Oracle Fusion Cloud Talent Management

How do I configure Talent Review meetings in Redwood?

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1 How do I configure Talent Review meetings in Redwood?

Overview of Configuring Talent Review Meetings in Redwood

As HR specialists, you can configure Talent Review meetings on the administrator's **Talent Review Meetings** page.

Go to **My Client Groups** > **Talent Review** and click **Add**. On the **New Talent Review Meeting** guided process, you need to do these steps:

1. Enter *meeting details*.
2. Optionally, *create a meeting invitation*.
3. *Add facilitators*.
4. *Select review content*.
5. *Select reviewers and participants for the meeting*.
6. *Add employees to the review population*.
7. Submit the meeting configuration.

Talent Review Meeting Details

You enter meeting details in the Meeting info step of the guided process for configuring Talent Review meetings.

Field	Description	Comments
Talent Review Meeting	Name of the Talent Review meeting	Identifies the meeting in searches and functions, such as viewing the history of notes and tasks.
Template	Talent Review template on which the configuration is based	The template specifies these attributes of the meeting: • Box chart views • Rating models • Actions facilitators can do • Filters to apply on the meeting dashboard • 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.

Field	Description	Comments
Business Leader	The senior manager of the organization that's being reviewed	• The organization of the selected business leader is automatically added as the organization of the Talent Review meeting. • The business leader is automatically added as a meeting participant. • You can change the business leader. The organization is automatically updated. The new business leader is added as a meeting participant and the person who was earlier the business leader is removed from the participants list.
Meeting Start Date and Time	Date and time when the Talent Review meeting will start	The facilitators and Talent Review super users can conduct the meeting only on or after the meeting start date and time.
Deadline for Submitting Ratings	The date by when reviewers need to submit their ratings	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 ratings until the meeting starts.
Meeting Status	Status of the Talent Review meeting, which can be 1 of these values: • Not started • In progress • Canceled	When a facilitator or a Talent Review super user conducts the meeting on the meeting date or later, the status changes to **In progress**.
Meeting Purpose	Purpose of the meeting	NA

Create Meeting Invitation

When configuring Talent Review meetings, you can opt to create a meeting invitation.

To create a meeting invitation, do these actions in the **Meeting info** step of the Talent Review meeting configuration guided process:

1. Select the **Create meeting invitation** checkbox.
2. Specify values in these fields:
    - Meeting Start Date and Time
    - Meeting End Date and Time
    - Location
    - Additional information to include in the calendar invitation

Results:

When you submit the meeting configuration, the meeting business leader, facilitators, participants, and reviewers are notified. An ICS calendar invitation file is included as an attachment in the notification. They can download this calendar invitation and add it to their calendars to keep track of the Talent Review meeting.

Add Facilitators for the Talent Review Meeting

You add 1 or more facilitators in the **Meeting info** step of the Talent Review meeting configuration guided process.

By default, the person creating the meeting is added as a facilitator. Only facilitators and Talent Review super users can conduct the meeting. They can update meeting information and the data that's being reviewed.

Select Review Content

You select the review content that reviewers can use to rate the review population in the **Review content** step of the Talent Review meeting configuration guided process.

1. Select the ratings for reviewers. You can reorder the ratings according to how you want the ratings to appear for managers preparing review content.
    a. Click **Reorder**.
    b. In the **Reorder ratings** panel, drag and rearrange the ratings.
    c. Click **Apply**.
2. If you have selected the **Potential** rating, the **Enable potential assessment** checkbox is selected by default. This allows reviewers to use the potential assessment questionnaire to rate their direct and indirect reports. By default, you see the questionnaire configured in the meeting template in the **Potential Assessment** list. But you can select another active potential assessment questionnaire.

    > **Tip:** Deselect the **Enable potential assessment** checkbox if you don't want to allow reviewers to use the potential assessment questionnaire.

3. To allow matrix managers to rate their dotted-line reports, select the **Include matrix managers as reviewers** checkbox. The setting you specify here for including matrix managers overrides the setting specified in the meeting template.

    > **Note:** Matrix managers need to have edit profile content section access security permissions to rate their dotted-line reports.

4. 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 of the review population that isn't current. The data validity is calculated back from the current date.

5. In the **Prior Rating Start Date** and **Prior Rating End Date** fields, indicate the date range in which you want to retrieve prior rating of completed meetings.

    Only the most recent rating in the indicated date range is considered.

6. In the **Succession plans** section, add succession plans to associate with the meeting.

   > **Note:** While conducting the meeting, facilitators can create additional succession plans for the Talent Review meeting and add review population members to these plans.

7. In the **Talent pools** section, add talent pools to associate with the meeting.

   > **Note:** While conducting the meeting, facilitators can create additional talent pools for the Talent Review meeting and add review population members to these pools.

What to do next

Click **Continue** to add meeting participants.

Select Reviewers and Participants

You select reviewers and participants in the **Meeting participants** step of the Talent Review meeting configuration guided process.

Typically, employees in an organization are reviewed by their managers. The business leader is automatically added as a meeting participant and receives the same meeting notifications as other meeting reviewers. You can select at most 500 participants for a meeting. Participants can be of 2 types:

- **Reviewer**: Someone who rates the employees 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 members of the review population. They participate in the discussions about how to rate the review population members.

Here's how you add reviewers and participants:

1. Click **Add**.
2. Do these actions in the **Search and select** panel:
   a. Search for persons or apply any of these filters:
      - Person Number
      - Manager
      - **Manager Reports**: Select direct or all reports.
      - Job
      - Department
      - Business Unit
      - **Location**: You can see only locations identified as employee locations on the **Location Details** page.
      - Email
   b. Select the persons to add.
   c. Click **Add**.
3. To assign the participant role to a person, edit the person's details and select the **Participant Type** as **Participant**.
4. In the **Meeting Instructions** field, provide instructions or information for reviewers. Reviewers can see the content added here on the Prepare Review Content page.

What to do next

Click **Continue** to add review population members.

How You Add Review Population Members

You add review population members in the **Meeting review population** step of the Talent Review meeting configuration guided process.

You can add review population members in any of these ways:

- *By criteria*
- *From a talent pool*
- *From an analysis*

You can review the persons added and remove those who you don't want to be part of the Talent Review meeting.

Add Review Population Members by Criteria

You can search for or apply filters and select review population members.

1. In the **Meeting review population** step of the Talent Review meeting configuration guided process, click **Add by Criteria**.

   You can see the **Search and select** panel.

2. Search for review population members or apply any of these filters:
   - Person Number
   - Manager
   - **Manager Reports**: Select direct or all reports.
   - **Reporting Relationship**: This filter is shown 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 **Manager** filter.
    - **Assignment Status**: Select any of these statuses:
        - Active - Payroll Eligible
        - Active - No Payroll
        - Suspended - Payroll Eligible
        - Suspended - No Payroll
        - Inactive - Payroll Eligible

    > **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**.

    - **Worker Type**: Select any of these types:
        - Contingent worker
        - Employee
        - Nonworker

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

    - Business Unit
    - **Location**: You can see only locations identified as employee locations on the **Location Details** page.
    - Department
    - Job
    - Grade
    - Management Level

    > **Note:** This 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 Setup and Maintenance to configure the values of the **MANAGER_LEVEL** lookup type.

3. Select the persons to add.
4. Click **Add**.

Add Review Population Members from Talent Pool

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

1. In the **Meeting review population** step of the Talent Review meeting configuration guided process, click **Add from Talent Pool**.

   You can see the **Add from talent pool** panel.

2. From the **Pool** list, select the talent pool whose members you want to include in the review population of the Talent Review meeting.

   The members of the pool are listed.
3. Select the members you want to add.

4. Click **Add**.

Add Review Population Members from Analysis

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

Before you start

The analysis from which you want to add employees needs to be present in the folder specified in the Default Reports Folder for Talent Review (HRR_DEFAULT_REPORT_FOLDER) profile option.

Here's what to do

1. In the **Meeting review population** step of the Talent Review meeting configuration guided process, click **Add from Analysis**.

   You can see the **Add from analysis** panel.

2. From the **Analysis Name** list, select the analysis.

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

3. Select the persons who you want to add.
4. Click **Add**.