

# Oracle Fusion Cloud Talent Management

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**How do I set up Talent Review in  
Redwood?**

**FA Latest**



Oracle Fusion Cloud Talent Management  
How do I set up Talent Review in Redwood?

FA Latest

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# 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.

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# 1 Overview of Setting Up Talent Review in Redwood

Use this playbook to set up Talent Review in Redwood for your organization. To implement Talent Review in Redwood, you need to have the privileges of an application implementation consultant.

Do these tasks to set up Talent Review in Redwood:

- Enable Talent Review in Redwood. You need to enable these pages:
  - Redwood setup pages for Talent Review
  - Redwood pages for Talent Review
  - Redwood talent review meeting dashboard page

For more information on this, see *Set profile options for Redwood pages*.

- *Configure Talent Review profile options.*
- *Configure descriptive flexfields for Talent Review.*
- *Set up potential assessment.*
- *Configure Talent Review meeting templates.*
- *Configure alerts for Talent Review meetings.*
- *Configure alerts for Talent Review tasks.*
- *Configure visibility of Talent Review notes.*
- *Create a Talent Review super user job role.*
- *Dispose Talent Review data.*



# 2 Configure Profile Options and Descriptive Flexfields

## Talent Review Profile Options for Redwood

As an application implementor, you can use Talent Review profile options to configure the Oracle Fusion Cloud Talent Review work area in Redwood.

Profile Option Code	Profile Display Name	Default Value	What Happens When You Change the Profile Value	Task to Use	Comments
HRR_DEFAULT_REPORT_FOLDER	Default Reports Folder for Talent Review	None	HR specialists can add analyses to the specified folder. They can then select an analysis to add workers to the review population of a talent review meeting.	Talent Review Profile Option Values	<ul style="list-style-type: none"> <li>You can copy the folder path directly from Oracle Transactional Business Intelligence (OTBI) by navigating to Properties for one of the analyses in the folder. You can then paste the copied location in the <b>Profile Value</b> field.</li> <li>You can enter only one folder location.</li> <li>The profile value must start with a forward slash (/), but not end with a forward slash.</li> </ul>
ORA_HRR_ALLOW_FACILITATOR_TO_SEARCH_OWN	Allow facilitator to add themselves to the review population	Y	Meeting facilitators can't include themselves in the review population of a Talent Review meeting.	Manage Administrator Profile Values	If a Talent Review meeting has more than one facilitator, a facilitator can add any of the other facilitators to the review population. Also, facilitators can always include themselves as review participants.

Profile Option Code	Profile Display Name	Default Value	What Happens When You Change the Profile Value	Task to Use	Comments
ORA_HRR_LOV_SEARCH_TRMANAGERS_STARTSWITH	Search for Talent Review Managers Starts with Enabled	Y	Will search for managers whose names contain the characters entered.	Manage Administrator Profile Values	NA

## Descriptive Flexfields for Talent Review in Redwood

You can add descriptive flexfields to a Talent Review meeting template or meeting configuration pages for your company-specific attributes.

### Define Descriptive Flexfield Segments for Talent Review

Use the **Talent Review Descriptive Flexfields** task to define a segment for a descriptive flexfield for Talent Review.

This table describes two descriptive flexfields available by default in Talent Review.

Flexfield Code	Name	Description
HRR_DASHBOARD_TMPLS_B	Dashboard Template	Fields for template details that appear on Talent Review template pages.
HRR_MEETINGS	Dashboard Meetings	Fields for meeting configuration that appear in the Meeting info step of the Talent Review meeting configuration process.

# 3 Set Up Potential Assessment

## Set Up Potential Assessment

The potential assessment is a questionnaire that reviewers of a talent review meeting can use to rate the potential of workers.

As administrators, you need to create and configure potential assessments before reviewers can use them to prepare review content. You can create multiple potential assessments for talent review meetings apart from the predefined potential assessment questionnaire named **Potential Rating**. Note that you can associate only one potential assessment with a talent review meeting template or meeting. You can associate a different assessment with each template or meeting.

### Before you start

You need to configure the **Potential** and **Potential Assessment** rating models to add or change rating levels or review points. As an administrator, you manage rating models on the **Profile Rating Models** page. In the Profiles work area, use the **Profile Rating Models** task to view this page.

### Here's what to do

1. Use the **Potential Assessment** task available in the Setup and Maintenance work area.
2. To create a new questionnaire, select **Create**.
3. Search for and select **Potential Rating Questionnaire Template**.
4. Ensure to set the status as **Active**.  
Only active questionnaires can be associated with Talent Review templates and meetings.
5. Specify the basic information:
  - o Enter a name for the questionnaire.
  - o Select the status.
  - o In the **Instructions and Help Materials** section, enter any instructions for questionnaire users. This text appears on the first page of the questionnaire.
6. Add a section.
7. Add or create questions and select response type. To allow reviewers to add comments, select the **Allow Additional Comments** checkbox. You need to add enough questions to ensure that the **Potential Assessment** rating model's review points map to the review points range in the **Potential** rating model.
8. Repeat steps 6 and 7 for all the sections that you want to add.
9. Review and save the questionnaire.

## Guidelines for Configuring a Potential Assessment

To allow your reviewers to use the potential assessment feature to rate workers, you need to first configure a potential assessment questionnaire.

Use the **Potential Assessment** task in the Setup and Maintenance work area to do this. The Potential Assessment questionnaires are available in the Potential Rating folder.

## Sections

You need to have at least one section for a Potential Assessment questionnaire. You use different sections to group questions by question type or other criteria. For each section, you can enter specific instructions.

You can select these options for a section:

- **Required:** To ensure that respondents answer all questions in the section.
- **New Page:** To start the section on a new page.

You can also control the order of questions and responses in the section.

## Questions and Responses

In each section, you can add questions in these ways:

- Create questions.
- Add questions from the Potential Assessment question library.

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

For each question that you create, you need to specify these values:

- Question text
- Response type: Single choice from a list or a radio button

To allow reviewers to add comments, select the **Allow Additional Comments** checkbox.

## Available Responses

The rating levels in the Potential Assessment rating model decide the responses in these ways:

- The number of rating levels is the same as the number of potential responses.
- The text of the response is the short description value for the rating level.
- The value of each response is the numeric rating of the rating level.

## Number of Questions

These parameters decide the number of questions you add:

- Number of rating levels and numeric rating for each in the Potential Assessment rating model
- Rating level and corresponding range of review points for each rating level in the Potential Rating Model

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

*Related Topics*

- [How You Determine the Number of Questions to Add to a Potential Assessment Questionnaire](#)

## How You Determine the Number of Questions to Add to a Potential Assessment Questionnaire

To get a valid potential rating, you need to add enough questions so that the total of the numeric value of the responses maps to an appropriate level in the review points.

Let's now using some examples discuss how to decide the number of questions to add to a potential assessment questionnaire.

Consider the rating model configuration shown in this table.

Potential Assessment Rating Model Rating Level	Potential Assessment Rating Model Numeric Rating	Potential Rating Model Rating Level	Potential Rating Model Review Points	Potential Rating Model Review Points Range For Each Level	Final Potential Rating
1	1	1	1	0-13	1-Low
2	2	2	2	14-21	2-Medium
3	3	3	3	22-99	3-High

The number of questions must ensure that the review points from the Potential Assessment rating model map to the review points range in the Potential rating model.

Let's assume that there are 7 questions. Here's the total points for each rating level in the Potential Assessment rating model.

- **Rating Level 1:**  $7 * 1 = 7$  points
- **Rating Level 2:**  $7 * 2 = 14$  points
- **Rating Level 3:**  $7 * 3 = 21$  points

You can see that for Rating Level 3, the total points is less than the review points range of the Potential rating model.

Now, let's assume that there are 8 questions. Here's the total points for each rating level in the Potential Assessment rating model.

- **Rating Level 1:**  $8 * 1 = 8$  points
- **Rating Level 2:**  $8 * 2 = 16$  points
- **Rating Level 3:**  $8 * 3 = 24$  points

All these scores from the Potential Assessment rating model map correctly to the review points range in the Potential rating model. This shows that you need to create 8 questions to rate potential.

Now, consider the rating model configuration shown in this table. The review points range is changed here.

Potential Assessment Rating Model Rating Level	Potential Assessment Rating Model Numeric Rating	Potential Rating Model Rating Level	Potential Rating Model Review Points	Potential Rating Model Review Points Range For Each Level	Final Potential Rating
1	1	1	1	0-7	1-Low
2	2	2	2	8-12	2-Medium
3	3	3	3	13-99	3-High

For this review point range, you need to create 5 questions to rate potential.

# 4 Configure Talent Review Meeting Templates

## Configure Talent Review Meeting Templates

As an implementer, you create templates which facilitators can use to create talent review meetings. Facilitators can use the same template for many meetings.

You create talent review templates on the **Talent Review Templates** page. Use the **Talent Review Templates** quick action available in My Client Groups to navigate to this page.

On the **New Talent Review Template** page, do these tasks:

1. *Specify general information about the meeting template.*
2. *Add ratings* to use in Talent Review meetings that are created based on the meeting template.
3. *Add box chart views* and *configure their boxes*.
4. Select *data options*.
5. *Specify display options*.
6. Submit the configuration.

## Specify General Information About the Meeting Template

You specify general information about the Talent Review meeting template in the **General info** step of the Talent Review meeting template configuration process.

1. Enter a unique name for the template.
2. Select the status. Only active templates can be used to configure Talent Review meetings.
3. Select the owner. The person creating the template is the default owner.
4. In the **Maximum Records Allowed** field, specify the maximum number of employees allowed for the review population. The default value is 500.
5. Indicate if you want to allow the inclusion of succession plans and talent pools in Talent Review meetings created based on the template.
6. Indicate if you want to allow the inclusion of matrix managers as reviewers for Talent Review meetings created based on the template.
7. Enter the *submission process threshold*. This value controls the scheduling of a process used to update ratings in employee profiles. We recommend a value below 50.

## Submission Process Threshold

The submission process threshold that you specify in a Talent Review meeting template controls the scheduling of a process used to update ratings in employee profiles.

We recommend setting the submission process threshold's value to not more than 100. This will ensure that the ratings are correctly updated in the employee's talent profile for talent review meetings with a larger review population. This table indicates the effect of the submission process threshold for actions performed by a facilitator or reviewer.

Action	Effect of Submission Process Threshold
Facilitator submits the meeting	A process to update the talent profile ratings of the members of the review population is triggered when the size of the review population equals or exceeds the submission process threshold. For example, if you enter 70 as the submission process threshold, when there are 70 or more employees in the review population, a scheduled process is automatically run to update the profile ratings when the facilitator submits the meeting.
Manager submits the ratings after preparing review content	A process to update the talent profile ratings of the members of the review population is triggered when the number of employees rated by the manager equals or exceeds the submission process threshold. For example, if you enter 70 as the submission process threshold, when there are 70 or more employees rated by the manager while preparing review content, a scheduled process is automatically run to update the profile ratings when the manager submits the ratings.

When the scheduled process starts, a message displays the job number. You can also see the job number of the process next to the meeting status in the Talent Review Meetings overview page. You can track the process using this job number.

## Add Ratings in Meeting Template

You add ratings that reviewers can use to rate the review population in the **Rating options** step of the Talent Review meeting template configuration process.

You can add both delivered and custom ratings of Talent Profiles, but only up to 7 ratings.

1. Select the rating.
2. Specify the display label.
3. Select the rating model. We strongly recommend that you select a rating model that's also used for the rating type in other Talent Management offerings. These are the advantages of selecting a consistent rating model:
  - o The ratings given in the other Talent Management offerings are available in Talent Review. Ratings assigned in Talent Review are available in the other offerings.
  - o Facilitators and participants can view the latest talent profile data in the meeting.
  - o Facilitators and participants can compare the meeting ratings with those from previous meetings and identify the employee's progress.
4. Indicate if you want to allow reviewers to use the rating to rate their team members who are part of the review population.
5. If you've selected the **Overall Competencies Rating** rating, select the content section.
6. Save your changes.

## Delivered Ratings

This table describes the delivered ratings that are available for including in a Talent Review template.

Ratings	Description
Impact of loss	Evaluate the real or perceived effects on an organization when a person leaves.
Overall Competencies	Evaluate the overall competency of a person. A competency is a combination of measurable knowledge, skills, and personal attributes that contribute to a person's performance.  If you've configured many content sections for <b>Overall Competencies Rating</b> in Profile Management, you can select the content section to include in Talent Review. In the <b>Content Section</b> column, select

Ratings	Description
	<p>the content section to use when you're creating a new template or editing a template that's not in use. If you don't specify the content section to use, then only the latest rating provided for any of the sections of the <b>Overall Competencies Rating</b> content is considered. If your organization has configured only one content section for <b>Overall Competencies Rating</b> in Profile Management, then you don't need to select a content section.</p> <p><b>Note:</b> If the performance document is configured to allow section ratings and to update Profiles with the performance document rating, then the overall competencies rating is pulled from Profiles. Else, facilitators need to update this rating while conducting the talent review meeting.</p>
Overall Goals	<p>Evaluate the overall goal achievement of a person.</p> <p><b>Note:</b> If the performance document is configured to allow section ratings, then the overall goals rating is pulled from Profiles. Else, facilitators need to update this rating while conducting the talent review meeting.</p>
Performance	Evaluate a person based on their work.
Potential	Evaluate a person's attainable level of excellence or ability to achieve success.
Risk of loss	Evaluate the likelihood of a person leaving the company.
Talent score	Evaluate a person's overall value to the organization using a rating model your organization defines. You can score workers based on factors beyond performance and potential. These might include readiness, ability to mentor, and learning agility.

## Custom Ratings

You can also add custom ratings that are created in Talent Profiles. For example, you can create a rating to assess the innovative thinking of your employees in Talent Profiles and select the rating in the template.

To add custom ratings in the Talent Review meeting template, the **Employee View** and **Manager View** checkboxes need to be selected for these evaluator types in the rating section:

- Profile
- Talent Review
- Talent Review Meeting Preparation

## Add Box Chart Views

You can configure multiple unique box chart views to display worker ratings in the **Box chart views** step of the Talent Review meeting template configuration process.

You can create single rating view or XY views. Facilitators can switch between the views when they conduct the Talent Review meeting.

1. Add a box chart view.
2. Enter a unique name for the view.
3. Select the view type.
4. In the **X-axis or Single Rating** column, select the rating that you want to use on the X-axis of the box chart or for the single rating view.
5. For XY Views, in the **Y-axis** column, select the rating that you want to use on the Y-axis of the box chart.
6. Select the checkbox in the **Submit Box Assignment** column if you want the labels of the boxes to appear in the table view of the box chart.

**Note:** You can submit the box assignment for only 1 XY and 1 Single Rating view.

7. Indicate if you want the view to be the default view.
8. Save your changes.

### What to do next

Configure the boxes in the box chart view.

## Configure Boxes of a Box Chart View

You configure boxes of a box chart view on the **Configure boxes** panel.

The colors configured are applied to the boxes in the box chart of the meeting dashboard when facilitators conduct a meeting or reviewers preview the dashboard while preparing review content. The **Prior Ratings** legend also shows the colors configured.

1. In the **Box chart views** step of the Talent Review meeting template configuration process, select the **Edit** link in the **Configure Boxes** column of a box chart view.  
You can see the **Configure boxes** panel.
2. For box charts of the **Single Rating View** type, select the number of rows and columns in the box chart. You can select a maximum of 5 rows and 7 columns.

**Note:** For box charts of the **XY View** type, the number of rating categories in the rating models you selected determine the box-chart dimensions.

3. To see the color code when you select a color from the color picker, select the **Show hexadecimal code** checkbox.
4. Repeat these steps for each box of the box chart view.
  - a. For box charts of the **XY View** type, specify a name for the box. For box charts of the **Single Rating View** type, select the rating level.
  - b. Select a color from the color picker. If you've selected the **Show hexadecimal code** checkbox, you can specify a hexadecimal color code to select the corresponding color.
5. Click **Save**.

## Data Options of Talent Review Meeting Templates

Control the filters and actions available to facilitators in the **Data options** step of the Talent Review meeting template configuration process.

We can classify the data options available in Talent Review meeting templates into these categories:

- *Population filters*
- *Actions*
- *Color code options*

### Population Filters in the Talent Review Meeting Template

When creating or editing a Talent Review meeting template, you can select the population filters to be displayed on the talent review meeting dashboard.

The population filters include business unit, job, and competency. Facilitators can filter the review population using these filters.

These population filters let you specify whom to include in the review population:

- **Manager:** Shows all managers in the review population hierarchy, even if they've no direct reports in the review population.
- **Reviewers and Participants:** Shows all the direct and indirect reports of the reviewers and participants if they're part of the review population.
- **Subordinate Level:** Shows only the subordinates of the meeting business leader.
- **Management Level:** Shows only people at the specified management level.
- **Department:** Shows only members of the review population from the selected departments.

### Actions Data Options

When creating or editing a Talent Review meeting template, you can specify the actions facilitators can perform while conducting the review meeting.

You specify these in the **Actions** section of the **Data options** step of the Talent Review meeting template configuration process.

Action Options	What It Does	Comments
<b>Add notes</b>	Facilitators can add notes about the meeting or for any person in the review population. Facilitators can also manage notes created by the worker's manager during the content preparation phase before the talent review.	NA
<b>Add tasks</b>	Facilitators can assign tasks to meeting participants and others.	The tasks added appear in the Manage Notes and Tasks task the facilitator uses after the meeting to follow up on assigned tasks.

Action Options	What It Does	Comments
<b>Add goals</b>	Facilitators can create goals or assign performance or development goals from the goal library.	The goal management business process must be available to create performance goals. The career development business process must be available to create development goals.
<b>Enable holding area</b>	The Holding Area displays workers without ratings at the start of the meeting.	During the meeting, participants can move workers to this area from the box chart. If you don't enable the Holding Area, workers without ratings at the start of the meeting don't appear in the review.
<b>Enable organization chart</b>	Participants can view the organization chart of the organization being reviewed.	NA
<b>Enable potential assessment</b>	Enables reviewers to answer potential assessment questions on the Prepare Review Content page. The potential rating is calculated automatically based on the responses.	You can select the potential assessment questionnaire when you enable this action.

## Color Code Options in the Talent Review Meeting Template

Use the color code options to let facilitators and participants to highlight selected segments of the review population.

You can highlight the review population by these criteria:

- Gender
- Age
- Ethnicity
- Religion
- Job
- Location
- Manager

Facilitators can view the average ratings for all workers within that option. For example, if a facilitator selects the **Location** color code option while conducting the meeting, all workers in the review population are categorized by location. Workers belonging to the same location are highlighted with the same color.

## Talent Review Display Options

When creating or editing a talent review meeting template, you can specify the display options that meeting facilitators and participants can see on the meeting dashboard for these ratings:

- Risk of loss
- Impact of loss
- Mobility

To create or edit a talent review meeting template, use the **Configure Talent Review Dashboard Options** task in the Setup and Maintenance work area.

## Configure Display Options

Here's how you configure the display options in the talent review meeting template:

1. From the **Preferred Display Option** list, select whether you want to show colors or shapes.
2. Specify the colors or shapes to use for each analytic value.

**Note:** You can't select a color or shape for the **No value** and **Secured** analytic values. You can see default colors or shapes for these analytic values.

3. Save your changes.

You can enter only the preferred display option for an analytic and not select any shapes or colors for each value. But if you do so, the facilitators and participants might see some random shapes or colors on the dashboard. Let's assume that you selected **Colors** as the preferred display option for the **Risk of Loss** rating but didn't specify the colors to show for each value. The facilitator might once see a high risk of loss in red, medium in yellow, and low in green. The next time the colors shown for the values might not be the same.

## Advantages of Configuring Display Options

After you specify the display options, facilitators can view consistent shapes or colors for each analytic rating value. For example if you selected **Colors** as the preferred display option for the **Risk of Loss** rating and then selected the red color for the **High** value, then in all meetings that are created based on the template, the facilitator will always see high **Risk of Loss** ratings indicated by the red color.



# 5 Redwood Alerts for Talent Review Meetings

## Redwood Alerts for Talent Review Meetings

You can configure alerts for Talent Review meeting stakeholders to notify them about meetings and remind them of the actions that they need to do.

As an administrator, use the **Talent Review Meeting Alerts** template in Alerts Composer to configure notifications related to Talent Review meetings. This table lists the included alert templates.

Template	Effect of enabling
Facilitators Notified After Meeting is Scheduled	Notifies facilitators that the Talent Review meeting has been scheduled
Participants Notified After Facilitator Schedules Meeting	Notifies reviewers and participants that the Talent Review meeting has been scheduled
Business Leader Notified After Facilitator Schedules Meeting	Notifies the business leader that the Talent Review meeting has been scheduled
Stakeholders Notified After Facilitator Updates Meeting	Notifies facilitators, the business leader, reviewers, and participants that the Talent Review meeting has been updated
Manager Notified After Reviewer Delegates Review	Notifies the delegated manager that they need to review their team members who are part of the Talent Review meeting
Reviewers Reminded About Ratings Submission	Notifies reviewers that they need to submit their ratings for their team members who are part of the Talent Review meeting
Facilitators Notified After Reviewers Submit Their Ratings	Notifies facilitators that a reviewer has submitted their ratings for the Talent Review meeting
Stakeholders Notified After Facilitator Cancels Meeting	Notifies facilitators, the business leader, reviewers, and participants that the Talent Review meeting has been canceled



# 6 Redwood Alerts for Talent Review Tasks

## Redwood Alerts for Talent Review Tasks

You can configure alerts to remind task assignees and owners about tasks that are assigned to them or those that are due.

As an administrator, use the **Talent Review Tasks Alert** template in Alerts Composer to configure notifications related to Talent Review tasks. This table lists the included alert templates.

Template	Effect of enabling
Redwood Alert for New Task Owner	Notifies task owners about each task of a Talent Review meeting that they're added as an owner
Redwood Alert for New Task Assignee	Notifies task assignees about each task of a Talent Review meeting that they're assigned
Redwood Alert of Aggregated Tasks for New Task Owner	Notifies new owners about all tasks of a Talent Review meeting in which they've been added as an owner in the specified number of days
Redwood Alert of Aggregated Tasks for Assignee	Notifies new assignees of all tasks of a Talent Review meeting that they've been assigned in the specified number of days
Redwood Reminder Alert for Task Due	Notifies assignees that a task is due in the specified number of days

## Notify Owners and Assignees about Talent Review Meeting Tasks

As an administrator, you can configure alerts to send individual or aggregated notifications to managers and HR specialists when they're assigned a new task for a Talent Review meeting or made the task owner.

Note that for existing tasks, when an HR specialist or a reviewer adds a person as an owner or an assignee, notifications are sent only if the task isn't complete. Also remember that if an employee is both an owner and an assignee for a task, the employee gets 2 notifications.

## Send Individual Task Notifications to New Task Owners and Assignees

Your organization might want to notify employees every time the employee is assigned a task or made an owner. Here's how you configure this:

1. Search for and open the **Talent Review Tasks Alert** template in Alerts Composer.
2. Ensure that it's enabled.
3. Enable these alert templates:
  - o Notification for New Task Owner
  - o Notification for New Task Assignee

4. Select **Save and Close**.

## Send Aggregated Notification of Tasks to Owners and Assignees

Your organization might not want to send a notification to employees every time they're added as an owner or assignee to a task associated with a Talent Review meeting. In this case, do these steps:

1. Configure alerts to send an aggregated notification of tasks for a meeting.
2. Run the **Send Notification for Talent Review Tasks** process.

**Note:** To run the **Send Notification for Talent Review Tasks** process, you need to have the **Run Global HR Processes (PER\_RUN\_HR\_PROCESSES\_PRIV)** function security privilege.

To configure alerts to send an aggregated notification of tasks for a meeting, do these steps:

1. Go to **Tools > Alerts Composer**.
2. Search for and select the **Talent Review Tasks Alert** template.
3. Ensure that it's enabled.
4. To send an aggregated notification to task owners:
  - a. Disable the **Notification for New Task Owner** template.
  - b. Enable the **Notification of Aggregated Tasks for Owner** template.
5. To send an aggregated notification to task assignees:
  - a. Disable the **Notification for New Task Assignee** template.
  - b. Enable the **Notification of Aggregated Tasks for Assignee** template.
6. Select **Save and Close**.

After you configure the alerts template, you need to run the **Send Notification for Talent Review Tasks** process regularly to let employees know about all tasks that they're assigned or own for a Talent Review meeting.

1. Go to **Tools > Scheduled Processes**.
2. Search for and run the **Send Notification for Talent Review Tasks** process.
3. Specify the number of days in the past that the process needs to check for new task assignees or owners.
4. Schedule the process according to your organization's needs.
5. Submit the process.

When the process completes, you can check these details in the log file:

- Person identifier of the employees who were notified and their role for the task
- Meeting with which the task is associated
- Number of notifications sent

Note that if employees are made an owner or an assignee for tasks of more than one meeting in the specified days, they receive separate notifications for each meeting.

### Related Topics

- [Overview](#)
- [Submit Scheduled Processes and Process Sets](#)

## Remind Assignees When Talent Review Tasks Are Due

Your organization might want to send a reminder to task assignees before the tasks are due. This helps the assignees to prioritize work and complete tasks.

To send task reminders, as administrators, you need to do these steps:

1. Configure the **Talent Review Tasks Alert** template.
2. Run the **Send Reminder for Talent Review Tasks That Are Due** process.

**Note:** You can run this process only if you've the **Run Global HR Processes (PER\_RUN\_HR\_PROCESSES\_PRIV)** function security privilege.

Remember that task owners aren't notified about tasks that are due.

## Configure Alerts to Send Task Reminders to Task Assignees

Do these steps to configure alerts to send reminders to task assignees:

1. Go to **Tools > Alerts Composer**.
2. Search for and select the **Talent Review Tasks Alert** template.
3. Ensure that it's enabled.
4. Ensure that the **Reminder Notification for Task Due** template is enabled.
5. Select **Save and Close**.

## Run the Send Reminder for Talent Review Tasks That Are Due Process

After you configure the alerts template, you need to run the **Send Reminder for Talent Review Tasks That Are Due** process regularly to let task assignees know about tasks that they need to complete for a Talent Review meeting.

1. Go to **Tools > Scheduled Processes**.
2. Search for and run the **Send Reminder for Talent Review Tasks That Are Due** process.
3. Specify the number of days before the task due date that the process needs to check for.
4. Schedule the process according to your organization's needs.
5. Submit the process.

When the process completes, you can check these details in the log file:

- Person identifier of the employees who were notified
- Task due date
- Meeting with which the task is associated
- Task title
- Number of notifications sent

### Related Topics

- [Overview](#)
- [Submit Scheduled Processes and Process Sets](#)



# 7 Securing Access to Talent Review Meetings

## Overview of Creating a Talent Review Super User Job Role

This topic provides an overview of how to create a talent review super user who can access all talent review meetings in your organization.

### Providing Access to All Talent Review Meetings in Your Organization

The predefined Human Resource Specialist job role enables users to access the talent review meetings for which they are a facilitator, but no predefined job role enables any user to access all talent review meetings. To give selected users this access, you can create a super user job role and provision the job role directly to those users. The job role is then granted custom data security policies that provide access to all talent review meetings.

It is not possible to configure a role that can report on all talent review meetings using Oracle Transactional Business Intelligence (OTBI).

## Create a Talent Review Super User Job Role

In this example, you learn how to create a job role that provides access to all talent review meetings in the Talent Review Meetings work area.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In this Example
What's the name of the job role?	Talent Review Super User
What's the code of the job role?	TALENT_REVIEW_SUPER_USER_JOB
What are the names of the data security policies?	Talent Review Custom Policy
What is the name of the role mapping?	Access All Talent Review Meetings
How do users acquire the role?	Users with the human resources representative responsibility can provision the role to other users.

## Summary of the Tasks

Enable access to all talent review meetings in the Talent Review Meetings work area by:

1. Creating a job role
2. Granting functional security policies to the job role
3. Granting data security policies to the job role
4. Creating a role mapping

## Create a Job Role

1. On the **Roles** tab of the Security Console, select **Create Role**.
2. On the **Create Role: Basic Information** page, enter the role name as **Talent Review Super User**.
3. Enter the role code as **TALENT\_REVIEW\_SUPER\_USER\_JOB**.
4. In the **Role Category** field, select **HCM - Job Roles**.
5. Select the **Function Security Policies** train stop.

## Granting Functional Security Policies to the Job Role

1. On the **Function Security Policies** page, select **Add Function Security Policy** to open the **Create Function Security Policy** dialog box.
2. In the **Create Function Security Policy** dialog box, search for the **HRR\_CONDUCT\_TALENT\_REVIEW\_PRIV** privilege and select **Add Privilege to Role**.
3. Then search for the **HRR\_SCHEDULE\_TALENT\_REVIEW\_MEETING\_PRIV** privilege and select **Add Privilege to Role**.
4. Select the **Data Security Policies** train stop.

## Granting Data Security Policies to the Job Role

1. On the **Data Security Policies** page, select **Create Data Security Policy** to open the **Create Data Security Policy** dialog box.
2. In the **Create Data Security Policy** dialog box, enter the policy name as **Talent Review Custom Policy**.
3. Search for and select the **Talent Review Meeting (HRR\_MEETINGS)** database resource.
4. Select **All values** in the **Data Set** field.
5. Select **Schedule Talent Review Meeting** in the **Actions** field.
6. Select **OK** to close the **Create Data Security Policy** dialog box.

## Create a Role Mapping

You create a role mapping to enable the Talent Review Super User Job Role to be provisioned to users.

1. In the Setup and Maintenance work area, go to the following:
  - o Offering: Workforce Deployment
  - o Functional Area: Users and Security
  - o Task: Manage Role Provisioning Rules
2. On the **Role Mapping** page, select the **Create** icon in the Search Results section.

3. In the **Mapping Name** field on the **Create Role Mapping** page, enter **Access All Talent Review Meetings**.
4. Complete the fields in the **Conditions** section as shown in this table.

Field	Value
HR Assignment Status	Active
Responsibility Type	Human resources representative

5. Add a row in the **Associated Roles** section.
6. In the **Role Name** field, search for and select **Talent Review Super User**.
7. Select the **Requestable** option and deselect the **Autoprovision** option.
8. Select **Save and Close**.

Users with the human resources representative responsibility can now provision the Talent Review Super User Job Role to other users.



# 8 Dispose Talent Review Data

To meet data protection requirements, as administrators you might need to dispose Talent Review data of terminated employees. You can do this in the Data Exchange work area.

You first need to use the **Configure Person Information Removal Policies** task to create configuration templates. You can create a template to remove person information of people who are part of a Talent Review meeting in any of these roles:

- Member of the review population
- Participant
- Facilitator

You then need to enable the template and run the **Remove Person Information** task.

## Create Configuration Template

1. Go to the **Data Exchange** work area in My Client Groups.
2. In the **Remove Person Information** section, select **Configure Person Information Removal Policies**.
3. Create a template.
4. Specify values for these fields.

Field	Description
Name	Template name
Code	The template code, defaults to the name of the template.
Category	Business object category. Select <b>Worker</b> .
Description	A suitable description to identify the template.

5. Select **OK**.
6. Ensure that you're on the **Components** tab.
7. In the **Business Objects** panel, select **Talent Review Meeting**.
8. In the **Components** panel, expand **Talent Review Meeting**.
9. Select any of these check boxes according to the role of the persons whose information you want to remove.

Check box	Role of person to remove
Facilitator	Facilitator of Talent Review meetings
Participant	Participant who can also be a reviewer of Talent Review meetings
<b>Reviewee</b>	Member of review population

Check box	Role of person to remove

10. Select **Save and Close**.

11. Enable the template.

**Results:**

Here's what happens after the person information removal process of the Talent Review Meeting object completes successfully:

- You can't see the workers whose person numbers you specified while running the person information removal process in the **Facilitators, Participants, and Review Population** section of Talent Review meetings.  
**Note:** The process removes workers whose employment was terminated as meeting facilitators even if they were the only facilitator for the meeting.
- Reviewers can't see the workers whose employment was terminated who were earlier part of the review population when they prepare review content.
- Facilitators and participants can't see the workers whose employment was terminated who were earlier part of the review population on the meeting dashboard.
- The process doesn't delete the ratings assigned by workers whose employment was terminated who were earlier Talent Review meeting participants.
- The process doesn't remove the ratings assigned to the workers whose employment was terminated either when preparing review content or when conducting the meeting from Talent Profile.

**What to do next**

Sometimes the removed workers whose employment was terminated can be the only facilitators for the Talent Review meeting. You then need to add a new facilitator for the meeting either as a super user or by using HCM Data Loader. You can edit the meeting only after you add a facilitator.

*Related Topics*

- [Remove Person Information](#)