Oracle Fusion Cloud Talent Management

Succession Management Questions and Answers

FA Latest

Oracle Fusion Cloud Talent Management
Succession Management Questions and Answers

FA Latest

G33534-03

Author: Malini Sampathkumar

Contents

Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Some application pages have help icons to give you access to contextual help. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons. If the page has contextual help, help icons will appear.

Get Support

You can get support at *My Oracle Support*. For accessible support, visit *Oracle Accessibility Learning and Support*.

Get Training

Increase your knowledge of Oracle Cloud by taking courses at *Oracle University*.

Join Our Community

Use *Cloud Customer Connect* to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest *ideas* for product enhancements, and watch events.

Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program*. Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to *oracle_fusion_applications_help_ww_grp@oracle.com*.

Thanks for helping us improve our user assistance!

1 Succession Management Questions and Answers

Why should we create succession plans?

These are the advantages of using succession plans:

- Ensure a smooth transition to key jobs and positions.
- Identify employees 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 so that they are ready to step into key roles.

What's the process flow for succession planning?

Succession planning helps to identify successors for key employees and ensure continuity in your organization.

1. Identify key people in your organization for whom you want to create succession plans. You can also identify key jobs and positions for which you want to create succession plans.
2. Review the impact of loss and risk of loss of people for whom you want to create succession plans.
3. Identify internal and external candidates for the role the succession plan was created.
4. Evaluate the readiness of the candidates.
5. Plan for grooming the candidates to fit the role of the succession plan by creating development goals for them. You can create a talent pool that includes these candidates and assign the development goals to them.
6. Create succession plans for the key persons and jobs and positions that you've identified.
7. Add the candidates and indicate their readiness. You can also use best-fit or AI based candidate suggestions to find suitable candidates for your succession plans. Or you can add candidates from talent pools.
8. Add owners who will manage the succession plan. You can have owners who can only manage candidates or who can manage the entire plan.
9. Indicate if the owners need to be informed of changes in job roles of the candidates or incumbents.
10. Monitor the performance of the candidates and adjust the readiness of the candidates in the succession plan.

What privileges are needed to use 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.

- To manage candidates in a succession plan, you need to have the Manage Succession Plan Candidate (HRM_MANAGE_SUCCESSION_PLAN_CANDIDATE_PRIV) privilege.

What are the different types of succession plans that we can create?

You can select one of 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.

Who are the inferred incumbents of a succession plan?

Persons who have the same job or position as defined in **Job** and **Position** type succession plans are the inferred incumbents of the succession plan

The defined succession plan attributes such as business unit and department are used to determine the incumbents who have the same position or job.

What are the different types of owners for a succession plan?

A succession plan can have owners of different types:

- **Administrator**: Can manage the succession plan and candidates and do all actions on candidates. Can also add and manage owners of the plan.
- **Candidate Manager**: Can manage candidates and do all actions on candidates.
- **Viewer**: Can only view the succession plan.

A private succession plan must have at least 1 **Administrator** type owner.

How can owners access the Succession Plans work area?

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

Can employees view their succession plans?

No, employees can’t view their succession plans or succession plans in which they’re added as candidates.

Only managers and HR specialists can view the succession plans of employees for whom they have access.

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

Who can access private succession plans?

Only these users can access private succession plans:

- Plan owners
- Succession plan super users

Who can manage nonprivate succession plans?

Only these users can manage nonprivate succession plans:

- Plan owners. Whoever creates or edits the plan can select the plan owners.
- Any 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 succession plan 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.

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.

What attributes can I use to specify the capability of a candidate to assume the role of the succession plan?

You use these attributes to specify the capability of candidates of a succession plan for assuming the plan role:

- **Readiness**: Indicate how soon the person can take up the job or position of the plan or the incumbent's role.
- **Ranking**: Rank the candidates to indicate who is the most capable and who is the least. 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**: Select a candidate who can perform the duties of the incumbent or assume the job or position until an actual successor is identified.

How can I add internal candidates to a succession plan when I am not in the Succession Plans work area?

You can use any of these methods to add internal candidates to a succession plan 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.
- Navigate to **My Team** > **Team Activity Center**. Use the **Add to Succession Plan** quick 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.

How do I add AI-suggested candidates to succession plans?

If your administrator has enabled AI suggested candidates, you can add them on the **New candidate** subpage of the succession plan.

1. Open the succession plan.
2. In the Candidates section, click **Add**.

You can see the **New candidate** subpage.

3. From the **Candidate Type** list, select **Suggested Candidates**.
4. To refine the suggestions, you can select the business unit, grade, and location for these candidates.
5. You can also sort the suggested candidates listed.
6. Select the suggested candidates who you want to add to the succession plan.
7. Click **Add**.

How can I improve the candidate suggestions for succession plans?

AI suggestions are based on employee talent profiles.

To view appropriate suggestions, as HR specialists you need to do these tasks:

- Set up well-defined job model profiles and person profiles.
- Assign a job for employees.

How do I create external candidates for succession plans?

You create external candidates on the **External Candidates** page.

1. Go to **My Client Groups** > **Succession Plans**.
2. On the overview page, click **View External Candidates**.
3. In the List of external candidates section, click **Add**.
4. Specify these details and save:
    - Last name
    - First name
    - Email
    - Phone number
    - Current employer
    - Current job title
    - Address

> **Note:** Only the last name is mandatory.

How can I add external candidates to a succession plan?

You add external candidates on the New candidate subpage of the succession plan.

1. Open the succession plan.
2. In the Candidates section, click **Add**.

   You can see the **New candidate** subpage.

3. From the **Candidate Type** list, select **External Candidate**.
4. From the **External Candidate** list, select the external candidate who you want to add to the succession plan.
5. From the **Readiness** list, select the readiness level of the external candidate.
6. Specify the external candidate's ranking.
7. Select the external candidate's status.
8. Indicate if the external candidate can be considered as an interim successor.
9. Click **Add**.

Do external candidates for succession plans need to be candidates from Recruiting?

No, the external candidates in succession plans aren't related to the candidates added in Oracle Fusion Recruiting.

Why can't I delete an external candidate?

The external candidate might be included in 1 or more succession plans.

You need to remove them first from all the plans in which they're included.

How can I add talent pool members as succession plan candidates?

You add talent pool members as candidates on the New candidate subpage of the succession plan.

1. Open the succession plan.
2. In the Candidates section, click **Add**.

   You can see the **New candidate** subpage.

3. From the **Candidate Type** list, select **Talent Pool Members**.
4. From the **Talent Pool** list, select the talent pool from which you want to add candidates to the succession plan.
5. Select the pool members to add.
6. Click **Add**.

Can I add myself as a candidate for a succession plan?

No, you can't add yourself as a candidate for any succession plan that you can access.

How can we sort the candidates in a succession plan by their readiness value?

Assign sequence for the readiness in the HRM_READINESS_CATEGORY lookup.

How can I groom candidates of a succession plan?

You can add candidates in a succession plan to an existing talent pool to manage their development.

The development goals in a talent pool can prepare candidates for the relevant job or position.

Where can I view the succession plan information of my direct reports?

You can see the succession plan information of your direct reports on these pages:

- Succession Planning spotlight page
- Succession Organization Chart

Why can't I view any succession plans when I try to add a person to a succession plan using the Add to Succession Plan quick action?

You need to be added as an owner of **Candidate Manager** or **Administrator** type to add candidates to a succession plan.

If you aren't added as such an owner to any succession plan or if all the created succession plans are private, you won't see any succession plans to select.

How can I enable alerts for a succession plan that I own?

Use the checkboxes in the Alerts section of a succession plan to enable alerts for that plan.

You can configure alerts to notify Administrator type 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 checkbox for enabling the alert for the plan incumbent changing roles only in incumbent plans.

Who receive alerts for succession plans?

The Administrator type owners for whom alerts are enabled receive alert notifications regarding candidate and incumbent assignment changes.

Can I modify the alerts text that are sent for succession plans?

Yes, search for the **Succession Plan Assignment Change Alert** in Alerts Composer and edit the alert templates.

How can managers create succession plans?

Managers can use these options to create succession plans:

- **Create Succession Plan** quick action for a direct or indirect report in **My Team** > **Team Activity Center**
- **Create Succession Plan** action for a direct or indirect report in **My Team** > **Career Overview**
- **Create Succession Plan** quick action available in **My Team**
- **Add** button in the Succession Plans section of the Succession Planning tab on the person spotlight page of a team member

What's a 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.

How can I view the succession organization chart of a person?

You search for a person who you can access by their name on the **Succession Organization Chart** page to view their succession organization chart.

Why should I use a succession organization chart?

You can use a succession plan organization chart to identify the succession details of the person who you're viewing the chart for.

You can identify these details about the person:

- Direct reports who have succession plans created for them.
- Direct reports who don't have succession plans created for them. You can check those who have high impact of loss or high risk of loss and create succession plans for such reports.
- All reports who have succession plans created for them.
- Succession plans in which the person is an incumbent or indirect incumbent.
- Succession plans in which the selected person is a candidate.

What privilege do I need to view succession organization charts?

To view succession organization charts, you need to have a role that inherits the **Use REST Service – Succession Org Charts REST** aggregate privilege.

What details can I see in the Candidate in Plans tab of a succession organization chart?

When you view the succession organization chart of a person, on the Candidate in Plans tab you can see those succession plans that you can access in which the person is a candidate.

You can see these succession plan details:

- Number of active candidates
- Date the selected person was added to the succession plan
- Readiness category of the selected person
- Plan type

Why can't I view the risk of loss or impact of loss rating of a person on a succession organization chart?

You can view the ratings only if you have been granted access in Talent Profiles to view this information.

How can managers view the succession organization chart of a team member?

As managers, you can view succession organization charts if you have the View Succession Org Chart by Manager function security privilege.

1. Use the **Succession Organization Chart** quick action available in **My Team**.

   You can see your succession organization chart.

2. If you have multiple assignments, search for and select an assignment to view the succession organization chart relevant to that assignment.

3. On the **Succession Organization Chart** page, search for and select a person in your hierarchy or click a direct report's name in the chart's tabs to view that person's succession organization chart.

How can HR specialists view the succession organization chart of an employee?

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

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 view.
4. Select the person's card from the search results.

How are succession plans integrated with Talent Review meetings?

Here's how your organization can use succession plans with Talent Review meetings:

1. When administrators set up a talent review meeting, they can associate succession plans that they can access with the meeting. The succession plans associated are usually for a person, job, or position from the business unit or department for which the talent review is conducted.
2. When facilitators conduct the talent review meeting, they can add suitable members of the review population as candidates to succession plans associated with the meeting. This will help to increase the plan strength. They can also create succession plans from the meeting dashboard.

How do I enable the automatic removal of candidates whose employment is terminated?

You need to set the value of the **ORA_HRM_AUTO_REMOVE_TERMINATED_CANDIDATES** profile option to **Y**.

Related Topics

- How do I enable a profile option?

How can we remove multiple inactive workers from succession plans?

Use HCM Data Loader to remove multiple inactive workers from succession plans.

This example SuccessionPlan.dat file removes some candidates who are inactive from a succession plan that's identified by the `PlanId` source key attribute.

```
METADATA|SuccessionPlanCandidate|SourceSystemOwner|SourceSystemId|PlanId(SourceSystemId)|
PlanCandidatePersonNumber
DELETE|SuccessionPlanCandidate|VISION|SPC009_MRKT_DIR|SP_MRKT_MGR|1023119
DELETE|SuccessionPlanCandidate|VISION|SPC009_MRKT_DIR|SP_MRKT_MGR|1032314
METADATA|SuccessionPlanOwner|SourceSystemOwner|SourceSystemId|PlanId(SourceSystemId)|PlanOwnerPersonNumber
DELETE|SuccessionPlanOwner|VISION|SPC009_MRKT_DIR|SP_MRKT_MGR|1023853
```

How can we make a public succession plan private using HCM Data Loader?

Set the value of the AccessTypeCode attribute to **PRIVATE** to make a succession plan private.

Here's an example **SuccessionPlan.dat** file:

```
METADATA|SuccessionPlan|SourceSystemOwner|SourceSystemId|PlanName|PlanType|Status|AccessTypeCode|
IncumbentPersonId(SourceSystemId)
MERGE|SuccessionPlan|VISION|SP816003|Name of the incumbent succession plan|INCUMBENT|ACTIVE|PRIVATE|
VISION006
```

How can we enable line managers to create their succession plans and add their direct reports as candidates?

The predefined Line Manager role with the **View Manager Hierarchy** person security profile doesn't allow managers to edit their own records.

So, you need to create a custom role and assign this role to managers in addition to their predefined Line Manager role.

1. Create a custom abstract role.
2. Add these aggregate privileges to the custom abstract role:
    - Create Succession Plan for Worker
    - Edit Succession Plan and Manage Candidates

3. Assign the predefined **View Own Record** person security profile to this custom abstract role.
4. Provision the role to managers who need to manage their own succession plans.
5. Run the **Regenerate Data Security Profiles and Grants** scheduled process to regenerate the role.

How can we add additional fields for succession plans?

Use the **Manage Descriptive Flexfields** task in Setup and Maintenance and configure the **HRM_PLANS** descriptive flexfield to add additional fields for succession plans.

For example, you might want to add a **Grade** field for succession plans of your organization. Remember to deploy the descriptive flexfield.

How do I make descriptive flexfields visible in succession plans?

Use Visual Builder Studio to make descriptive flexfields visible in succession plans.

1. Edit a succession plan page in Visual Builder Studio.
2. Select a project.
3. In Express mode, click the **Configure Fields and Region** button.
4. Expand the Form Rules region.
5. Add or edit a regular form rule and give a suitable name and description.
6. Ensure that the rule is active.
7. In the Regions and Fields section, expand the Plans info region.
8. Locate the talentSuccessionPlansDFF attribute and set its **Hidden** property to **Visible**.
9. Preview your changes and publish.

How do I make descriptive flexfields visible in succession organization charts?

Use Visual Builder Studio to make descriptive flexfields visible in succession organization charts.

1. Edit the **Succession Organization Chart** page in Visual Builder Studio.
2. Select a project.
3. In Express mode, click the **Configure Fields and Region** button.
4. Expand the Form Rules region.
5. Add or edit a regular form rule and give a suitable name and description.
6. Ensure that the rule is active.

7. In the Regions and Fields section, expand the Candidate in Plans Business Object region.
8. Locate the candidateInPlanDFF attribute and set its **Hidden** property to **Visible**.
9. In the Regions and Fields section, expand the Succession Plans Business Object region.
10. Locate the successionPlansDFF attribute and set its **Hidden** property to **Visible**.
11. Preview your changes and publish.

How can I enable the risk of loss and impact of loss ratings for succession organization charts?

Use Visual Builder Studio to configure the visibility of fields on succession organization charts.

1. Edit the succession organization chart page using Visual Builder Studio.
2. Select a project.
3. Set the value of these page properties to **true**:
    - Show Impact of Loss Rating
    - Show Risk of Loss Rating
4. Preview and publish your changes.

How do I hide the plan strength bar on the Succession Overview page?

Use Visual Builder Studio to hide the plan strength bar on the Succession Overview page.

1. Edit the Succession Overview page using Visual Builder Studio.
2. Select a project.
3. In Express mode, click the **Configure Fields and Region** button.
4. Expand the Form Rules region.
5. Add or edit a regular form rule and give a suitable name and description.
6. Ensure that the rule is active.
7. In the Regions and Fields section, expand the Succession Overview section.
8. Locate the readinessLevelStatusMeter attribute and set its **Hidden** property to **Hidden**.
9. Preview your changes and publish.

How to hide the View External Candidates button on the Succession Overview page?

Use Visual Builder Studio to hide the **View External Candidates** button on the Succession Overview page.

1. Edit the Succession Overview page using Visual Builder Studio.
2. Select a project.
3. Set the **Show View External Candidates Button on the Succession Overview Page** property to **false**.
4. Preview your changes and publish.