

     > **Note:** You can't use this filter by itself. You can apply this filter only after you select other filters such as manager or location.

   - You can use the **Worker Type** filter to show or hide contingent workers, employees, and nonworkers.

     > **Note:** You can't use this filter by itself or with the **Workers** and **Assignment Status** filter. You can apply this filter only after you select other filters such as manager or location.

   - You can use the **Management Level** filter to see all workers whose primary active or suspended assignment is associated with the selected management level. You needn't type the entire management level name. You can specify part of the name and see the matching management levels.

     > **Note:** The **Management Level** filter is based on the **Management Level** attribute of a job. You can view this attribute in the Job Details section of a job. Note that this attribute is hidden by default. Administrators can use the **MANAGER_LEVEL** lookup type to configure the different management levels. They can use the **Manage Job Lookups** or **Manage Common Lookups** task in the Setup and Maintenance work area to configure the values of the **MANAGER_LEVEL** lookup type.

5. Select the employees who you want to add to the review population.
6. Click **Add to Review Population**.

Find Review Population in Talent Pool

You can select members of any talent pool that you have access to and add them to the review population.

1. Go to the Population Selection section of the meeting configuration page.
2. From the **Employees to Include** list, select **Find in talent pool**.
3. From the **Talent Pools** list, select the talent pool.
4. Select the members who you want to add to the review population.
5. Click **Add to Review Population**.

Find Review Population by Analysis

You can add employees to the review population from one or more analyses that your organization has already created.

Before you start

The analyses from which you want to add employees needs to be present in the folder specified in the HRR_DEFAULT_REPORT_FOLDER profile option.

Here's what to do

1. Go to the Population Selection section of the meeting configuration page.
2. From the **Employees to Include** list, select **Find by analysis**.
3. From the **Analysis Name** list, select the analysis.

   > **Note:** To select employees from the analysis, you need to ensure that the selected analysis has the **PERSON_ID** column.

4. Select the employees who you want to add to the review population.
5. Click **Add to Review Population**.

FAQs for Talent Review Meeting Configuration

On which Talent Profiles attribute is the mobility value displayed in Talent Review meetings based on?

The **Mobility** value you see in Talent Review meetings is based on the **Willing to Relocate** attribute of the Work Requirements content section of Talent Profiles.

Can I include employees with a suspended primary assignment in a talent review meeting?

Yes. You can include employees with a suspended primary assignment in a talent review meeting in any of these roles:

- Facilitators
- Business leaders
- Review participants
- Members of the review population

But note that users can't distinguish between employees with an active primary assignment and those with suspended primary assignments.

Can I duplicate a talent review meeting?

Yes, you can select an existing meeting and from the **Actions** menu, select **Duplicate** to create another meeting.

Enter a name for the new meeting. You can also copy the meeting participants, review population, succession plans, and talent pools. The associated potential assessment questionnaire is also associated with the copy of the meeting. But note that delegated reviewers who have been granted access to the meeting aren't copied. After duplicating the meeting, you can edit other meeting attributes before saving or submitting the new meeting.

As a super user, can I edit the content of a Talent Review meeting?

Yes, you can change the review content for any Talent Review meeting that isn't complete. If the meeting is complete, you can only change or add facilitators.

What happens when facilitators include matrix managers in a Talent Review meeting?

Facilitators can include matrix managers as meeting reviewers when they configure a Talent Review meeting.

Here's what happens when facilitators include matrix managers in the meeting:

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

- On the Talent Review meeting dashboard, they can perform the same actions as other managers included in the meeting.

What happens if I change the potential assessment questionnaire in the meeting configuration?

As facilitators, you can change the potential assessment questionnaire in the meeting configuration if the meeting hasn't already started or is in progress.

Here's what happens if you change the potential assessment questionnaire in the meeting configuration:

- Responses that managers had already submitted are deleted provided the data submission deadline hasn't been reached and the meeting hasn't started.

- If managers have already submitted the potential rating from the old potential assessment, the ratings are retained. However, their responses in the questionnaire are cleared and they can see only the latest questionnaire.

- Managers need to reassess the members of the review population who they can access using the latest associated assessment.

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4 Talent Review Meeting Content Preparation

How You Prepare Content for a Talent Review Meeting

As reviewers, you can rate your direct and indirect reports who are part of the review population before the talent review meeting. You do this on the Prepare Review Content page.

To prepare review content, you need to have security access to update the talent profile ratings of the person. To view the Prepare Review Content page, do these steps:

1. Select **My Team** > **Talent Review** to open the participants' Meetings overview page.
2. Select the meeting for which you need to provide ratings.

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

3. From the Actions menu, select **Prepare Review Content**.

If your administrator or the meeting facilitator has enabled the inclusion of matrix managers as reviewers, and if your dotted line reports are part of the review population, you can identify them by the **Dotted line report** label below their name. But if a person is both a direct report and a dotted line report, then you won't see the **Dotted line report** label for that person.

Get Notification to Update Ratings

When the meeting facilitator or a Talent Review super user creates and submits a talent review meeting, as a reviewer, you will receive a notification to prepare the review content. The notification has a link to the meeting's Prepare Review Content page. You can update content until the meeting data submission deadline. But remember that after the meeting starts, you can't edit any ratings. You can, however, add notes and view the box chart matrix to see where your reports appear on the box chart before the meeting starts.

Check Ratings to Update

While creating the meeting, facilitators and Talent Review super users can set a data validity guideline to ensure that ratings are updated within a specified time frame. When you open the Prepare Review Content page, you can see a circular icon next to ratings that fall outside the guideline. This indicates that you need to update these ratings. When you change a rating, the icon disappears.

Complete Potential Assessment

You can also use the potential assessment questionnaire to rate your direct and indirect reports. As matrix managers you can rate your dotted line reports if you have the relevant Talent Profiles security access.

1. Select the row that shows the person who you want to rate.
2. From the Actions menu, click **Potential Assessment**.
3. Select an appropriate option for all the questions. Add comments about the rating you've given for questions that have comments enabled.
4. Click **Continue**.

You can see the potential rating and assessment score for the employee. You can choose to use this score or provide different responses to obtain a new rating.

Tip: Click **Cancel** if you don't want to use the ratings and return to the Prepare Review Content page.

Save or Submit the Content

You can either save or submit ratings on the Prepare Review Content page.

- When you save, the edited ratings are saved, but the employee profile isn't updated. Facilitators and Talent Review super users can't see the updated ratings in the meeting dashboard. You can return to the page and continue editing data until the meeting starts or until the submission deadline.

- Here's what happens when you submit the ratings:
  - The employee profile is updated with the edited ratings. The rating source is set to **Talent Review Meeting Preparation** in the profiles tables.
  - If your administrator has configured the submission process threshold in the meeting template and if the number of employees rated by the reviewer exceeds or is equal to the submission process threshold, a scheduled process is automatically run to update the profile ratings.

    Note: Configuring the submission process threshold in the meeting template is optional.

  - Facilitators and Talent Review super users can see the updated ratings on the meeting dashboard.

Related Topics
- How You Manage Tasks When Preparing Review Content
- Manage Notes When Preparing Review Content
- How You Set Up Potential Assessment

Preview Meeting Dashboard When Preparing Review Content

When preparing review content, you can preview the Talent Review dashboard to see where your direct and indirect reports appear in the box chart matrix.

On the Prepare Review Content page, click **View Dashboard** to open a preview of the Talent Review dashboard. You can do these actions on the dashboard:

- Move your reports on the box chart. You can see their updated ratings on the Prepare Review Content page.

- View succession plans and talent pools for which you're an owner if they're added by facilitators when they create the meeting.

- Create additional succession plans or talent pools. You can do this only if you have the security permission to create succession plans and talent pools.

- Perform many other actions that are available on the dashboard during the meeting. For example, you can create tasks and notes, and add goals for your reports.

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How You Manage Tasks When Preparing Review Content

When preparing review content, you can view and add tasks for the members of the review population.

You can manage tasks only if the **Add Task** action has been enabled in the meeting template used for the meeting. As reviewers, you can manage tasks for the members of the review population on these pages:

- **Talent Review Meetings Overview page**: Locate the meeting row and select the **View Tasks** action.
- **Prepare Review Content page**: Locate the person whose tasks you want to manage and then select the **View Tasks** action.
- **Dashboard view**: Select the table view of the meeting dashboard. You can see the number of tasks assigned to the members of the review population in the **Tasks** column. Click the task count to see the list of tasks associated with the member of the review population on the Tasks page. When you add or delete a task, the corresponding count of tasks for the associated worker is updated in the Tasks column.

  Note: When you edit a task after navigating from the table view, you can't change the name of the associated worker.

Related Topics
- Talent Review Tasks

Manage Notes When Preparing Review Content

When preparing review content, you can view and add notes for the Talent Review meeting and members of the review population.

As reviewers, you can manage notes only if your administrator has enabled the **Add Notes** action in the meeting template used for the meeting. You can add notes for the members of the review population either from the Talent Review Meetings Overview page or the Prepare Review Content page. But you can view and add meeting notes only from the Talent Review Meetings Overview page. To view the manager's Talent Review Meetings page, go To **My Team** > **Talent Review**.

Manage Notes from Talent Review Meetings Overview Page

1. Locate the meeting for which you want to add notes.
2. From the Actions menu, select **View Notes**.
3. To add a meeting note, in the Meeting Notes section, click **Add**. Then select the note visibility and add content. Save the note.
4. To edit a meeting note, click the **Edit** icon. To delete the note, click **Delete** when editing.

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5. To manage notes for the members of the review population, locate the member row. Then click the notes count to view the Notes page.

> **Tip:** Select the **Include review population without notes** check box to also view members who don't have any notes.

Manage Notes on the Prepare Review Content Page

You can also manage notes on the Prepare Review Content page when rating the review population members.

1. On the Talent Review Meetings Overview page, go to the meeting row. Then select the **Prepare Review Content** action to view the Prepare Review Content page.
2. Select the person's row.
3. From the Actions menu, click **View Notes**.
4. Select the notes that you want to view:
   - Select **All Authors** to view all notes for that person or select **Me** to view only your notes.
   - Select the period for which you want to view the notes.
5. Click **Add** to add a new note for that person. You can set the visibility of the note to control who can view the note.

Related Topics
- Talent Review Notes

Grant Review Access to Other Managers

As Talent Review reviewers, you can grant access to other managers below you in your organizational hierarchy to submit data about their own direct reports.

You can also grant access to matrix managers of employees who report to you. To do this, these conditions need to be met:

- Your administrator or the meeting facilitator needs to enable the inclusion of matrix managers as reviewers. They can do this in the template used for the meeting or on the meeting configuration page.
- At least one person reporting to the matrix manager needs to be part of the review population.

To grant review access, do these steps:

1. Select **My Team** > **Talent Review**.
2. Select the meeting row for which you want other managers to provide ratings.
3. From the Actions menu, select **Grant Access**.
4. Search and select the managers who you want to grant access to.
5. Save and close the Grant Access page.

Results:

When you grant access to other managers, they receive a notification to update the content with a link to the meeting's Prepare Review Content page.

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FAQs for Talent Review Meeting Content Preparation

What happens if talent review content isn't complete by the deadline?

The talent review meeting uses data from the worker's current profile record. If the reviewer doesn't submit ratings prior to the meeting, the most recent ratings are used even if the ratings are outside of the data validity guidelines.

If the profile record contains no performance or potential ratings, the worker appears in the holding area of the Talent Review meeting dashboard at the start of the meeting. The worker doesn't appear in the box chart matrix. Meeting participants can rate the worker during the meeting.

Can reviewers see data for workers they don't manage when preparing content?

No. Outside the talent review meeting, when reviewers update ratings on the Prepare Review Content page or the dashboard view available from that page, they can see profile data for their direct and indirect reports only.

However, during the meeting, such as in a conference room when the facilitator dashboard is projected on a screen, reviewers who are also participants can see profile data for all persons being reviewed.

Can I grant access to managers with a suspended primary assignment?

Yes. As managers, you can grant review access to managers below you in your organizational hierarchy even if their primary assignment has been suspended.

Why can't I edit, save, or submit ratings for my direct reports when preparing review content for a talent review meeting?

When preparing review content for a talent review meeting, you can edit, save, or submit ratings for your direct reports only if these conditions are met:

- You need to have the **Manage Talent Review Content** (**HRR_MANAGE_TALENT_REVIEW_CONTENT_PRIV**) privilege.
- In Enhanced Talent Profiles, your role needs to be configured to edit the rating.
- The current date needs to be before the data submission deadline.
- The talent review meeting shouldn't have started.

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Related Topics
- Content Section Access

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5 Talent Review Meetings: Conducting

How You Conduct a Talent Review Meeting

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

(▶) **Watch video**

To open the Talent Review dashboard:

1. Go to **My Client Groups** > **Talent Review**.
2. Select the meeting row in the Meetings section.

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

3. From the Actions menu, select **Conduct Meeting**.

You can see workers in the review population in the box chart matrix. But you can't see workers who have an inactive primary assignment or whose profile has been inactivated on the dashboard.

You can do any of these actions in a talent review meeting:

- Change the review ratings.

- View the prior ratings of members of the review population if enabled in the Talent Review meeting template.

- View the most recent potential assessment ratings saved or submitted by reviewers.

- Add a member of the review population to a talent pool.

- Add notes or tasks for members of the review population.

- Add a development or performance goal to a member of the review population if enabled in the Talent Review meeting template.

- Print the dashboard.

You can save a meeting that's in progress and can continue it later. When you have completed conducting the meeting, submit it. This updates the worker profiles with the new ratings.

> **Note:** You can reopen a submitted talent review meeting.

Let's look at different aspects of the Talent Review dashboard that you use to conduct a meeting.

Dashboard View

The dashboard views that you can use are configured in the template selected when the talent review meeting was created. For example, the template might be configured to show performance ratings on the x-axis, and potential on the y-axis. Another view might contain risk of loss on the x-axis and impact of loss on the y-axis. A third might be a single rating, such as talent score. You can select one of these dashboard views while conducting the meeting.

Holding Area

Click the **Holding Area** icon to view the workers in this area. The number above the icon indicates the number of workers in the area. These workers are included in the Holding Area:

- Workers who aren't rated by their managers
- Workers who are rated using nonstandard rating models
- Workers removed from the box chart during the talent review meeting

You can drag and drop workers from the Holding Area to the dashboard and back. When you submit a meeting, the ratings of the workers in the Holding Area for that meeting are set to blank in their profiles.

Succession Plans and Talent Pools

Click the **Succession Plans** and **Talent Pools** icons to view the succession plans and talent pools associated with a meeting. You can view or add only these succession plans and talent pools in a talent review meeting:

- By default, you can view only the succession plans and talent pools that were included when the meeting was created.
- You can add only the succession plans or talent pools that you own to a talent review meeting.
- You can create succession plans and talent pools while conducting the meeting and add the workers in the review population to these new plans and pools.

Only workers in the review population who are candidates in succession plans or members of talent pools appear in the views shown on the dashboard. The number that you see with a plan or pool is the number of members of the review population who are in the plan or pool and who are active candidates and pool members.

Actions

In the graph view, you can perform some actions on individual workers and some on multiple workers. The actions are grouped in the Actions menu. To do an action, select workers and then select the action to perform, or right-click a worker and select an action. To select multiple workers, use the Control key and click worker names.

Use the **Select Visible Workers** check box to select multiple workers. These workers are selected depending on the visibility of the Holding area and the area of the box chart matrix that you focus:

- If the Holding Area is visible, all workers on the box chart and the Holding Area are selected.
- If you had minimized the Holding Area, only the workers on the box chart are selected.
- If you had zoomed into a single box, only workers in that box are selected.

Related Topics
- Overview of Adding Analyses to the Talent Review Dashboard
- What happens when I submit a talent review meeting?
- Talent Review Notes
- Talent Review Tasks
- Talent Review Prior Ratings

Graph and Table Views of the Talent Review Meeting Dashboard

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

Differences Between the Graph and Table Views

Areas of Difference	Graph View	Table View
Representation of members of review population	Graphical	Tabular
Display order of workers	Alphabetic order within each box	Alphabetic order of the entire review population **Note:** You can sort to show workers according to job, location, manager, and other criteria.
Holding Area in the redesigned dashboard	A separate region. You can move workers to and from the box chart to the holding area.	Not a separate region. Workers in the Holding Area appear with an icon by their names.
Display Options	Available	Not available

Display Options of the Talent Review Dashboard

The display options of a Talent Review meeting are conveniently grouped in the Display menu.

You use display options to highlight segments of the review population. For example, if the workers in the review population are from different locations such as Chicago, San Francisco, and Indianapolis, you might want to identify workers by their location.

You can view the display options only in the graph view of the Talent Review dashboard. The display options that appear depend on the configuration of the template used for the meeting.

Here are some of the ways in which you can use the available display options:

- Highlight workers by color code according to the categories within the option.
- View and compare impact of loss, risk of loss, and mobility ratings.
- View worker names.

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When you select any display option other than worker photos and names, the option appears in a legend that opens on the dashboard. In the legend, each category within the display option appears with a different color code. For example, if you select **Job** from the Color Code menu, the jobs for all members of the review population appear in the legend distinguished by different colors. The worker markers in the box chart are highlighted with the colors corresponding to their jobs. Select a category in the legend, such as developer or manager, and the workers with the selected job are highlighted on the box chart matrix. You can select one category only for most of the display options. But for the impact of loss, risk of loss, and mobility ratings, you can select up to two at a time.

When you select the **Ethnicity** display option, if a member of the review population has identified themselves with multiple ethnic races, you can see all their ethnicity information concatenated and displayed as a string in the display legend.

Related Topics
- How can I view a summary of the selected display options?

Actions for Talent Review Meetings

A facilitator, super user, or reviewer can perform actions on workers in the review population of a Talent Review meeting.

As a facilitator or a Talent Review super user, you can perform many actions on workers in the review population when conducting the meeting. As a reviewer, you can perform actions on the dashboard view that you open from the Prepare Review Content page. Remember that the actions are available only if they have been enabled on the template on which the meeting is based.

What You Can Do

You can do some actions only for a single worker and some actions for multiple workers.

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

Action	What You Do	For a Single Worker	For Multiple Workers	Comments
Show Details	See more information on the worker's person spotlight.	Yes	No	Click **Done** to return to the dashboard.
View Analytics	See the Oracle Transaction Business Intelligence (OTBI) reports added to the meeting in which the selected workers are included.	Yes	Yes	You can only view analyses that you have access to view.
View Potential Assessment	View the most recent potential assessment ratings saved or submitted by reviewers.	Yes	No	• Facilitators can only view the ratings and the comments entered by the reviewers. They can't edit

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Action	What You Do	For a Single Worker	For Multiple Workers	Comments
				the responses and comments. • If a reviewer has saved or submitted multiple potential assessments for a member of the review population, then the facilitator will see only the most recent responses and comments. • If multiple reviewers have completed a potential assessment for a member of the review population, then the facilitator will see only the most recently saved or submitted assessment regardless of who submitted it.
Print Profile	Print the profile information.	Yes	Yes	Select **Print Profile** > **Print All Profiles** to print the profiles of all the workers in the dashboard. The print output will include only the worker's profile and content sections that you have access to.
Move	Move the selected workers to the holding area or to another box in the box chart.	Yes	Yes	To move workers to another box, specify the new ratings.
Add Task	Add a task for the selected worker.	Yes	No	The selected worker becomes the associated worker and the worker's manager the default assignee for the task. You're added as the default owner of the task. But you can change these values.
Add Note	Add a note for the selected worker.	Yes	No	You can specify who can see the note added.
Add to Succession Plan	Add the selected workers to a succession plan associated with the meeting.	Yes	Yes	Reviewers can add workers only to succession plans that they have access to.

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Action	What You Do	For a Single Worker	For Multiple Workers	Comments
Add to Talent Pool	Add the selected workers to a talent pool associated with the meeting.	Yes	Yes	Reviewers can add workers only to talent pools that they have access to.
Add Development Goal	Add a development goal for the selected worker.	Yes	No	
Add Performance Goal	Add a performance goal for the selected worker.	Yes	No	When a primary goal plan is active, the performance goal that's added is automatically added to the primary goal plan of the selected review period.
Compare	Compare the first selected workers with other selected workers.	No	Yes	You can see the **Compare** action only if both these conditions are true: • The **Hide Person Compare Flow** profile option's value is **N**. • The **Enable Compare** check box is selected in the Actions section of the Talent Review Template page.

Related Topics

- Comparing Items
- Talent Review Data Options

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

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

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

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

- **Subordinate Level**: Select this filter to show people in the selected levels below the business leader.

    - **Level 1**: This shows only the direct reports of the business leader.

    - **Level 2**: This shows the indirect reports of the business leader.

    - **Level 3**: This shows workers who report to managers in level 2.

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

- **Competency**: If you have upgraded to Enhanced Talent Profile, you can see multiple competency sections for filtering the talent review meeting. You can see both the section and the competency names. Note that you can see only the competencies that have HRMS (Human Resources) subscribed sections.

- **Management Level**: Select this filter to show only people at the specified management level.

- **Reporting Relationship**: Use this filter to filter the review population by the reporting relationship they have with their managers. You can view this filter only if these conditions are met:
    - Matrix managers are included in the meeting.

    - You selected a manager who has dotted line reports included in the meeting in the **Managers** filter.

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

Talent Review Tasks

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

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

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

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

Create and Assign Tasks

You can create and assign tasks in these areas:

- **Talent Review dashboard**: You can use any of these options to manage tasks on the meeting dashboard:

    - **Add Task action**: Select any person in the review population and add a task. The person to whom you add the task is automatically the **Associated Worker**, and the person's manager is the **Assignee**. But you can change this.

    - **Table view of the meeting dashboard**: You can see the number of tasks assigned to the members of the review population in the **Tasks** column. Click the task count to see the list of tasks associated with the member of the review population on the Tasks page. When you add or delete a task, the corresponding count of tasks for the associated worker is updated in the **Tasks** column.

- **Tasks page**: Assign a task to any person you have access to; you aren't restricted to assigning tasks to meeting participants or the review population

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

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

Edit Tasks

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

Note: When you edit a task after navigating from the table view of the meeting dashboard, you can't change the name of the associated worker.

View Task History

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

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

Related Topics
- Profile Management Lookups

Talent Review Notes

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

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

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

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

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

Create Notes

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

- On the meeting dashboard, select a worker in the review population and click **Add Notes**.

- On the Notes page that opens when you select the **View Notes** option from the Actions menu of a meeting, you can add notes in these ways:

  - To add a note about the meeting, in the Meeting Notes section, click **Add**.

  - To add a note for a worker:

    i. Click the **Notes** link in the worker row.
    ii. In the Notes section, click **Add**.

- On the Prepare Review Content page, to add a note for a worker in the review population, do this:

  a. Select the worker row.
  b. From the Actions menu, select **View Notes**.
  c. In the Notes section, click **Add**.

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

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

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

View History

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

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

Create Reports

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

Overview of Adding Analyses to the Talent Review Dashboard

As an implementor or administrator, you can add analyses to the Talent Review dashboard to display data about the review population from the analyses in the meeting.

You can use Page Composer to add analyses to the dashboard by any one of these methods:

- Create a placeholder analysis, associate it with company-defined analyses, and then add the placeholder analysis to the dashboard.

- Add company-defined analyses directly to the dashboard and open the analyses.

Data security of the facilitator ensures that only the data in the analyses that the facilitator has access to view appears on the dashboard. You set up analyses on the Create Analysis page in the Reports and Analytics work area.

Placeholder Analysis

You can create a placeholder analysis, add it to the dashboard, and use it to open associated analyses. Here's how you use the placeholder analysis:

1. Select worker names or meeting titles.
2. Open the placeholder analysis to automatically open all analyses associated with the placeholder analysis.
3. View data about the selected workers or meetings.

Non-Placeholder Analyses

You can add analyses directly to the dashboard. Using this method, you can open only one analysis at a time. When you open the analysis, you can view all data that you have access to view. When you create the analyses, add either, or both the **PersonID** and **AssignmentID** columns to the analysis to ensure that you can select one or more workers and view only their data. You can also add the **MeetingId** column to view only the currently selected meeting's data in the analyses.

Related Topics
- Add Analyses to the Talent Review Dashboard

Add Analyses to the Talent Review Dashboard

You can deploy Oracle Transactional Business Intelligence (OTBI) analyses directly from the Talent Review dashboard. You can do this by adding links of specific analyses to the dashboard.

▶ **Watch video**

The analyses you add help to keep relevant information about workers readily available to support the talent review. To open an analysis for a selected worker on the Talent Review Dashboard, the analysis you add to the dashboard must contain a prompt set to **Is Prompted** on any of these parameters:

- Person ID

- Assignment ID

- Meeting ID

Create a Talent Review Meeting Analysis

Create a talent review meeting analysis in the Reports and Analytics work area to view real-time talent review meeting data in graphs or table views.

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To create a talent review meeting analysis:

1. Sign in as an Application Implementor.
2. Navigate to the Reports and Analytics work area.
3. Click **Create** > **Analysis**.
4. From Select Subject Area window, select **Workforce Talent Review - Talent Review Meeting Real Time** and click **Continue**.
5. In the Subject Areas pane, expand the folders, and add columns that you want to the analysis.
6. Order the columns and click **Next**.
7. Enter a title for your analysis, select the views that you want to include, and click **Next**.
8. Edit the selected views and click **Next**.
9. Add **Meeting ID**, or **Person ID**, or **Assignment ID** as a filter of type **is prompted**.
10. In the Save train stop, enter the analysis name and optionally a description. Select the folder in which you want to save the analysis, and click **Submit**.

Open the Talent Review Meeting

First, activate a sandbox and then do these steps.

1. On the home page, click **My Client Groups** > **Talent Review** to open the Talent Review Meetings overview page.
2. Select the row of the meeting in which you want to add the analysis.
3. From the Actions menu, select **Conduct Meeting**.
4. If you're adding an analysis with Person ID or Assignment ID filters, you must select at least one person marker in the box chart of the talent review meeting dashboard.

   Tip: To select all the review population members displayed in a box, select the **Select Visible Workers** check box.

5. On the dashboard for the selected meeting, click **Actions** > **View Analytics** to open the Analytics page.

Edit the Talent Review Dashboard

1. On the **Settings and Actions** menu, click **Edit Pages**.
2. Select the **Edit Layer** as **Site**.
3. Select **View** > **Design**.
4. On the Analytics page, click **Add Content** to open the Add Content dialog box.
5. In the **Reports and Analytics** row, click **Open**.
6. In the **BIPresentationServer** row, click **Open**.
7. In the folders row in which the analysis is located, click **Open** to open the folder path containing the analysis that you want to add.
8. Continue clicking **Open** to follow the file path containing the analysis until you locate it.
9. In the row for the analysis you want to add, click **Add**.
10. Click **Close** to close the Add Content dialog box.
11. To enable contextual parameter passing for the embedded analysis, do these steps:

    a. Click **Parameters**.
    b. In the **Value1** field, type the corresponding expression given in the following table according to the filter added for the analysis.

Filter	Expression
Meeting ID	#{pageFlowScope.biFilterName_TalentReviewMeetingDetailsMeetingId}
Person ID	#{pageFlowScope.biFilterName_WorkerPersonID}
Assignment ID	#{pageFlowScope.biFilterName_WorkerAssignmentID}

     c. Click **Save**.
12. Click **Close** to stop editing the page.
13. Publish the sandbox.

Related Topics
- Create a Sandbox and Make It Active

Overview of Reopening a Talent Review Meeting

As a facilitator or a Talent Review super user, you can reopen a submitted meeting if you had submitted the meeting in error or if you want to make some changes such as updating the ratings.

What Happens When You Reopen a Meeting

Here's what happens when you reopen a talent review meeting:

- The Talent Review Meeting Reopening process starts. You can see the process ID in the confirmation dialog box.

- You can view the notes and tasks associated with the meeting; but you can't perform any other actions on the meeting.

What Happens When the Reopen Process is Successful

Here's what happens when the talent review meeting's reopen process completes without any errors:

- The meeting's ratings for each person in the review population are deleted from the worker's profiles.

- The ratings in the worker's profiles for that meeting are reset to their prior ratings.

- The status of the reopened meeting changes to **In Progress**.

- The meeting date remains unchanged, but you can't see a submission date.

Note: If an error occurs during the reopen process, the meeting is still treated like a completed meeting and you can't make any changes to the meeting data.

What You Can See or Do in the Reopened Meeting Dashboard

When you reopen a talent review meeting, you can see these details:

- The previously submitted ratings for the workers in the review population.

- The workers who were in the holding area of the previously submitted meeting in the same area.

- The current assignment information of the review population. For example, if the manager of a review population member has changed, you can see the new manager's name when you view the person's details.

Note: You can't see workers who were terminated since the meeting was last submitted.

You can edit the dashboard and perform actions on the workers in the review population.

Related Topics
- How You Conduct a Talent Review Meeting
- How can I monitor the deletion or reopening of a talent review meeting?

FAQs for Talent Review Meetings: Conducting

Can I edit the review population of a talent review after it's started?

Yes. Edit the meeting and then add members in the Population Selection section. You can select members and remove them from the meeting in the Review Population section.

Click **Submit** to submit your changes. When you restart the meeting, your changes appear. If you remove workers from the meeting, no data changes are applied to their worker profiles.

During the meeting, you can move workers from the box chart matrix to the holding area. Data changes made during the meeting for these workers are uploaded to their worker profiles.

Related Topics
- Can I change the attributes of an in-progress talent review meeting?

Can I change the attributes of an in-progress talent review meeting?

Yes. Edit the Talent Review meeting. You can change attributes including the meeting status, name, participants, and review population.

Click **Submit** to save your changes.

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Profile data updates made so far aren't affected. Profile data for any additional workers appears when you restart the meeting.

Can I save the talent review meeting even if it isn't completed?

Yes. All edited values from the meeting are available when you resume the meeting in the Talent Review work area, even if a manager or worker updates profile data elsewhere. After the facilitator submits the meeting, you can't edit meeting values.

How can I view a summary of the selected display options?

You use display options to highlight segments of the review population of a talent review meeting. You can view a summary of the highlighted segments to identify the count of members in each segment.

When you select any display option other than worker photos and names, you can see the members of the review population highlighted with colors corresponding to the legend shown for the display option. To view the summary information of each display option, select the **View Summary** check and then select the level at which you want to view the summary information:

- **Per Box**: Show summary information for each box of the meeting dashboard.
- **Across Boxes**: Show summary information for the entire meeting dashboard.

For example, if you selected the **Age** display option, and then opted to see the summary information for each box, you can see the counts of people in each age group in each box. These counts are highlighted with the colors shown in the legend so that you can identify the age group that the count is for. For example, you might see that there are 2 people in the Flexible Talent box who have ages between 40 and 49 and 4 people in the same age group in the Emerging Talent box.

If you select another display option, the counts will be shown for each combination of the display options. For example, if you also selected the **Mobility** display option, then you can find that of the 4 in the Emerging Talent box who have ages between 40 and 49, only 2 are willing to relocate.

Similarly, if you opted to see the summary information across boxes, you will see the counts of members in each age group across all the boxes. You might see that there are 12 members of the review population who have ages between 30 and 39, and 10 members who have ages between 40 and 49. If you also selected the **Mobility** display option, then you can find that of the 12 members in the 30 to 39 age group, only 5 are willing to relocate.

Related Topics
- Display Options of the Talent Review Dashboard

What happens to the performance evaluation rating if I change the performance rating in the talent review?

The performance evaluation rating is unaffected. The performance rating that managers provide for a talent review is recorded in the worker profile and is separate from the rating provided for the performance evaluation.

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What happens when I submit a talent review meeting?

Rating changes that you made before and while conducting the talent review meeting appear in the profile records of workers in the review population. The **Meeting Submission Date** value is set to the current date.

The meeting status changes to **Complete** and you can no longer update ratings. But you can do these tasks:

- View the dashboard and worker ratings and change views.

- Add notes and tasks.

- Add workers to succession plans and talent pools associated with the meeting.

- Create succession plans and talent pools and add workers to them.

If the meeting template is configured to run a scheduled process when you submit the meeting, a message appears with the process number. You can check the status of the submission process using the Scheduled Processes task. You can continue to view the dashboard, open another page, or sign out while the process runs.

Why can't I add the talent review population using the Workforce Talent Review - Talent Review meeting Real Time subject area in OTBI?

You need to have the **Talent Review Meeting Real Time Transaction Analysis Duty** (**FBI_TALENT_REVIEW_TRANSACTION_ANALYSIS_DUTY**) privilege to view or create Talent Review reports.

When do talent review calibrated ratings appear in reports?

Facilitators need to submit the ratings from the Talent Review meeting dashboard. Only then, you can see these ratings in reports.

What happens when I delete a completed talent review meeting?

The Talent Review Meeting Deletion process is initiated. The process ID is displayed in the confirmation dialog box.

Here's what happens when the process completes successfully:

- The meeting is removed from the Overview page and the OTBI reports.

- The ratings that were sent to worker profiles when the meeting was completed are deleted and replaced by the ratings that were effective before the deleted meeting.

- Notes and tasks associated with the talent review meeting are deleted.

How can I monitor the deletion or reopening of a talent review meeting?

Two statuses, Process job in progress and Process job error, are available to monitor the meeting deletion and reopen processes. These statuses are available in the Filters panel of the Talent Review Meetings page.

The application creates a log that indicates the success or failure of the deletion or reopen process. You can view this log in the Schedule Processes page. Search the process using the process ID displayed in the confirmation dialog box or next to the meeting status in the Talent Review Meetings page.

Can I hide or unhide a note created during a Talent Review meeting?

Yes, you can hide or unhide a note shared with everyone if you're one of these people:

- The person for whom the note was created
- The HR specialist who has access to the person for whom the note was created

Note: When the author of the hidden note or the HR specialist tries to view it, they can see that it's hidden.

What happens to the note count when a note is hidden?

The note count shown in the Review Population Notes section of the Notes page may differ depending on the person viewing the page.

- If you're the author or receiver of the hidden note, then the hidden note is included in the count.
- For anyone else, the hidden note isn't included in the count.

As a super user, can I report on all Talent Review meetings?

No. You can generate reports only for the ratings and employees that you can access in Oracle Transactional Business Intelligence (OTBI).

Why can't I see the View Task button in the task notification for a Talent Review meeting?

You need to be a facilitator, reviewer, or business leader to see the View Task button in the notification sent to task owners and assignees of a Talent Review meeting.

6 Succession Planning

Succession Planning

Succession planning or succession management can help you to identify successors for key employees.

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

Because of the default filters, you can see only active succession plans that you have access to when you view the Succession Overview page. Clear the filter to also view inactive succession plans.

These are the advantages of using succession plans:

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

Plan Types

Select from these succession plan types:

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

Plan Incumbents

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

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

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

Plan Candidates

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

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

- Search for employees that you can access and add them as candidates.

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- Add external candidates.

- Use Best-Fit feature to find candidates who match the job or position requirements.

  > **Note:** The Best-Fit feature isn't available on mobile devices. You also can't see this option when your administrator enables adding artificial intelligence suggested candidates.

- Add artificial intelligence suggested candidates.

- Add talent pool members.

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

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

- Readiness information

- Status

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

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

- The total number of plans in which the person is a candidate

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

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

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

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

- The succession plans created for that person that you can access

- The succession plans in which the person is a candidate that you can access

- The talent pools in which the person is a member and which you can access

- Risk of Loss, Impact of Loss, and Job Criticality details

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

You can search for existing candidates when editing a succession plan or creating a new one. Use the search field in the Candidates section to do this. You can search by the first name, last name, or both. Initially, you can see 5 candidates that match the name entered, but you can load more. You can sort the candidates listed.

> **Note:** You can select only these succession plans when you try to add candidates:
> - Plans for which you're a named owner
>
> - Plans in which you have access to the named or inferred incumbent of the plan

Talent Pools

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

Related Topics

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

How You Access Succession Plans

To work with succession plans, you need to have specific privileges.

To access the Succession Plans work area, you need to have the **View Succession Plan** (**HRM_VIEW_SUCCESSION_PLAN_PRIV**) privilege. To create succession plans, you need to have the **Create Succession Plan for Worker** (**HRM_CREATE_SUCCESSION_PLAN_FOR_WORKER_PRIV**) privilege.

HR specialists can view and create succession plans by default.

Managers can use these options to create succession plans:

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

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

Only these users can manage a nonprivate succession plan:

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

Attributes for Succession Plan Candidates

You use attributes to specify which of your candidates on a succession plan are most capable of assuming the plan role.

Attribute	Indicates	Comments
Readiness	How soon a person can take up the job or position of the plan.	You select a readiness level based on these factors:

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Attribute	Indicates	Comments
		• Your knowledge of the candidate
		• How well the candidate's current competencies match the skills of the job or position associated with the plan
		By seeing the readiness levels of all candidates in a plan, you can determine the bench strength for the job or position and your organization. For example, if no candidate is likely to be ready in the next 2 years, the bench strength is poor. You can add other candidates in this case.
Candidate Ranking	Order of preference for a succession plan candidate to fill the job associated with the plan.	You can rank candidates across the entire plan, or you can rank candidates within a readiness category. You can have multiple candidates with the same ranking across readiness categories.
Interim Successor	The candidate can't be considered as an actual prospect but can perform the duties of the incumbent, or for the job or position, until an actual successor is identified.	NA

How You Add Internal Candidates to a Succession Plan from Other Work Areas

You can add internal candidates to a succession plan when you aren't in the Succession Plans work area if you have the required data security privileges.

You can use any of these methods to add succession plan candidates when you aren't in the Succession Plans work area:

- Navigate to **My Team** or **My Client Groups**. Use the **Add to Succession Plan** Quick Action. Select a person and add them to a selected succession plan.

- Navigate to **My Team** > **Career Overview**. Use the **Add to Succession Plan** action for the person who you want to add as a candidate.

- Select a person from the review population of a Talent Review meeting and add them as a candidate to any succession plan associated with the meeting.

Create a Succession Plan

Create a Private Succession Plan

This example shows how to create a private succession plan for a job.

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This table summarizes key decisions for this scenario.

Decisions to Consider	This Example
Which plan type do I create?	Job
Do I add external candidates?	No
How many owners do I add for the plan?	A minimum of two

Summary of the Tasks

To create a succession plan:

1. Enter succession plan details.
2. Select candidates.
3. Add owners.

Enter Succession Plan Details

1. Click **My Client Groups** > **Succession Plans**.
2. On the Succession Overview page, click **Add**. You can see the Create Succession Plan page.
3. In the **Plan Name** field, enter **Director of Talent Management**.
4. From the **Plan Type** list, select **Job**.
5. Complete the **Status** and **Description** fields as shown in this table.

Field	Value
Status	Active
Description	Director of Talent Management

6. Select the **Private** check box.
7. From the **Job** list, select the **Director** job.

    The jobs that appear are those set up by your organization.

Select Candidates

Do these steps for each candidate that you want to add to the plan.

1. In the Candidates section, click **Add** > **Internal Candidate**.
2. In the **Name** field, search and select a candidate.
3. From the **Readiness** list, select a readiness level for the candidate.

You can add or remove readiness levels using the Succession Management Lookups task in the Setup and Maintenance work area.

4. Complete the **Ranking**, **Interim Successor**, and other ratings fields.
5. Click **OK**.

Add Owners

By default, the person creating the succession plan is added as an owner of type **Administrator**. If you don't add additional owners, no one else can access the succession plan as it's a private plan. Do these steps for each owner that you want to add to the plan.

> **Note:** 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.

1. In the Owners section, click **Add**.
2. In the **Owner** field, search and select a plan owner.
3. From the **Owner Type** list, select the owner type.

   Only an administrator can manage the plan details. Candidate managers can add and remove candidates, and viewers can only view the plan.
4. Click **OK**.
5. Click **Save and Close** to save the succession plan.

Related Topics
- Succession Management Lookups

Examples of Creating Succession Plans

You can create succession plans on the Succession Overview page.

Go to **My Client Groups** > **Succession Plans** to view this page.

Create a Succession Plan for a Job

You must create a succession plan for the job Channel Sales VP of North America. Only current sales directors are eligible for this role.

- Set **Plan Type** to **Job**.

- Select the North America business unit.

- Search for sales directors globally and add them as candidates.

- Use the **Add** > **Best-Fit Candidates** option, search for sales directors who match the model profile for the job, and add them as candidates.

- Set readiness and risk of loss values.

- For candidates outside North America, assess willingness to relocate.

- Delete any candidate who's either at high risk of loss or unwilling to relocate.

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Create a Plan for Multiple Positions

Your organization has many North American outlets, each with a general manager. Each year, 10 percent of general managers either win promotions or resign. You plan a talent review meeting to evaluate candidates and fill a current vacancy.

- Set **Plan Type** to **Position**.
- Select the North America business unit and set the position to General Manager.
- Search for and select candidates with management experience.
- Add plan candidates to the existing general manager talent pool.
- Set readiness and risk of loss values for known candidates.
- Schedule the talent review meeting.
- Associate both the succession plan and the talent pool with the meeting so that they appear on the meeting dashboard.

During the meeting, participants rate the review population and add candidates. The meeting identifies Elizabeth White as the preferred candidate, who accepts the offer. You remove her from the plan but keep it open to candidates for future vacancies.

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

External Candidates

How You Manage External Candidates for Succession Plans

You manage external candidates in the External Candidates section of the Succession Overview page. You need access to the Succession Plans work area to do this.

Create External Candidates

You create an external candidate in the External Candidates section of the Succession Overview page. When creating an external candidate, you need to specify the last name. The other details such as first name, job title, email, and phone are optional.

The application stores the external candidate details separately and not with the internal candidate details. Also, remember that external candidates that you see on the Succession Overview page are available only for succession plans. These external candidates aren't the same as recruiting candidates and aren't available in the Recruiting work area.

Edit or Delete External Candidates

Any user who has access to the Succession Plans work area can edit or delete any external candidate details. They can do this even if they didn't create the candidate. In the External Candidates section of the Succession Overview page, you can search for external candidates by their last name or first name.

You can edit any detail of the external candidate, including the last name.

You can delete external candidates if they're not included in a succession plan. To delete external candidates who are included in one or more succession plans, remove them first from all the plans in which they're included.

How You Add External Candidates to Succession Plans

You can include external candidates in a succession plan when creating or editing the plan.

In the Candidates section of the succession plan page, click **Add** > **External Candidate** to do this.

In the Candidates section of the succession plan page, when adding external candidates, you can search using any of these attributes:

- Display name: First name or last name
- Current company or employer
- Current business title
- City

You can specify these details for an external candidate for the plan:

- The candidate status, readiness, and ranking
- Whether the candidate is an interim successor

If any descriptive flexfields are available for candidates, you can also specify values in them for external candidates.

You can't enter these details for an external candidate even if your administrator has made them visible using Page Composer:

- Risk of loss
- Impact of loss
- Willingness to relocate

External candidates are included in these counts:

- Candidate count of a succession plan
- Readiness count of a succession plan
- Count of other accessible succession plans in which the person is a candidate
- Count of all succession plans in which the person is a candidate

Note: By default, the count for all plans the person is a candidate for is hidden. Your administrator can use Transaction Design Studio to show this count.

You can also view the date the external candidate was added to the succession plan.

Note: You can't view external candidates in the Talent Review work area. So, you can't add external candidates to a succession plan from a Talent Review meeting.

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Related Topics

- Transaction Design Studio

How You Edit External Candidate Details in Succession Plans

You can edit the details of an external candidate added to a succession plan if you are an administrator or candidate manager for the plan.

Administrators and candidate managers can also remove external candidates from a succession plan. When you remove an external candidate, they're only removed from the succession plan. You can still view the details of the external candidate in the External Candidates section of the Succession Overview page.

How You Add Talent Pool Members as Succession Plan Candidates

You can add talent pool members as candidates to a succession plan for which you're an administrator or candidate manager.

These considerations apply when you try to add members from talent pools as succession plan candidates:

- You can only add members from talent pools you own.
- You can't edit the talent pool that you select for adding members.
- You can't add yourself as a succession plan candidate if you're a member of the selected pool.

To add talent pool members as succession plan candidates:

1. Open the succession plan and expand the Candidates section.
2. Select the **Talent Pool Members** option in the **Add** menu.

   You can see the Add from Talent Pool page. The **Pool Name** list shows only the talent pools that you own.
3. From the **Pool Name** list, select the talent pool from which you want to add candidates.

   In the Members section, you can see only members for whom you have succession data security access. You can expand a member row to view additional details about the member.
4. Select the members who you want to add to the succession plan. You can add inactive pool members also.

   > **Tip:** Click **Select All** to select all the members.

5. Click **Add** to add the members.

Selected members who already are candidates in the succession plan aren't added again. A succession plan can have a maximum of 500 candidates. If after adding the pool members, the candidate count exceeds 500, then you will see an error message.

When you try to add talent pool members while creating a new succession plan, the selected members are added as candidates only when you save the succession plan. But when you try to add talent pool members while editing an existing succession plan, the selected pool members are automatically added to the plan when you click **Add** on the Add from Talent Pool page.

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Related Topics
- Succession Planning
- Talent Pools

How You Add Artificial Intelligence Suggested Candidates to Succession Plans

If your Oracle Cloud administrator has activated AI apps and performed the required setup tasks, you can view and add artificial intelligence (AI) suggested candidates to succession plans.

The candidate suggestions are based on AI machine learning and web-scale data. Note that after your administrator enables the AI suggested candidates feature, you can no longer use the best-fit feature to find candidates for succession plans.

Add Suggested Candidates

1. Open the succession plan and expand the Candidates section.
2. Select the **Suggested Candidates** option in the **Add** menu.
   You can see the Suggested Candidates page. You see the suggestions in order of their strength.
   The suggestions are based on the model profile for the succession plan job.
   - For position based succession plans, the job associated with the position is the succession plan job.
   - For incumbent based succession plans, the incumbent's job is the succession plan job.
3. Select the candidates you want to add to the succession plan.
   You can refine the list of suggested succession candidates by applying business unit, grade, and location filters. You can select multiple business units, grades, and locations. You can see only suggested candidates who match the filter criteria.
   You can also sort the suggested succession candidates. By default, the candidates are listed ordered by the suggestion strength. But you can also sort the candidates by these attributes:
   - Name
   - Job
   - Location

   | **Tip:** Click **Select All** to select all the suggested candidates.

4. Click **Add** to add the suggested candidates to the succession plan.

Considerations for Adding AI Suggested Candidates

- AI suggestions are based on employee talent profiles. To view appropriate suggestions, HR specialists need to do these tasks:
   a. Set up well-defined job model profiles and person profiles.

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    b.   Assign a job for employees.

- You can see suggested candidates based on the candidate security defined for you.

- Even if a suggested candidate has multiple assignments, you see the candidate only once on the Suggested Candidates page.

- If you change the job or position or incumbent of a succession plan, any suggested candidates that are already added as candidates will remain as candidates. You need to manually remove them from the succession plan if you don't want them to be plan candidates.

Select Succession Candidates from a Talent Pool Using the Talent Review Dashboard

You can add members of a selected talent pool to a talent review meeting to evaluate and select candidates for a succession plan.

Assume that you want to select candidates for the **Senior Manager** succession plan. Here's how you can do this:

1. Create a Talent Review meeting, for example **Senior Manager Candidate Selection Meeting**.
2. While adding review content, add the **Senior Manager** succession plan and talent pools that you have access to.
3. Add those managers who need to select candidates as reviewers for the meeting.
4. Add talent pool members who you think can be included in the Senior Manager succession plan to the review population of the created meeting.
5. Prepare the review content for the meeting.
6. Conduct the **Senior Manager Candidate Selection Meeting** talent review meeting.

   > **Note:** You can add a succession plan while conducting the meeting. You can also create a succession plan while conducting the meeting.

7. Review the available ratings of the review population to evaluate potential candidates.
8. Add suitable candidates to the **Senior Manager** succession plan.

Let's now see how you can do some of these steps.

Add Talent Pool Members to the Review Population of a Meeting

While creating or editing a Talent Review meeting, you can add members of a talent pool that you can access to the review population of a meeting.

1. Edit the Talent Review meeting, for example **Senior Manager Candidate Selection Meeting**.
2. Navigate to the Population Selection section of the meeting configuration page.
3. From the **Employees to Include** list, select **Find in talent pool**.
4. Select the talent pool.
5. Select the members who you want to add to the review population.
6. Click **Add to Review Population**.
7. Save the meeting.

Conduct the Meeting, Review Potential Candidates, and Add Them to a Succession Plan

1. On the facilitator Overview page, select the **Senior Manager Candidate Selection Meeting** talent review meeting row.
2. From the Actions menu, select **Conduct Meeting**.
3. Review the ratings.

   - Hover over a person's name on the dashboard to view the ratings for that person.

   - Select a person on the dashboard and click **Show Details** to see more information on the worker's person spotlight.
4. Add workers to the succession plan.

   - Select workers, and drag them to the plan in the Succession Plans pane.

   - Select workers, and from the Actions menu, click **Add to Succession Plan**.
5. Save or submit the meeting.

Related Topics
- Guidelines for Selecting Review Content for a Talent Review Meeting
- Guidelines for Selecting Participants for Talent Reviews
- How You Prepare Content for a Talent Review Meeting
- How You Conduct a Talent Review Meeting

Considerations for Selecting Owners and Privacy Levels for Succession Plans

For a succession plan, you select owners, administrator types, and a privacy level.

Create and manage succession plans on the Succession Overview page. Select **My Client Groups** > **Succession Plans** to view this page.

Owners and Administrative Types

A succession plan has one or more owners. For each owner, you select an **Administrator Type** role, which controls the actions available to the plan owner. The available roles include:

- Administrator
- Candidate Manager
- Viewer

This table shows the actions each **Administrator Type** role can perform.

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Action	Administrator Role	Candidate Manager Role	Viewer Role
View the plan	Yes	Yes	Yes
Add candidates	Yes	Yes	No
Remove candidates	Yes	Yes	No
Update worker readiness	Yes	Yes	No
Update risk of loss	Yes	Yes	No
Update impact of loss	Yes	Yes	No
Add candidates to talent pools	Yes	Yes	No
Change the plan name	Yes	No	No
Change the plan privacy level	Yes	No	No
Add owners	Yes	No	No
Remove owners	Yes	No	No

A private succession plan must have at least one administrator.

> **Note:** 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.

Security Access to Candidates

Plan owners can view, add, and remove candidates to whom they have security access. For others, you can restrict candidate search based on their data security profile or change data security so that managers or HR specialists can select candidates outside their normal data security profile.

You can define your own securing conditions for the candidates that a user can access. You can create data roles, specify securing conditions for the data roles, and assign these roles to different users. The role the signed-in user is assigned to restricts the candidates that a signed-in user can search. For example, you can create an HR_Specialist_Sales data role and specify a securing condition that allows only access to workers in the Sales department for this role. When you assign this role to a user, the user can only select candidates from the Sales department.

Super users can view all candidates, even if they're not in the super user's data security profile. Super users can add any candidate to a succession plan.

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Plan Privacy

You must specify whether a plan is private or not. A private plan can be accessed by only the named owners. If you don't specify a plan as private, the plan can be accessed by these people:

- Owners of the plan
- Employees who have access to the named or inferred incumbent of the plan

The privacy setting determines access to the plan in these locations:

- Succession Plans Overview work area
- Succession Planning page in the person spotlight
- Talent review meetings

Note: A super user can view and update all succession plans.

For more information on securing access to succession plans, incumbents, and candidates, see the Securing HCM Guide.

How Plan Privacy and Ownership Determines Access in the Succession Plans Overview Work Area

In the Succession Plans Overview work area, owners can perform the actions they're allowed to according to their administrator type settings.

For nonprivate plans, apart from the plan owners, anyone with access to the Succession Plans Overview work area and who has access to the named or inferred incumbent of the plan can view the plan.

How Managers Can Work With Succession Plans

As managers, you can manage succession plans in the Succession Plans work area only if you have the security permissions to access this work area.

If you can't access the Succession Plans work area, you can use these options to work with succession plans:

- Actions available for a person on the My Team and Career Overview pages
- Succession Planning page in person spotlight
- My Team Quick Actions

When you add a person to a succession plan, you can also edit the details of other candidates and owners of the succession plan to which you added the person.

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Actions on My Team and Career Overview Pages

To view people who report to you, click **My Team** > **My Team**. To see more information about the people who report to you such as the number of completed development goals, and talent score, click **My Team** > **Career Overview**.

These two succession plan actions are available for a person on the My Team and Career Overview pages:

- **Add to Succession Plan**: Use this to add a person in your team to a succession plan that you can access.
- **Create Succession Plan**: Use this to create a new succession plan.

To use these actions:

1. Select the person row.
2. From the **Actions** menu, select the action.

Succession Planning Page in Person Spotlight

The Succession Planning page in person spotlight has these sections for succession plans:

- Succession Plans
- Candidate in Plans

In the Succession Plans section, you can do these actions:

- View these succession plans:
  - Active succession plans in which the person is an incumbent.
  - Active succession plans that were created for the same job or position as that of the person. For example, if a direct report has the Senior Manager job, you can see active succession plans defined for the Senior Manager job.
- Create succession plans for the person.

In the Candidate in Plans section, you can do these actions:

- View active succession plans in which the person is a candidate.
- Add the person as a candidate to a succession plan that you can access.

My Team Quick Actions

As managers you can use these two succession plan related Quick Actions available in My Team:

- **Add to Succession Plan**: Use this to add a person in your team to a succession plan that you can access.
- **Create Succession Plan**: Use this to create a new succession plan.

These Quick Actions are available in the Career and Performance group.

> **Note:** HR specialists can find these Quick Actions in My Client Groups.

Related Topics
- Succession Planning

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How Plan Privacy and Ownership Determine Plan Access for Talent Review Meetings

Talent review meeting facilitators can associate succession plans they own with a meeting. They can also associate private plans for which they're administrators or candidate managers.

Meeting facilitators can also associate nonprivate plans in which they have access to the named or inferred incumbent of the plan with a meeting. All meeting facilitators, regardless of their security access to workers elsewhere or whether they're plan owners, can perform actions on the plans on the meeting dashboard. All plans that facilitators add to the meeting can be viewed by meeting participants, so facilitators should select only plans they want participants to see.

Reviewers can do these actions related to succession plans on the dashboard view that they open from the Prepare Review Content page:

- View plans added by facilitators of which they're owners.

- View nonprivate plans added by facilitators in which the managers have access to the named or inferred incumbent of the plan.

- Perform actions on plans if they're administrators or candidate managers.

- Access private plans if they're plan owners.

Both facilitators and reviewers can do these actions for succession plans and talent pools associated with the talent review meeting:

- Add only workers who are in the review population to plans and pools.

- Add workers only to plans and pools that are associated with the meeting.

- See only the candidates in the plan who are in the meeting review population.

Examples of Access to Nonprivate Succession Plans

In the automatic plan access method, only the named owners of the plan and employees who have access to the named or inferred plan incumbents can access nonprivate succession plans.

In this topic that includes some scenarios, you learn more about:

- How plan incumbents determine access to nonprivate succession plans

- How transfers can affect access to nonprivate succession plans

This image shows a reporting hierarchy in First Software. It shows the employees who report to the managers, and the employees the HR specialists have security access to. The managers and HR specialists shown in this image have the privileges to create and manage succession plans.
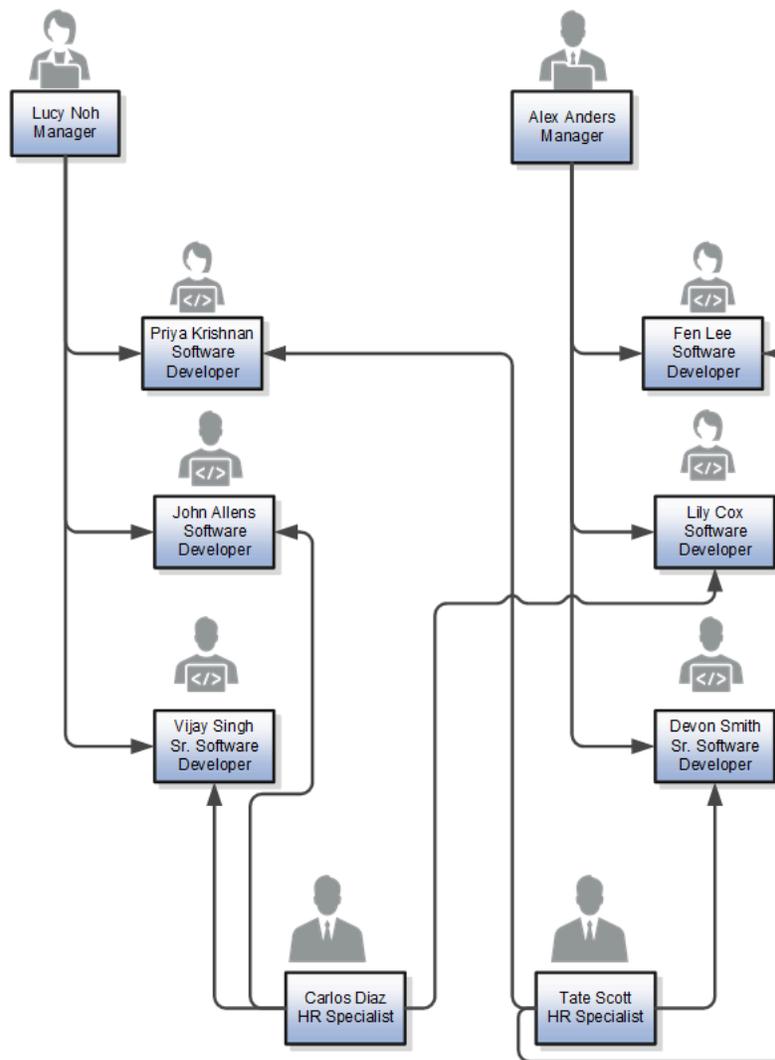
Nonprivate Incumbent Plan

Tate Scott creates a nonprivate **Incumbent** type succession plan for Devon Smith and names it **D Smith Succession Plan**. He adds Carlos Diaz as a Candidate Manager.

Now, let's see what access privileges the managers and HR specialists shown in the image have for this succession plan.

Employee	View Plan	Modify Plan Name	Add Candidates	Delete Plan	Comments
Lucy Noh	No	No	No	No	Lucy can't view the plan because she isn't a named owner. Also, her person security profile doesn't let her access Devon Smith's data.

Employee	View Plan	Modify Plan Name	Add Candidates	Delete Plan	Comments
Carlos Diaz	Yes	No	Yes	No	Carlos Diaz is the Candidate Manager. He can view the plan and add candidates. But, he can't change the plan name or delete the plan.
Alex Anders	Yes	Yes	Yes	Yes	Alex Anders isn't a named owner. But, Devon Smith is a direct report. This enables Alex to access Devon Smith's data. So, Alex Anders can manage the plan.
Tate Scott	Yes	Yes	Yes	Yes	Tate Scott is the default plan owner as he created the plan.

Nonprivate Job Plan

Carlos Diaz creates a nonprivate **Job** type succession plan for the Senior Software Developer job. He names the plan **Senior Software Developer Plan CD**. As Vijay Singh and Devon Smith are both Senior Software Developers, they're the inferred incumbents of this plan.

Let's discuss what access privileges the managers and HR specialists shown in the image have for the **Senior Software Developer Plan CD** succession plan.

Employee	View Plan	Modify Plan Name	Add Candidates	Delete Plan	Comments
Lucy Noh	Yes	Yes	Yes	Yes	Vijay Singh reports to Lucy Noh. This enables Lucy to access Vijay's data. So, Lucy can access the **Senior Software Developer Plan CD** plan and manage it.
Carlos Diaz	Yes	Yes	Yes	Yes	Carlos Diaz is the default owner as he created the plan.
Alex Anders	Yes	Yes	Yes	Yes	Devon Smith reports to Alex Anders. Alex's person security profile lets him access Devon Smith's data. So, he can access the **Senior**

Employee	View Plan	Modify Plan Name	Add Candidates	Delete Plan	Comments
					Software Developer Plan CD plan and manage it.
Tate Scott	Yes	Yes	Yes	Yes	Tate Scott's person security profile lets him access Devon Smith's data. So, he can access the **Senior Software Developer Plan CD** plan and manage it.

Plan Access Affected by Transfers

Devon Smith is transferred to another project and now reports to Lucy Noh. Tate Scott no longer has security access to Devon Smith's data. But, Carlos Diaz can now access Devon Smith's data. Another Senior Software Developer, Robin Marlow now reports to Alex Anders. Tate Scott has the security privilege to access this employee's data.

This image shows the hierarchy in First Software after Devon Smith's transfer.
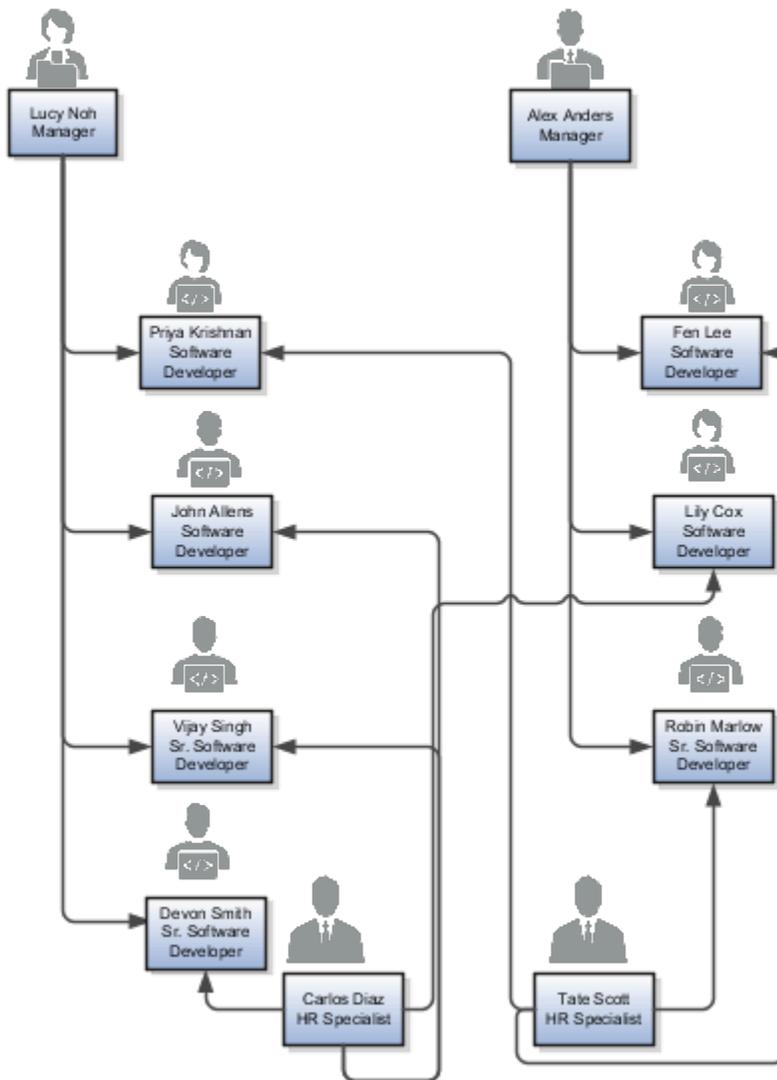
The administrator in First Software runs the Succession Plan Incumbents process to update the succession plan incumbent table for the changes resulting from employee transfers. Let's see how Devon Smith's transfer affects access to the **D Smith Succession Plan** plan.

Employee	View Plan	Modify Plan Name	Add Candidates	Delete Plan	Comments
Lucy Noh	Yes	Yes	Yes	Yes	Lucy Noh can manage the **D Smith Succession Plan** plan as Devon Smith now reports to her and she has access to Devon Smith's data.

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Employee	View Plan	Modify Plan Name	Add Candidates	Delete Plan	Comments
Carlos Diaz	Yes	Yes	Yes	Yes	Carlos Diaz is the Candidate Manager for the **D Smith Succession Plan** plan. But, now he also has the security privilege to access Devon Smith's data. So, he can view and manage the plan.
Alex Anders	No	No	No	No	Alex Anders is not a named owner. After Devon Smith's transfer, Alex can't access Devon Smith's data. So, he can no longer view the **D Smith Succession Plan** plan.
Tate Scott	Yes	Yes	Yes	Yes	Tate Scott is the default plan owner as he created the plan.

Let's also find out how Devon Smith's transfer affects access to the **Senior Software Developer Plan CD** succession plan. Now, Vijay Singh, Devon Smith, and Robin Marlow, who all have the Senior Software Developer job, are inferred incumbents for the **Senior Software Developer Plan CD** succession plan.

Employee	View Plan	Modify Plan Name	Add Candidates	Delete Plan	Comments
Lucy Noh	Yes	Yes	Yes	Yes	Vijay Singh and Devon Smith now report to Lucy Noh. This enables Lucy to access their data. So, **Lucy** can access the **Senior Software Developer Plan CD** plan and manage it.
Carlos Diaz	Yes	Yes	Yes	Yes	Carlos Diaz is the default owner as he created the plan.
Alex Anders	Yes	Yes	Yes	Yes	Robin Marlow, another Senior Software Developer now reports to Alex Anders. Alex's person security profile lets him access Robin's data. So, he can access the **Senior Software**

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Employee	View Plan	Modify Plan Name	Add Candidates	Delete Plan	Comments
					Developer Plan CD plan and manage it.
Tate Scott	Yes	Yes	Yes	Yes	Tate Scott's person security profile lets him access Robin Marlow's data. As Robin Marlow is an inferred plan incumbent, Tate Scott can access the **Senior Software Developer Plan CD** plan and manage it.

Succession Plan History of Changes

Succession Plan History of Changes

Improve your succession planning by viewing the history of changes for each succession plan.

You can open the Plan History page to view a succession plan's history of changes in these ways:

- Select the **View Plan History** action for the succession plan on the Succession Overview page.

- Click the **View Plan History** button on the succession plan details page to view the plan history.

Plan History Page Sections

The Plan History page is divided into 3 sections:

- **Plan Info**: Here you can see the changes made in the Plan Info and Alerts section of a succession plan. You can view the changes of any delivered hidden fields that your administrator has enabled except for these incumbent-related fields that are stored in Talent Profiles.
  - Reason for Departure
  - Estimated Remaining Months
  - Risk of Loss
  - Impact of Loss

- **Candidates**: Here you can see the changes made in the Candidates section of a succession plan. You can only see the changes for candidates that you can access. Even if your administrator has enabled these hidden fields, you won't see the details of any changes made to them in the plan history since their values are stored in Talent Profiles:
  - Risk of Loss
  - Impact of Loss
  - Willing to Relocate

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- **Owners**: Here you can see the changes made in the Owners section of a succession plan. You can only see the changes for owners that you can access.

You can initially see a few rows in each section. But if there are more changes, you can load more rows.

Succession Plan Changes in Plan History

You can view these details about the changes made to a succession plan:

- Date the change was made
- Attribute that changed
- Old and new values of the attribute
- Person who made the change

You see the latest changes first.

You can also view the changes made to the succession plan by HCM Data Loader and HCM Spreadsheet Data Loader uploads. But you can't see the name of the user who uploaded the changes. Instead, you can see **HCM Data Loader** in the **Changed By** column.

The changes are grouped by date. By default, you see the changes made in the last 3 months. But you can change the period and see these changes:

- All changes
- Changes in the last 6 months
- Changes in a specific date range

    | **Note:** To see the changes in a specific date range, you need to specify at least a **To** date or a **From** date.

Related Topics
- Succession Planning

Considerations for Succession Plan History

You can view the history of changes made to any succession plan that you can access.

These considerations apply for the history of changes that you view on the Plan History page:

- The succession plan data of 22B release is the baseline data for tracking the plan changes.
- Even if a user or multiple users change the same attribute multiple times on the same day, you can see all changes. You see the most recent change first.
- You can't see the changes made to descriptive flexfields.
- You can't see the history of changes related to inferred incumbents.
- If the name of the incumbent, candidate, owner, or person who modified the plan changes, you can see only the most recent name on the Plan History page for all historical rows.
- You can see when newly added candidates were added, but not the candidate attributes that were added initially. But if you make changes to any of the candidate's attributes later, you can see the changes.

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- If any plan attribute, such as job name, position name, and department changes over time, you can only see the current attribute name in all the historical rows.

- You can view when a plan was made inactive or active again.

- You can't see job changes of plan incumbents and candidates in the plan history. But when a candidate moves to the plan role or a role that's different from the plan role, you can view this information.

- If an incumbent, owner, or a candidate is terminated, you can't see the termination information. But if someone removes the terminated incumbent from the succession plan, you can see this information.

- If a plan candidate, owner, or the person who made the changes is terminated, you can no longer see their name in the plan history.

- You can continue to see the changes in information of terminated candidates and owners in the succession plan history.

- If someone deletes a succession plan, you can no longer view the history for the plan. But the plan's information is retained in the history records.

Succession Organization Chart

Succession Organization Chart

A succession organization chart provides information about succession plans of a manager and persons reporting to the manager. You can see this information in a hierarchical chart format.

▶ **Watch video**

You search for a person by name on the Succession Organization Chart page to view the succession organization chart of that person.

The succession organization chart has 5 tabs:

- **Directs with Plans**: This tab shows employees with succession plans created for them and who directly report to the selected person. You can also see the count of succession plans for each direct report.

- **Directs Without Plans**: This tab shows employees who directly report to the selected person but don't have any succession plans created for them. You can select a person and create a succession plan for them, if required.

- **All Reports with Plans**: This tab shows both direct and indirect reports of the selected person who have succession plans.

  > **Tip:** Click the person card to view the succession organization chart of the direct or indirect report.

- **Succession plans**: This tab shows the succession plans in which the selected person is an incumbent or indirect incumbent. For each plan, you can see the number of active candidates. You can see candidates grouped by their readiness levels.

- **Candidate in plans**: This tab shows the succession plans in which the selected person is a candidate. You can see these succession plan details:
  - Number of active candidates
  - Date the selected person was added to the plan
  - Readiness category of the selected person

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        ◦ Plan type

> **Tip:** Click the succession plan name to view and edit the plan.

On the **Directs with Plans** and **Directs Without Plans** tabs, you can see a red flag on the person card for the direct reports when any of their talent ratings such as impact of loss, risk of loss, or job criticality is high. You can see this flag only if your Talent Profiles security allows you to view the ratings information.

How HR Specialists View Succession Organization Chart

HR specialists can view a succession organization chart only if they have the View Succession Org Chart by HR function security privilege.

HR specialists need to do these steps to view the succession organization chart of a person they can access:

1. Go to **My Client Groups** > **Succession Plans**.
2. On the Succession Overview page, click **View Succession Organization Chart**.
3. On the Succession Organization Chart page, search for the person whose succession organization chart you want to see.
4. Select the person's card from the search results.

HR specialists can also do these actions on the succession organization chart if they have the corresponding security privilege to do so:

- Create a succession plan for the selected person.

- Add the selected person as a candidate to a succession plan that they own.

Related Topics
- Create a Private Succession Plan

How Managers View Succession Organization Chart

Managers can view a succession organization chart if they have the View Succession Org Chart by Manager function security privilege.

Managers can use the **Succession Organization Chart** Quick Action available in My Team to view their succession organization chart. Managers with multiple assignments can search and select any one of their assignments to view the succession organization chart relevant to that assignment. On the Succession Organization Chart page, they can search for and select a person in their hierarchy to view that person's succession organization chart.

When viewing the direct report's succession organization chart, managers can do these actions:

- Add the direct report as a candidate to a succession plan that they own.

- Create a succession plan for the direct report.

Managers can add themselves as a candidate to a succession plan or create succession plans for themselves only if they have the required privilege.

Note that managers can't do these actions when they navigate to the succession plan details page from the succession organization chart:

- Click on a candidate's name to go to their Spotlight page.

- Click the **Add to Pool** button to add a candidate to a talent pool.

- Find best-fit candidates to add to a succession plan.

- Add artificial intelligence (AI) suggested candidates to a succession plan.

Considerations for Using Succession Organization Chart

A succession organization chart provides information related to succession plans of a manager and persons reporting to the manager in a hierarchical chart format.

These considerations apply for succession organization charts:

- You can search for a person only by their name to view their succession organization chart.

- You can see only the first 50 persons who match the name you enter.

- If a person who you can access has multiple assignments, then you can see all the assignments of the person in the search results. But you can see the succession and talent profile information only for the assignments you can access.

- When you select a nonprimary assignment, the **Create Succession Plan** and **Add to Succession Plan** actions are hidden.

- On the **Succession plans** and **Candidate in plans** tabs, if a candidate has multiple assignments, then you can see the candidate only once in a plan.

- On the **Succession plans** and **Candidate in plans** tabs, if you're viewing the person's nonprimary assignment, then you will see only the succession plans related to the primary assignment.

- In the succession organization chart, you can view the name and assignment of the manager the person reports to in the topmost level of the chart only if you have the security access for it.

- You can see the **Directs with Plans** and **Directs Without Plans** tabs on the succession organization chart even if the person whose chart you're viewing has no direct reports.

- You can see only active succession plans in the succession organization chart.

- The succession plan counts and candidate counts that you see are based on the active plans and candidates that you can access.

- If your administrator has configured more than 6 readiness levels, you can see only the first 6 on the **Succession plans** and **Candidate in plans** tabs. But you can load more readiness levels.

- The display sequence of the **Readiness Category** lookup controls the display order of the readiness levels in the succession organization chart.

- A succession super user can view the succession organization chart of any person in the organization. They can perform the succession plan actions also.

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

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

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

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

Succession Plans with Talent Pools

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

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

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

Succession Plans and Talent Pools with Talent Review Meetings

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

- When you set up a talent review meeting, you can associate succession plans and talent pools that you can access with the meeting.

- When you create a talent review meeting, you can add members of a talent pool that you can access to the review population of the meeting. This way you can discuss the potential of the talent pool members and rate them during talent review meetings.

- When you conduct the talent review meeting, you can add members of the review population to succession plans and talent pools associated with the meeting. You can also create succession plans and talent pools from the meeting dashboard.

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

Related Topics

- Talent Review
- Succession Planning
- Talent Pools

FAQs for Succession Planning

Can I include employees with a suspended primary assignment in a succession plan?

Yes. You can add employees who have a suspended primary assignment as incumbents, owners, or candidates in a succession plan that you can access.

But note that users viewing the succession plan can't distinguish between employees with an active primary assignment and those with suspended primary assignments.

Why can't I perform all the actions on a succession plan?

Access to succession plan actions depends on the security set up for the individual plan.

If you're an administrator, you can edit or disable the plan, or add and remove candidates. If you're a candidate manager, you can only add and remove candidates. If you're a viewer, you can access the plan, but can't perform any actions on it.

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.

Can I delete a succession plan?

Only some users can delete a succession plan.

- An administrator of the succession plan
- A super user

- A user who has automatic access to the succession plan, which is determined by the plan incumbent

What happens when I delete a succession plan?

Here's what happens when you delete a succession plan:

- The plan data is deleted from the database.
- The succession plan is removed from talent review meetings in which it was earlier added.
- These profile items that were created for the plan are deleted:

  - Candidate Readiness
  - Risk of Loss
  - Impact of Loss

  > **Note:** Only the profile items that were associated with the plan are deleted.

- The count of succession plans for employees who are candidates in the deleted succession plan is reduced.
- The plan is removed from the Succession Planning tab in person spotlight.

Why can't I view some succession plans?

You can only view succession plans in which you are a named owner or for which you have access to the named or inferred incumbent.

Employee movements such as transfers or promotions can affect plan access. To update plan access, your administrators need to run the **Succession Plan Incumbents** process regularly. This process updates the plan incumbent table to reflect the current organization hierarchy.

How can I enable alerts for a succession plan that I own?

Use the check boxes in the Alerts section of a succession plan to enable alerts for that plan.

You can configure alerts to notify plan owners for these events:

- A candidate moves to the plan role.
- A candidate moves to a role that's different from the plan role.
- The plan incumbent changes roles.

> **Note:** You can see the check box for enabling the alert for the plan incumbent changing roles only in incumbent plans.

What attributes determine if a candidate has moved to plan role?

This table indicates the attributes that determine if a candidate has moved to the role defined in the succession plan for the different types of succession plans.

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

When a candidate's role changes, the attributes defined in the succession plan are compared with the corresponding attributes of the new role of the candidate. A candidate is considered to have moved to the plan role only if these attributes match and alerts are sent for a candidate moving to the plan role.

> **Note:** If an attribute isn't specified in the succession plan, then that attribute isn't compared. For example, if **Department** isn't specified in a **Position** type succession plan, then only the position and the business unit of the new role of the candidate are compared with those defined in the succession plan.

Why can't I change the notification settings in the Alerts section of a succession plan?

If you're a view-only owner or a candidate manager owner, then you can't change the notification settings in the Alerts section of a succession plan. Also note that the Alerts section is hidden for inactive succession plans.

How can I send alerts to some owners for role changes of candidates or incumbents of a succession plan?

As an Administrator type plan owner, you can edit the details of a plan owner and indicate if alerts should be sent or not.

Why can't I change the notification settings for succession plan owners?

You can't change the notification settings for succession plan owners if any of these conditions is true:

- You are a **Viewer** or **Candidate Manager** type owner.
- The succession plan is inactive.
- The plan owner whose notification setting you're trying to change is a **Viewer** type owner.

Why don't I get notified about assignment changes in succession plans?

You aren't notified about all assignment changes of succession plan candidates and incumbents.

These conditions apply for notifications about assignment changes of succession plan candidates and incumbents:

- Only named plan owners who have data security access to the candidate are notified about assignment changes of the candidate.
- If the job change needs to be approved in Human Resources, notification isn't sent until the job change has been approved.
- For position plans, even if you're a plan owner, you won't get notifications if only the candidate's job and not the position changes.
- You won't get any notifications for inactive plan candidates.
- You won't get any notifications for inactive succession plans.

Can I hide the banners shown in a succession plan?

Only some people can hide the banners shown in a succession plan.

If you're a plan owner of **Candidate Manager** type, then you can only hide the banners shown for candidates. But if you're a plan owner of **Administrator** type or have automatic access to a non-private plan, then you can also hide the other banners. Remember that you have automatic access to a plan when you have security access to the data of any of the plan incumbents.

Note that you can't hide the banners shown for a candidate moving to the plan role. Also remember that after hiding the banners, you can't see them the next time you open the succession plan.

How can I refresh the list of incumbents shown in a Job or Position type succession plan?

You can refresh the list of incumbents shown in a Job or Position type succession plan.

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Do any of these actions to refresh the incumbents shown:

- Click **Refresh** in the Incumbents section.

- Edit the succession plan, change any of these plan information details, and save your changes:

  - Business Unit
  - Department
  - Job
  - Job Grade
  - Position

What happens if the automatic removal of candidates whose employment is terminated is enabled?

Your administrator can enable the automatic removal of candidates whose employment is terminated. This ensures that your organization's succession plans are up to date.

After your administrator enables the automatic removal of candidates whose employment is terminated and after the employment termination becomes effective, you can see these effects:

- The candidates are removed from all active succession plans that they were included.

- When you view the plan history, you can see that the candidate whose employment has been terminated is removed from the succession plan.

- The active candidates count and plan strength indicator for the succession plan on the Succession Overview page is updated.

- The candidates whose employment has been terminated aren't listed in succession organization charts and Oracle Transactional Business Intelligence (OTBI) reports.

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7 Talent Pools

Talent Pools

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

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

Pool Details

You need to specify these details for a talent pool:

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

You can mark a talent pool as a private pool. If you do so, then only the named owners can access the private pool. If you don't mark a talent pool as a private pool, then talent pool security profiles determine who can access the nonprivate pool.

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

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

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

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

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

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

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

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

- Add members from an analysis.

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

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

- Status
- Date they were added as a member

You can also identify members who have inactive assignments.

When creating or editing talent pools, you can search for existing pool members. Use the search field in the Members section to do this. You can search by the first name, list name, or both. Initially, you can see 5 members that match the name entered, but you can load more. You can sort the members listed.

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

Talent Pool Goals

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

Related Topics

- How You Use Development Goals in Talent Pools
- How Succession Plans, Talent Pools, and Talent Reviews Work Together
- Transaction Design Studio

How You Access Talent Pools

You can access talent pools using different navigation flows if you have the required security privileges.

You can access talent pools in these ways:

- Go to **My Client Groups** > **Talent Pools**.

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

On the Talent Pools overview page, because of the default filters, you can see only the active talent pools that you have access to.

- You can see the private talent pools for which you're a named owner.

- If your organization has enabled security profiles for talent pools and has assigned these profiles to specific roles, then you can see only nonprivate pools that are relevant to your business unit, department, or job family based on the security configuration.

Uses of Talent Pools

Talent pools are groups used by organizations to categorize people based on criteria such as performance, potential, or functional area.

Your organization can use talent pools for these purposes:

- **Track groups of employees with similar characteristics**: You can plan the career development of employees and monitor their progress by grouping them into a talent pool. For example, you can group employees as campus hires or leadership trainees.

- **Plan successors**: You can add selected candidates in a succession plan as members of a talent pool. This will help to groom talent pool members to replace people in key jobs and positions.

- **Roll up talent review populations**: During a talent review, facilitators can create a talent pool and add members from the review population. Facilitators can include the talent pool with other review meetings and include members from that review population. Later, while creating a talent review meeting, facilitators can add the talent pool members to the review population and evaluate their performance.

Talent Pools Super User

A talent pools super user can access all talent pools in your organization without being a named owner.

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The super user can manage the talent pools in your organization even if the named owners aren't available. Here's what the talent pools super user can do:

- Create a talent pool.
- Delete any talent pool.
- Set any talent pool as inactive.
- Manage pool members and owners.
- Add development goals for pool members.
- View profile-related data such as Risk of Loss, Impact of Loss, or mobility of pool members based on their profiles data security. Note that your administrator needs to make these fields visible to see their data.
- Report on all talent pools across the organization.

Add Talent Pool Members from an Analysis

As talent pool owners, you can add members from an analysis.

Your organization might have an analysis that helps you to identify persons who can be part of the talent pool. For example, an analysis that indicates which workers are high performers or have leadership potential. By adding these workers to suitable talent pools, you can enhance your organization's talent pools.

Before you start

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

Here's what to do

1. From the **Add** menu of the Members section of a talent pool, select the **Members from Analysis** option.

   The Add from Analysis section shows the default file path specified in the **Default Reports Folder for Selecting Talent Pool Members** profile option. The **Analysis Name** list shows the analyses in this path that you have access to.

2. From the **Analysis Name** list, select the analysis from which you want to add members to the talent pool.

   | **Note:** The analysis that you select must include **Person ID** as an attribute.

   In the Workers section, you can see workers included in the analysis in alphabetical order of their display names. You can initially see 25 workers, but you can load more workers.

   A maximum of 10,000 workers are fetched from the results of an analysis.

3. Select the workers who you want to add to the analysis.

   | **Tip:** Select the **Select All** check box to select all the workers in the analysis.

4. Click **Add**.

Results:

The workers selected from the analysis are added as members of the talent pool with these exceptions:

- Terminated workers aren't added to the talent pool.

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- Existing pool members aren't added again.

When you try to add workers in an analysis while creating a new talent pool, the selected workers are added as members only when you save the talent pool. But when you try to add workers while editing an existing talent pool, the selected workers are automatically added to the pool when you click **Add**.

How You Use Development Goals in Talent Pools

As an owner of a talent pool, you add development goals to a talent pool to enable all pool members to achieve the goals for which the talent pool was created.

You need to have the Access Talent Pool Overview privilege to manage development goals added to a talent pool.

Here's how you can navigate to the Talent Pools overview page:

- Go To **My Client Groups** > **Talent Pools**.

- On the Deep Links page, search for **pools**, and then select **Overview**.

How You Add a Development Goal

You can add development goals that are available in the goal library or a free form development goal to a talent pool.

1. Open the talent pool.
2. Expand the Development Goals section.
3. Click **Add**. You can see the Add Goal page.
4. To add a library goal, from the **Library Goal** list, select the development library goal that you want to add.
5. To create a development goal, specify the name that identifies the development goal in the **Goal Name** field.
6. Specify the values listed in this table in the Basic Info section.

Field	Value to Enter
Description	(Optional) A suitable description for the development goal
Status	**Not Started**
Start Date	Start date for the development goal
Target Completion Date	(Optional) The date by when the development must be completed
Category	(Optional) Development goal category
Success Criteria	(Optional) The criteria that identifies that the user who is assigned the development goal has successfully completed the goal.

7. Add measurements and tasks if applicable.
8. Click **Save and Close**.

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How You Assign Development Goals to Pool Members

To assign existing development goals to new talent pool members or to assign newly added development goals to existing talent pool members, click the **Assign Goals to Members** button in the Development Goals section of the talent pool. A process is initiated to assign the development goals. You can see the process ID in the message that's displayed.

After the process completes, you can view the development goals in the development plan of the talent pool members.

But remember that if a pool member has an inactive member status or has a terminated assignment, the process that runs after you click the **Assign Goals to Members** button won't assign any development goals for that person.

What Happens When You Remove a Development Goal

Did you know that even after you remove a development goal from a pool, the members of the talent pool continue to have the goal assigned to them? To remove the goal from a member's development plan, you need to delete it from the Development Plan section of the member's Career Development page.

Similarly, if a pool member deletes a development goal from their development plan, the development goal added to the talent pool isn't affected.

What Happens When a Development Goal is Edited after it's Added to a Talent Pool

Let's assume a development goal is edited in the goal library after it was added to a talent pool. You won't see the changes made to the goal automatically. But if you remove the changed goal and add it back again, you can see the updated goal in the pool.

If you change the goal name or attributes directly in a pool member's development plan, the changes won't be updated in the development goals of the talent pools in which they're added.

If you change the name or any other attribute of a development goal by editing it in the talent pool, the change is not carried over to the development plan of the pool members. The development plan of existing pool members will continue to show the original development goal. Pool members who are added after the revision will see the updated development goal in their development plan after you click the **Assign Goals to Members** button.

What Happens When a Talent Pool is Deleted

When you delete a talent pool, the development goals of the pool that were assigned to the pool members continue to be part of their development plan.

Related Topics

- Talent Pools
- Career Development Work Area

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FAQs for Talent Pools

Can I include employees with a suspended primary assignment in a talent pool?

Yes. You can add employees who have a suspended primary assignment as a member or an owner of a talent pool. But note that users viewing the talent pool can't distinguish between employees with an active primary assignment and those with suspended primary assignments.

Can I delete a talent pool?

Yes, you can delete talent pools on the Talent Pools page.

Select the pool row and then from the **Actions** menu, select **Delete**.

Here's what happens when you delete a talent pool:

- It's removed from all talent review meetings that it's associated with.

- The Risk of Loss and Impact of Loss ratings assigned in the pool for the members are removed from their profiles.

What happens if I set the status of a talent pool to inactive?

You can't associate it with talent review meetings or succession plans. If you own the talent pool, you can set its status back to Active at any time on the Talent Pools page.

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