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Administrator Training Guide

SAP SuccessFactors Succession Management Administration (HR841)

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About this Handbook

This handbook is intended to complement the instructor-led presentation of this course and serve as a source of reference. American English is the standard used in this handbook. The following typographic conventions are also used:

Use	Example/Visualization
Demonstration by Instructor A hint or advanced detail is shown or clarified by the instructor – please indicate reaching any of these points to the instructor	
Warning or Caution A word of caution – generally used to point out limitations or actions with potential negative impact that need to be considered consciously	
Hint A hint, tip or additional detail that helps increate performance of the solution or help improve understanding of the solution	
Additional information An indicator for pointing to additional information or technique beyond the scope of the exercise but of potential interest to the participant	
Discussion/Group Exercise Used to indicate that collaboration is required to conclude a given exercise. Collaboration can be a discussion or a virtual collaboration.	
User Interface Text	Find the *Flavor Gallery* button
Solution or SAP Specific term	E.g. *Flavors* are transaction specific screen personalization created and rendered using SAP Screen Personas.

Course Introduction

Overview

Through discussion, demonstration, and hands-on exercises, this course uses the concepts and terminology associated with SAP SuccessFactors Succession functionalities and helps you to develop a working knowledge to use in implementing your succession strategy. You will gain basic skills in how to use SAP SuccessFactors Succession as an administrator and learn how to use the basic tools for managing succession in your organization.

	Please note that "user" in this guide refers to the end-user or employee with access to Succession module. The Succession Planner is a typical role that may include any or all of the following: Managers, Directors, Executives or HR Representatives.

Target Audience

This is an instructor-led training course (virtual or in-person) intended for SAP SuccessFactors System Administrators responsible for one or all of the following:

- Providing permissions access to Succession Planners or other appropriate roles
- Modifying Succession options or features within Admin Center
- Relaying end user actions for proper use of nomination tools or reports

Course Objectives

Upon completion of this course, you will be able to:

- Introduce the permissions controlling access within Succession
- Describe the nomination methods and concepts used in Succession
- Discuss the Succession features and options available within Admin Center
- Practice the exercises detailing the necessary actions to modify Succession
- Determine the areas of Succession where additional assistance is needed from Customer Success or Professional Services for next steps and enablement

SAP SuccessFactors Community

Customer Community is your one-stop shop for support, quick answers, product training and quarterly release updates. You may also post ideas for enhancements on product-specific Q&A boards, and "Kudo" other ideas that you like. Enhancement ideas with the most kudos often become part of the product roadmap for future releases.

https://community.successfactors.com/

Data Protection and Privacy Features

	Data Protection and Privacy Features: With recent releases, several new data protection and privacy features have been made available to our customers and some existing features have been enhanced. The data protection and privacy features include, for instance, the ability to report on personal data changes and the capacity to report on all the data subject's personal data available in the application. Customers will also have options to configure data retention rules at country level for active and inactive employees that will permanently purge personal data from SAP SuccessFactors applications. It is the customer's responsibility to adopt the features that they deem appropriate. More information can be found on the SAP Help Portal: http://help.sap.com/cloud4hr

Additional Resources

For more information about SAP SuccessFactors, refer to these resources:

Main Website	http://www.SuccessFactors.com
SAP SuccessFactors Process Library	https://community.successfactors.com/t5/SAP-SuccessFactors-Process/ct-p/ProcessLibrary
Training and Certification Shop	https://training.sap.com/shop/learninghub
SAP SuccessFactors HCM Suite Help Portal	http://help.sap.com/cloud4hr

Unit 1 – Succession Management Introduction

Unit Objectives

This unit contains three lessons which apply to all nomination methods

- Lesson 1-1: Succession Management Introduction
- Lesson 1-2: Succession Nomination Methods & Configuration
- Lesson 1-3: Succession Management Tools Overview

Upon completing this unit, you will be able to:

- Describe the purpose and goals of Succession Management
- Explain the three Succession Nomination Methods
- Identify the primary tools used in Succession Management

Lesson 1-1 – Succession Management Introduction

Lesson Overview

The goal for this lesson is to provide an overview of Succession Management and guidelines in usage of succession planning.

Lesson Objective

- Describe the three succession nomination methods
- Explore modifying succession configurations

What is Succession Management?

The purpose of SAP Succession Management is to ensure a steady supply of high performing talent in critical job roles.

Historically, Succession Management focused on figuring out who would replace top executives, but the increasing importance of human capital combined with advances in talent management technology is leading organizations to implement Succession Management for more and more roles across the company. Succession Management is no longer limited to the boardroom, and in some cases, extends all the way to frontline employees.

A robust Succession Management program enables organizations to know their talent, to identify talent gaps, and to close talent gaps with development plans. Organizations can move employees to positions aligned with employee expertise and career aspirations. A loss of a key employee may be less stressful to the organization because a successor has already been identified.

Different organizations will have different goals in their usage of SAP Succession Management; therefore, the company must analyze their business goals, resources, and characteristics of the organization to determine how they will utilize the SAP SuccessFactors Succession module. Common Succession Management goals might include:

- Identifying candidates for key roles
- Improving accuracy of staffing decisions
- Filling positions rapidly
- Accelerating employee development
- Increasing employee engagement
- Tracking potential and key talent
- Collaborating across functions and sharing knowledge
- Retaining critical organizational expertise during workforce transitions
- Building an employment brand

These goals are typically discussed during implementation so that the SAP SuccessFactors system can be configured to best meet the company's Succession Management needs.

In addition to understanding and evaluating its Succession Management goals and needs, a company must also decide how they would like to evaluate Succession candidates. The system can be configured during implementation to track many criteria related to an employee's performance and potential in order to make informed decisions on their readiness to move into a new position.

Typical evaluation criteria include:

- Documented facts which may include an employee's previous work experience, accomplishments and qualifications.
- Subjective ratings such as job performance ratings from goal management, performance management or 360 reviews, and future potential ratings.
- Commitment criteria which may involve looking at the candidate's personal attributes, career goals, retirement age, and demonstrated support for the company mission and goals.

Lesson Conclusion – Succession Overview

In this lesson, you were introduced to the concepts and goals of Succession Management and planning within an organization.

You should now be able to describe the purpose of Succession Management.

Lesson 1-2 – Succession Nomination Methods & Configurations

Lesson Overview

The goal for this lesson is to provide strategic information about the varying nomination methods for the customer.

Lesson Objective

- Describe the three succession nomination methods
- Explore modifying succession configurations

Overview of Succession Nomination Methods

SAP SuccessFactors Succession Management has several nomination methods to support various processes and strategies to our customers. Currently, there are three types of nomination methods:

- Role-Person Nominations
- Position-Based Nominations
- MDF Position-Based Nominations

	The succession nomination method in your system is determined by a Provisioning setting. As mentioned earlier, these Provisioning settings must be activated or changed by Customer Success or Professional Services.

Role-Person Nomination Method

The role-person nomination method (also known as Incumbent-based) is typically used for “replacement planning”. Successors are nominated to role/unique person combination (i.e., job code + user ID). Job codes and roles must be defined, and this method of succession planning is focused on the person or incumbent rather than the position itself. For example, a company may select the role-person nomination method if they have grown quickly by acquisition and do not have strong position management in place or need a more simplified method of administration and maintenance.

	One important thing to know regarding the Role-Person Nomination Method is that succession plans move with the incumbent and such plans are dropped if the incumbent's job code changes.

Since the role-person nomination method is not a recommended best practice at this time, the discussion of it is limited to this scope. If you are currently utilizing this method, your company should consider exploring some of our newer options for optimal use of the Succession module.

Position Nomination Method

The position nomination method (also known as Legacy Position) is often selected by customers due to its minimal pre-requisites. For example, you may choose the permissions structure of legacy admin domains or role-based permissions with position nominations. Whereas, the MDF Position nomination method requires the use of role-based permissions discussed later in this guide. Since successors are nominated to positions, a position model is created with defined roles and job codes. This allows succession plans to be linked to the position, regardless of incumbent or vacancy.

Advantages for succession planning with this method are as follows:

- Supports future planning for vacant positions
- Adds To Be Hired (TBH) positions in the org chart
- Holds plans in tact even if incumbent and job code changes occur
- Automatic Removal of Succession Nomination for Incumbents

If an employee, who was nominated as a successor to a position, becomes the incumbent, the system automatically removes that employee from the successor list for this position. This enhancement automates the process of identifying successors who become incumbents and then removing them from the successor list. By selecting this option, you can optimize your succession process and relieve your talent planners of the manual steps otherwise required.

To activate this enhancement, go to Admin Center > Nominations Set Up and select: Automatically remove nominated successor if that user becomes incumbent.

	Remember, the position model must be maintained via sync or import. Both features are available to the Administrator within Admin Center > Succession.

MDF Position Nomination Method

The MDF Position Nomination method builds on our most sophisticated platform feature called the MetaData Framework (MDF) and commonly referenced as the generic object (GO). MDF puts control back into your hands as the Administrator by broadening the capabilities within Admin Center.

Some powerful benefits in areas like configuration, tracking and permissions are below:

- Creating custom fields unique to your organization within the position details
- Utilizing effective dating of positions to capture historical changes to a record
- Providing more granular permissions and targets to restrict sensitive information
- Automatic Removal of Succession Nomination for Incumbents

⚠	MDF positions are generic objects built with the Metadata Framework that can be used for succession planning with or without SAP SuccessFactors Employee Central. For initial setup or modifications to Provisioning settings, contact Customer Success or your Professional Services partner to assist further.

⚠	In the case of automatic removal of a succession nomination and the MDF Position Nomination: If an employee who was nominated as successor to a position actually becomes the incumbent of the position, the system automatically removes that employee from the successor list for this position.

Modifying Configurations of Succession Management

Succession Management Configuration

Depending on the tool, Succession Management is configured in Admin Center AND in Provisioning. While an effort has been made to bring more and more options to Admin Center, some options can only be controlled with an access to Provisioning. For example, the Talent Flags icons visible on the Succession Org Chart come from an xml code only available in Provisioning. Consultants are needed for XML changes and provisioning access.

Readiness Rating Scale

All successor nominations require a readiness rating to determine how far successors are from being ready to fill the role in question. The readiness rating scale is defined in both the org chart XML (via Provisioning) and the rating scale designer (via Admin Center). The rating scale must match exactly in both locations to avoid inconsistent results in the various succession planning tools.

The Check Tool can help customers to find if their readiness rating scale defined in Admin Center matches the readiness rating scale in the org chart xml, not only for the scores and also the language pairs. If customers experience any issue with Readiness rating scale, then they should first perform the check and if they get some error in the check result then should contact their implementation consultant (if still working with their consultant) or the support team to fix it.

Lesson Conclusion – Succession Nomination Methods & Configuration

In this lesson, you were introduced to the different nomination methods and configurations.

You should now be familiar with Succession nomination methods and configurations.

Lesson 1-3 – Succession Management Tools Overview

Lesson Overview

The goal for this lesson is to describe the main tools used in SAP SuccessFactors Succession Management.

Lesson Objectives

- Identify the main tools used in SAP SuccessFactors Succession Management.

What are the Main Succession Management Tools?

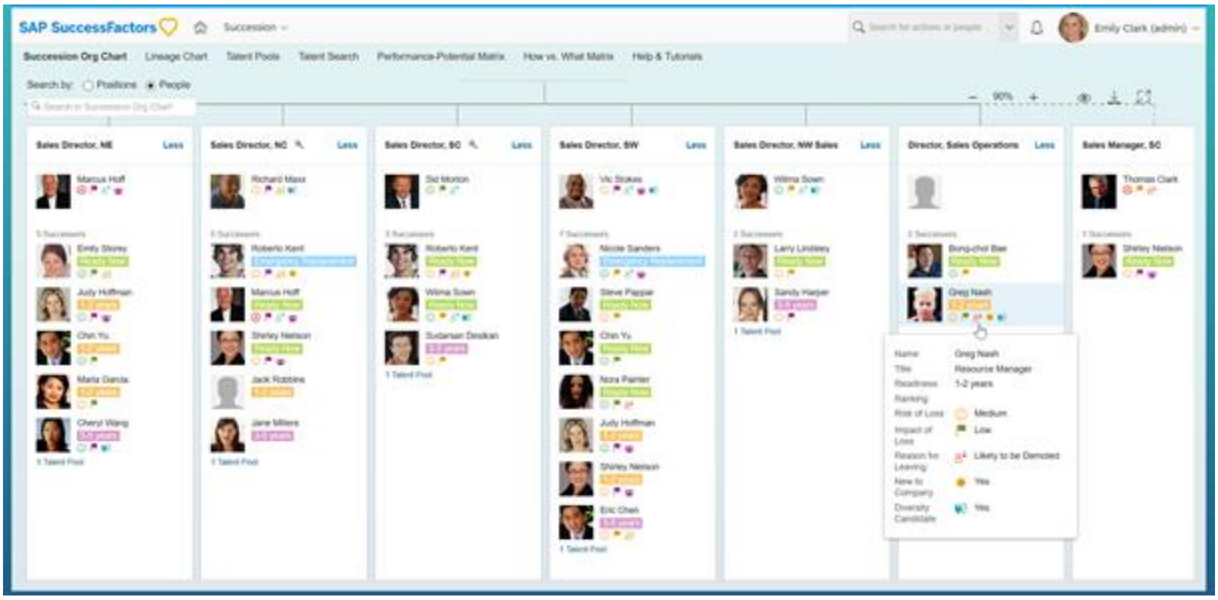
The main tools used in the SAP SuccessFactors Succession module are the Succession Org Chart v12, Lineage Chart, Talent Search v2, and the v12 Matrix Grid Reports. Two additional tools, Position Tile and MDF Talent Pools, will be discussed in later chapters for each requires use of the Metadata Framework (MDF). Many of these tools are utilized independently or together to assess an employee's readiness for a position, nominate a successor to a position, search for talent in the organization, or review ratings via reports.

Succession Org Chart (v12)

The Succession Org Chart v12 is our latest version of the Succession Org Chart. This version incorporates a Succession Talent Card for more detailed viewing of Succession information. Icons for the Successors as well as Incumbents may be included in the chart with initial assistance of a professional services consultant. The list of available icons that can be assigned to talent flags has been expanded to include new Fiori-style icons. Icons have been redesigned for the most commonly used fields. Customers can find the list of legacy icons as well as the newer Fiori-style icons in the Succession Management Implementation Guide.

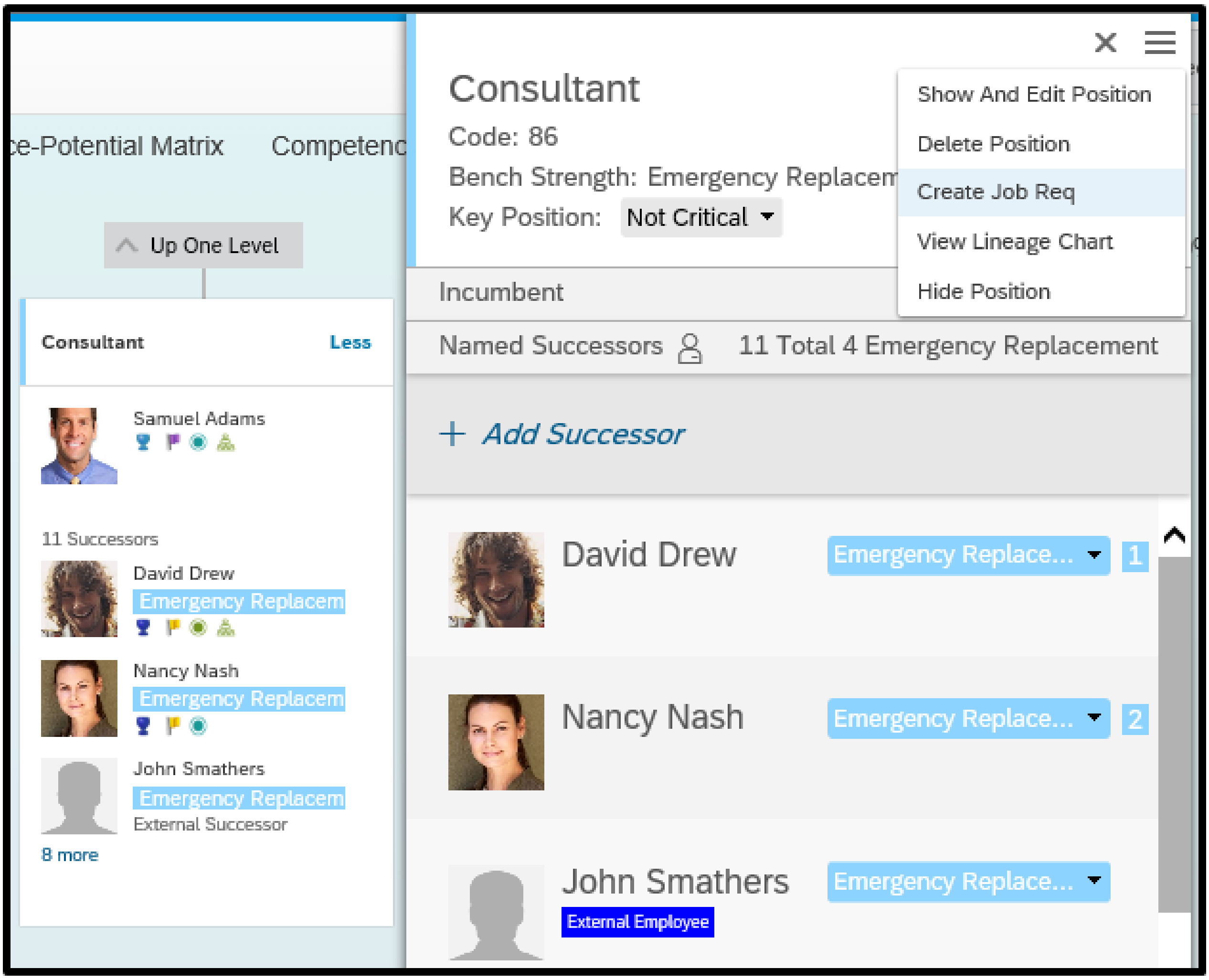
For existing customers, existing icon configurations will not be overwritten. Nevertheless, if the customer upgrades to v12 UIs or if they start a Succession Planning implementation, they should consider using the new Fiori-style icons for a more harmonized look and feel across modules.

You may utilize the display options as well to modify views within the chart.



Data from modules like Recruiting Management or Career Development Planning is captured within the Succession Org Chart, Position Card, or the Succession Talent Card.

With Succession Management and Recruiting Management integrated, the Succession Org Chart v12 allows for the display of a Successor, the nomination of an external candidate and the ability to create a job requisition as seen below.

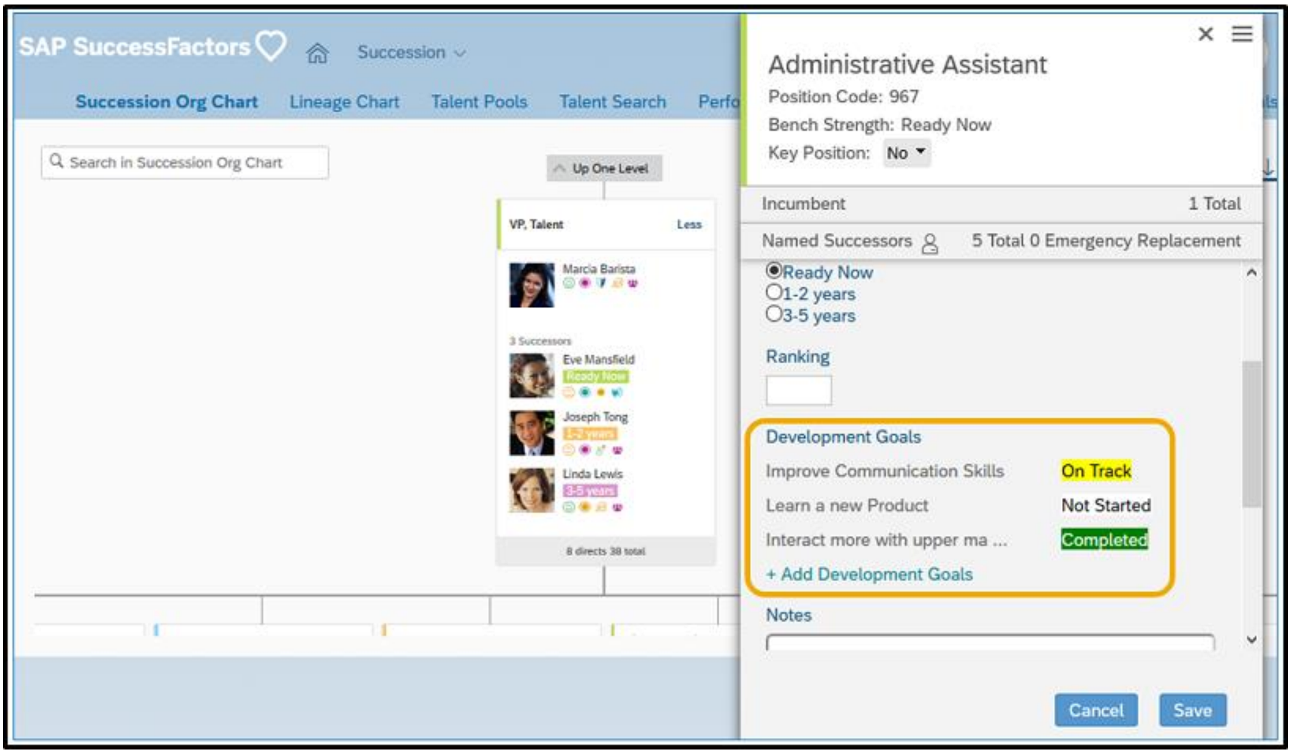


With Succession Management and Career Development Planning, the Succession Org Chart v12 is capable of displaying development goals pulling from an employee career development plan as well as creates the ability to add a development goal from the Position Card during nomination of Successors.

From the Succession Org Chart, we can mention two integration points with CDP:

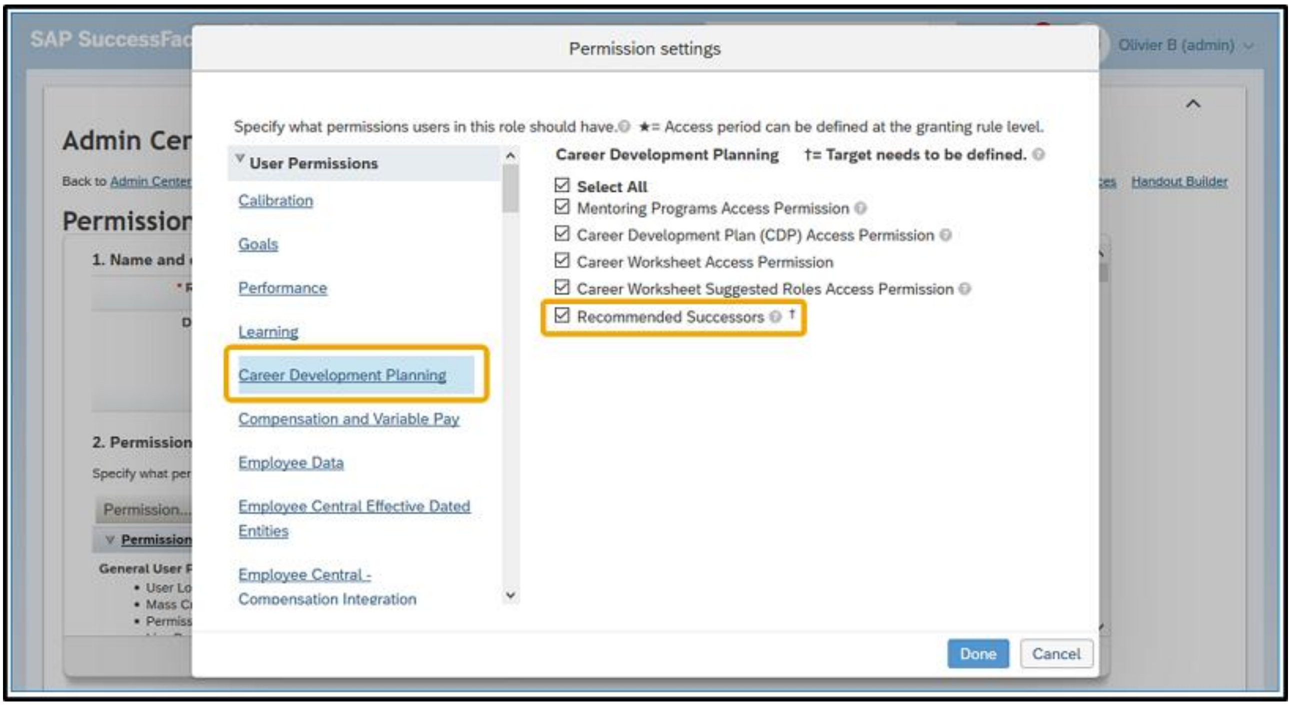
- The Development Goals in the nomination dialog
- The Suggested Successor and the readiness

If you have the permission in the development plan, you can view and add development goals from the nomination card from the Succession Org Chart.

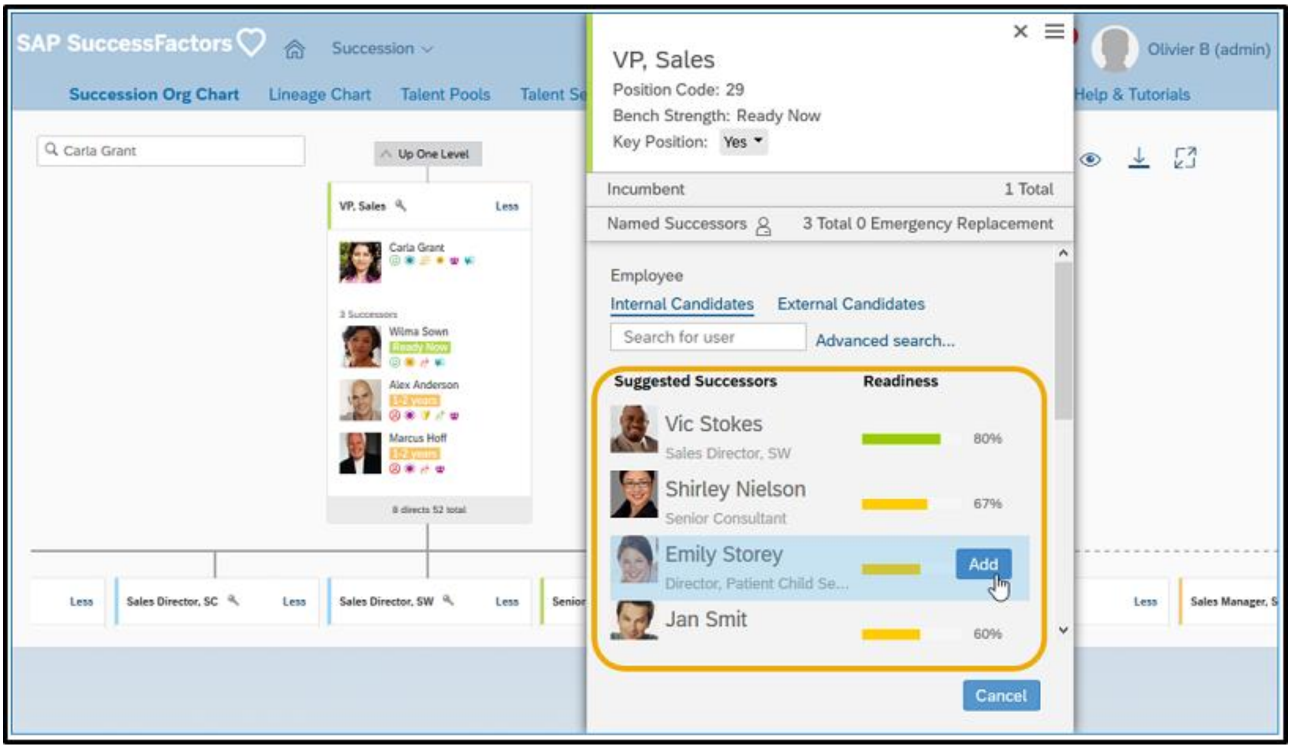


If you have the career worksheet template permission and if it contains the readiness_meter field, the suggested successors can also be used.

The Recommended Successors permission in the category Career Development Planning uses the target population to control the users who will be visible in that section.



When you add successors to positions, the system presents a list of the top 10 suggested successors.



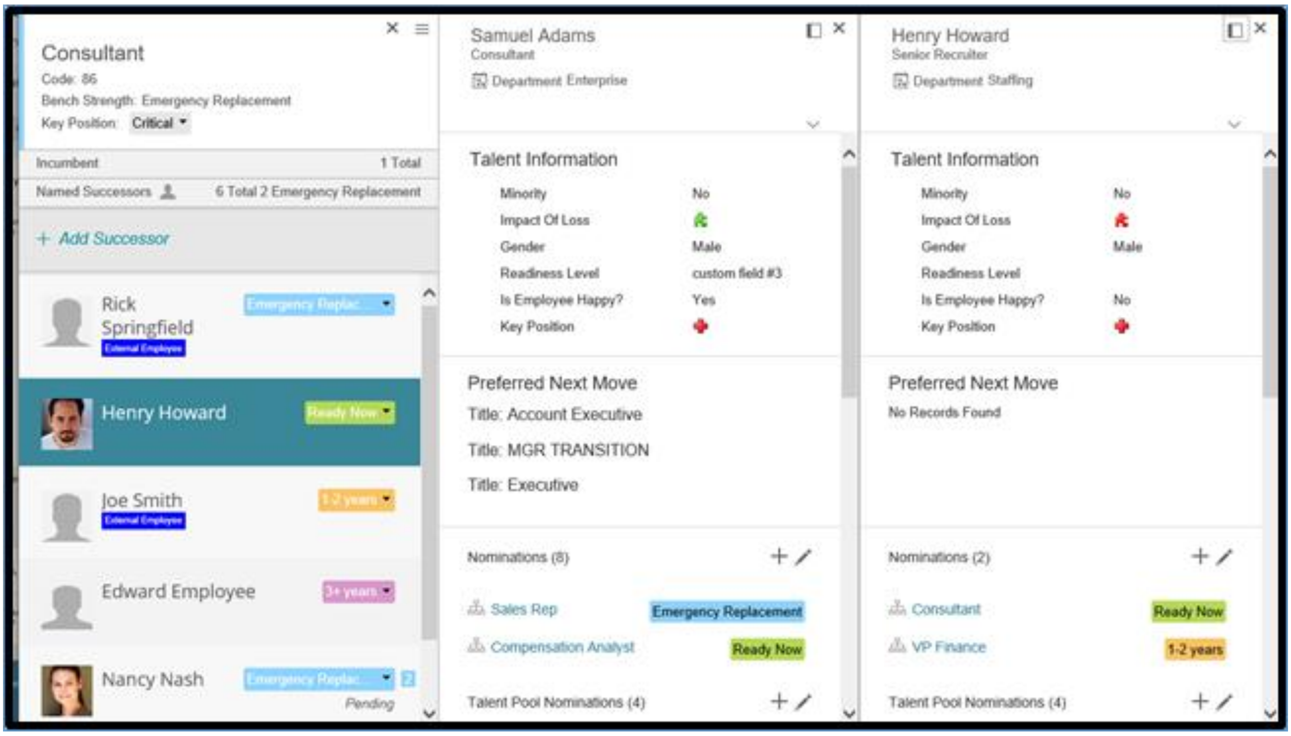
The successors are suggested based on the same logic used for the Career Worksheet. There are two calculation methods:

- The first method is that the competencies assigned to the role associated with the position are compared to the competencies of employees in the system. Then, the readiness is calculated by dividing the number of rated role-competencies with the total number of competencies assigned to that role. The employees with the 10 highest readiness ratings are then listed as suggested successors for the position.
- The second method requires that the switch <new-role-readiness-calculation> is configured on the career worksheet template. To change the template, you would need to work with professional services or customer success. All competency ratings, no matter if they meet the expected rating for the role or not, are included and divided by expected rating ratings to get competency readiness ratings. The final readiness rating is calculated by averaging all competency readiness ratings.

Succession Talent Card within Succession Org Chart v12

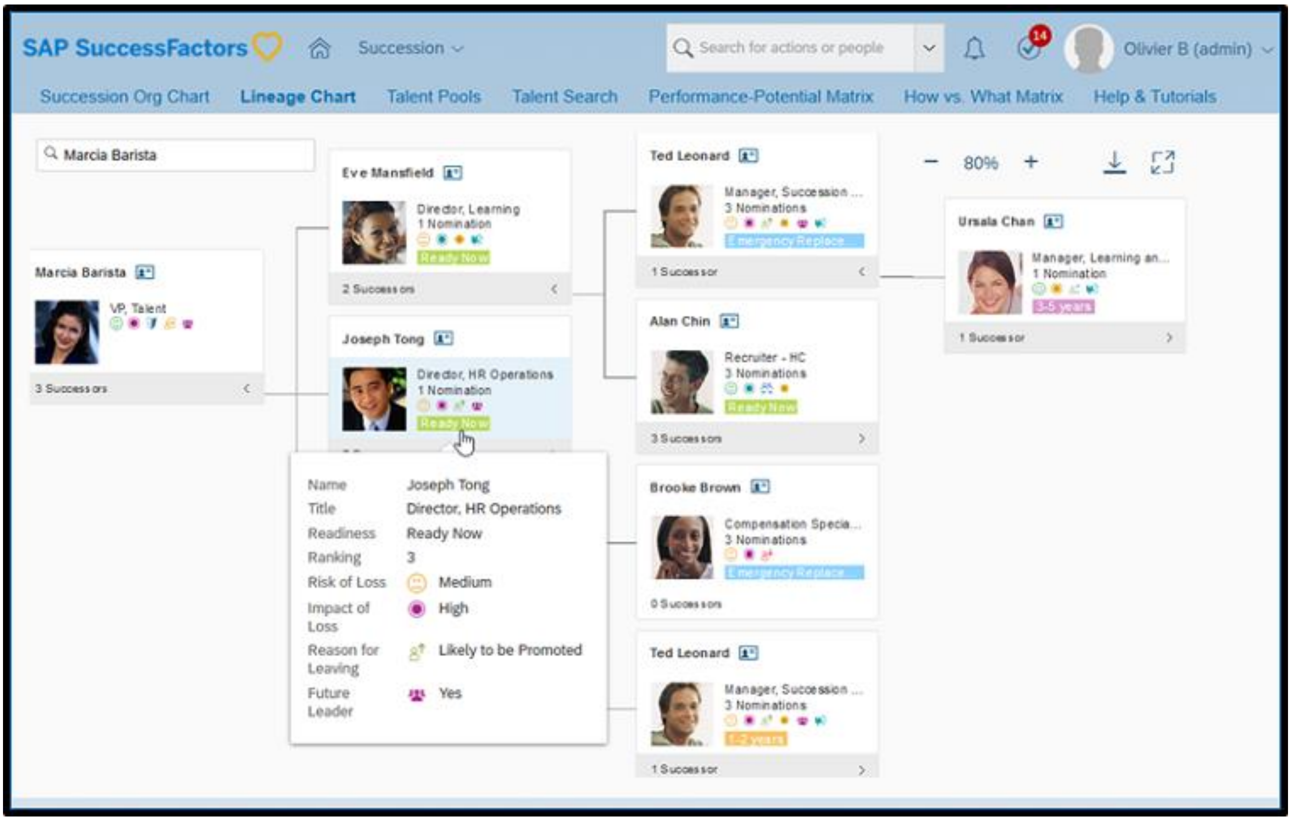
The Administrator can easily modify the information displayed on the Succession Talent Card by going to the Presentations section of Admin Center. In order for the end user to view the card, simply click on the Succession Org Chart v12 for further options. To nominate a successor or use Advanced Talent Search, select Add Successor. To see a current successor's talent card, click on their name or photo. To change the report type, icons, number of successors on a card and key positions, select or deselect the desired display options via the eye icon.

Based on your click on the succession org chart, the position card and the succession talent card display. Permissions control the ability to nominate, view or edit information like talent pools within the succession talent card. The succession talent cards may also appear in side by side comparisons as seen here. If an area in the succession talent card is not populated or states no record found, be sure to populate that information block in People Profile.



Lineage Chart

The Lineage Chart provides insight into the "domino effect" that could take place if a succession plan is put into action. This view helps us understand the implications of staffing decisions by clearly displaying an employee's successors, the successors' successors, and so forth. It is easy to identify the readiness of the successors and where any gaps may exist.



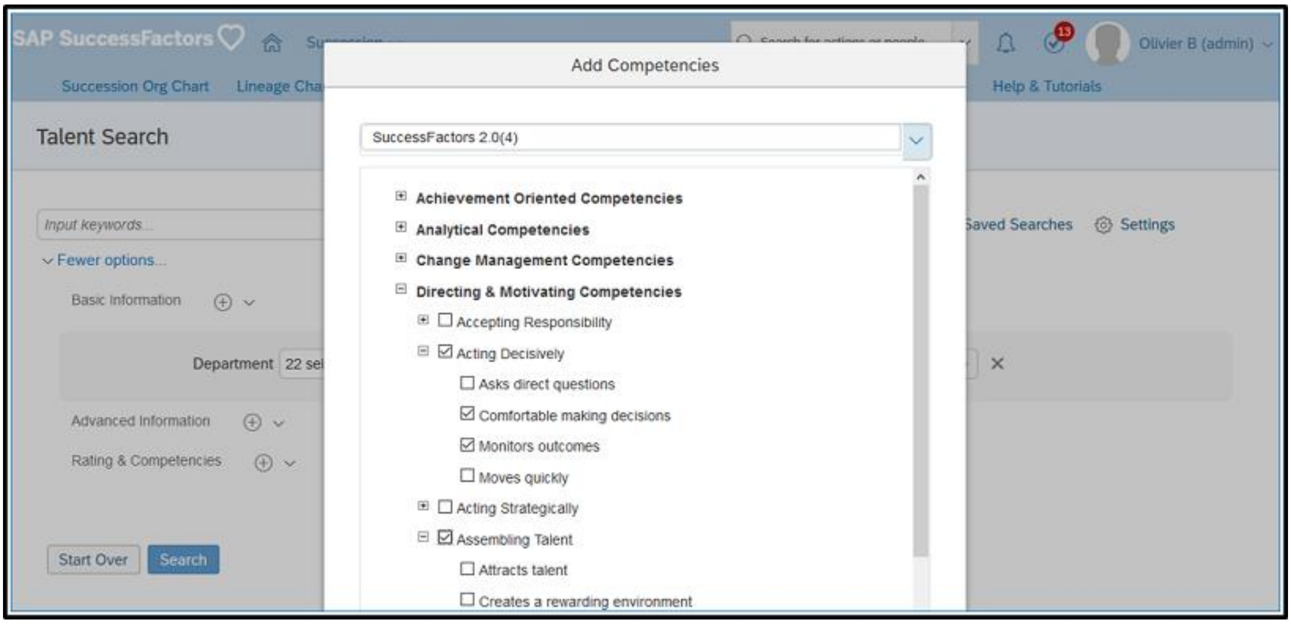
A legend displays at the bottom of the screen to indicate an employee's title, number of successors, and readiness.

Sorting of Successors

The sorting of successors is consistent across all Succession pages including the Succession Org Chart, the Lineage Chart and the Position Tile. This will respect the sort setting that has been configured in the Nomination Setup tool in Admin Center and also the personal settings define in the Succession Org Chart. The same order will also be reflected in the succession slides in Presentations.

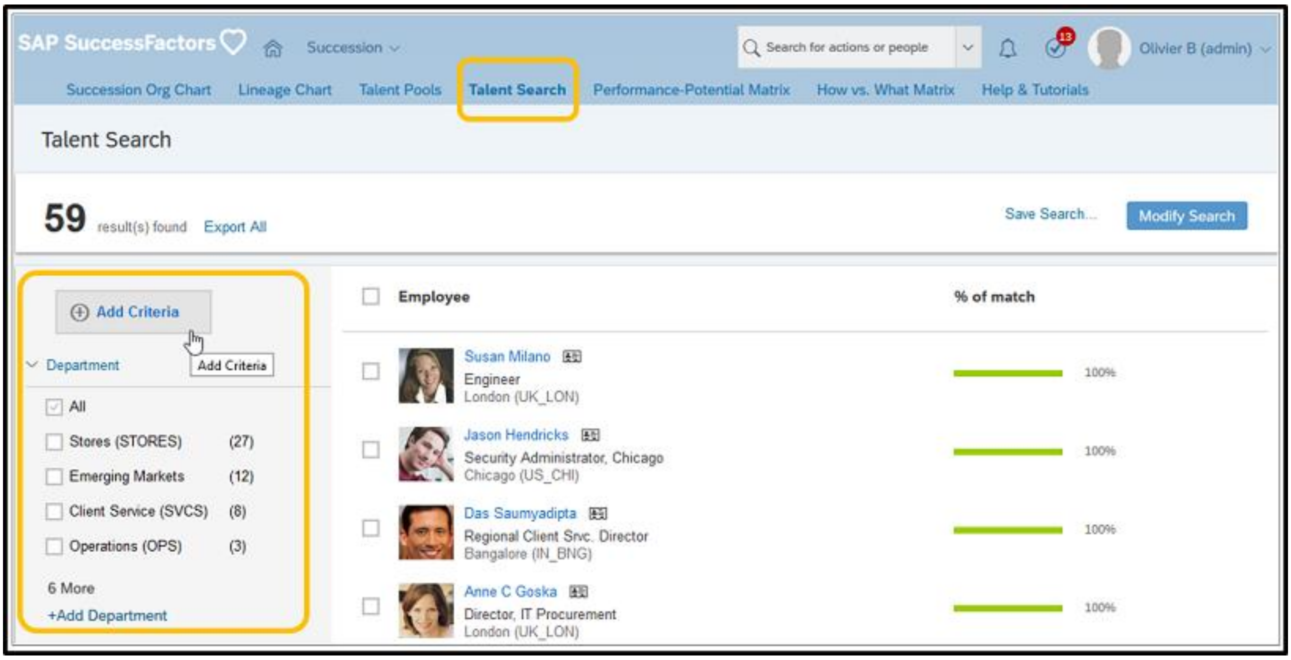
Talent Search v2

Talent Search v2 looks completely updated and modern. The end user and the administrator have expanded flexibility with the ability to select the fields or criteria most important in a search. The additional security located in role-based permissions and talent search settings in Admin Center allow the administrator to restrict sensitive fields or default popular search fields. You can even search by adding competencies.



Search Results for Talent Search v2

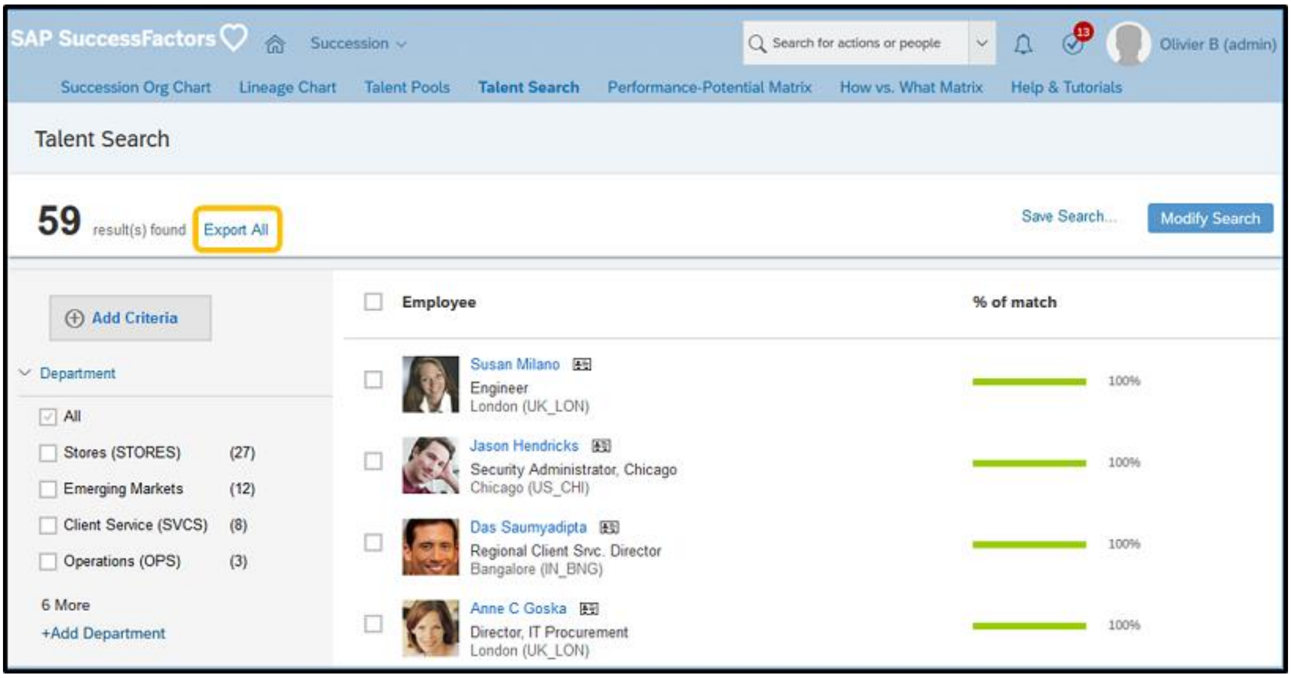
Search Results can also be filtered by further selection criteria and use the search to add one or multiple candidates to a talent pool, compare data, or nominate to a position.

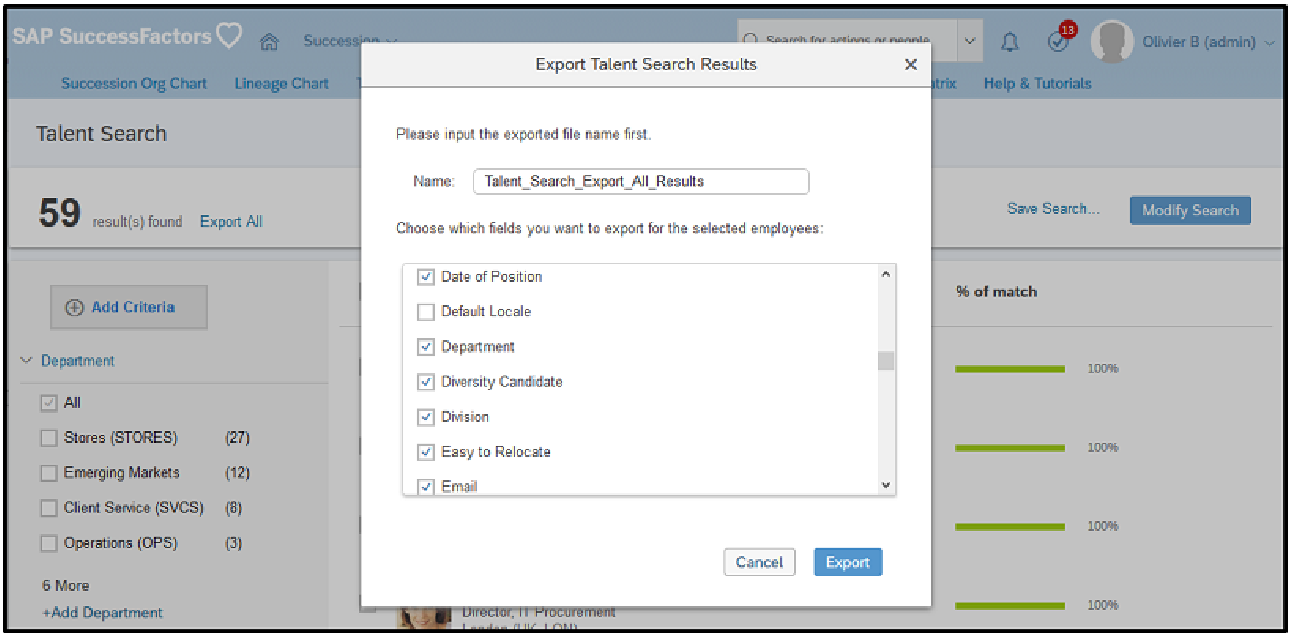


Exporting Results for Talent Search v2

When using the “Export All” function, users can export all available matching results into the export file. It does not matter if the user did not scroll down in the list of results. When we click the “Export All” link, a dialog pop ups allow us to specify the exported file

name and choose which fields we want to export.
If there are more than 20 match results, then when we click on the “Export” button in the pop up dialog, a job will be triggered in the back-end. An information window will inform user to download the exported file in Schedule Reports (Reports > Analytics > Switch to Classic View > Schedule Reports).





Matrix Grid Reports v12

The Matrix Reports v12 is the most recent update to the Succession suite of tools. This update completes the crisp, user-friendly reveals for our customers. Although it references and pulls the data from People Profile like the original Matrix Grid Reports, the end user is able to run the report with a clearer understanding of the report.

With v12 Matrix Grid Report, you receive the following benefits:

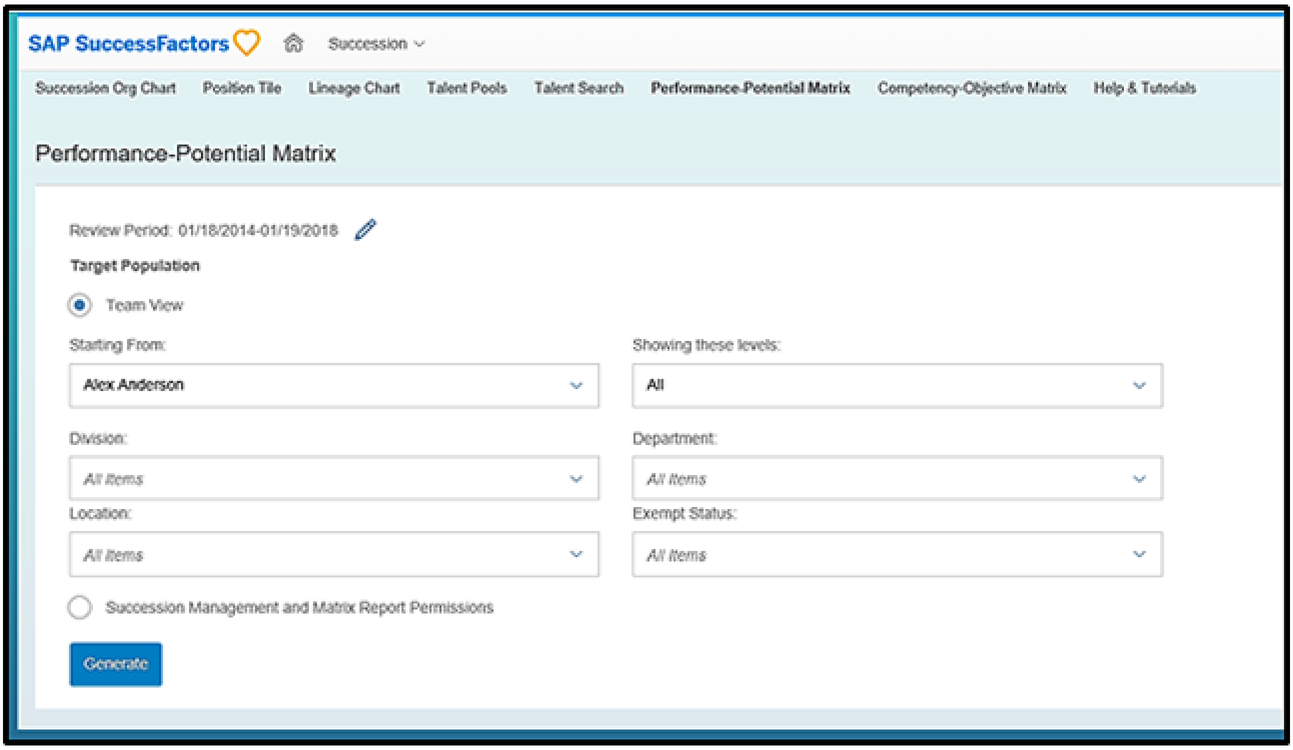
Usability Enhancements:

- Ability to focus on a specific quadrant and additional filter options
- Click navigation in the matrix grids opens the Succession Talent Card
- Expands communication capabilities through PDF printing and exporting

Differences to previous Matrix Grid UI:

- No limit to number of employees displayed per cell
- No Performance Trend (Matrix Grid Placement History) information
- No support of the “Groups” feature as select options (filters)

First, you will select the filters and criteria as below to generate the report:



Then, the report results display in a clean and colorful fashion:

To utilize this version of the Matrix Grid Reports, you will initially need the assistance of Customer Success or use the Upgrade Center. If you have previous configurations of the Matrix Grid Reports, the feature simply needs to be enabled. If you have never utilized these reports in the past, you will need to additional instructions.

Lesson Conclusion – Succession Management Tools Overview

In this lesson, you were introduced to the main tools used in Succession Management: The Succession Org Chart, Lineage Chart, Talent Search, and Performance-Potential Matrix.

You should now be able to identify and describe the main tools used in Succession Management.

Unit Wrap-Up

In this unit, you covered:

- Lesson 1-1: Succession Management Introduction
- Lesson 1-2: Succession Nomination Methods
- Lesson 1-3: Succession Management Tools Overview

You should now be able to:

- Describe the purpose and goals of Succession Management
- Discuss the succession nomination methods
- Identify the main tools used in Succession Management

Unit 2 – Permissions

Unit Objectives

This unit contains two lessons regarding permissions for all nomination methods:

- Lesson 2-1: Introduction to Succession Permissions
- Lesson 2-2: Granting Role-Based Permissions

Upon completing this unit, you will be able to:

- Describe the necessary permissions for Succession and Nomination Tools
- Grant users the needed succession permissions utilizing Role-Based Permissions

Lesson 2-1 – Introduction to Succession Permissions

Lesson Overview

The goal for this lesson is to describe the main succession permissions.

Lesson Objective

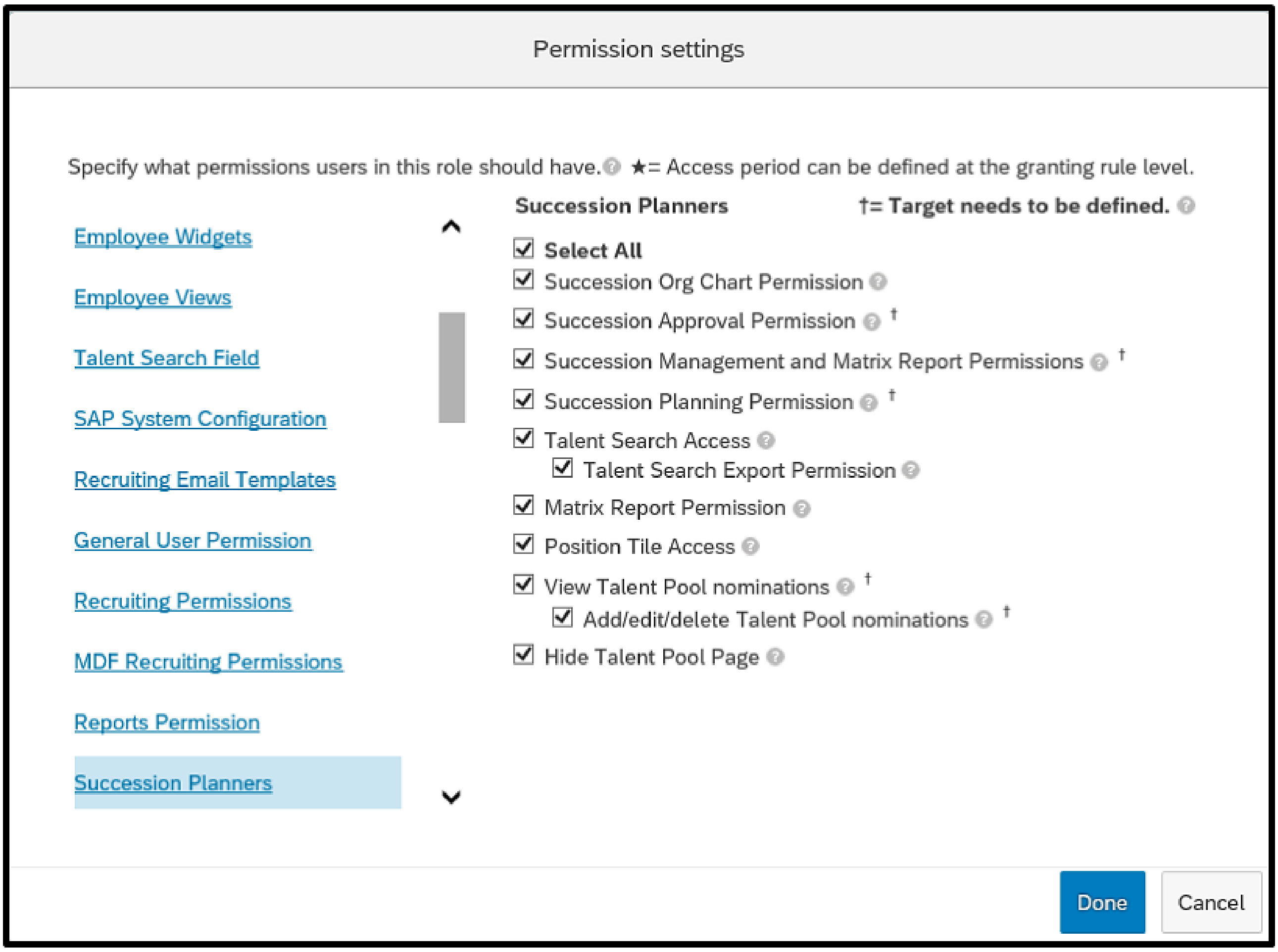
- Identify the main permissions used in succession management.

What are the Main Succession Permissions?

As you learned in Lesson 1-3, the main tools used in the SAP SuccessFactors Succession module are the Succession Org Chart v12 and Lineage Chart, Talent Search v2, and the Matrix Grid Reports v12. Permission must be granted to users to access these tools. Additionally, the employees visible within these tools must be defined, and those responsible for succession planning must have permission to nominate successors for the appropriate group of employees.

During implementation, these permissions were configured for users in your organization for Succession Management. As an administrator, it may be your responsibility to alter the permissions from time to time.

This guide includes instructions for granting permissions to the main areas of Succession Management for the Role-Based Permissions model.



IMPORTANT NOTE

Permissions related to the Position Tile and the Talent Pools will only appear utilizing the Metadata Framework (MDF) which will be located within Miscellaneous Permissions rather than Succession Planners. MDF-related permissions are discussed in a later chapter.

On/Off Permissions to the Succession Tools

Access to the Succession Tools is controlled by several permissions but begins with On/Off Permissions to the following: the Succession Org Chart (which also grants access to the Lineage Chart), Talent Search, Matrix Grid Reports, Position Tile and Hide Talent Pool Page. These are on/off permissions, meaning that a user either has access to the tool, or they do not. In order to grant the tool to the role, simply enable it by checking the box and save.

Permissions Needing a Target Population

Other permissions within Succession need a target population defined. These are denoted by the “t” at the end of the permission and briefly discussed below.

Succession Approval Permission

This permission switch originates within Provisioning and activates a pending status for nominations. If you did not have this activated during implementation, contact Professional Services or Customer Success to assist. These succession nominations stay in pending status until a person from a role with the Succession Approval Permission accepts or rejects the nomination. To verify or grant a role this permission, navigate using the Action Search to Manage Permission Roles. Click on the appropriate role and then the Permission button. After completing these steps, Select Succession Planners to view the Succession Approval Permission. Enable the permission by checking the box and the clicking Done. You will also need to select the Save Changes button to complete this change.

For more information regarding rules applying to formless nominations and approvals, review the Formless Nominations and Approvals section of this guide.

Succession Management and Matrix Report Permissions

The Succession Management and Matrix Report Permissions allow a succession planner to view employees within the Succession Tools (Succession Org Chart, Lineage Chart, Talent Search, Matrix Grid Reports). The target population of employees that the succession planner can view is defined within the permission role, and controls visibility within ALL of these tools; therefore, it is not possible to give different levels of visibility to the different tools.

The visibility granted to a user within SAP SuccessFactors Succession will vary by organization. Some companies have very clearly defined rules and processes for visibility across the organization, while others may have more transparency. For example, a company may have a specific group of people who are responsible for succession planning throughout the entire organization, so these people would have visibility across the whole organization. Another company may task succession planning to management, where each manager has visibility to his or her direct reports, and no one else in the organization is responsible for succession planning.

The strategy behind your organization’s processes will have to be defined internally when deciding which data a person should have access to when using the Succession Management Tools.

Succession Planning Permission

The Succession Planning Permission grants access to a target group of users for whom a succession planner can nominate successors. This is often confused with the Succession Management and Matrix Report Permission. While both permissions require that a target population is defined, the Succession Planning Permission essentially allows a succession planner to nominate a successor for an employee. For example, a succession planner may have visibility across the entire organization (which is granted through the Succession

Management and Matrix Report Permissions) but can only nominate successors for employees within a certain line of business (granted through the Succession Planning Permission).

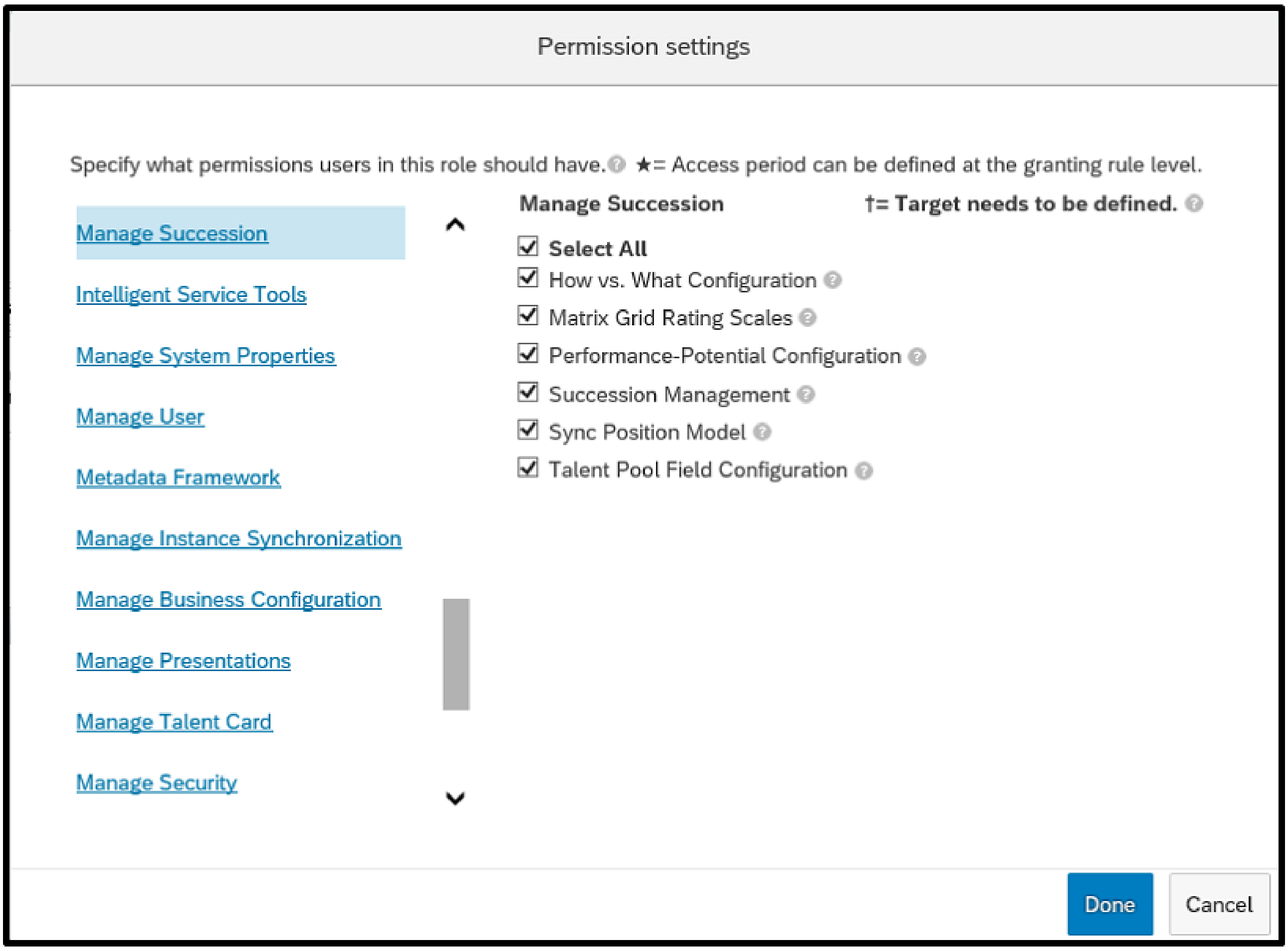
Succession Planning Permissions allow a user to nominate successors for a target group of employees.

View Talent Pool Nominations Permission

When this permission is active, users will see nominations within Talent Pools. If this is inactive, users can see talent pools but not the nominations within the Talent Pools. With this permission enabled, the **add/edit/delete talent pools nominations** may be selected to provide the ability to add, edit or delete nominations to talent pools.

Permissions for Administrators within Manage Succession

In order to make changes to Succession within Admin Center, Administrators need certain permissions within Manage Permissions Roles. Be sure to enable such permissions within this area:



Lesson Conclusion – Introduction to Succession Permissions

In this lesson, you were introduced to the main permissions used within Succession Management.

You should now be able to identify the main permissions used within Succession Management.

Lesson 2-2 – Granting Role-Based Permissions

Lesson Overview

The goal for this lesson is to detail how to grant access to the Succession permissions utilizing Role-Based Permissions.

Lesson Objective

Identify and grant access to the Role-Based Permissions needed for Succession.

Why Use Role-Based Permissions?

Role-Based Permissions allow for quicker updates and creation of dynamic groups. This means that users who change roles or positions within the organization can automatically lose or inherit permissions. For SAP SuccessFactors Succession, this means that rather than individually granting each permission to each user participating in Succession, a "Succession Planner" role can be created containing all succession-related permissions and granted to all Succession Planners in the organization. To make any modifications to the permissions, the user must first have system administrator permissions and access to Role-based permissions in Admin Center.

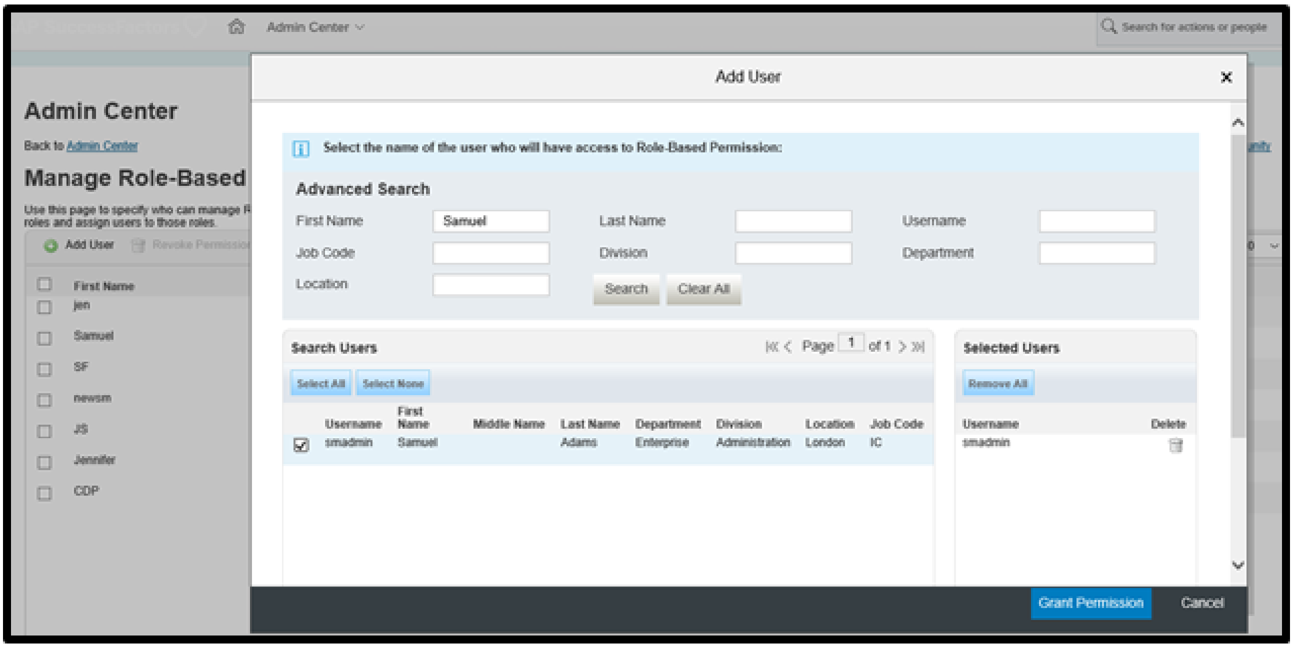
This section describes how to enable the various role-based permissions for Succession Management.

!	This guide does not discuss how to create Role-Based Permissions. This guide only discusses permissions as they relate to Succession.

Exercise – Access to Role-Based Permissions

In this simulation, you will grant access to Role-Based Permissions. This grants access to the Manage Permission Groups and Manage Permission Roles in Admin Center:

1. Log into SAP SuccessFactors and select **Admin Center** from the main menu.
2. On the Administration Center page, click **Set User Permissions** in the Manage Employees section.
3. Click **Manage Role-Based Permission Access**.
4. Click **Add User**.
5. Enter the **First Name**.
6. Select the User.
7. Click **Grant Permission**.



Succession Org Chart v12 and Lineage Chart

Permission to access the Succession Org Chart and Lineage Chart is controlled by the Succession Org Chart Permission within role. There is not an independent permission for the Lineage Chart. Therefore, if a person has access to the Succession Org Chart, access to the Lineage Chart is granted automatically if the Lineage Chart was activated by your Professional Services Consultant during implementation. If you would like to activate the Lineage Chart, contact professional services or customer success for assistance.

	The Succession Org Chart Permission also makes Succession available in the home navigation dropdown.

	While this permission allows access to the Succession Org Chart and Lineage Chart, the target population of employees a user is able to view in these tools is determined by the Succession Management and Matrix Report Permissions.

Exercise – Access to the Succession Org Chart and Lineage Chart

Using the Action Search, type and select Manage Permission Roles. Choose the appropriate role, and then click on Succession Planners link. Enable the checkbox next to Succession Org Chart Permission. Click Done and Save Changes. Now, the role should be able to access the Succession Org Chart and Lineage Chart.

Note: If you do not see the Lineage Chart, ask your implementation consultant or customer success to verify the chart is activated in Provisioning.

Talent Search v2

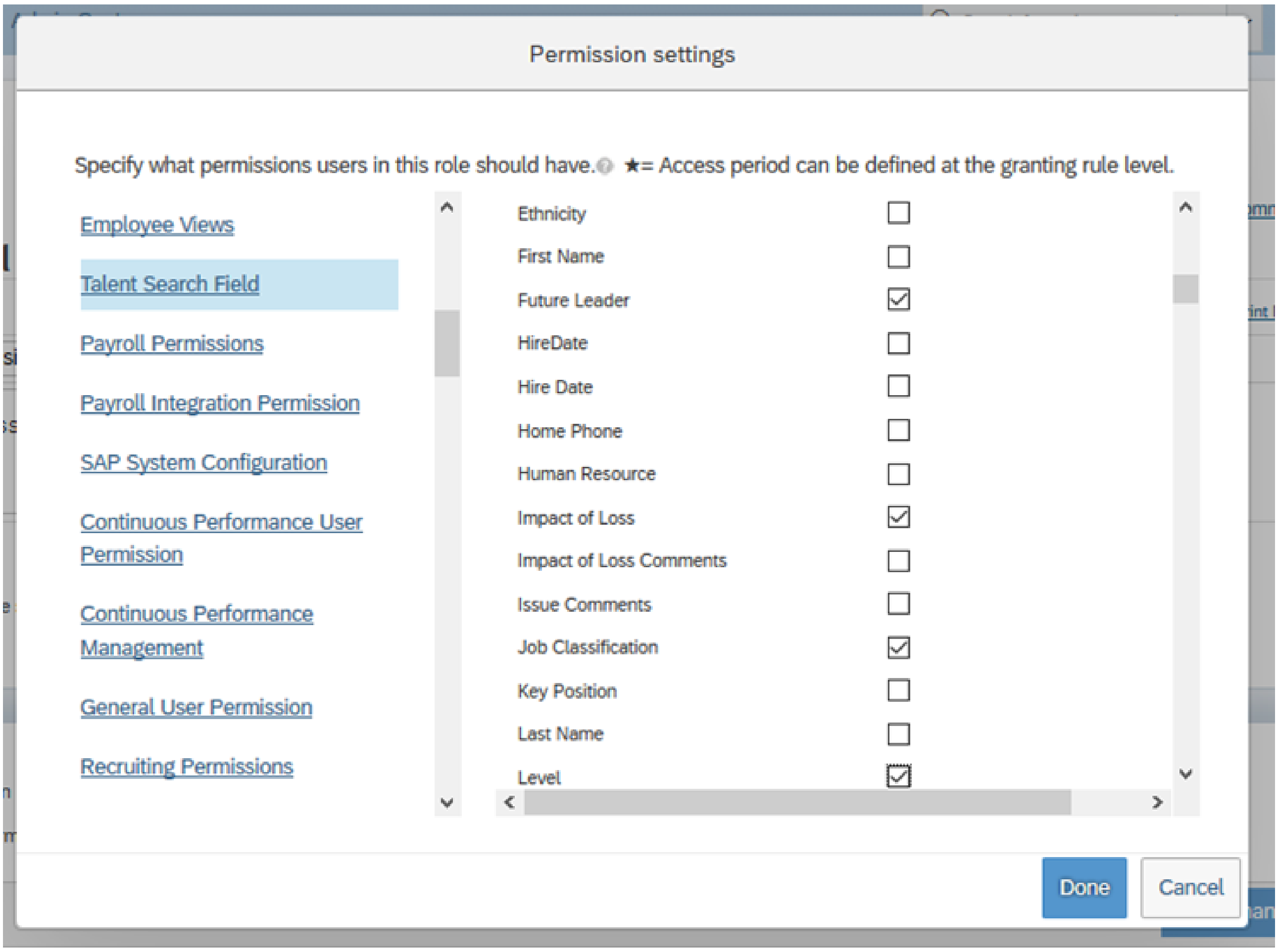
There are several permissions to take into consideration for the Talent Search v2. They are defined from Admin Center, Manage Permission Roles. Role-Based Permissions (RBP) provides flexible configuration options of the Talent Search fields and target populations for different employee groups while maintaining robust data privacy.

1. **Talent Search Access:** This option determines the Talent Search sub-tab in Succession but also the Advanced search… link when adding successors from the Succession Org Chart.
   You can give permissions to any number of roles. Users in multiple roles with access to Talent Search can choose between relevant roles on the Talent Search screen. The system remembers the role a user selects so that it does not change between sessions. For example, if a user is both a manager and a succession planner, they can select their preferred role for performing talent searches but can always switch to another role if their task requires it.

2. **Talent Search Export Permission:** This option allows users to see the Export button in the Talent Search Result page.
   Although Talent Search v2 was already fully compliant with security and permission settings, this option offers additional convenience for customers who do not accept to provide easy export function, regardless whether the user roles have access to the data within the system. Exporting employee data is often considered a very sensitive privacy task and should not easily be available for all Talent Search users.

3. **Succession Management and Matrix Report Permissions:** This option controls the results a user sees in Talent Search with the associated target population. Only those users who match the search criteria and who are part of the assigned target population of the user performing the search are displayed in the search results.

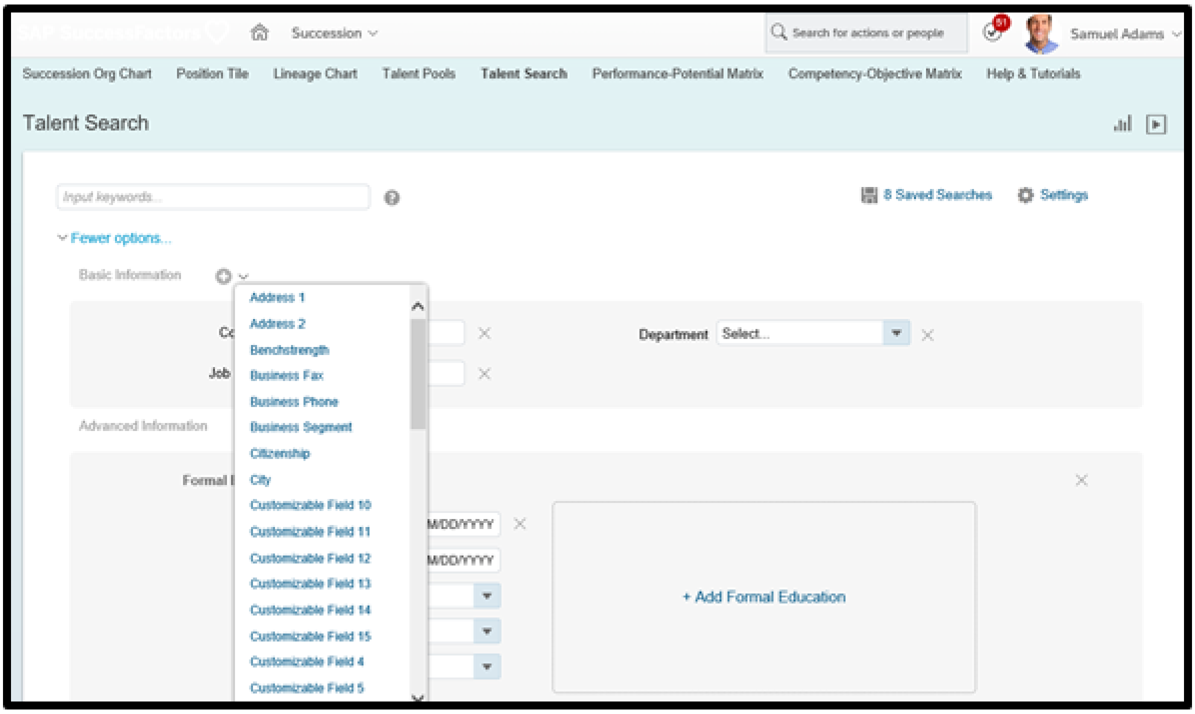
4. **Talent Search Fields:** We can specify search fields for each role. This permission category includes the standard elements, the userinfo elements, the background elements, the Employee Central job information fields (if the customer has EC enabled) and other options (Inactive User and Talent Pool).



Exercise – Provide Talent Search Access and Talent Search Fields

In this exercise, you will provide the succession permissions utilizing Role-Based Permissions.

1. Log into SAP SuccessFactors and select **Admin Center** from the main menu.
2. Click **Set User Permissions** in the Manage Employees section.
3. Click **Manage Permission Roles**
4. Select the role to modify and click permission button.
5. Click **Succession Planning Full Permission** area.
6. Assign the Permission Setting to Talent Search within Succession Planning. **Save** your changes.
7. Next, Go to the Talent Search Field.
8. Click **Searchable** for desired fields.
9. **Save** your changes.
10. In the SAP SuccessFactors, select **Succession** from the main drop-down menu.
11. Select **Talent Search** and view the fields on the main screen and throughout the tool. These fields are controlled by the Talent search field permissions.



Matrix Grid Reports v12

The Matrix Grid Reports Permission grants access to the Performance-Potential Matrix Report. This permission also controls access to the How vs. What Matrix Report. There is not a separate permission for each matrix; both reports are controlled by the Matrix Grid Reports permission. If you do not see one of the matrices, it means that it was not enabled for your organization during configuration.

!	While this permission allows access to the Performance-Potential Matrix, the target population of employees a user is able to view in this tool is determined by the Succession Management and Matrix Report Permissions.

Lesson Conclusion – Granting Role-Based Permissions

In this lesson, you were introduced to the Role-Based Permissions necessary for Succession Management.

You should now be able to identify and grant appropriate access to Succession Management tools using the Role-Based Permissions.

Unit Wrap-Up

In this unit, you covered:

- Lesson 2-1: Introduction to Succession Permissions

- Lesson 2-2: Granting Role-Based Permissions

You should now be able to:

- Describe the necessary permissions for Succession and Nomination Tools
- Allow users the needed succession permissions utilizing Role-Based Permissions

Unit 3 – Succession Data and People Profile

Unit Objectives

This unit contains four lessons pertaining to all succession nomination methods:

- Lesson 3-1: Additional Permissions and Access
- Lesson 3-2: Employee or User Data Management
- Lesson 3-3: People Profile Information Blocks
- Lesson 3-4: Extended Data for People Profile Blocks
- Lesson 3-5: Matrix Grid Placement History
- Lesson 3-6: Picklist Center

Upon completing this unit, you will be able to:

- Additional Permissions Needed to Support Succession Data
- People Profile and Data Management Options

Lesson 3-1 – Additional Permissions and Access

Lesson Overview

The goal for this lesson is to introduce the permissions and access needed in order to update your data for succession, specifically areas related to People Profile or data support areas of Succession.

Lesson Objective

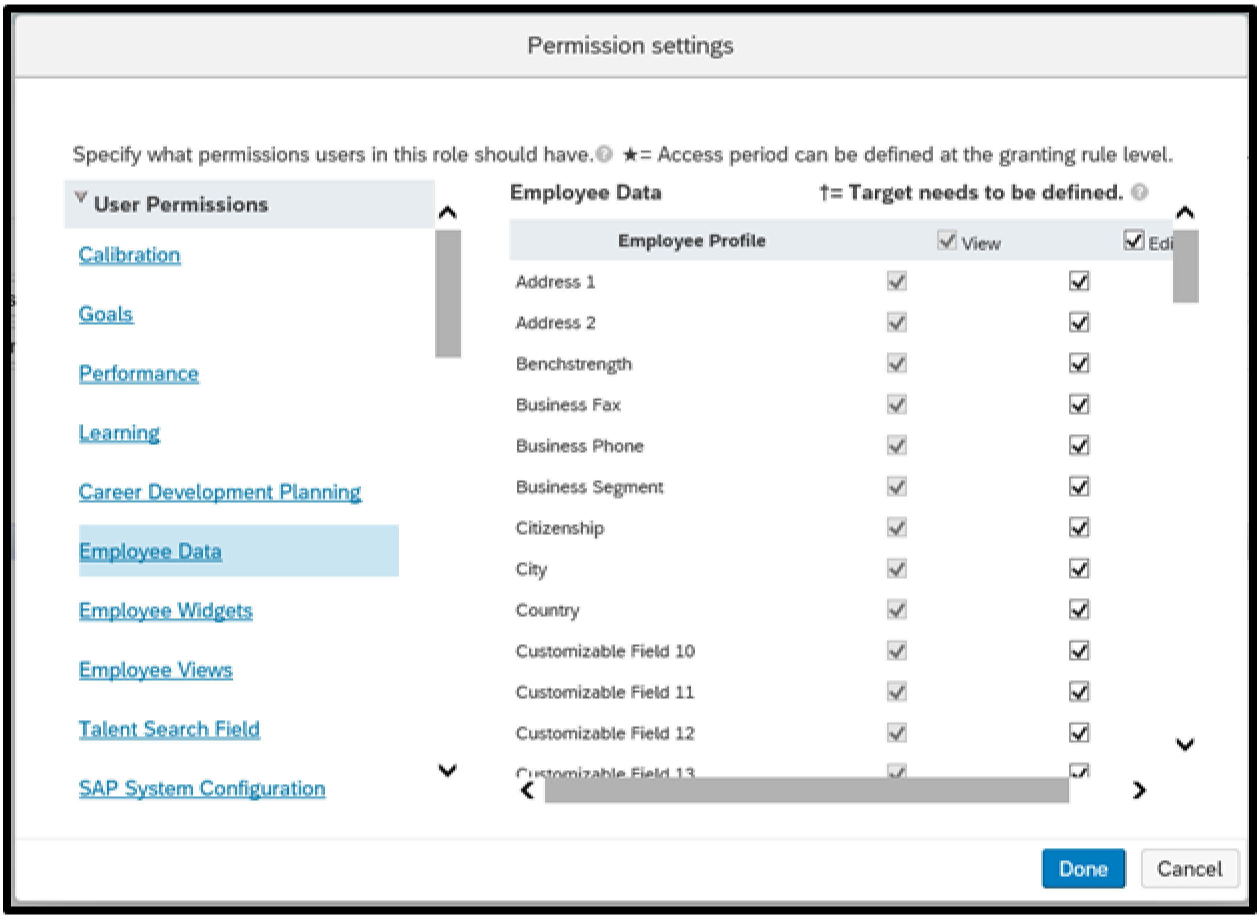
- Discuss the permissions to update or maintain data within People Profile and Succession.

What Additional Role-Based Permissions and Access are Needed?

In order to effectively make changes within Admin Center, it is vital that you have the proper access to the system.

Next using the action search, begin typing and select Manage Permission Roles. Click on the correct role link and then the Permissions button.

Your screen should look similar to this one:



Under User Permissions, you need to have view/edit rights to the information below:

- Employee Data
- Employee Views
- General User Permission
- Reports Permission
- Succession Planners

On the same page, scroll down to the Administrator Permissions section and provide access to the following areas so you will be able to see the appropriate links within Admin Center:

- Manage Competencies and Skills
- Manage Dashboards/Reports
- Manage Form Templates
- Manage Succession
- Manage User
- Manage Talent Card

	Any time you make changes in Admin Center (especially around permissions), it is a best practice to log out of SAP SuccessFactors as well as your browser to ensure the modifications appear upon login.

Lesson Conclusion – Additional Permissions and Access

In this lesson, we discussed the permissions to update data within People Profile and Succession.

You should now be familiar with the permissions needed to change data.

Lesson 3-2 – Employee or User Data Management

Lesson Overview

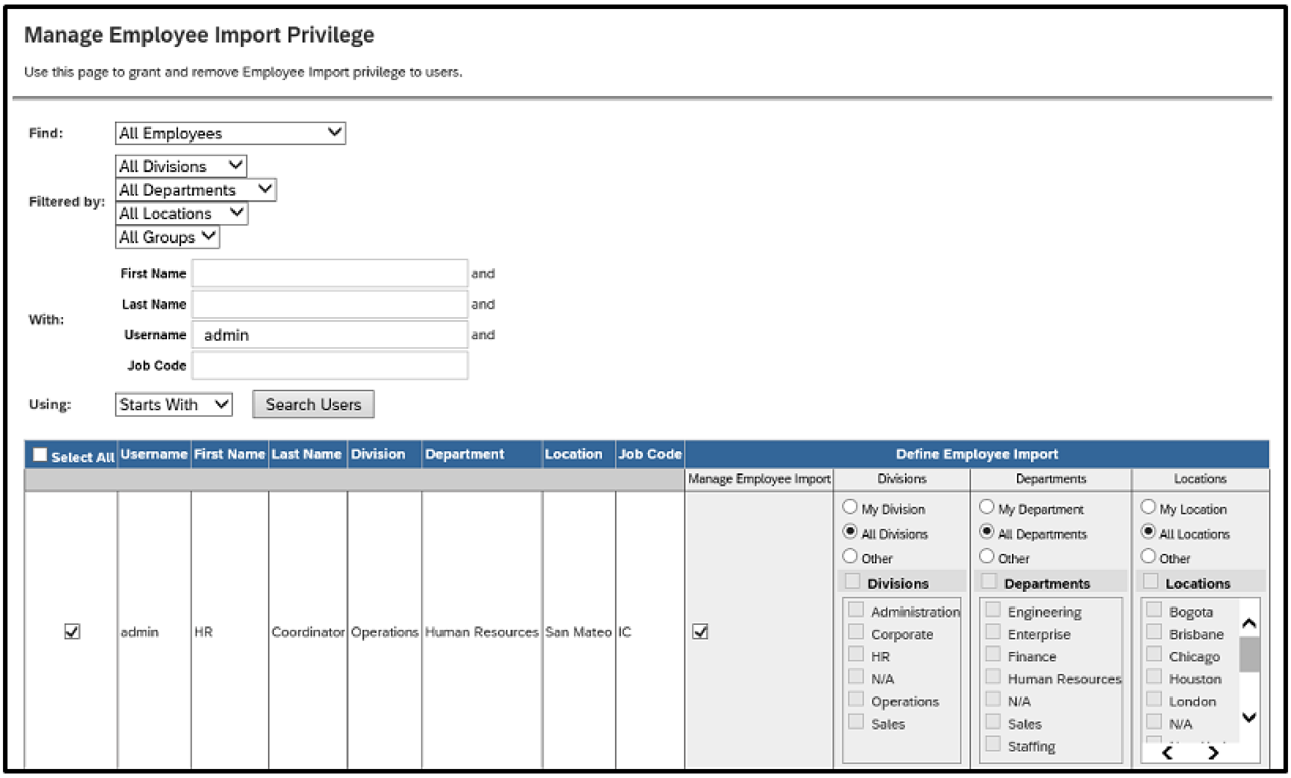
The goal for this lesson is to discuss the permission needed to perform an employee import.

Lesson Objective

- Identify and grant access to the Employee Import within Admin Center.

How Do I Gain Permission to the Employee Import in Admin Center?

Basic employee or user data populates within People Profile (also known as Live Profile) as well as Succession. If your system is live and active, this employee information is likely updating to the system by one of three common methods: a manual import, an automated file transfer (FTP), or an HRIS integration point. If you should desire to perform a manual import of your employee data, there is a specific role-based permission which must be granted to the Administrator located in Admin Center > Set User Permissions > Manage Employee Import.



Once this data exists within SAP SuccessFactors, regular maintenance is required to keep the employee hierarchy and information current through an accurate, consistent process. As a best practice, keep this method recorded for others who may join your team in the future.

!	Your employee data may play a greater role than you realize if you choose to use Succession > Position Management: Sync Position Model with Employee Data within Admin Center.

Lesson Conclusion – Employee or User Data Management

In this lesson, you were exposed to the permission controlling the Employee Import and its importance.

You should now be able to locate and grant access to the Employee Import permission.

Lesson 3-3 – People Profile Information Blocks

Lesson Overview

The goal for this lesson is to introduce the People Profile information blocks holding Succession-related data.

Lesson Objective

- Introduce People Profile Blocks and its purpose within Succession.

Where Does Succession Store Data?

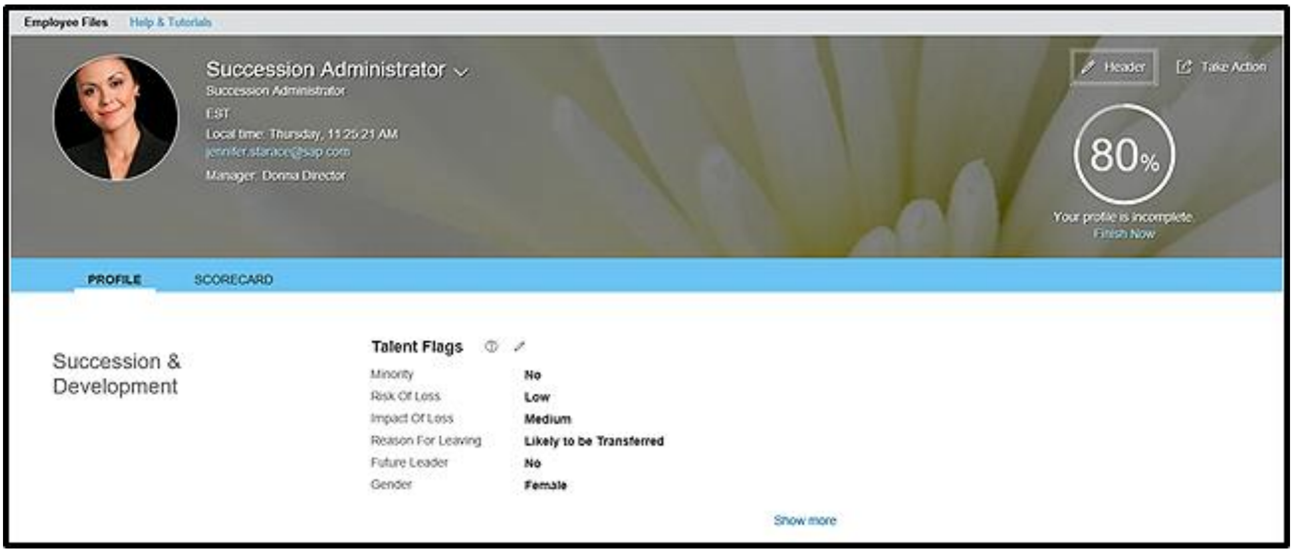
Data for Succession is stored in People Profile information blocks designed and controlled within Admin Center > Employee Files > Configure People Profile. These information blocks typically house data like Personal Information, Talent Review Fields, Trend Ratings like Performance or Potential, and other data often reflected within the Succession Nomination Tools.

Although the admin setup and user experience of People Profile are slightly different from Employee Profile, the origination of fields and interaction with Succession Tools remains the same as previous versions. Unique benefits of People Profile for the Admin include:

- Interfaces and Display Employee Central Information
- Adds and Edits Goals on the People Profile
- Saves a Draft of New Hire Transaction in Employee Central
- Generates HR Documents from the People Profile
- Shows Leave of Absence in User Interface
- Uses a New Profile Configuration Tool and Header Options

And enhancing the user experience, People Profile offers:

- New One-Page Design
- New User Experience For Employee Central
- New Profile Header
- New Information Blocks
- New Editing Experience
- Responsive Display on Mobile Browsers

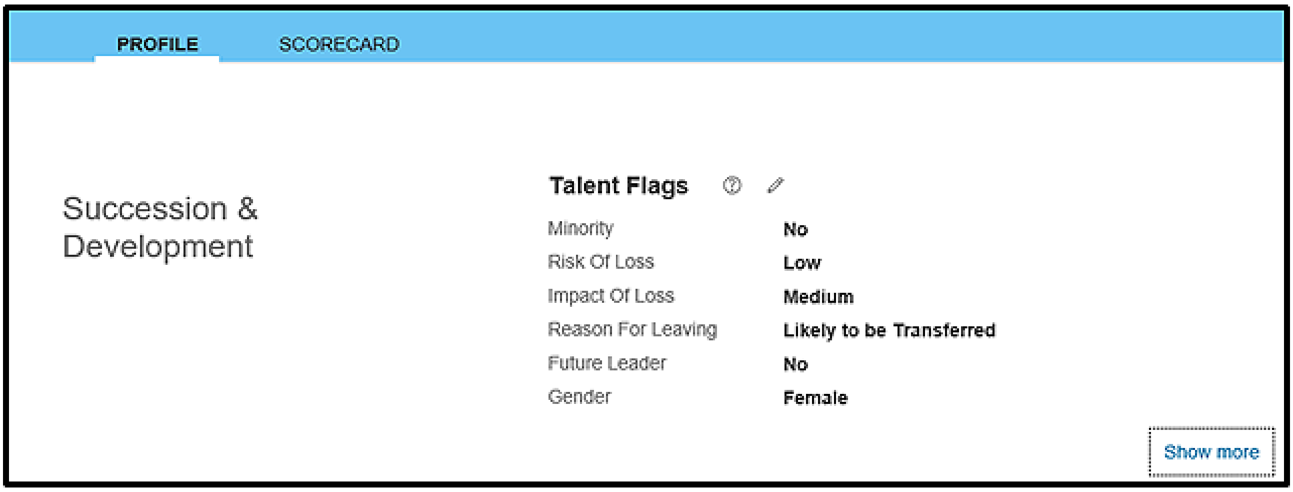


⚠	If you would like to activate additional personal, background, or custom fields in your data model when creating People Profile blocks with Admin Center > Employee Files > Configure People Profile, you will need to contact Customer Success or a Professional Services Partner.

Common People Profile Blocks Used in Succession Management

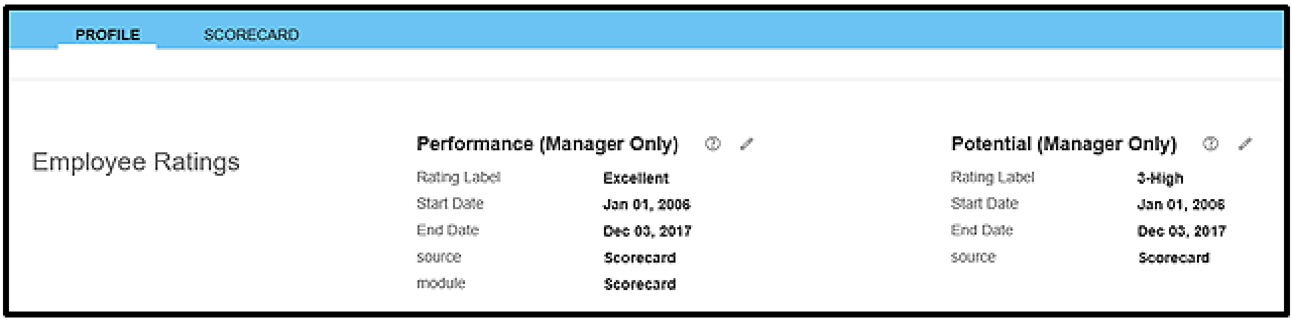
Below are some of the most common People Profile Blocks used in Succession Management.

Talent Review (Talent Flag) Block



Talent Flags enable the manager or succession planner to see the impact, risk or reason.

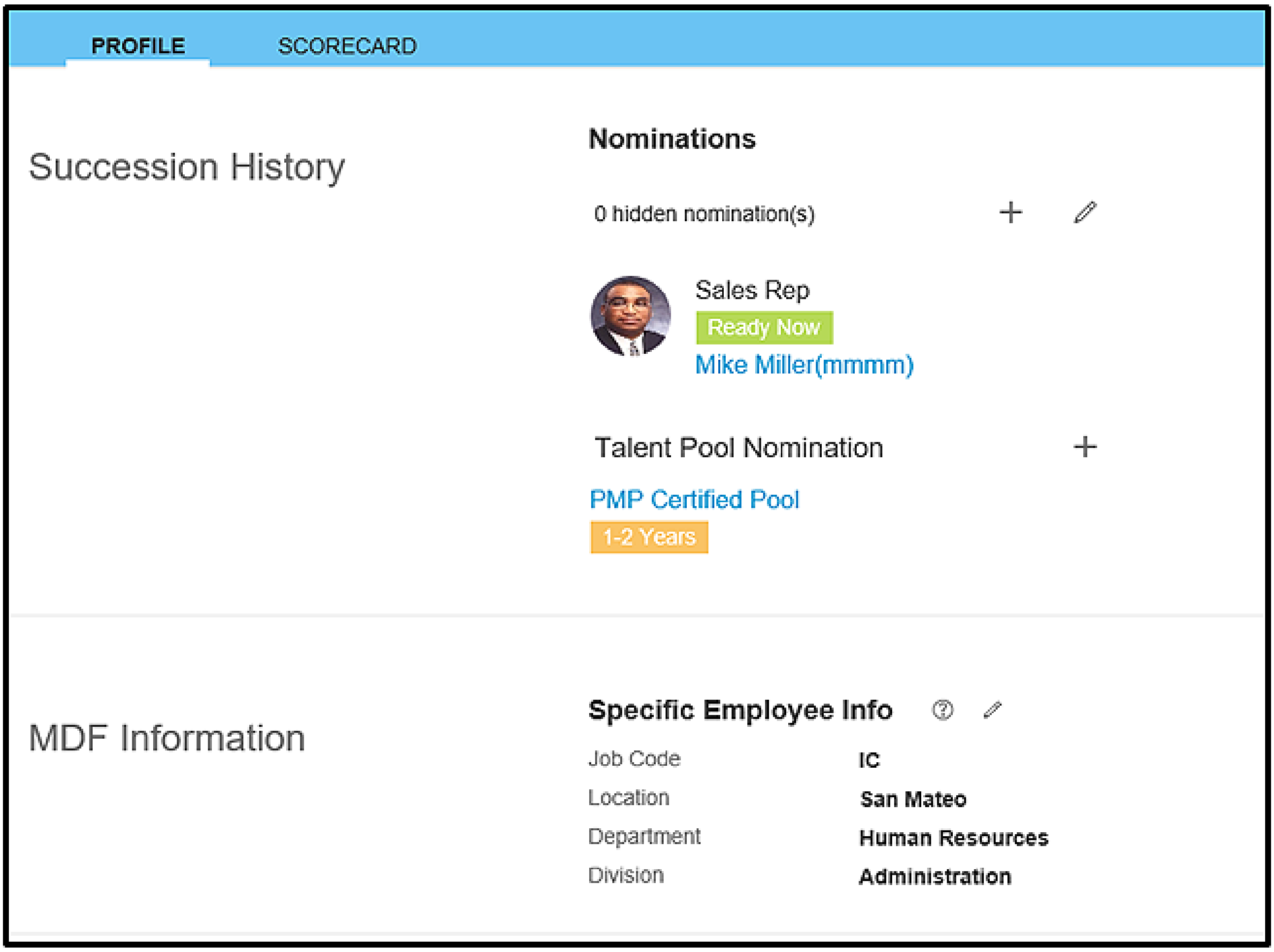
Performance or Potential Blocks



Performance or Potential Blocks are also referred to as trend data. Trend data is considered specific background elements in the Succession Data Model which track the patterns over time and utilize the matrix grid rating scales within the dropdowns of these blocks.

Additional blocks pertaining to Succession may draw from Personal Information, Competencies, Objectives, or Custom1 and Custom 2. All of this will vary based on your original system configuration. If you need more specific information, review your configuration guides or speak with the Professional Services partner who assisted you during implementation.

Also, with People Profile, there are unique summary blocks which may be configured in the Admin Center similar to the ones below:



Lesson Conclusion – People Profile Information Blocks

In this lesson, you were introduced to the connection between People Profile Blocks and Succession.

You should now be able to locate the most commonly utilized portlets for Succession.

Lesson 3-4 – Extended Data for People Profile Blocks

Lesson Overview

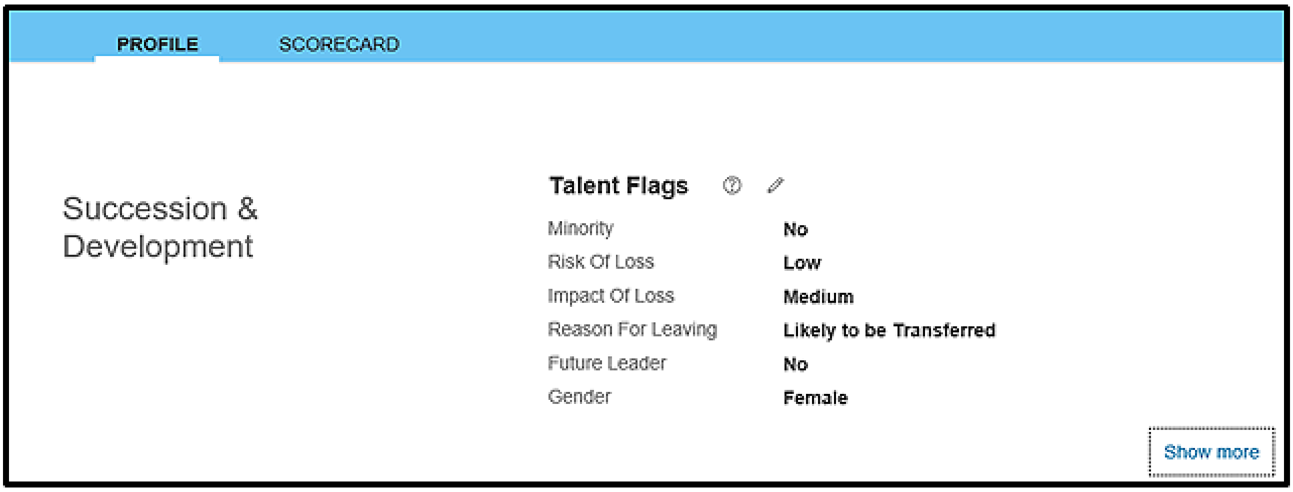
The goal for this lesson is to review the location and process for modifying Extended User Information.

Lesson Objective

- Discuss the imports available in Admin Center for population of succession-related data.

How to Place Data into People Profile Blocks?

Since the People Profile plays a critical role in housing information used in Succession, it is valuable to know how to import data into different portlets. You, as the Administrator, have the ability to create the portlets as well as import or capture data used for Succession-related pages. For example, the talent flags scores as well as performance or potential ratings are often displayed on the Succession Org Chart or the Matrix Grid Reports. Also, the Talent Search references back to these ratings when performing a search with specific criteria if the configuration exists in your system.



To get started with these data updates, verify the permissions within Role-Based Permissions by using the action search and choosing Manage Permission Roles. Select the appropriate role. Click on the Permissions button and the Manage User link. Then, be sure the Import Extended User Information is enabled. Also, if you plan to utilize the export function, check the Export Extended User Information while in this area and be sure to save changes.

After you have completed this action, the import and export options should appear within Admin Center > Update User Information as below:

Inside the Import Extended User Information, you can perform several different imports which coincide with the specific People Profile Blocks and other configuration information that must be performed by Professional Services or Customer Success. As mentioned earlier, it is best practice to use the starter templates provided within this section to see the appropriate fields or download an export to model data rows and columns within the file and avoid possible errors.

Lesson Conclusion – Extended Data for People Profile Blocks

In this lesson, you were exposed to the Extended User Information Import / Export features.

You should now be able to import primary data housed within configured People Profile blocks.

Lesson 3-5 – Matrix Grid Placement History

Lesson Overview

The goal for this lesson is to review the Matrix Grid Placement History portlets that can be added to the Profile.

Lesson Objective

- Discuss the Matrix Gird Placement History portlets

Overview and Rule

The matrix grid placement for employees is calculated in real time when the grid report is generated. Since the Performance-Potential and How vs. What matrices depend upon Performance Management processes that often have different effective dates, there is a need to define a consistent strategy for storing 9-box placements to retrieve accurate results. For example, if the Performance rating on the 9-box label is based on Annual Review, while the Potential is based upon the Talent Review of the individual, the effective dates for both these processes might be different.

Currently, the system would simply assign a 9-box placement based on the most recent Performance rating and Potential rating. However, the challenge is to store this information using an effective dated 9-box placement for reporting purposes.

The rule is quite simple: **Rating effective date boundary is based on end date**.

Placement Example

To generate historical matrix placement for a user, we load all of his or her performance and potential ratings based on the configuration used in 9-box report. Then we use these ratings to calculate the historical matrix placement based on the rule mentioned before.

For example, for a user we have the following annual performance review ratings and talent review potential ratings:

Performance Rating ID	Start Date	End Date	Performance Rating
Perf1	01/01/2018	12/31/2018	Meets Expectation
Perf2	01/01/2019	12/31/2019	Exceeds Expectation

Potential Rating ID	Start Date	End Date	Potential Rating
Pot1	06/01/2018	06/01/2019	Solid
Pot2	06/01/2019	06/01/2020	High

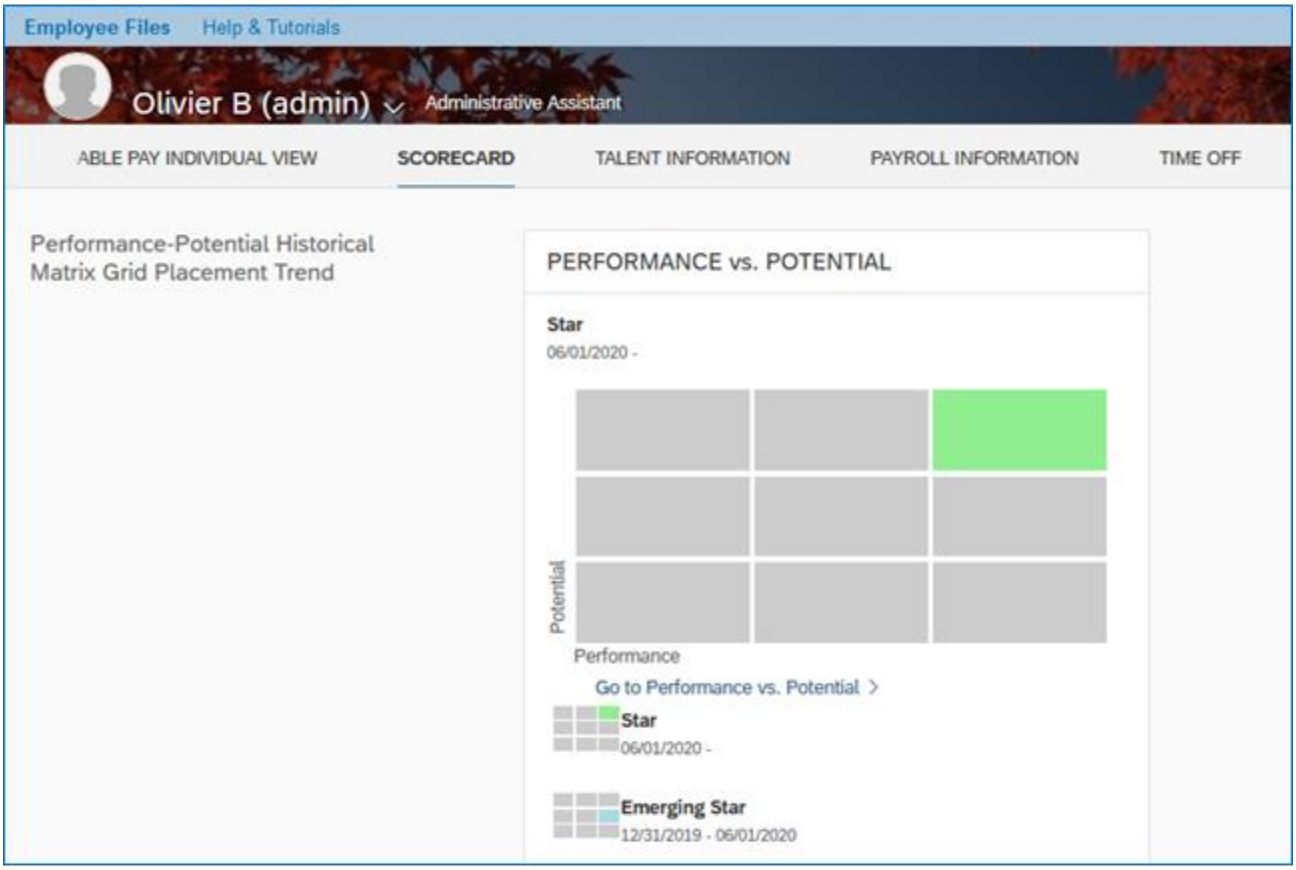
According to the rule, we only have to check the end dates. Each rating can be marked as a point at the end date on the timeline. The system starts from Perf1 and looks for the next rating. It finds Pot1. Ratings of two different types can generate a matrix placement, so Perf1 - Pot1 is generated. The start date of this historical matrix placement is 2018/6/1 and the end date is 2018/12/31.

It continues looking for next rating, finds Perf2. It is the same rating type as Perf1. It means Perf1 is out of date, no need to look for any other Potential ratings. So the system stops, and restarts from Pot1. It finds Perf2. Calculate Perf2 - Pot1, 2018/12/31 ~ 2019/6/1. Then it meets Pot2, stops, and restarts from Perf2, repeats the same operation until it traversed all the ratings.

The generated historical matrix placement can be described as following:

Start Date	End Date	Performance - Potential
06/01/2018	12/31/2018	Meets Expectation - Solid
12/31/2018	06/01/2019	Exceeds Expectation - Solid
06/01/2020		Exceeds Expectation - High

The last historical matrix placement is the most recent placement. So the end date is empty. We can consider the end date as **Today**.



Lesson Conclusion – Matrix Grid Placement History

In this lesson, you were exposed to the Matrix Grid Placement History portlets.

You should now be able to explain the rules of the Matrix Placement History portlets.

Lesson 3-6 – Picklist Center

Lesson Overview

The goal for this lesson is to review the location and process for modifying picklists in the Picklist Center.

Lesson Objective

- Locate and identify the permissions for the Picklist Center
- Create and edit picklists from the Picklist Center
- Import and export picklists from the Picklist Center

Picklist Center Overview

In SAP SuccessFactors, the dropdown menus are often configured in picklists. Picklists can also have a parent-child relationship, in which options in the child picklist are associated with options in the parent picklist. These are known as cascading picklists.

Historically, picklists in different SAP SuccessFactors solutions have been managed using different tools: the Picklist import/export tool for legacy picklists and the Metadata Framework (MDF) tools for MDF picklists. Management of legacy picklists was cumbersome and error-prone.

To alleviate this difficulty, we standardized the way picklists are managed in the system. All picklists in the suite will now be managed from a unified, easier-to-use Picklist Center tool which reduces the risk of errors and potential for data corruption. The migration process occurred for most users already. Now, Administrators can maintain picklists effectively and easily for any or all of the SAP SuccessFactors suite.

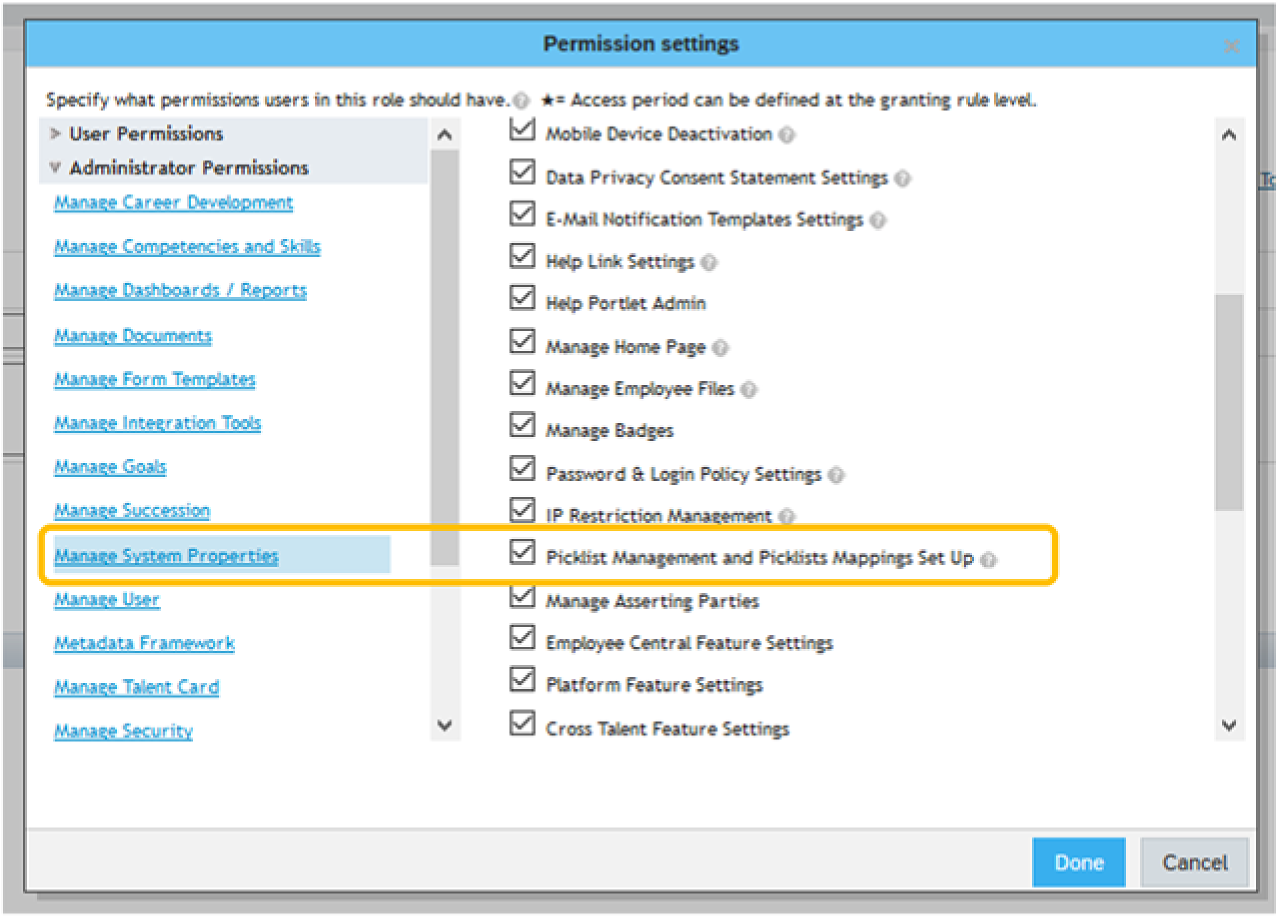
Picklists allow end users to easily select an option from a pre-defined list of choices. The following list describes picklists and their functionalities:

- Picklists are fields in a drop-down list within SAP SuccessFactors modules.
- You can edit picklists through Admin Center within Picklist Center.
- With picklists, you can create consistent content for reporting and talent searching.
- With picklists, you can handle multiple languages.

	Picklist Management and Picklists Mappings Set Up permission is a pre-requisite for the Picklist Center. After your picklist migration, you can no longer manage picklists using the Configure Object Definitions admin tool for MDF. You should be able to use Picklist Center for managing picklists.

Picklist Permissions

To use the Picklist Center, be sure to grant the Picklist Management and Picklist Mappings Set Up permission within Manage Permission Roles.

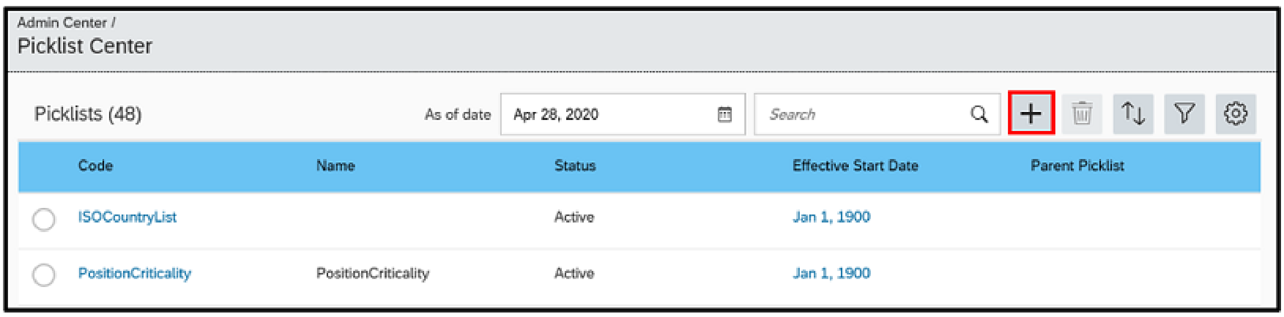


Locating the Picklist Center

To locate the Picklist Center, use the action search and simply typing Picklist Center.

The Picklist Center does utilize the Metadata Framework as a pre-requisite.

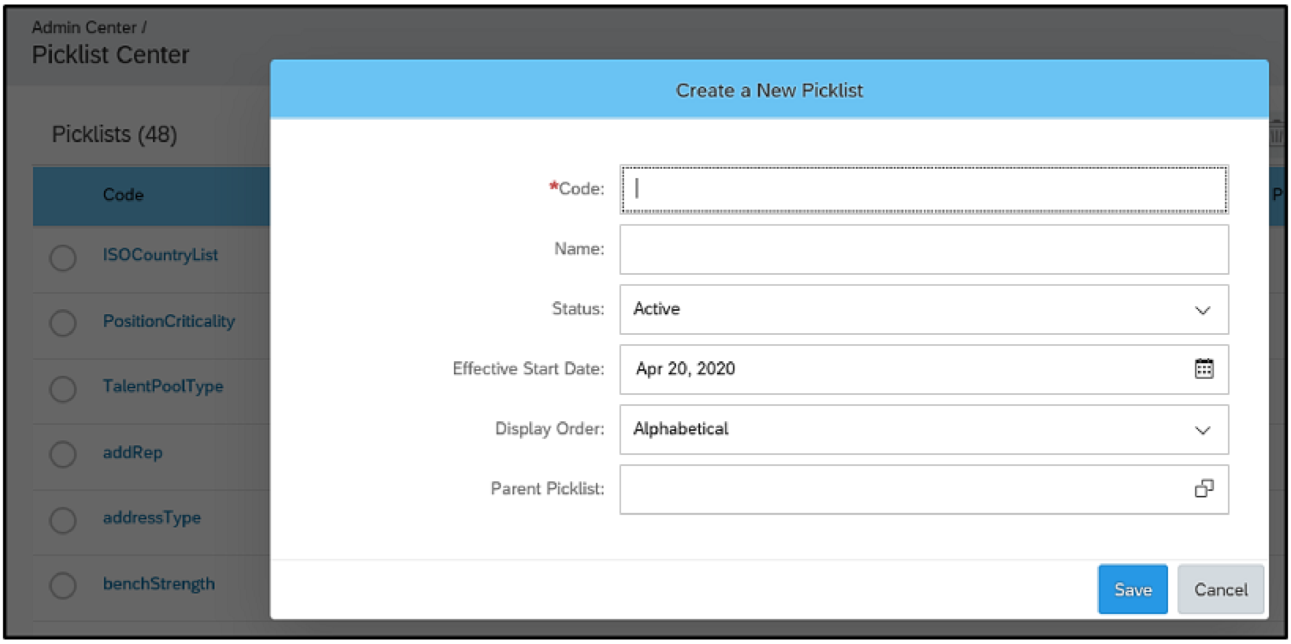
Once you have located Picklist Center, a listing is available for selection. For a faster find, begin typing the name of the picklist. If needing to create a new picklist, use the appropriate icon within this section:



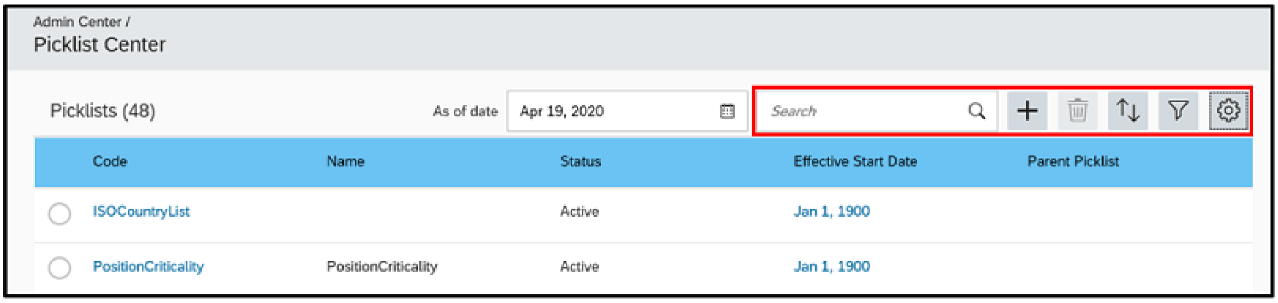
Picklist Center Creation

To manually create a picklist in Admin Center, follow the procedure below:

1. Use the Action Search to navigate to the Picklist Center
2. Click on the plus (+) icon and enter in the necessary information
3. Enter the code and pertinent values for the picklist.



Other actions may also be performed in this section like deleting a picklist using the trash icon, sort the list displayed, filtering for a specific picklist, or define the column properties.



You may also edit the picklist values by clicking on the code and external code to make modifications:

Data may consist of the following fields:

Field	Description
Code	Unique business key that is used to identify the picklist. (If you are familiar with legacy picklists, the code is the equivalent of the picklist ID.)
Parent Picklist	A picklist can have a parent picklist. For example, if only certain states can be chosen when a specific country is selected, the Country picklist is the parent of the State picklist. When legacy picklists are migrated to MDF picklists, an optionId is generated for existing MDF picklist values. For legacy picklist option that have been migrated, the existing optionId is stored in the mapping table. After the migration, if you create a picklist from the Picklist Center, an option ID is generated for all records. The present effective dated record is used; other effective dated entries for the parent picklist are not considered.
Display Order	Order in which the picklist values are listed in the picklist dropdown, for example, alphabetically or numerically.
Name	Unique name of the picklist. For example, if the picklist is for the type of address (home, mailing, business, billing, and so on), you could name the picklist "Address Type".
Status	Specifies whether the picklist is active or inactive, that is, whether it is available for use.

Field	Description
External Code	MDF external code. A unique business key that is used to identify the picklist value, for example, state_Alabama.

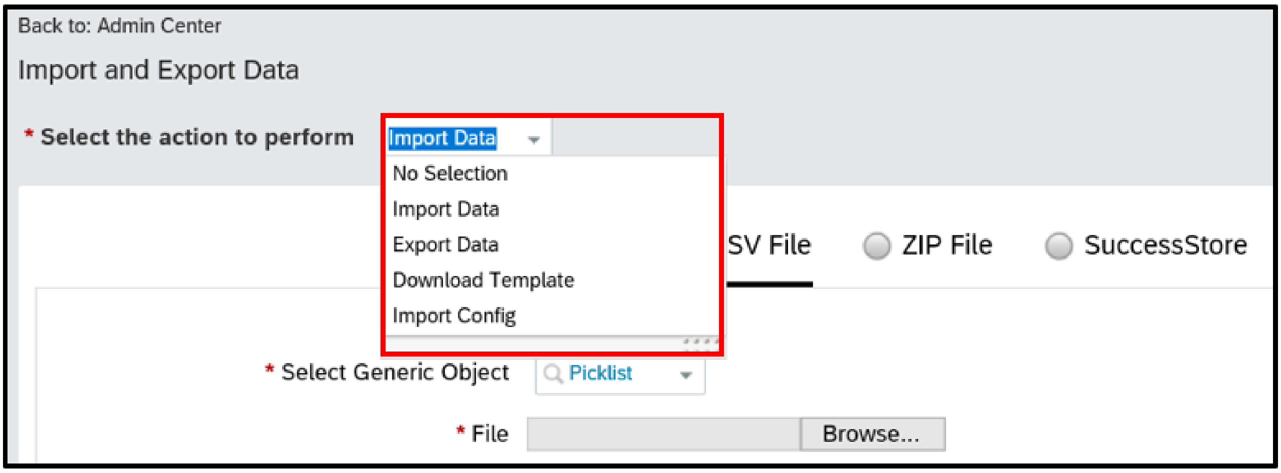
Field	Description
Non-unique External Code	Legacy external code. Unlike the MDF external code, it can be blank or duplicated.
Parent Picklist Value	For example, if the external code is state_Alabama, the parent picklist value would be United States. If the value is state_Alberta, the parent picklist value would be Canada.
Label	For example, if the external code is state_Alabama, the label would be Alabama.

Field	Description
Status	Specifies whether the picklist value is active or inactive, that is, whether it is available for use.
Minval	Use -1 unless working org chart icons

Picklist Import/Export

Use the picklist import or export picklists to feed data from or to external systems. For example, you import picklists for the initial mass creation of values.

1. Go to the Action Search and enter Picklist Center
2. Choose Import/Export which redirects you to Import and Export Data
3. Select an action in the dropdown based on action to perform
   • Import Data
   • Export Data
   • Download Template

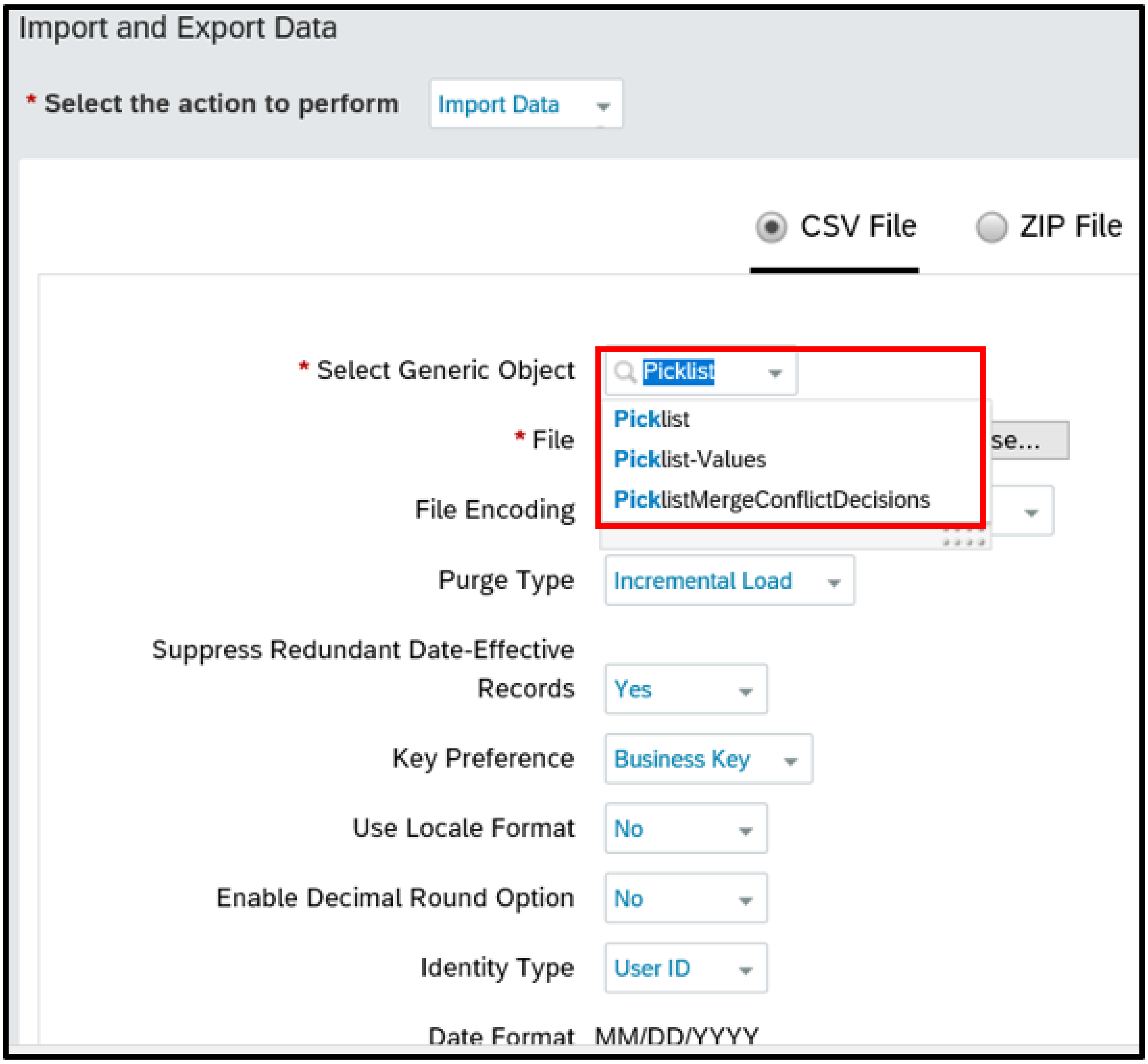


!	When importing a legacy picklist, be sure to provide a value for the external code. If you leave it blank, the import fails.

Importing Picklists Through Picklist Center

Importing picklists through Picklist Center is a two-step process. First, you will import your Picklists (IDs, effective date, etc.) and second, you will import your Picklist Values. These are two separate .CSV files.

1. Use Action Search to locate the Picklist Center
2. Click the Import/Export button
3. Select the action to perform: Import Data
4. Select CSV File tab
5. Select Generic Object: Picklist or Picklist-Values
6. File: Browse to locate and select the file
7. File Encoding: Unicode (UTF-8)
8. Purge Type: Incremental Load
9. Key Preference: Business Key
10. Use Locale Format: No
11. Enable Decimal Round Option: No
12. Date Format: MM/DD/YYYY
13. Validate (optional)
14. Import



Next, to import the Picklist Values, repeat this import activity with the highlighted following changes:

- Select Generic Object: Picklist-values
- File: Browse to locate and select the Picklist-values.csv
- File Encoding: Unicode (UTF-8)
- Purge Type: Incremental Load
- Key Preference: Business Key
- Use Locale Format: No
- Enable Decimal Round Option: No
- Date Format: MM/DD/YYYY
- Validate (optional)
- Import

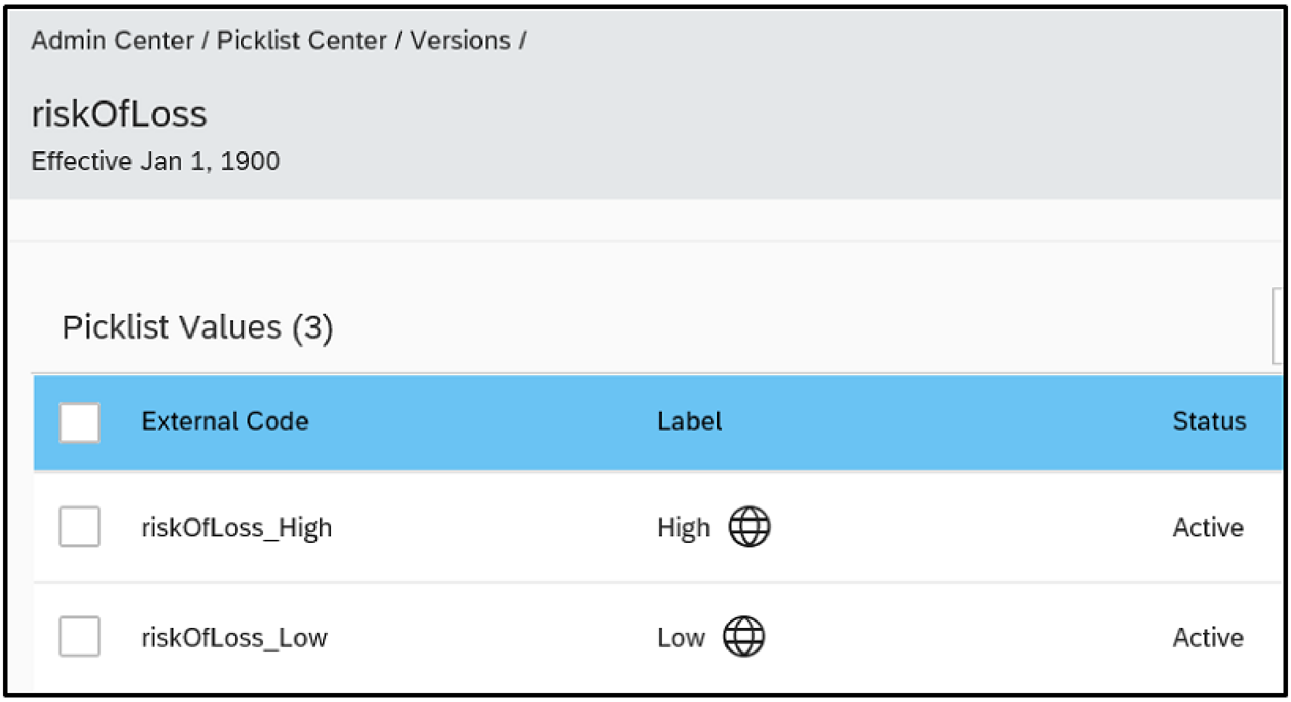
When the two jobs complete, you will receive an e-mail with any errors that occurred during the import. If any errors occurred, you can check the complete report (and download the .CSV file with notes of errors) under Admin Center > Monitor Job.

Troubleshooting Icons Not Appearing in the SOC when the Picklist Center Used

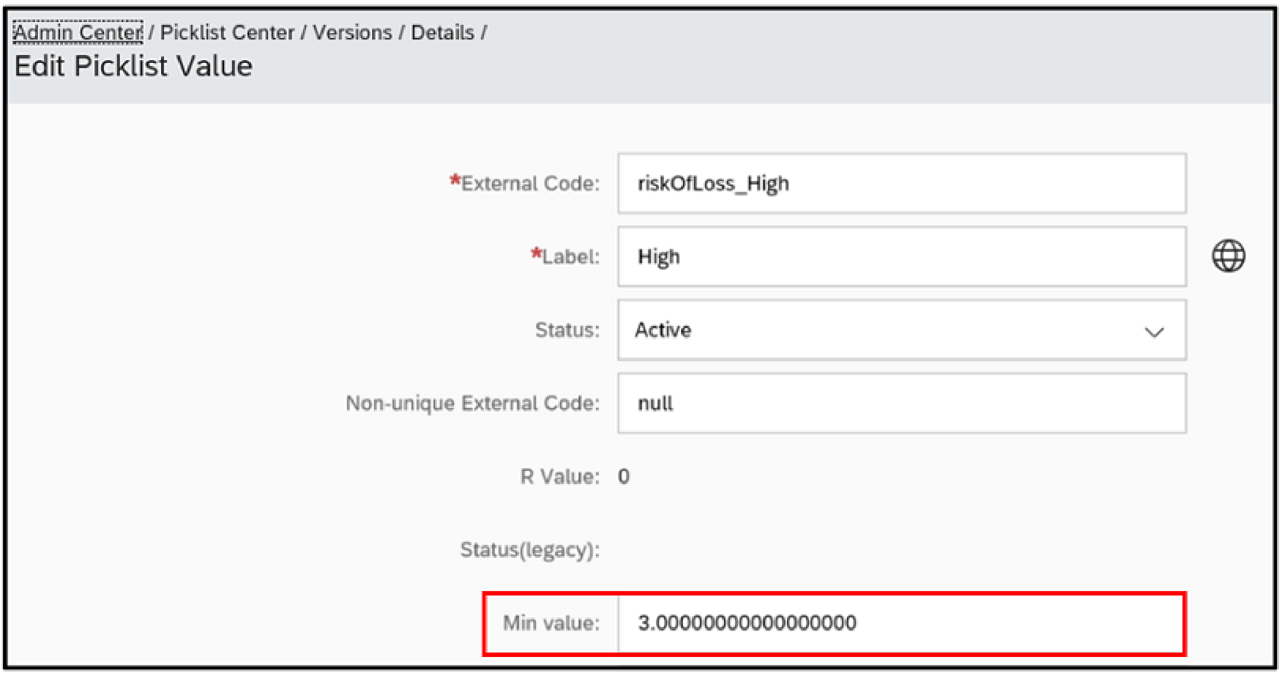
In the Succession Org Chart configuration, the minValue from the picklist is used to configure the icons.

When utilizing the minValue, be sure to provide a Min Value for the picklists that the Succession Org Chart uses:

1. Go to Admin Center > Picklist Center.
2. Select the desired picklist.
3. Click to the picklist value and choose edit.
4. Insert the Min Value for all options in the picklist, which should match what is configured in the Succession Org Chart XML.



After selecting the edit option, configure the min value:



After correcting the "minValue" of the picklist options, the icons should start appearing in the Succession Org Chart.

Note: You will need an implementation consultant or customer success to provide the values from the Succession Org Chart XML since customers do not have access to this area. In addition, if you should happen to change the min values in this section, you will likely break the connection to your succession org chart icons.

Lesson Conclusion – Picklist Center

In this lesson, you were exposed to the Picklist Center.

You should now be able to identify the necessary permissions, locate the tool, create, edit, import and export picklists.

Unit Wrap-Up

In this unit, you covered:

- Lesson 3-1: Additional Permissions and Access
- Lesson 3-2: Employee or User Data Management
- Lesson 3-3: People Profile Information Blocks
- Lesson 3-4: Extended Data for People Profile Blocks
- Lesson 3-5: Matrix Grid Placement History
- Lesson 3-6: Picklist Center

You should now be able to:

- Additional Permissions Needed to Support Succession Data
- People Profile and Data Management Options
- Explain the rules of the Matrix Placement History portlets
- Create and edit picklists with the Picklist Center

Unit 4 – Managing Positions using Legacy Position Nomination Method

Unit Objectives

This unit contains one lesson:

- Lesson 4-1: Managing Positions via Import or Sync

Upon completing this unit, you will be able to:

- Sync employee data controlling the hierarchy and organizational chart
- Import the extended user information and maintain your position model

Lesson 4-1 – Managing Positions via Import or Sync

Lesson Overview

The goal of this lesson is to describe details and options for import or sync with Legacy Position Nomination Method.

Lesson Objective

- Provide information to maintain the Position model by using the import or sync in Admin Center.

What is Position Management?

Position Management is a method or process designed to update, edit, or maintain the position structure utilized in Succession. Within our guide, this term should not be confused with the module or feature called Position Management which is coupled with the use of Employee Central. The position model is designed to satisfy one fundamental requirement: nominating successors to positions, regardless of which employees occupy those positions. This can include TBH (to be hired) positions, not occupied by any employee. The following features help to achieve this:

- An entity, called a position, which includes a unique position code
- A position hierarchy, similar to (but separate from) the employee hierarchy
- Support for displaying that hierarchy with the new org chart
- Permission controls for managing positions via the org chart
- A third nomination method, for attaching succession plans to positions (rather than roles or incumbents)

You can think of the position file as a table in the SAP SuccessFactors database. This table holds the data of all the positions, active and inactive, defined in your instance. This table can be exported from and imported to your SAP SuccessFactors instance. There are several options to create the position model:

- Option 1: Importing the Position Model
- Option 2: Syncing the Position Model

Both of these options are available to Administrators and located within Admin Center > Succession for the Succession Nomination Method: Position. It is important to decide which option will be your ongoing process for the position hierarchy must be maintained and updated regularly for Succession information to display accurately.

!	It is strongly recommended that administrators pick one and only one of these methods for managing the position hierarchy. Combining imports with sync operations can result in duplicating position data and/or overwriting good data with bad.

The terminology within this document and the product are defined below and should be considered when discussing Succession.

A role is a job description and a set of competencies/skills required for that job. It can be as broad or narrow as the instance administrators want it to be. Roles are grouped into families.

A position is a specific instance of a role that can be filled by an employee, or it can be vacant. For example, we might have a role called “Sales Director”, and there might be 4 specific positions using that role (Sales Director West, Sales Director East, etc.).

A job code is used to match an employee or a vacant position to a role. Roles can have multiple job codes associated with them, but employees can only have one.

Option 1: Importing the Position Model

Many customers choose to import the position model because of a former system which holds this type of data like an HRIS.

This option is intended for customers already managing positions in their HRIS or other “master” system, or those who have purchased succession planning licenses for a smaller population than the number of total employees they are loading. As an administrator, you can also manually import the position information by navigating to Admin Center > Succession > Position Management: Position Import.

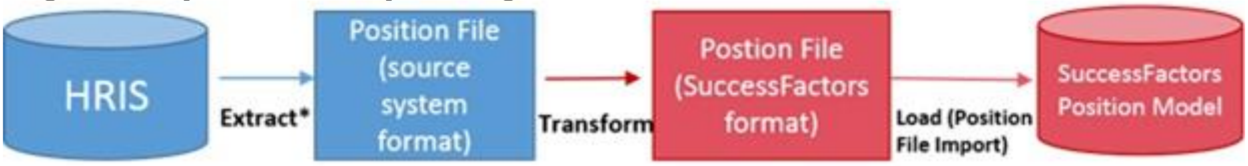
	As a best practice for imports, download the position template or export the current file by navigating to Admin Center>Succession>Position Management: Position Export.

!	If you have used the sync method initially to create positions for implementation and would like to switch to importing positions, ensure that the positions created by sync are DELETED before initiating the import. To DELETE existing positions, simply export the position data in a csv. Then, update the action to “DELETE” and import the position file.

The import file is used for creating and updating the incumbents of position records, as well as attributes of vacant positions. The same format can be exported from a position model on demand. The order of the columns may vary; additional fields may be inserted in the future.

File format is CSV. Extended ASCII characters (curly quotes, etc.) are not supported. The same file encoding options supported in the Employee Import function (including Western (ISO), Unicode (UTF-8), and foreign-language encodings) are supported here. Enclose text values in double-quotes.

Figure: Option 1: Importing the Position Model



Important information about the position import file format follows:

Column header:	Sample value:	Column required?*	May be blank?	Description:
MODEL	1	Required	No	This value must always be "1".
POSITIONCODE	salesrep123	Required	Yes	The position code is a unique identifier for the position record. It can be customer-supplied (alphanumeric) or auto-generated (numeric). Leaving this value blank will always create a new position, whereas if it supplied, the

Column header:	Sample value:	Column required?*	May be blank?	Description:
				system will use it to check for an existing position first and then update it if found.
POSITION_TITLE	Account Manager	Optional*	Yes	The succession org chart optionally allows the display of the position title instead of the employee title. If your system is configured to always display the employee title, this value is not required.
USERID	jsmith1	Required	Yes	The employee's user ID. The value in this file must match an existing active employee record (specifying a nonexistent or inactive userID will result in an error). If left blank, the current incumbent (if any) will be removed from the position, leaving the position marked as TBH.
MANAGERPOS	salesmgr32	Required for new records	No	The position code of the position that this position reports

Column header:	Sample value:	Column required?*	May be blank?	Description:
				to. (Note that this is not a user ID; the employee's current manager could be different than the position they are projected to report to). If a position has no manager, use the value NO_MANAGER . Blank or invalid position codes will result in errors.
KEYPOSITION	0	Optional*	Yes	Indicates whether the position is key or a level of criticality. This can be set by a rating scale, so while the most common options are 1 (Yes) and 0 (No), any numeric value that corresponds to a criticality rating can be used. If column is not included, value for existing positions will not be changed. If column is included but value is blank,

Column header:	Sample value:	Column required?*	May be blank?	Description:
				record will be set to 0.
JOBCODE	salesrep	Optional*	Yes	Valid fields are: Title, Jobcode, Department, Division, Location, Manager (specify a user ID), HR (specify a user ID), Matrix_Manager (specify a user ID), CustomManager (specify a user ID), and Custom01 through Custom15. These fields only update TBH positions.

TITLE	Account Manager
DEPARTMENT	Sales
DIVISION	ACE Software
MANAGER	Cgrant1

Option 2: Syncing the Position Model

Generating the position model from employee data is intended for customers that do not already have a master source for position data. Administrators with user management permissions should find option in Admin Center > Succession > Position management: Sync Position Model with Employee Data.

The sync function can be used to “seed” the position hierarchy based on the employee data. You can run it once employee records are loaded and it will create a matching position for each employee.

The first option to select in the sync function is what to do with inactive incumbents: either mark their positions as TBH, or delete the positions. The sync process bases its changes on employee data, so this only changes positions that have inactive employees in them—

not positions that are already marked as TBH. (To delete TBH positions, you must either go to the org chart to delete them manually or use the import function with the “DELETE” command described below).

Note that by default, vacated positions will remain on the position model and will be marked as TBH (the administrator intends to fill this position with another employee). If you select the “Deleted” option, those positions will be deleted from the position model. In this case the system uses a logical (“soft”) delete; the position record is retained in the system but hidden. To restore the position in the event of an error you must import the position (see file format described below) with a “REACTIVATE” action. The position code can be retrieved by running the Position Export (see below) with the “Include deleted positions” option selected.

If the sync process encounters an active employee that is an incumbent in a deleted position and that position reports to a position that is filled by the employee's manager, the system will reactivate the deleted position (rather than create a new one).

There are 3 sync options for when employees report to new managers. Typically, customers should choose one to standardize on that best fits their needs:

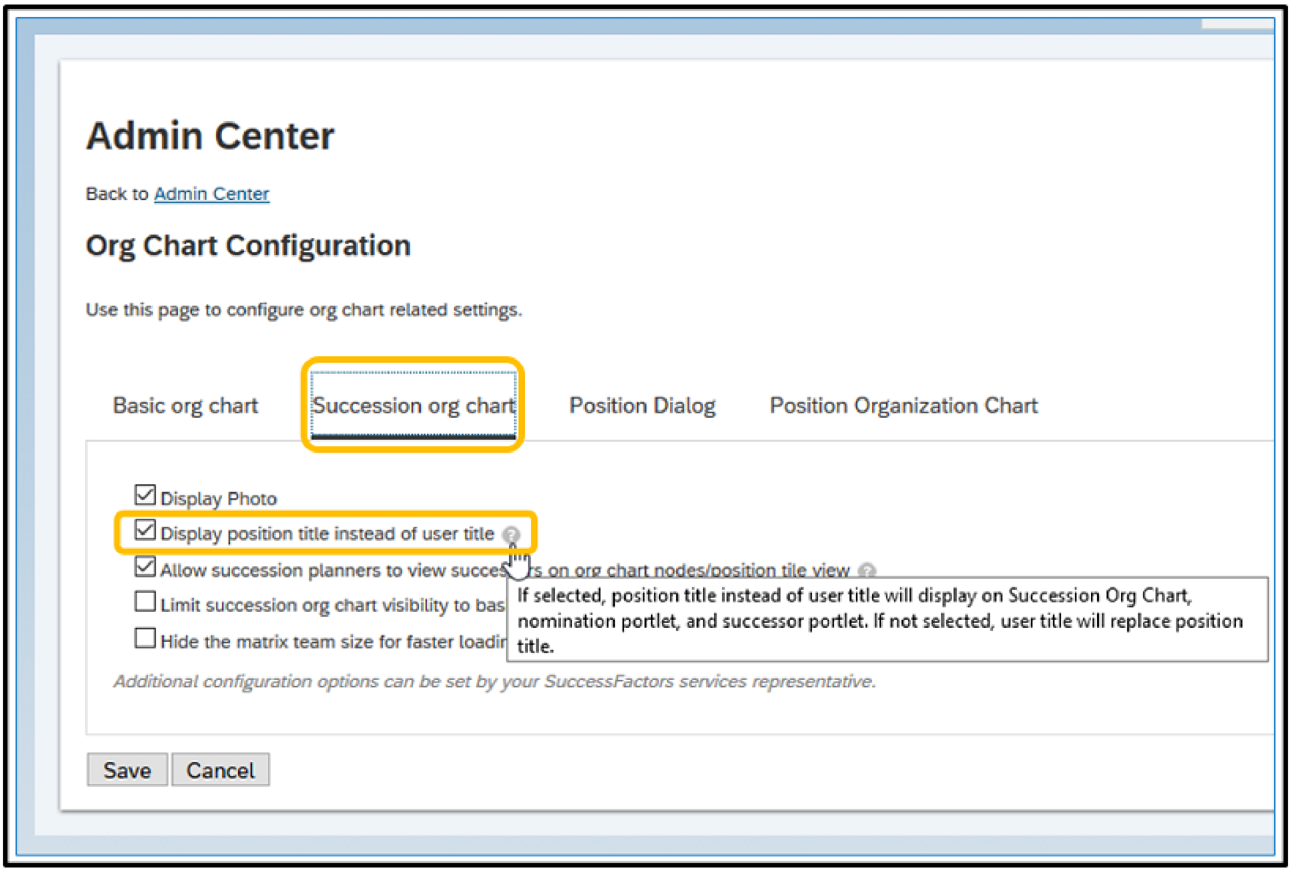
- Always create a new position for the employee (successors stay with old position, now TBH). The first option is conservative, erring on the side of creating new positions, which is the safest route—all position-based succession plans will be preserved. However, this can also result in unnecessary positions records that will have to be removed manually.
- Update the position to report to the new manager's position (successors move with them). The second option is aggressive: positions always follow employee changes, and new TBH positions are never created in the wake of an employee move. This means you will spend less time cleaning up unnecessary TBH positions. But, you will have to manually intervene when a position gets moved that should have been kept under the old workgroup.
- Create a new position for the employee only if they leapfrog or move laterally and only if they have successors. The third option is a hybrid approach which applies some additional logic.

The manager userID should be specified for TBH positions created via the import file to match the incumbent of the manager position, to ensure that planning and visibility permissions are correctly applied.

Displaying Position Title Instead of User Title

With the legacy position nomination method, there is an option to have positions as a type of container to which the succession plan is assigned but which would not have any content attributes. We can simply use the user titles on all succession screens so that we do not have to fill in position titles when importing positions.

When the position title is used however, there is a switch from Admin Center > Org Chart Configuration under the sub-tab for the Succession Org Chart to display the position title on the Succession Org Chart and on the Nomination and Successor Portlet in People Profile. When the option is enabled, we see the position title and when it is disabled, we see the user title.



Lesson Conclusion – Managing Positions via Import or Sync

In this lesson, you were exposed to Position Management's import or sync feature in Admin Center.

You should now be able to execute an import or sync for regular position maintenance.

Unit Wrap-Up

In this unit, you covered:

- Lesson 4-1: Managing Positions via Import or Sync

You should now be able to:

- Sync employee data controlling the hierarchy and organizational chart
- Import the extended user information and maintain your position model

Unit 5 – MDF Objects Overview

Unit Objectives

This unit contains permissions specifically related to the Metadata Framework (MDF) and its supported objects.

- Lesson 5-1: Introduction to MDF Permissions and Tools

Note: Please reference the succession permissions in the earlier part of this guide for an introduction and general information. This section is intended to highlight the MDF specific permissions.
Upon completing this unit, you will be able to:

- Describe the necessary permissions related to the Metadata Framework (MDF)
- Allow users the necessary MDF permissions utilized within Role-Based Permissions

Lesson 5-1 – Introduction to MDF Permissions and Tools

Lesson Overview

The goal for this lesson is to describe the Metadata Framework (MDF) permissions and tools utilized within the Succession Management module.

Lesson Objectives

- Identify the MDF permissions used in succession management.
- Discuss MDF Position Tile and MDF Talent Pools.

What is the Metadata Framework (MDF)?

The Metadata Framework (MDF) is a platform that can be used to build new applications to add to your client's SAP SuccessFactors solution or to modify out-of-the-box SAP SuccessFactors applications that have been built using MDF to fit your client's needs.

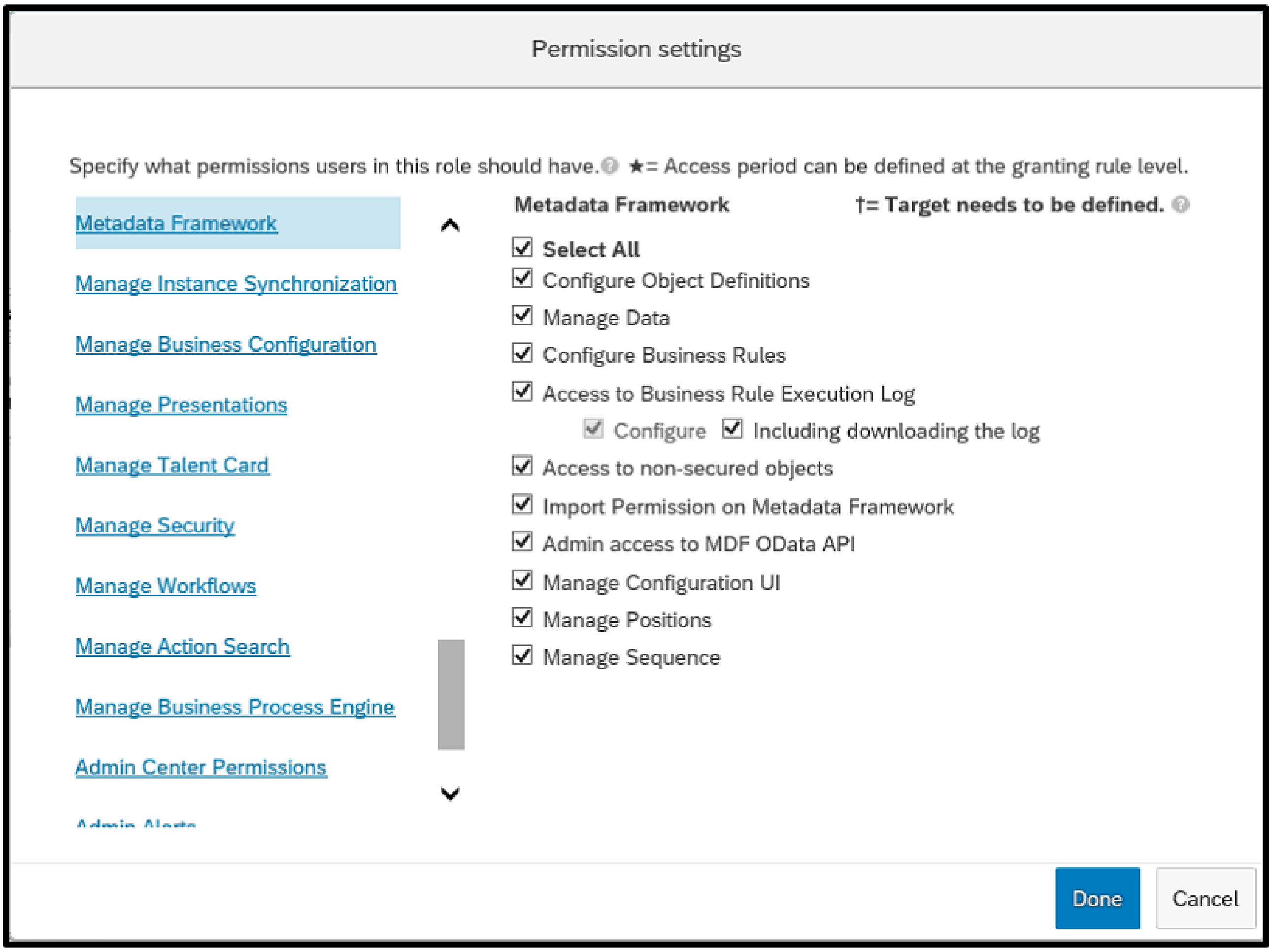
With MDF, you can create and manage database object definitions, object relationships, and object hierarchy. MDF is tightly integrated with workflow, rules engine, and reporting. MDF also integrates with role-based permissions (RBP) - the recommended security layer for SAP SuccessFactors HCM Suite. This means you can leverage RBP roles to secure your customer's objects and data.

MDF objects are exposed through Common Object OData REST APIs as well as through reports in the ODS inform reporting tools.

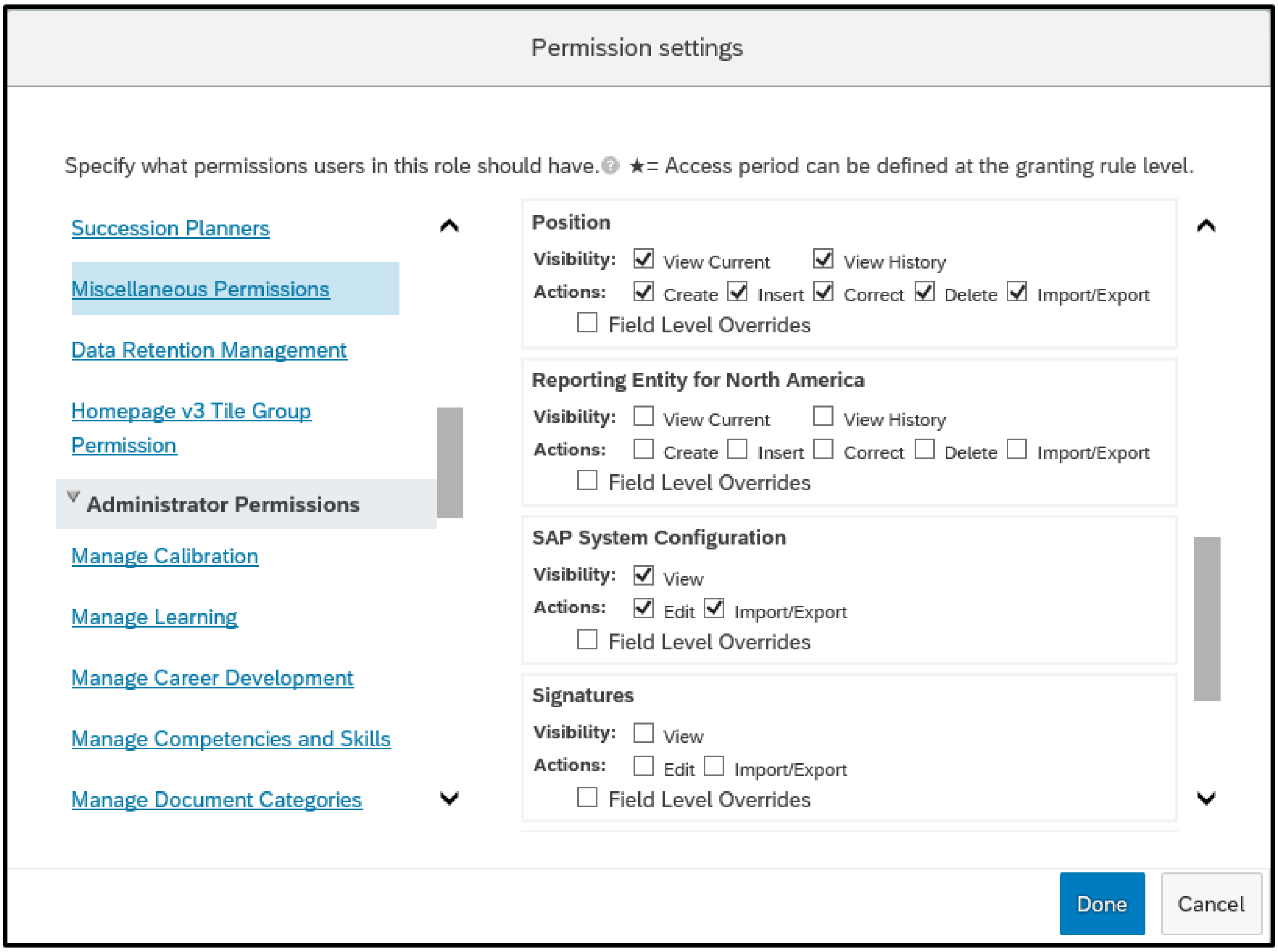
MDF supports data import and export.

What are the Permissions Specific to the Metadata Framework (MDF) and MDF Succession Tools?

When utilizing the Metadata Framework (MDF), the Succession Nomination Method: MDF Position, and other MDF-related tools like MDF Talent Pools or Position Tile, there are some additional areas to enable within Role-Based Permissions. These permissions are located within the Manage Permission Roles in Admin Center. First, select an Administrator role and navigate to the Administrator Permissions within Manage Permission Roles. Select the Metadata Framework link and enable the options. If you do not see these permissions in this area, you will need to upgrade to Metadata Framework in the Upgrade Center or contact Customer Success for additional assistance.



The Metadata Framework permissions allow you to view and utilize MDF features inside the Admin Center. The most commonly used features for the Succession Module are Configure Object Definitions, Import Permission on MetaData Framework, and Manage Data. Some of these permissions are primarily used when integrated to Employee Central (EC) and will not be of importance unless your instance deployed EC. Others like miscellaneous permissions are specific to objects like Position or Talent Pool. Once an object is defined and secured in Admin Center > Company Settings > Configure Object Definition, more granular security may be granted within the Miscellaneous Permissions section under Manage Permission Roles of Admin Center. Succession utilizes two objects consistently in this area: Position Object and Talent Pools Object.

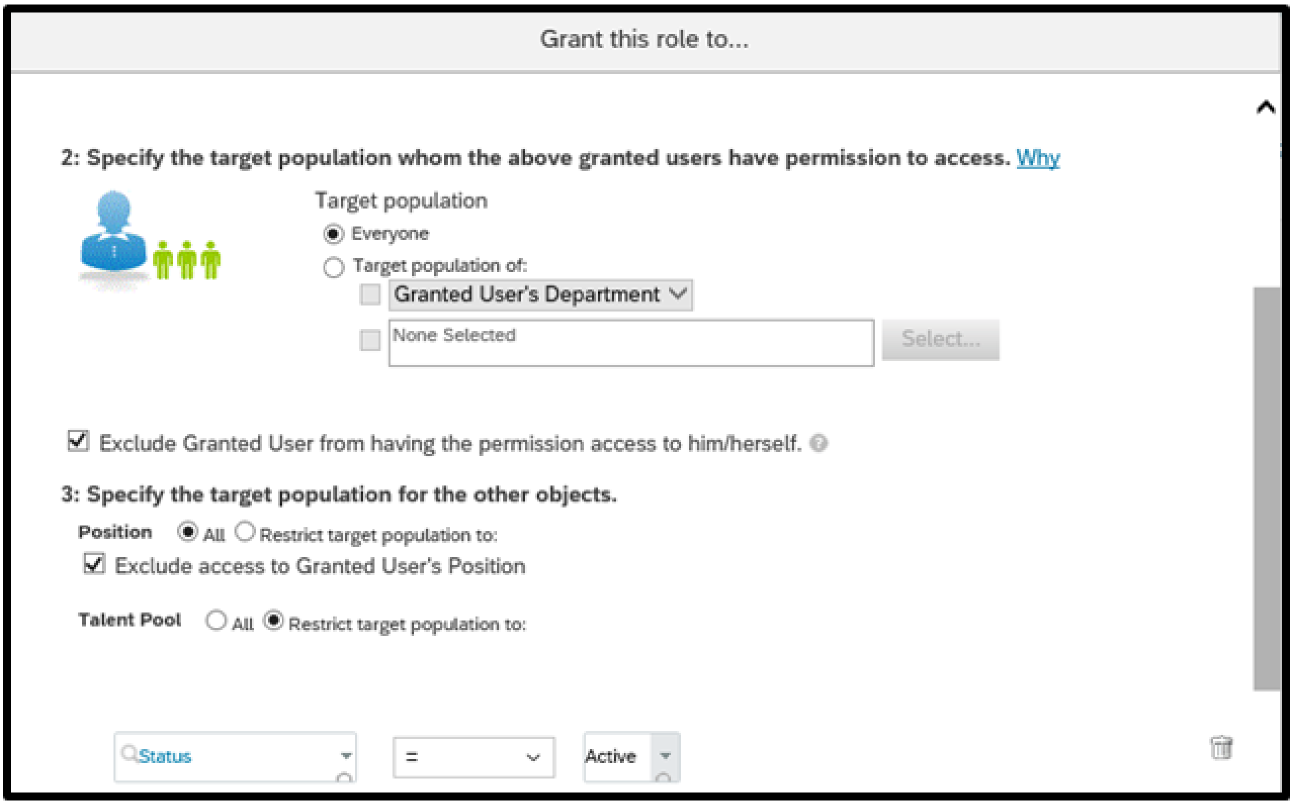


Below are the setting definitions for the Position and Talent Pool object within Miscellaneous Permissions:

- View Current/View History: Allows users to view the current or effective dated history of the object
- Create: Allows users to create Pools (needed for anyone who wants to create a Pool)
- Insert: For inserting an effective dated version of the Pool
- Correct: Allows users to edit values of the Pool attributes
- Delete: Allows users to delete Talent Pools
- Import/Export: Allows administrators to import or export data for Talent Pools
- Field level overrides: Used to remove access to certain fields on the Pools

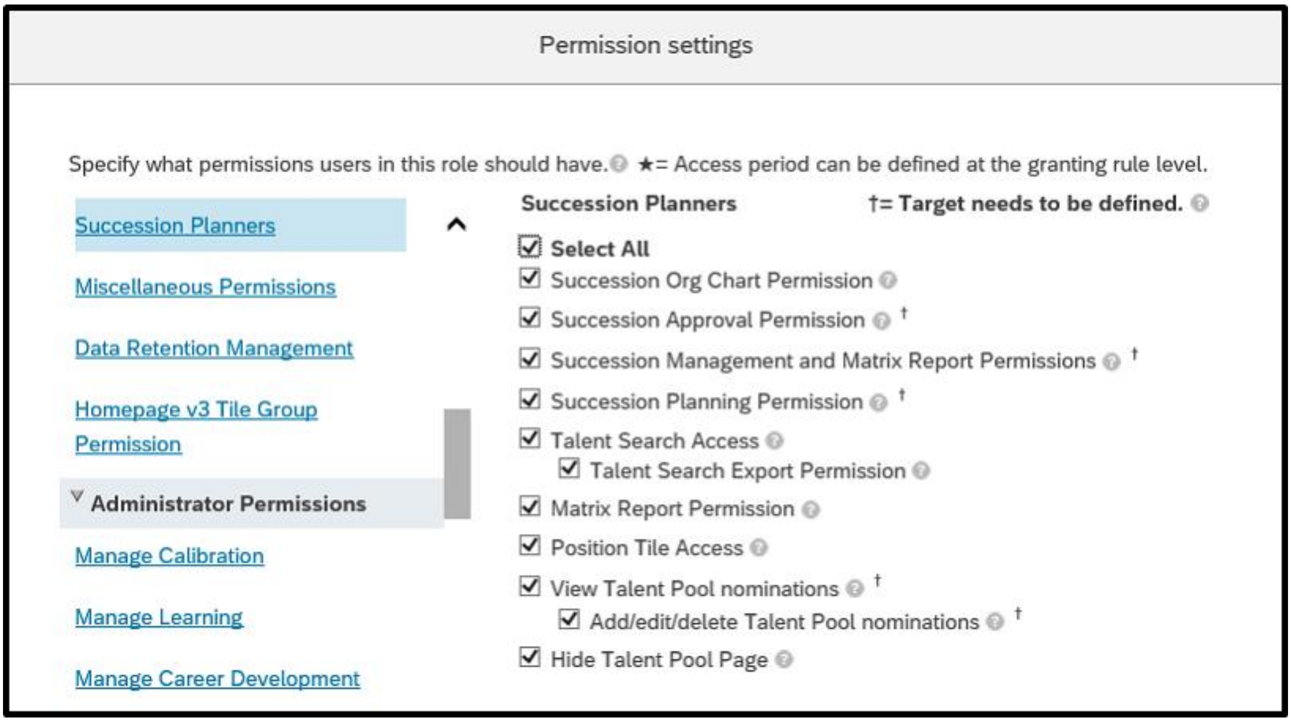
	These object level permissions will only control ability to add/edit/delete Pool properties. Ability to add/edit/delete nominations will only require the user to at least “view” the pool. Create/Insert/Delete will have no impact on the users’ ability to manage nominations.

Remember to specify the target population for both the Position Object and the Talent Pool Object by navigating to Edit Granting.



You may also restrict the target population of MDF Objects by selecting this option and the field of interest. There is also an additional option on the Position Object which allows the System Administrator to exclude access to the Granted User’s Position. This checkbox restricts the succession planner from viewing his or her own position and successors.

Within the Succession Planners area of Manage Permission Roles in Admin Center, talent pools and the position tile have additional access permissions to the tool as seen here:



	This guide covers Succession without Employee Central integration. If you need further details about Succession integrated with Employee Central, contact Customer Success or Professional Services.

Lesson Conclusion – Introduction to MDF Permissions & Tools

In this lesson, you were introduced to the MDF Permissions necessary for Succession Management.

You should now be able to identify and grant appropriate access to Succession Management using the MDF Permissions.

Unit Wrap-Up

In this unit, you covered:

- Lesson 5-1: Introduction to MDF Permissions and Tools

You should now be able to:

- Describe the necessary MDF permissions for MDF Objects and Tools
- Allow users the needed MDF permissions utilizing Role-Based Permissions

Unit 6 – MDF Positions for Succession

Unit Objectives

This unit contains seven lessons:

- Lesson 6-1: MDF Position Object Configuration
- Lesson 6-2: Modification of Field Visibility
- Lesson 6-3: Field Label Changes and Translations
- Lesson 6-4: Custom Fields and Picklists
- Lesson 6-5: Associations and Searchable Fields
- Lesson 6-6: Miscellaneous Permissions and Position Target Populations
- Lesson 6-7: Updating the MDF Position Model via Import or Sync

Upon completing this unit, you will be able to:

- Modifications of the MDF Position Object and Fields
- Permissions and Target Populations Specific to MDF Position Method
- Data Management and MDF Position Management Options

	This unit highlights the features and functionality of the Succession Nomination Method: MDF Position without integration to Employee Central. If you are utilizing Employee Central, consult Professional Services for additional details regarding changes and modifications.

Lesson 6-1 – MDF Position Object Configuration

Lesson Overview

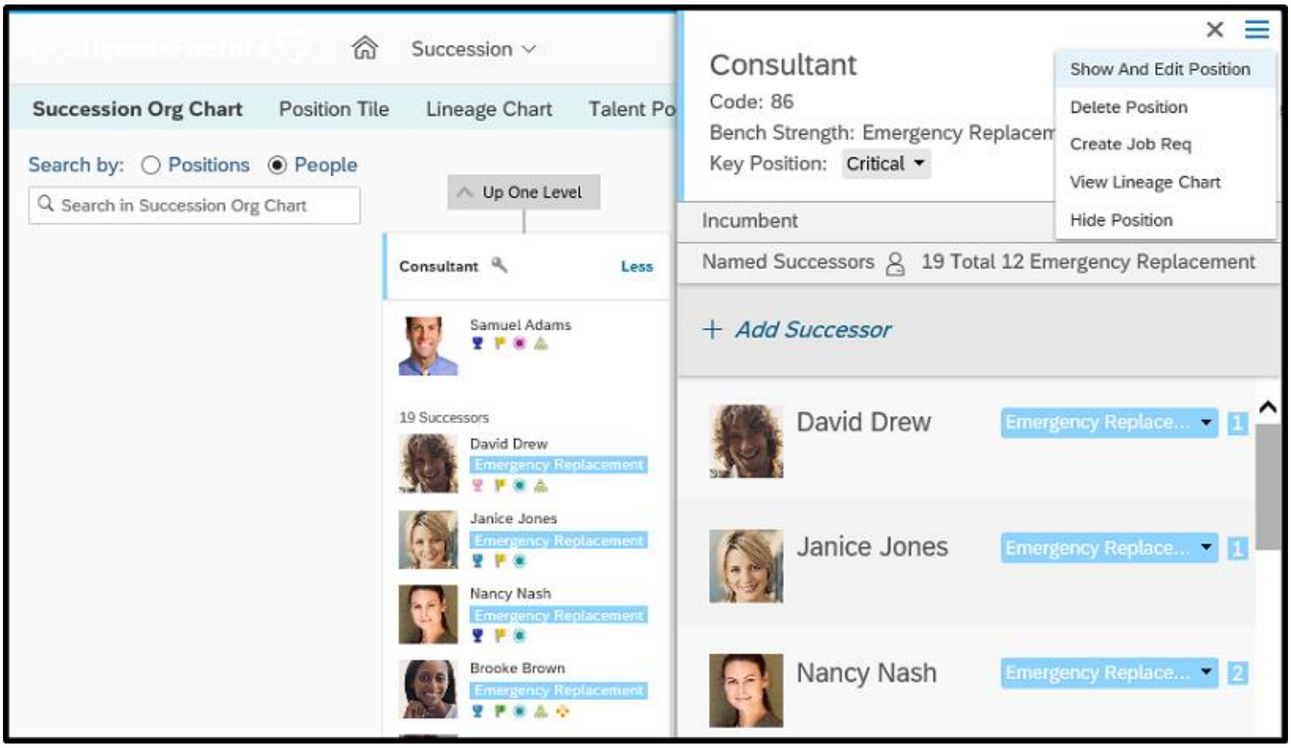
The goal for this lesson is to offer options surrounding the MDF Position Object within Admin Center.

Lesson Objective

- Locate and provide exposure to the configuration of the MDF Position Object.

Where Do I Find the MDF Position Object within Admin Center?

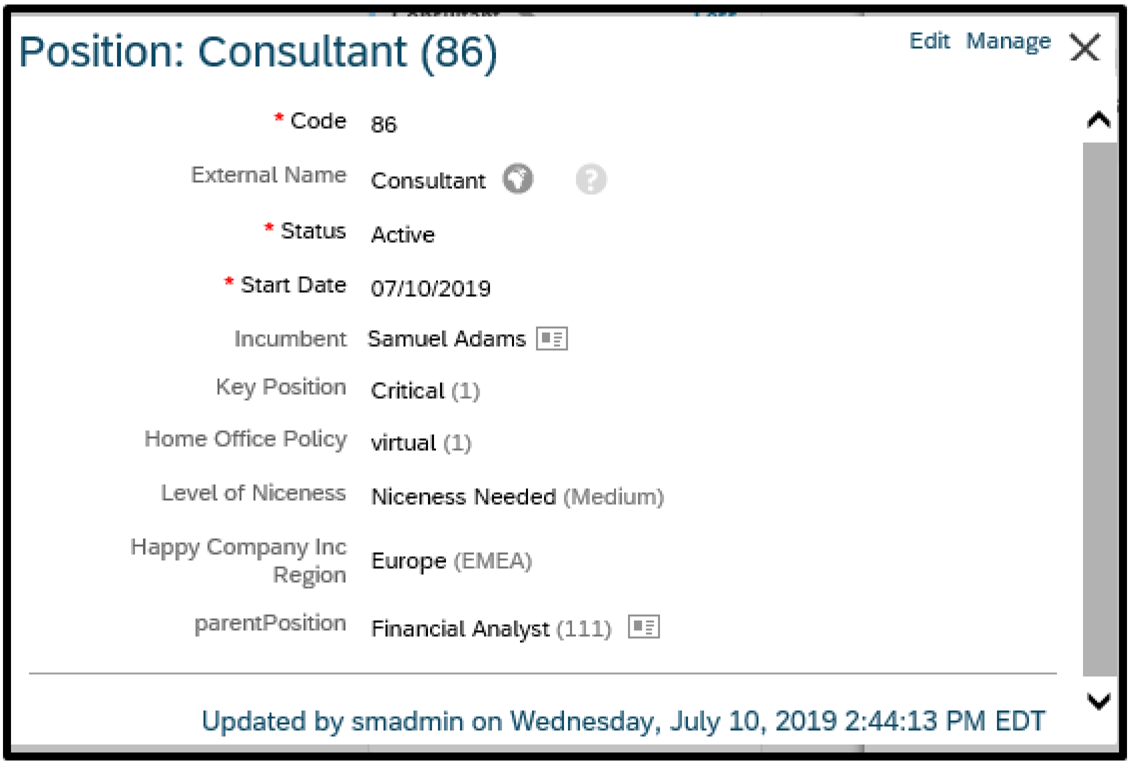
As seen by the user with appropriate permissions within the Succession Org Chart, the MDF Position information displays when you go to Succession > Succession Org Chart and click on the photo and then the three line icon for Show and Edit Position:



	Note: Your terminology and field labels may differ slightly based on your original configuration and permissions within Role-Based Permissions and Text Replacement.

	If you are transitioning from another succession nomination method and the MDF Position Object was not originally set up in your system, please contact Customer Success or Professional Services for next steps.

Edit and Show Position



The power and flexibility of the MDF Position Object is easy to see in this quick screenshot. When using the Succession Nomination Method: MDF Position, there are many advantages over other succession nomination methods like effective date tracking and up to 200 custom fields which can be configured or modified by you as the Administrator.

When using the Succession Nomination Method: MDF Position, the ability to configure or modify the position object belongs to you as the Administrator.

Exercise – Modify the Position Object Label

In this simulation, you will change the label of the MDF Position Object.

1. Log into SAP SuccessFactors and select **Admin Center** from the main drop-down menu.
2. Click **Configure Object Definition** in the **Company Settings** section.
3. Select **Object Definition in the Search dropdown**.
4. **Begin typing Position in the second dropdown**.
5. Select **Make Correction**.
6. Modify the label to your intended change.
7. Click **Save**.
8. Select **Succession** from the main drop-down menu.
9. Click **Show and Edit Position to view your new label**.

Configure Object Definitions

To understand the sections within the MDF Position Object, review this chart:

Sections	Purpose
Fields	Displayed on the Position UI based on visibility settings
Associations	Associates other MDF Objects with the Position
Searchable Fields	Adds position fields and allows keyword search in SOC and Position Tile view
Business Key Fields	Not required for Succession
Security	Required to associate MDF Position object with Role-Based Permissions
Rules	Not required for Succession without Employee Central

Typical Position Fields for Succession without Employee Central:

Field Name	Purpose	Required	Visible
Code	External position code visible to users	Yes	Yes
externalName	Free form text for position title	Not required/ Recommended	Yes
effectiveStatus	Indicates whether position is active	Yes	Yes
effectiveStartDate	Indicates when the position becomes effective for Succession Planning	Yes	Yes
effectiveEndDate	Autogenerated by system	Yes	Yes
positionCriticality	Indicates whether the position is a “key position”.	Yes	Yes
Incumbent	Indicates the incumbent for the position. Leave field blank if position is vacant	Yes	Yes

	The field positionCriticality is a picklist field and the picklist code that must be referenced in the Valid Values Source must be written: PositionCriticality. This code is case sensitive and it has to be written in one word with a capital P and a capital C. Do not use lower case like positioncriticality or positionCriticality. Moreover, for the PositionCritcality picklist, do not use letters for Values. The external codes should be numeric values, otherwise you'll receive an error in the Position Tile view. Besides, as a best practice, please start with 0.

Lesson Conclusion – MDF Position Object Configuration

In this lesson, you were exposed to the basic configuration of the MDF Position Object.

You should now be able to locate the MDF Position Object within Admin Center.

Lesson 6-2 – Modification of Field Visibility

Lesson Overview

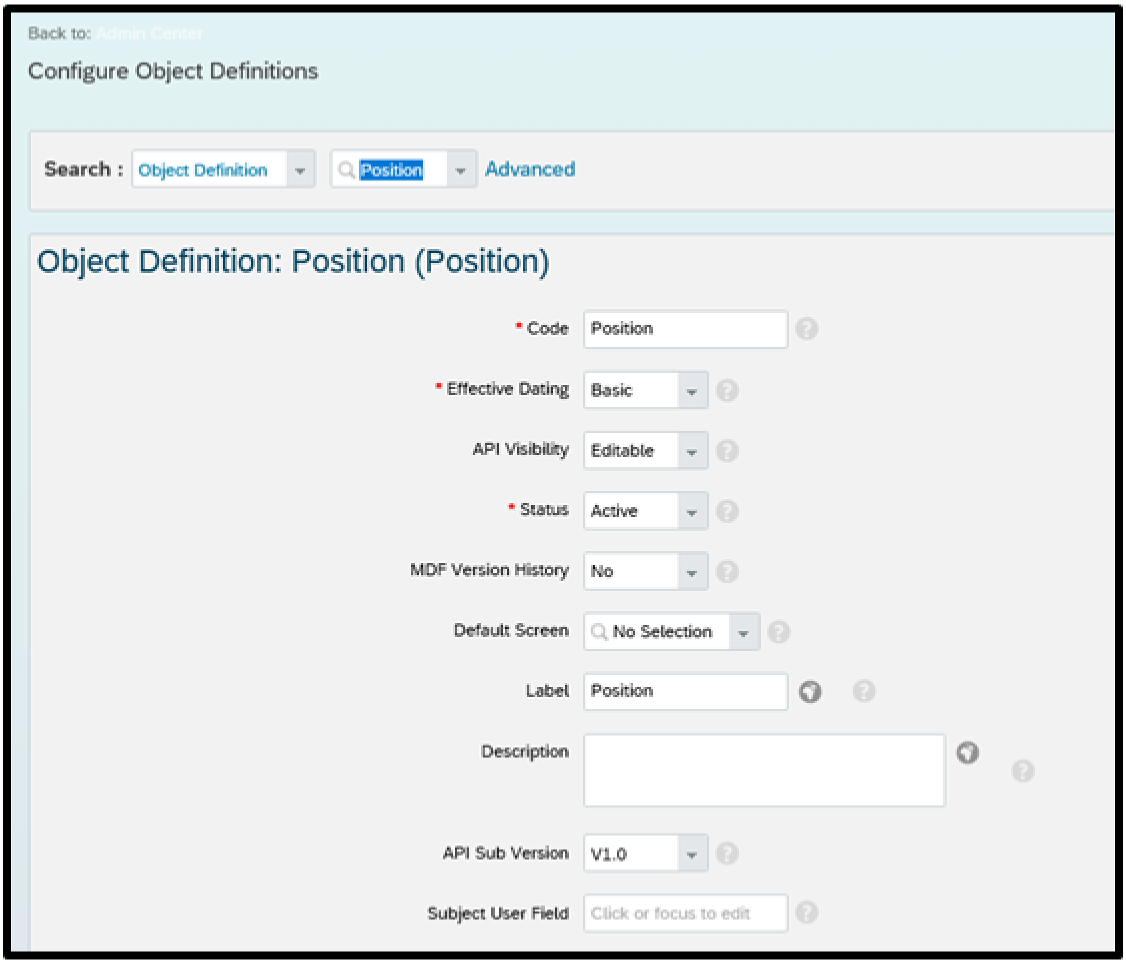
The goal for this lesson is to review the steps to modify field visibility within the MDF position object.

Lesson Objective

- Locate and discuss the process to change the field visibility within Admin Center.

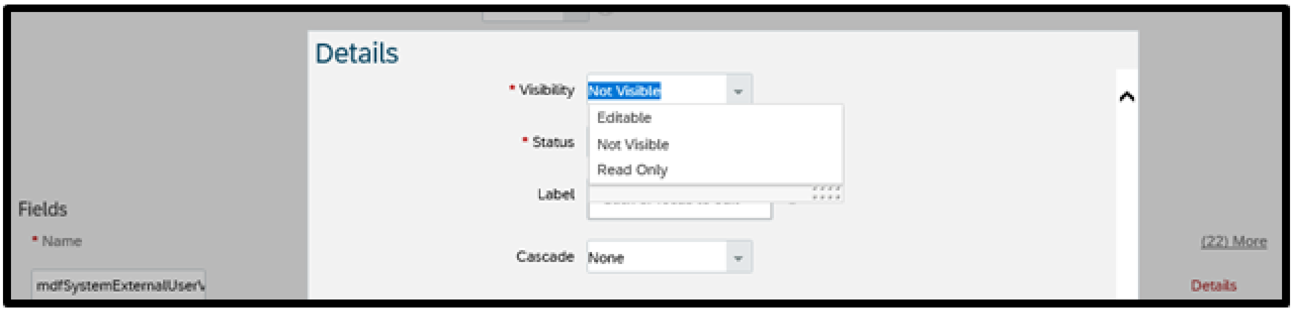
Where Do I Change the Visibility of a Field in the MDF Position Object?

To edit the visibility of the fields with in the MDF position object, use the action search. Begin typing and select Configure Object Definition. Choose Object Definition from the first dropdown. Start typing Position in the second text box dropdown and then click on Position. Once this page loads, select Make Correction for the Take Action menu. Then, a similar screen should appear as this one:



Remember, you must have the correct MDF-related permissions within Role-based Permissions to access this area of Admin Center.

Next, click on the Details link to access the following:



Now, modify the Visibility field by choosing from the dropdown. The terms/definitions are as follows:

Terms	Definitions
Editable	The field becomes editable for anyone that has Create/Insert/Correct permission on the Position object.
Not Visible	This value sets the field to invisible and not available on the UI or the import file.
Read Only	This makes the field read only on the UI but still importable using the MDF import.

Lesson Conclusion – Modification of Field Visibility
In this lesson, we discussed the location and steps to modify the field visibility when using MDF.

You should now be able to make the changes desired.

Lesson 6-3 – Field Label Changes and Translations

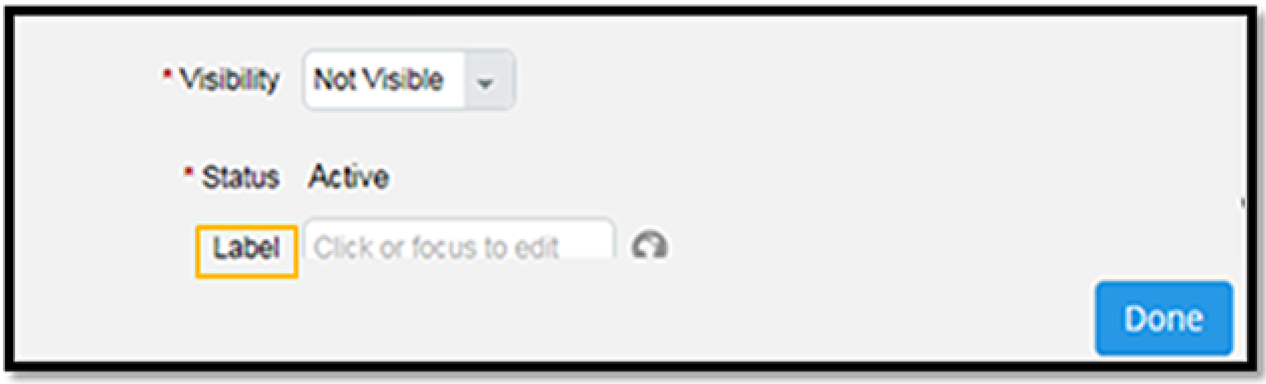
Lesson Overview
The goal for this lesson is to demonstrate changing a field label or adding a translation.

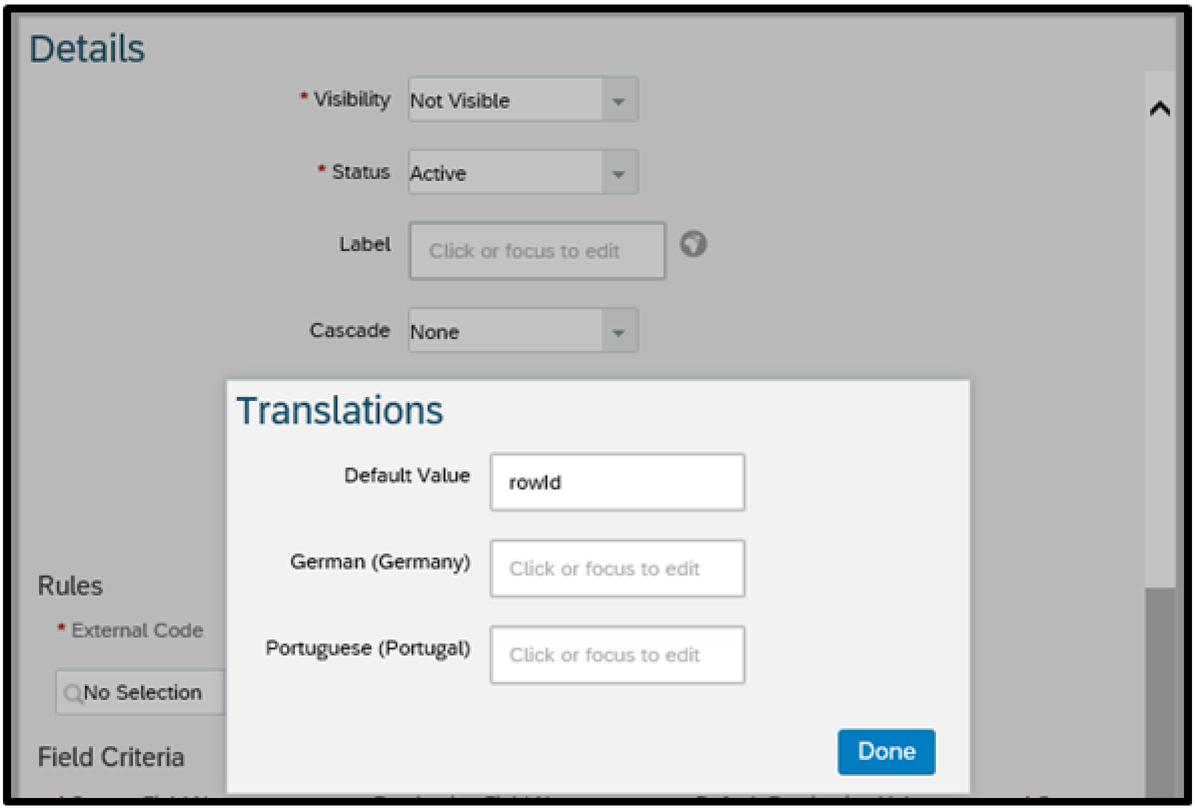
Lesson Objective

- Review the actions needed to modify a field label or translation within the MDF Position object.

To Change the Label of a Field?
Follow the same steps as in the previous lesson to navigate to the field details within the MDF Position Object.

Locate the Label box within the field details screen and click inside the text area to edit it. To add translations to the label, click on the icon to the right of the Label box.





Make any necessary changes and click Done and Save.

Lesson Conclusion – Field Label Changes and Translations

In this lesson, we discussed the location and steps to modify the field label or add a translation.

You should now be able to make the changes desired.

Lesson 6-4 – Custom Fields and Picklists

Lesson Overview

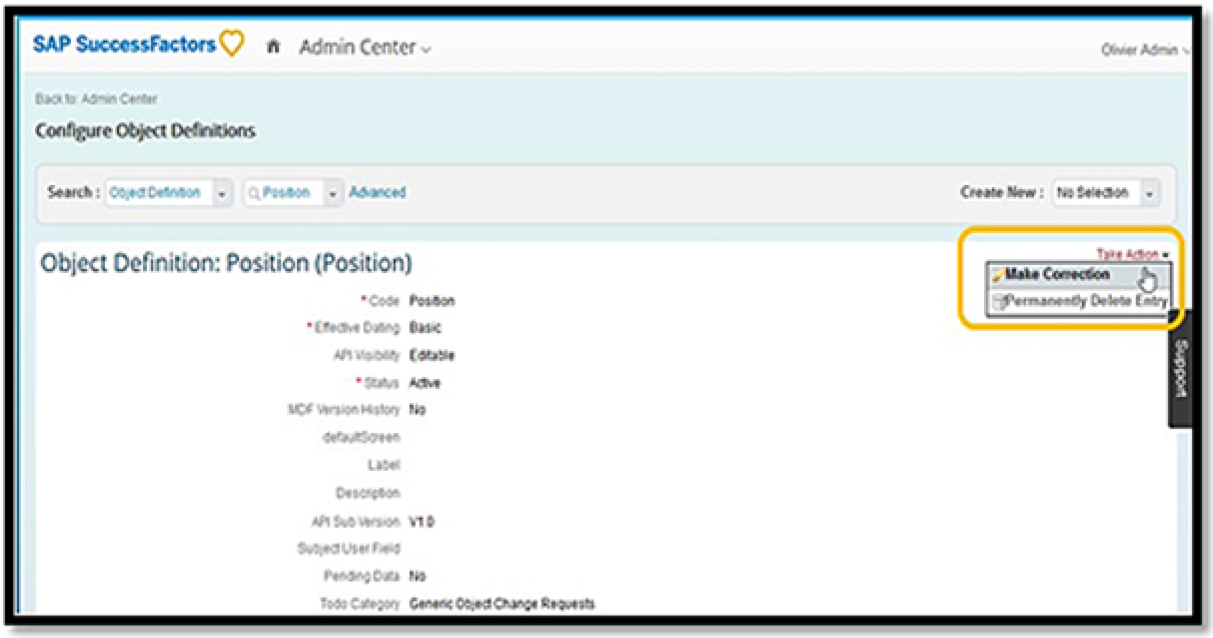
The goal for this lesson is to learn how to create a custom field and picklist for the position object.

Lesson Objective

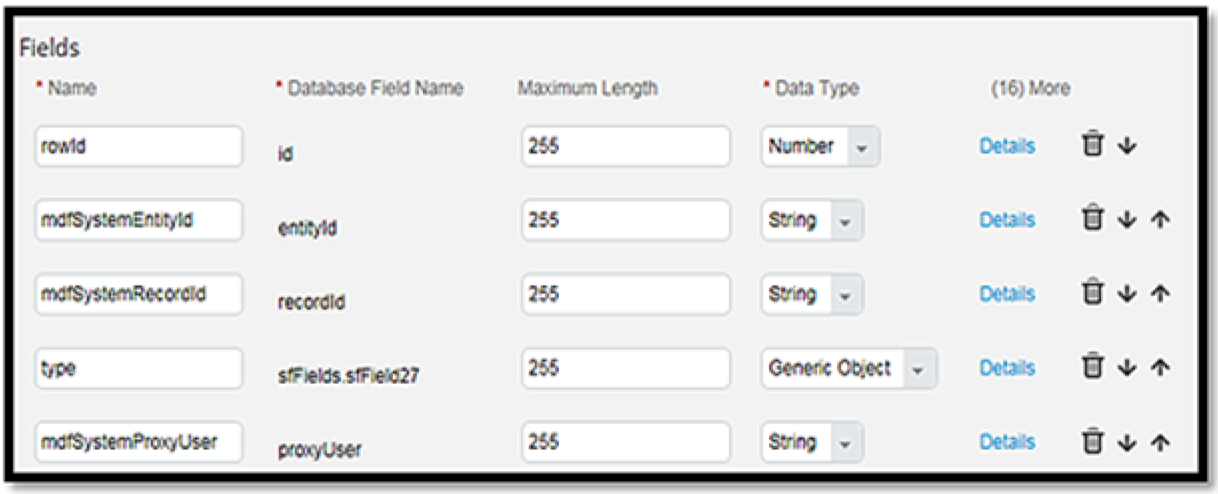
- Describe the necessary actions to modify or add custom fields and picklists.

To Create a Custom Field

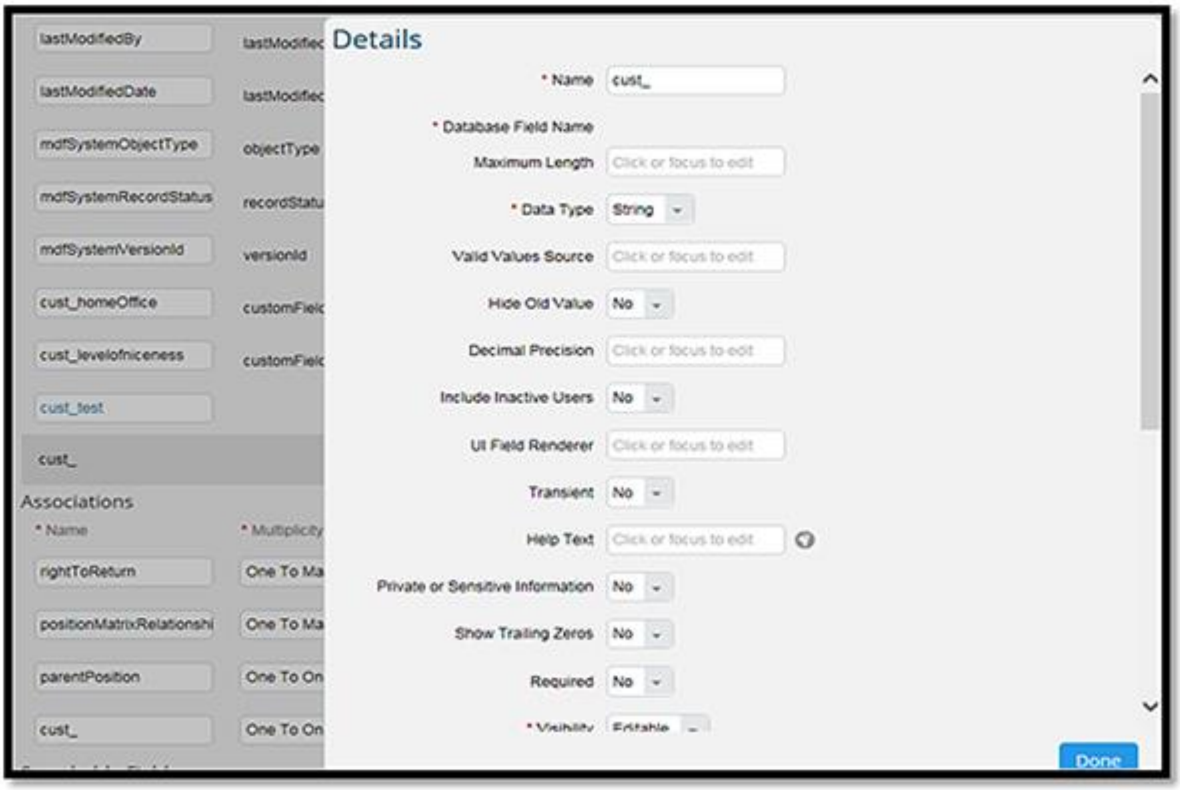
To create a custom field, navigate to the Action Search and locate Configure Object Definition. Select Object Definition and Position from the Search options. Then, click on the Take Action down arrow to select Make Correction.



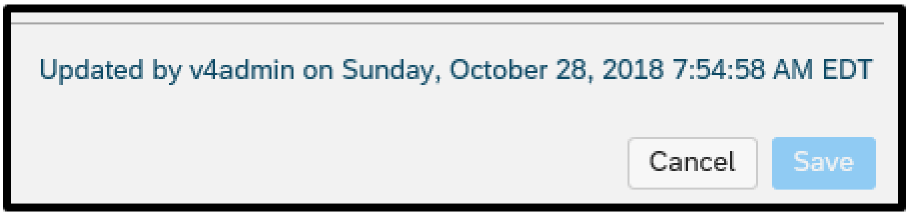
Once in Make Correction mode, the Position Object options are editable or configurable. Scroll to the bottom of the Fields section and click in the text block stating cust_:



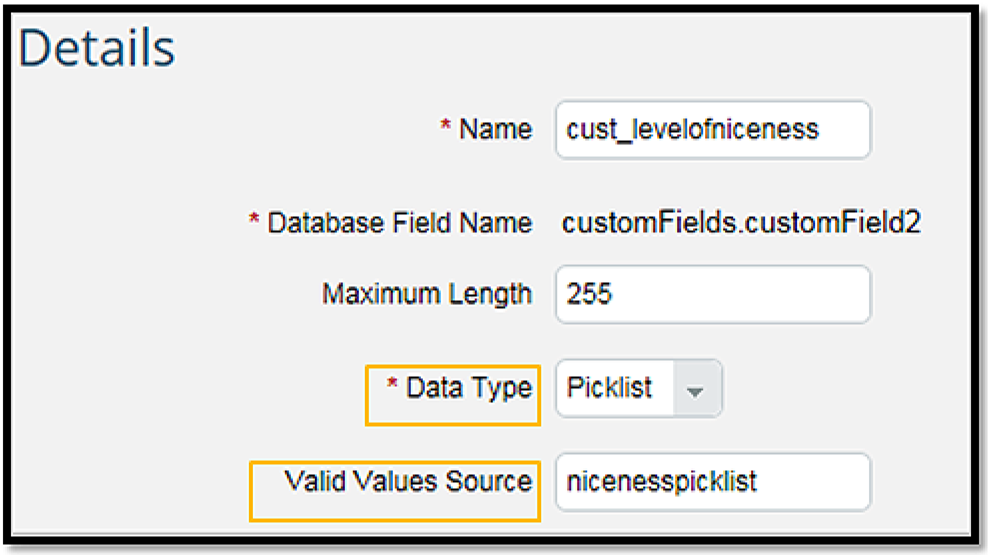
Begin typing the desired name of the custom field in the text area and click the Details link for additional feature options. At this point, a new pop-up window launches.



Within the Details area, many changes or decisions about the custom field are available. For example, decide the maximum length, data type, visibility, status or label of the field if desired or determine whether the field requires the end user to enter data prior to moving forward. The mandatory details are marked with the red asterisk (*). Click Done and Save when finished.



To connect an existing picklist to a custom field. Change Data Type to Picklist and add the picklist Code to the Valid Values Source.



For a new picklist, go to create new picklist within the Picklist Center. Fill in the mandatory fields and connect the picklist back to the correct field in the Position Object.

	Always be mindful of the Effective Start Date when creating picklists or other MDF fields. In the initial setup, be sure use a date before any employees' original hire date. We recommend 1/1/1900 so that any data captured or imported after this effective start date will display within the system.

Exercise – Create a Picklist and Custom Field

In this simulation, you will create a picklist and a custom field for the MDF Position Object.

NOTE: If you have recently transitioned from Picklist Management to the MDF Picklist Center, the picklists once located in Configure Object Definition are now consolidated to the Picklist Center. With this change, the ability to create a picklist in Configure Object Definition has been removed.

1. Log into SAP SuccessFactors and select **Admin Center** from the main drop-down menu.
2. Click **Configure Object Definition** in the **Company Settings** section.
3. Click **Picklist** and create a new picklist within the Picklist Center
4. Fill in the entries for the fields
   a. Code
   b. Name
   c. Effective start date
   d. External code
   e. Label
5. Click **Save**
6. Click **Admin Center** and select **Configure Object Definition** in the **Company Settings** section.

7. Click **Object Definition**
8. **Choose the object entitled Position**
9. Select **Make Correction**
10. Fill in the entries for the fields
    a. Name
    b. Data Type
    c. Valid Values Source
    d. Label
    e. Source Field Name
    f. Destination Field Value
    g. Default Destination Value
11. Click **Done**
12. Click **Save**
13. Select **Succession** from the main drop-down menu
14. Click **Show and Edit Position**
15. Edit the Position and click **Proceed**
16. Save the entries

Lesson Conclusion – Custom Fields and Picklists

In this lesson, we discussed the location and steps to create a custom field, connect an existing picklist or create a new picklist.

You should now be able to modify or create the items discussed.

Lesson 6-5 – Associations and Searchable Fields

Lesson Overview

The goal for this lesson is to explain the configuration of Associations and Searchable Fields.

Lesson Objective

- Describe the action steps to change an Association or Searchable Field.

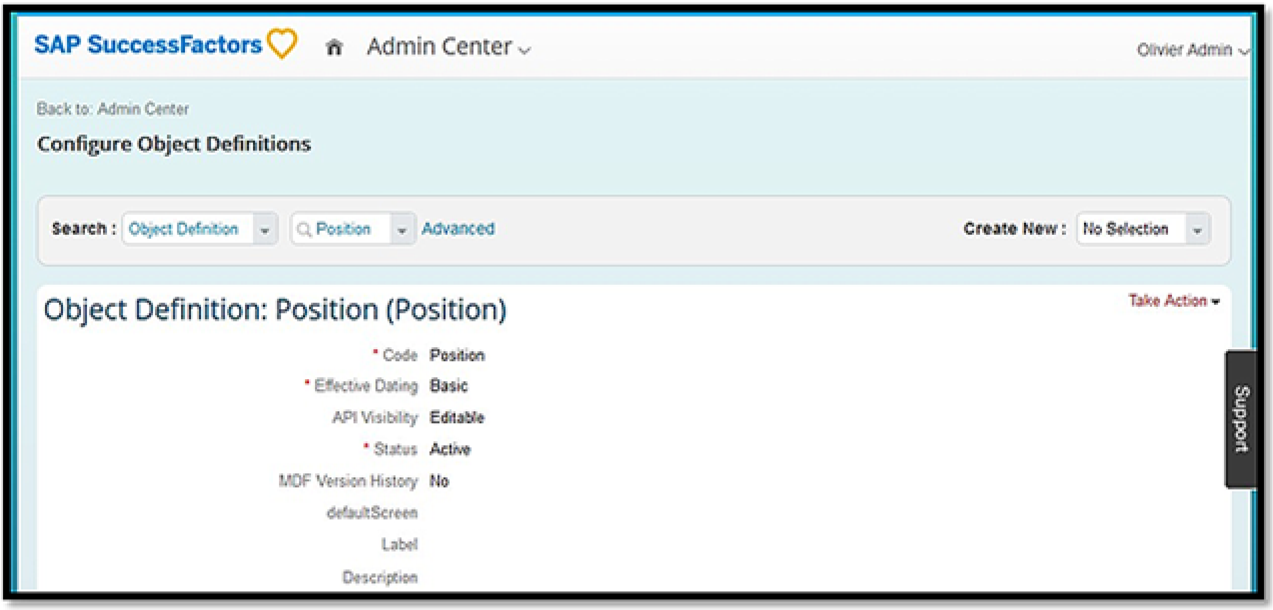
What is an Association within the MDF Position Object?

An Association references the Position Object itself. Because of this fact, the MDF position object must be created prior to defining any association. An example of an Association is detailed in the table below:

Name	**parentPosition**
Type	Valid When
Multiplicity	One To One
DestObjectId	Position
Required	No

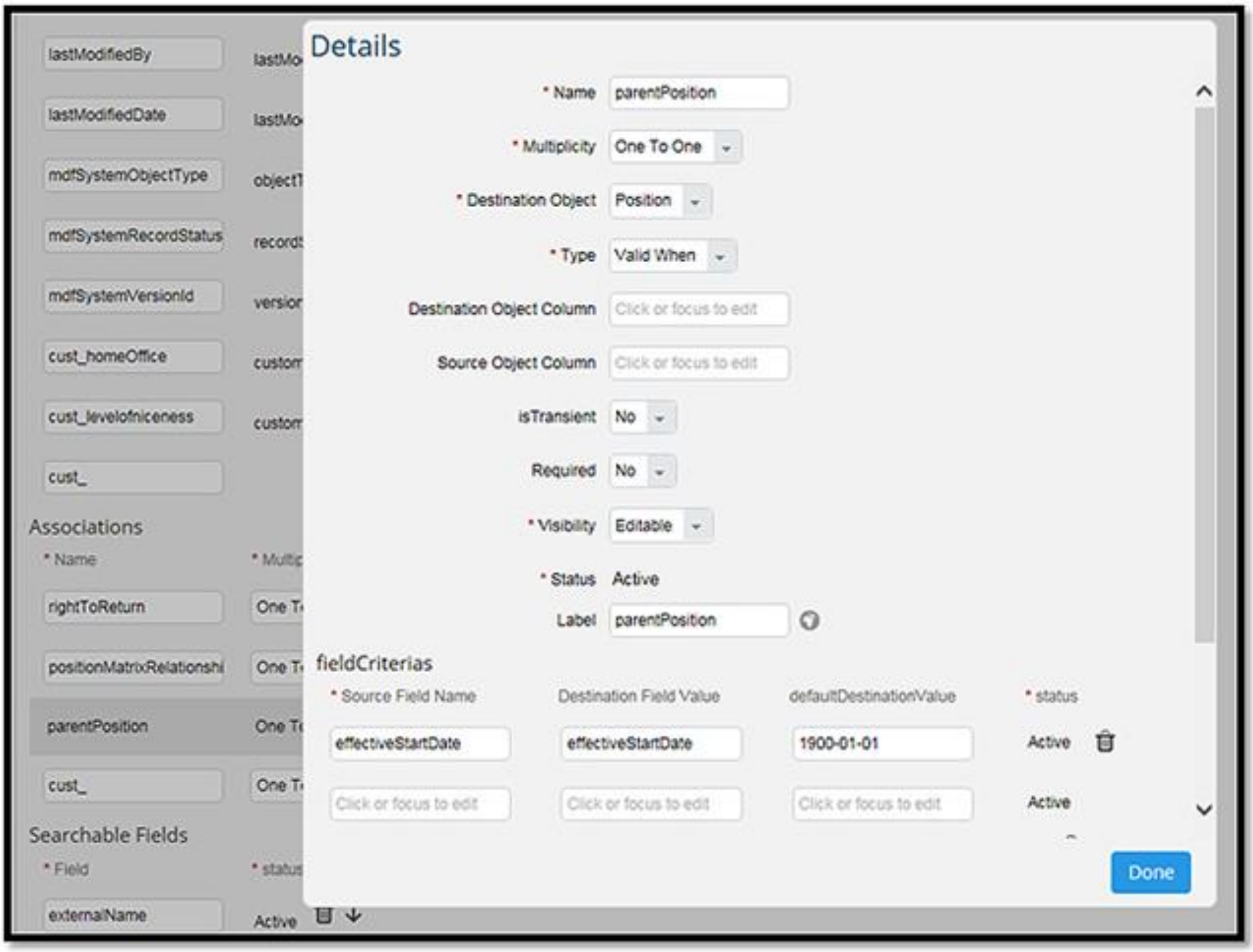
Name	parentPosition
Visibility	Editable
Label	parentPosition

To create an Association, navigate to Admin Center > Company Settings > Configure Object Definitions. Select Object Definition and Position from the Search dropdown. Then, choose Make Correction from the Take Action dropdown.



Scroll to the Associations section and enter data in the appropriate areas.

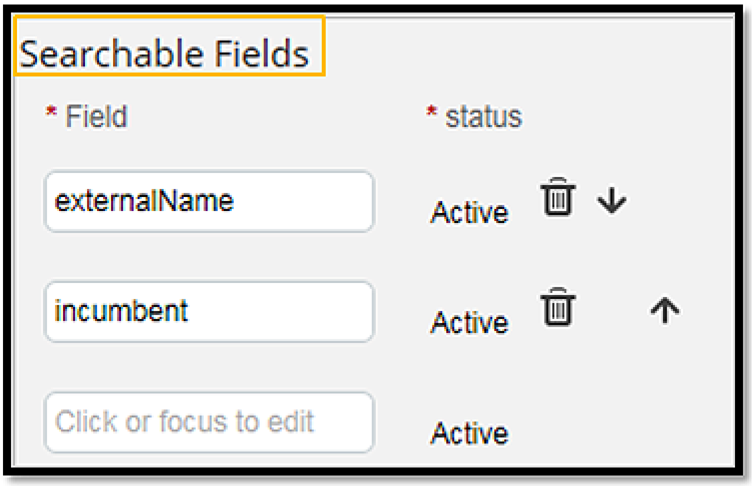
Click the Details link to access more configuration information on the Association.



Make the desired changes or selections, and then click Done. Be sure to click for your modifications to become effective.

Searchable Field

Within the same area of the Position Object as above, scroll below Associations to locate the Searchable Fields section as seen here:



At a minimum, externalName and incumbent should be utilized as configured here. To add more fields, simply click in the empty field and enter the correct field name. Once you have made the desired changes, choose Done and Save.

Once a field is added to the Searchable Fields section, it becomes available in the filters for the Position Tile. Not all position data fields are available for use in the position tile filters. One of the issues clients sometimes face is the position data that they would like to have as a filter (like Location or Division) may be a Foundation Object or a Generic Object, which is currently not supported.

Lesson Conclusion – Associations and Searchable Fields

In this lesson, you were introduced to Associations and Searchable Fields.

You should now have an increased knowledge of each location and configuration option.

Lesson 6-6 – Miscellaneous Permissions and Position Target Populations

Lesson Overview

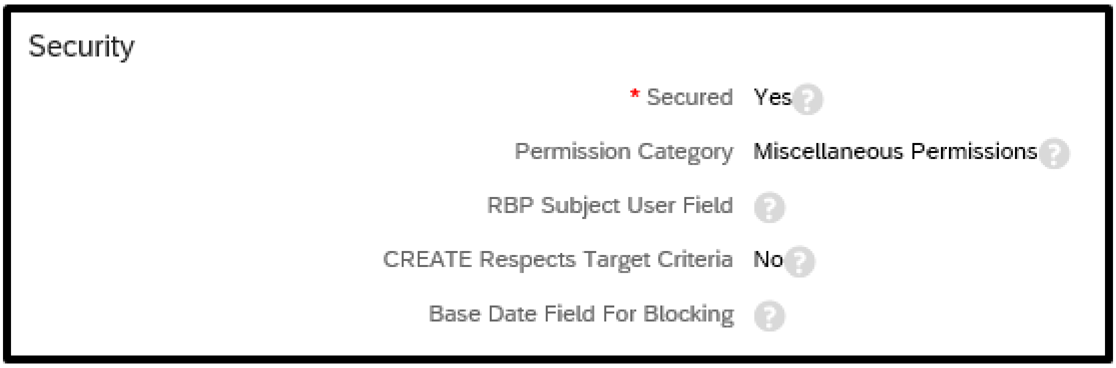
The goal for this lesson is describe the Miscellaneous Permissions and the Target Populations.

Lesson Objective

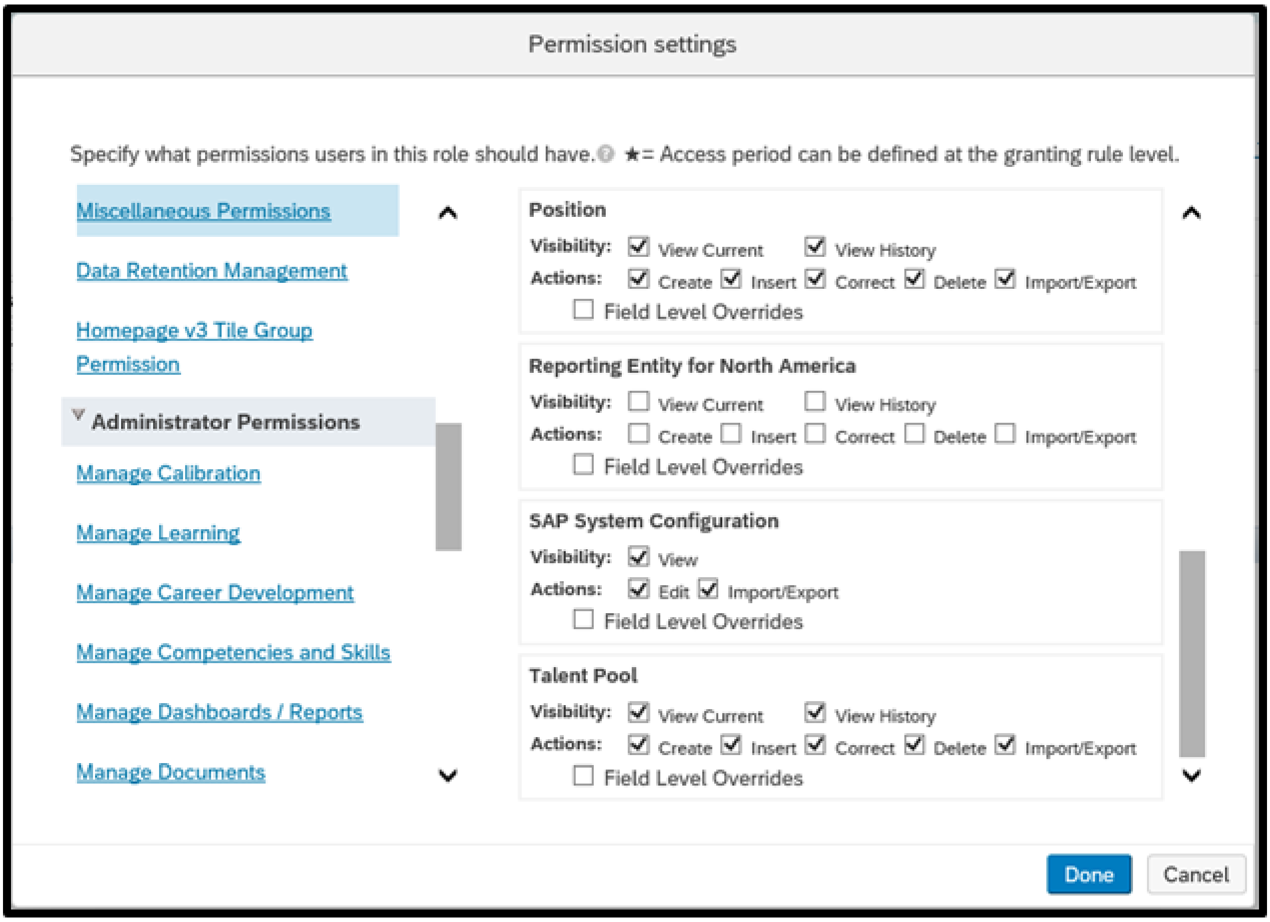
- Enable the Miscellaneous Permissions and Position Target Populations within Role-Based Permissions.

What are Miscellaneous Permissions and Position Target Populations?

In defining the MDF Position Object, the Miscellaneous Permissions are setup within Admin Center > Company Settings > Configure Object Definitions. Select Object Definition and Position in the Search area. Navigate to the Take Action link and choose the Make Correction option.



Once these actions are completed, navigate to Manage Permissions Roles using the Action Search to provide access to these newly available options by choosing Miscellaneous Permission from the left panel.



As with the Position Object, the talent pool objects and additional generic objects, there are many permission options to designate. Below is a table defining the permission group, description, and value:

Permission Group	Description	Value
Visibility	Controls if the role has permission to view the position history	View Current View History
Actions	Controls ability to add/edit/delete positions	Create (creates a new position) Insert (inserts a new effective dated record to an existing position) Correct (allows to edit position values) Delete (soft deletes position with an effective end date) Import / Export (allows the ability to manage data in Admin Center) Field Level Overrides (provide opportunity to restrict field access to read only or no access)

Roles with Permissions	Recommended Miscellaneous Permissions
Administrative Privileges	Create, Insert, Correct, Delete, View Current, View History
Succession Planning	Create, Correct, Delete, View Current
Other Succession Permissions	View Current, View History

What is Unique about the Position Level Target Population within RBP?

With MDF Positions, customers now have more control over their permission settings. The Position Level Target Population helps customers to extend their permissions beyond users and into positions. The advantage of the Position Level Target Population is that these permissions are independent of the position’s incumbent. Thus, if a user has access to a position, they continue to enjoy the same access even if the incumbent changes on the position. This powerful control can be critical during Succession Planning. A Succession Planner may have permissions to do planning for the Finance organization. If John Doe leaves Finance and moves to Accounting, the Succession Planner continues to have access and manage the position that John Doe vacated. This permission capability also provides more control over vacant position level permissions and eliminates the need for a placeholder “TBH” user record. Following are the key details on Target Population:

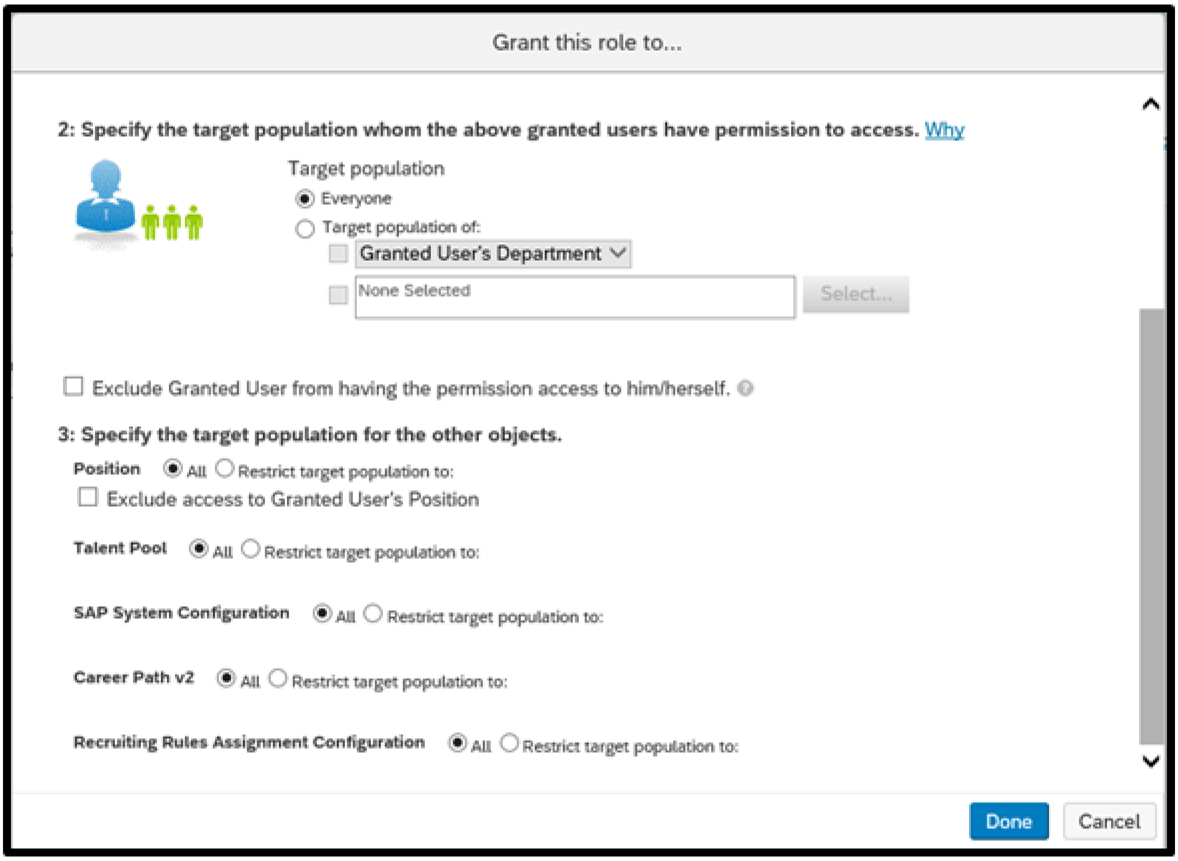
A target population of position is required for MDF based Succession Planning processes. Key Succession Planning permissions are applied to Positions with the MDF Position nomination method.

The target population of position is available when any of the Miscellaneous Position permissions are selected (e.g., View Current).

The following Succession planning permissions only work with position level target population for MDF Positions:

- Succession Planning: Access is required to the Position to add/delete Successors for a position. At a minimum, a View Current permission is required to a position once target populations are configured.
- Succession Management and Matrix Reports: At a minimum, a View Current permission is required to view the Successors in a position node.
- Succession Approval: Same rule as Succession Planning permission.

The Position target population defaults to “All” Positions. To change the target population, navigate to Manage Permission Roles > Choose your Role. Navigate to the bottom of the permission screen and choose “Edit Granting”. Scroll to the bottom of the “Edit Granting” window and review “section 3: Specify Target Population for Other Objects”. Change the default selection from “All” to “Restrict target population to:” and select from below.



Restrict Target Population

Two options available to restrict target population:

- Restrict by Position attribute (e.g., access to Positions that have Position department = Finance)
- Restrict by Position hierarchy (Similar to people hierarchy, users can define levels below the Planners hierarchy)

Make the necessary changes within this area. Be sure to click Done and Save Changes.

	When working with the MDF Talent Pools or other MDF objects, you will follow similar steps to define the Miscellaneous Permissions.

Exclude Logged-in User

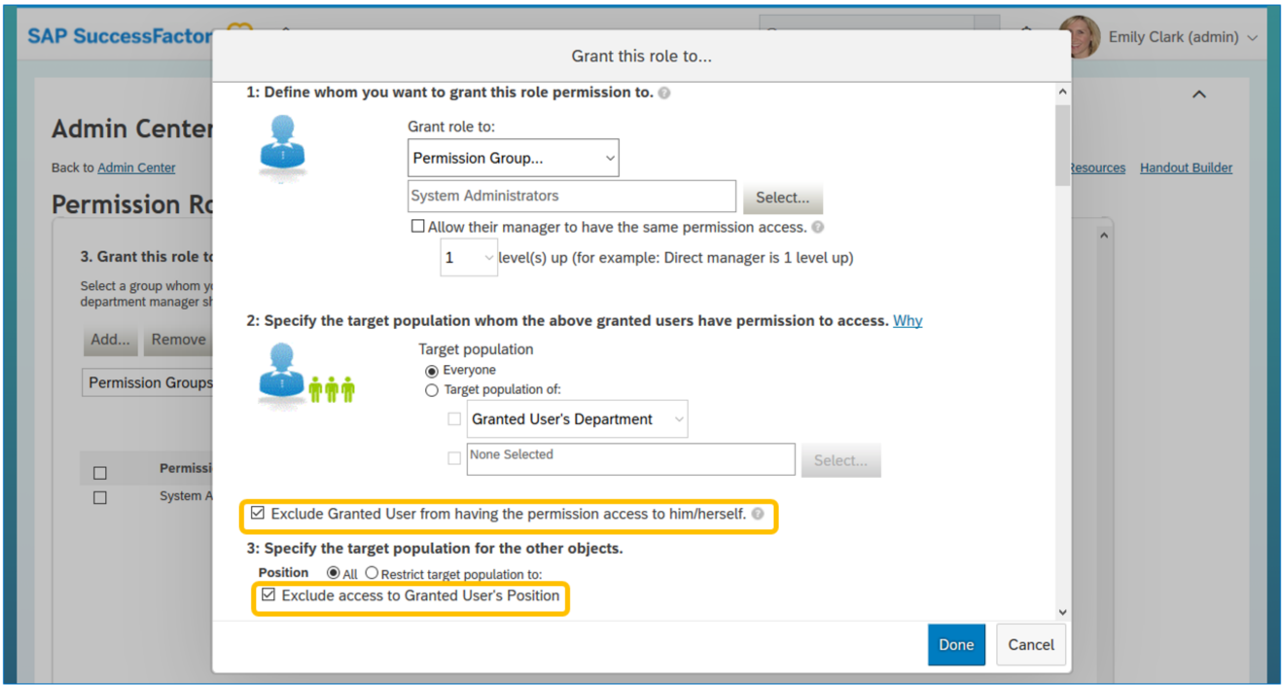
Located in this same area, there is an option which now restricts the succession planner from accessing the position information and successors of his or her own position.

You can prevent logged-in user from seeing and from planning their own successors. There are two options that have to be activated in the target population in RBP:

1. For “2: Specify the target population whom the above granted users have permission to access.” make sure that the option Exclude Granted User from having the permission access to him/herself. is activated
2. For “3: Specify the target population for the other objects.” make sure that the option Exclude access to Granted User's Position is activated.

When selected, the users are not permitted to plan or view succession for their own positions. This applies even if they have succession planning permission over their organization areas in which this position belongs. For example, an HR user responsible for succession planning in the HR department should not see the successors for their own position.

As Succession nominations are very sensitive data for many organizations, this is a classical best practice approach.



Lesson Conclusion – Miscellaneous Permissions and Position Target Populations

In this lesson, you were introduced to Miscellaneous Permission and Position Level Target Populations.

You should now be able to assign permissions and targets based on your specific needs.

Lesson 6-7 – Updating the MDF Position Model via Import or Sync

Lesson Overview

The goal of this lesson is to describe the details and options of Updating the MDF position Model.

Lesson Objective

- Provide information to maintain the Position model by using the import or sync in Admin Center.

What is the Purpose of MDF Position Nomination Method?

MDF Position Management is critical to the Succession process since its purpose is to update, edit, or maintain the position structure for the Succession Nomination Method: MDF Position. You can think of the position file as a table in the SAP SuccessFactors database. This table holds the data of all the positions, active and inactive, defined in your instance. This table can be exported from and imported into your SAP SuccessFactors instance. There are several options to create and maintain the MDF Position model:

- Option 1: Importing the MDF Position Model
- Option 2: Syncing the MDF Position Model

Both of these options are located within Admin Center for you to maintain the MDF Position Model via periodic sync or import. A permissioned end user may also manually enter data. However, your organization may choose to automate the maintenance by utilizing a regularly scheduled file transfer or integration from your HRIS. It is important to decide which option will be your ongoing process for the position hierarchy must be maintained and updated for Succession information to display accurately.

!	It is strongly recommended that administrators pick one and only one of these methods for managing the position hierarchy. Combining imports with sync operations can result in duplicating position data and/or overwriting good data with bad. To set up a regularly scheduled file transfer or integration from your HRIS, contact Customer Success or Professional Services for next steps.

Option 1: Importing the MDF Position Model in Admin Center

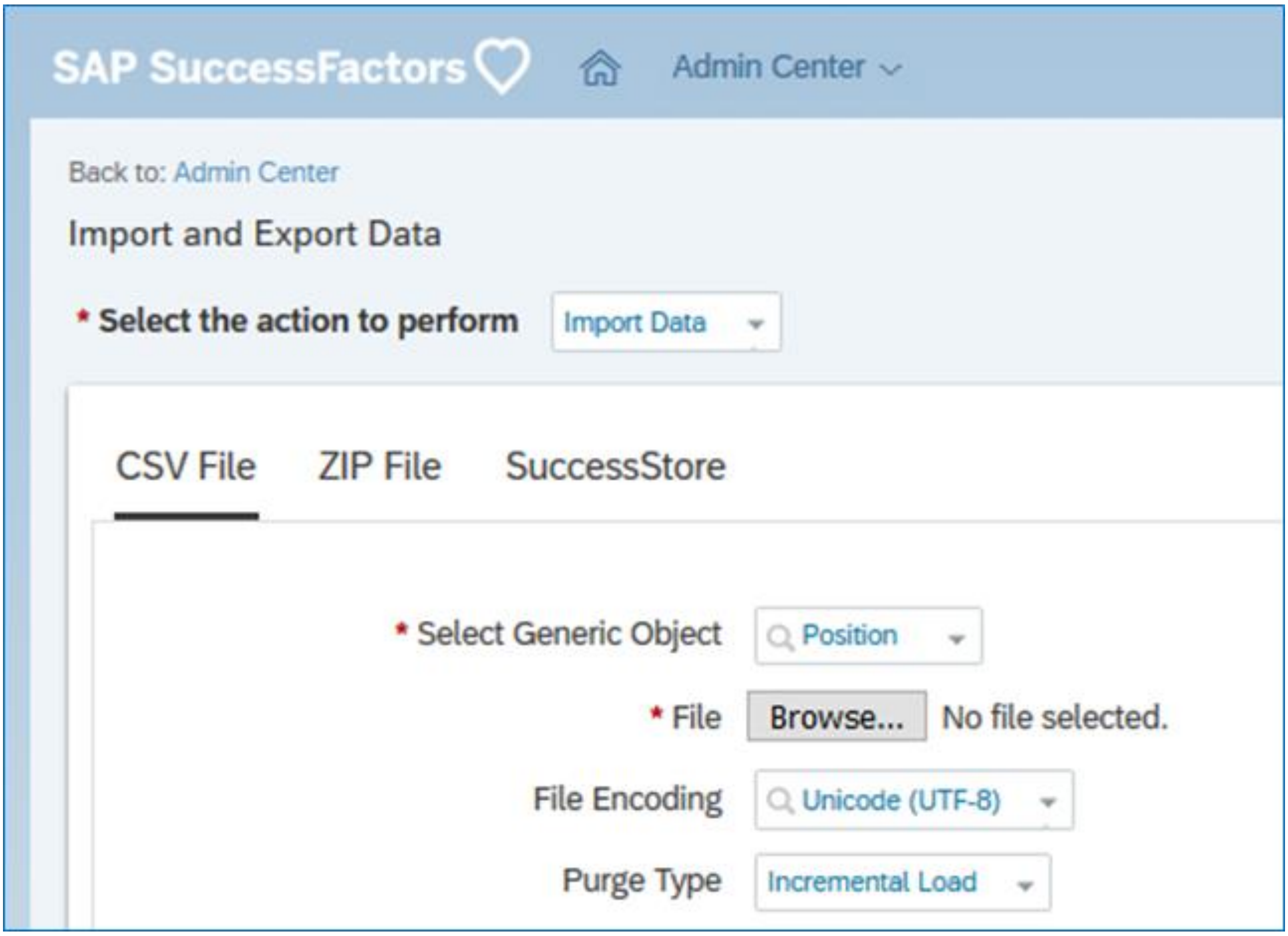
To import or export MDF position data from Admin Center, we use the Import and Export Data tool. This is the same tool that is used for any other MDF objects.
This tool can be used for initial load of position data as well as delta imports.

It is important to make the distinction between this tool and the Position Management: Import Positions and Position Management: Export Positions admin tools that are only relevant for legacy positions.

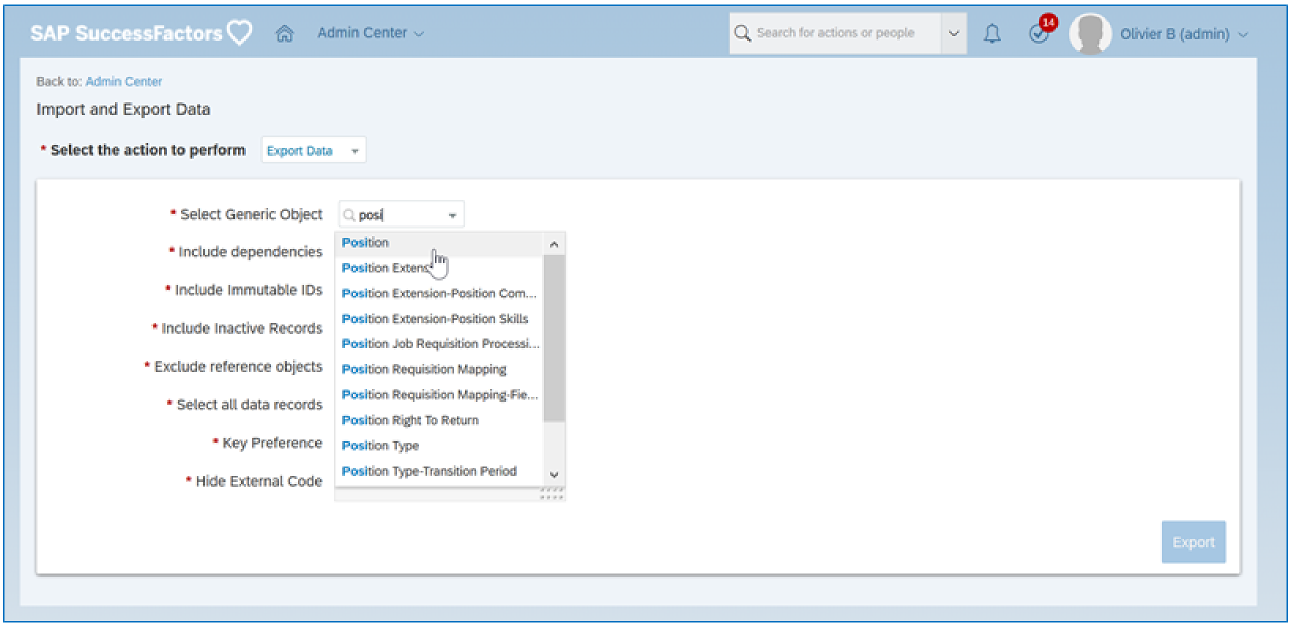
When the MDF Position based nomination method is used, there is a mechanism that will remove the RBP switch Position import and export as well as the corresponding options in Admin Center. This avoids confusion as Import and Export Data tool has to be used when the MDF position-based nomination method is activated.

- **Download the Template:**
  From Import and Export Data, for the drop-down menu Select the action to perform, we can choose Download Template.
  For Select Generic Object, we choose Position.
  For Include dependencies, we select No. This option is only required when the position object refers to other objects and those objects have to be imported as well.
  The template display fields that have been set to either Edit or Read-only in the position object definition. Fields set to Invisible in the position object are not available in the template.

- **Import the File:**
  To import the file containing the MDF position data, from Import and Export Data, we select the action Import Data and we select Position for the Generic Object. We will locate and upload the file.
  For the Purge Type, we generally choose Incremental Load. This is the suggested method of import. When importing a position file with this option, only the positions that are included in the file are updated. Indeed, with the incremental load option, positions that are not in the file will not be updated or deleted.



- **Export MDF Position Data:**
  To export the MDF Position Data, we select Export Data from the action menu in the Import and Export Data tool. We select Position for the Generic Object. We select the other export parameters needed and click on the Export button.
  The file will then be available to download from Admin Center, in the Monitor Job tool by clicking on Download Status.



Option 2: MDF Position Sync

MDF Position Management for NON-EC CUSTOMERS allows for special handling of vacant positions in Role Based Permissions. Until now, it was not possible to include vacant positions in the definition of the target population for RBP. Once an incumbent was removed, the vacant positions would not be visibly any more to the Succession Planner user. As the target population for Succession RBP is based on employee attributes in USERINFO_SYS (for example, Division), there would be no value for these attributes for a vacant position (no incumbent).

Now, you can update fields at the MDF Positions and fill them with fields from the employee's USERINFO_SYS data. If a position is turning vacant, the system will keep the field values at the MDF Position that were updated there when the position still had its incumbent before. This will take effect in all module areas that can render position information (for example, Succession Org Chart, Nomination/Succession Portlets, Adhoc reporting).

MDF Position Management is important because with this mapping mechanism, when using MDF Positions as your nomination method, you can define Role Based Permissions (RBP) for vacant positions, those without an incumbent, to allow certain user groups access to vacant positions, for example, within their own department or division. Information like the department is only available on a position without an incumbent, if you have previously updated the position with incumbent information. Then, after you remove the incumbent, that information remains at the position level.
Prerequisites include the following:

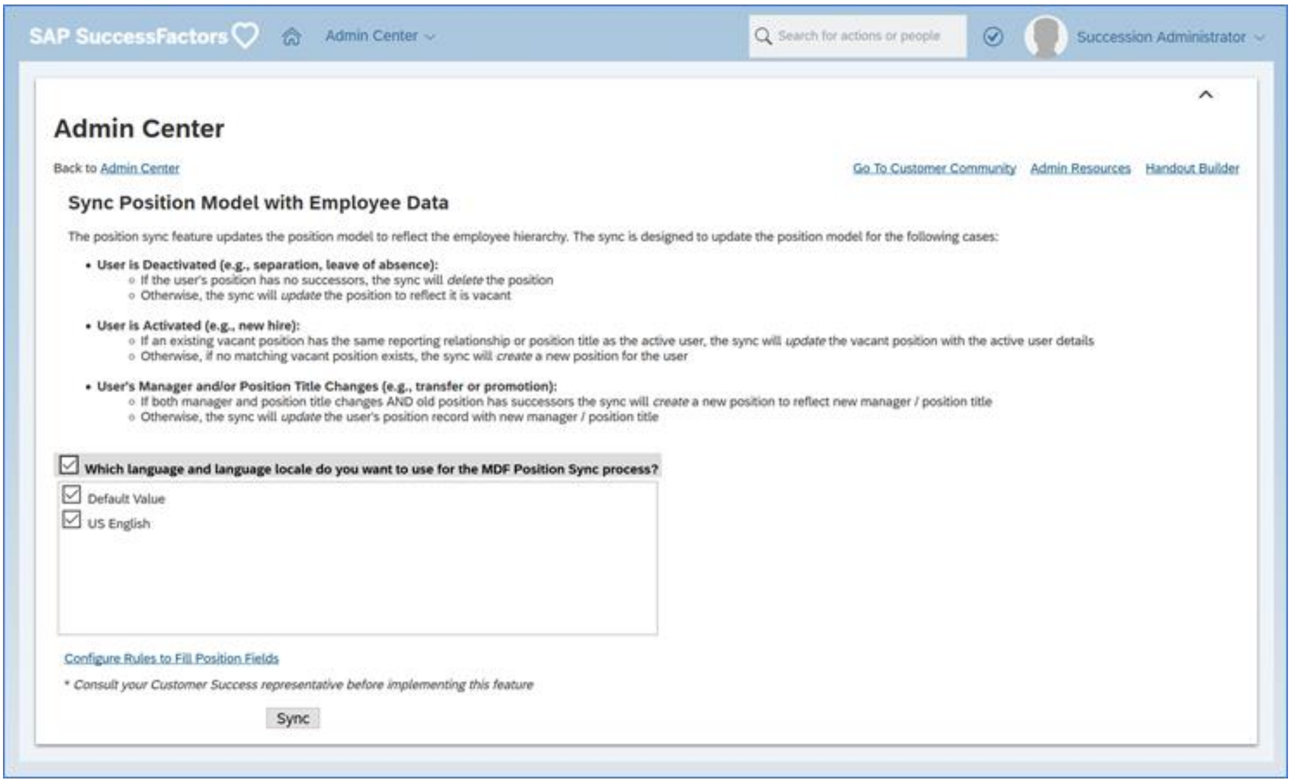
Admin Opt-In. This feature is universally added to the existing configuration screens in Admin Center. To actively use this mechanism you need to map incumbent attributes with position attributes in Admin Center → Succession Settings → Update Position Attributes.

The new feature will only show in Update Position Attributes if Employee Central (EC) Position Management is inactive in Provisioning.

There is no impact on existing MDF Position Sync processes if you choose to not configure this feature.

To select the language and locale for the MDF Position sync processes for non-Employee Central customers. This is being used for the sync of the position title only. If only one language is selected for copy, nothing happens to the other available language versions. This feature helps avoid errors in the sync update; up until this point, the sync process only ran with language EN_US. Customers who had maintained their positions in another language would get empty position titles after the sync. To avoid this issue, the sync now supports the flexible selection of the master language locale a customer wants to use for the sync.

The prerequisite is Admin Opt-In. Administrators can configure this functionality in Admin Center → Position management: → Sync Position Model with Employee Data.



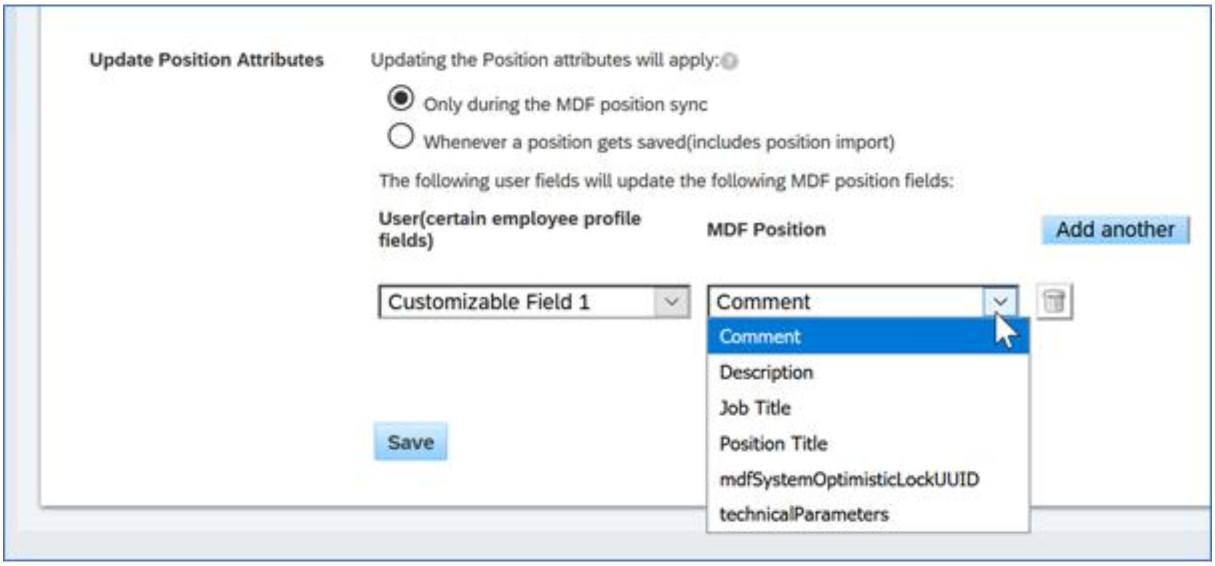
Updating of Position Attributes in Succession Settings

You can update position attributes by using Admin Center → Succession Management: Succession Settings → Update Position Attributes.

The user data will update the MDF position fields when any of the following conditions occur:

- Only during MDF Position Sync.
- Whenever a position gets saved (including position import).

Mapping can be done between standard fields as well as custom fields of USER_INFO_SYS and the fields of the MDF Object Position. Up to 10 fields can be mapped.



When updating position attributes, consider the following example:

- The Account Manager position is visible to the logged-in user because of the role based permission (RBP) settings.
- When the incumbent, Larry Lindsley, is removed, the position of Account Manager is still visible to the logged-in user because the attributes of the previous incumbent are still kept at the position and are considered in the RBP settings.

Lesson Conclusion – Updating the MDF Position Model via Import or Sync

In this lesson, you were exposed to MDF Position import and sync feature within Admin Center.

You should now be able to execute an import or sync to maintain your MDF Position data.

Unit Wrap-Up

In this unit, you covered:

- Lesson 6-1: MDF Position Object Configuration
- Lesson 6-2: Modification of Field Visibility
- Lesson 6-3: Field Label Changes and Translations
- Lesson 6-4: Custom Fields and Picklists
- Lesson 6-5: Associations and Searchable Fields
- Lesson 6-6: Miscellaneous Permissions and Position Target Populations
- Lesson 6-7: Updating the MDF Position Model via Import or Sync

You should now be able to:

- Modifications of the MDF Position Object and Fields
- Permissions and Target Populations Specific to MDF Position Method
- Data Management and MDF Position Management Options

Unit 7 – Nomination Features

Unit Objectives

This unit contains four lessons:

- Lesson 7-1 – Import Successors Tool
- Lesson 7-2 – Nominations Setup Overview
- Lesson 7-3 – Enabling Successor Ranking
- Lesson 7-4 – Formless Nominations and Approvals

Upon completion of this unit, you will be able to:

- Import successors for any succession nomination method
- Activate the successor ranking option
- Define the rules for the successor nomination approval

Lesson 7-1 – Import Successors Tool

Lesson Overview

The goal of this lesson is to provide details around the Import Successors tool and highlight the informative error messages.

Lesson Objective

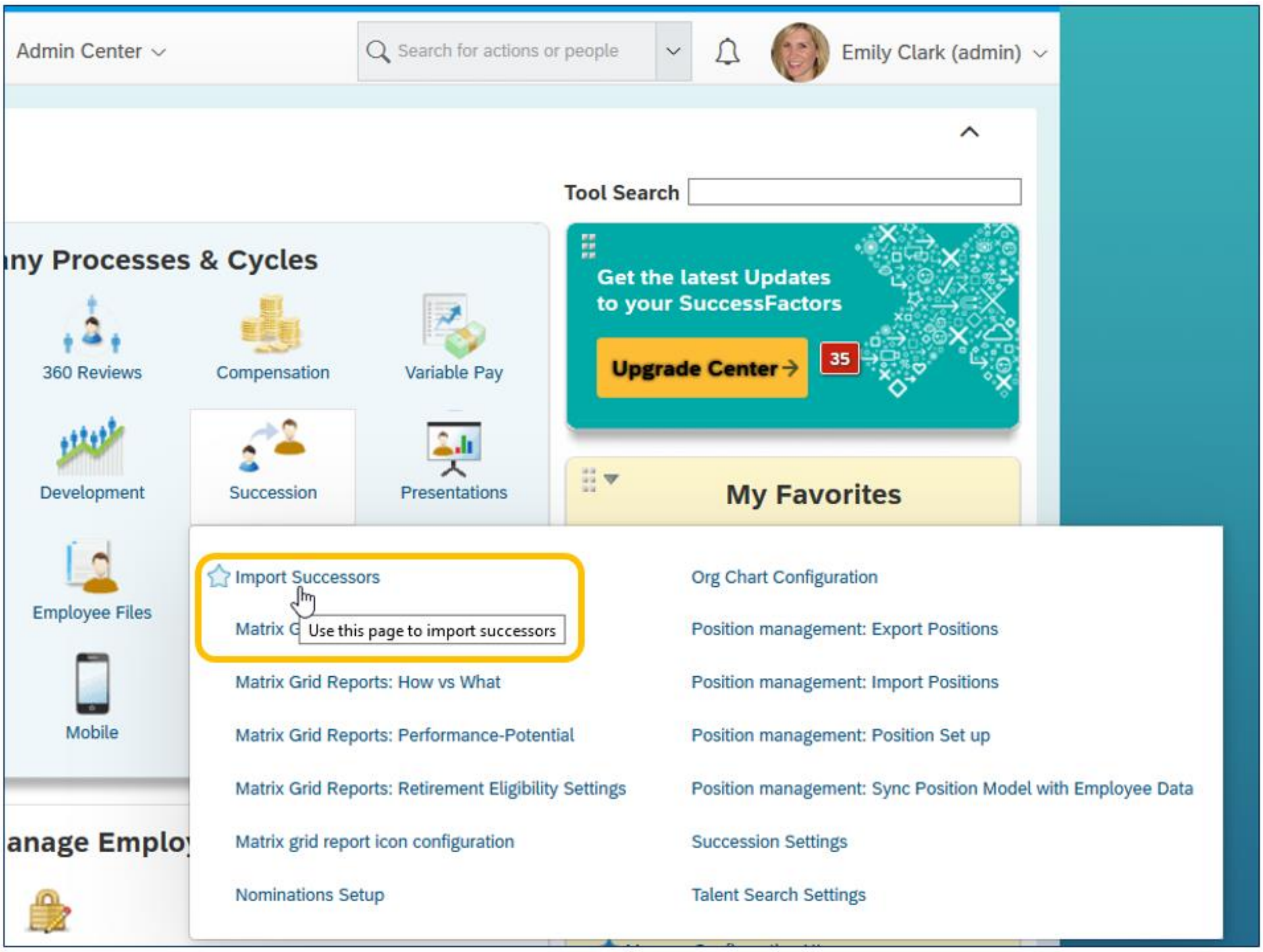
- Introduce the Import Successors section in Admin Center
- Preview the error messages to assist with import troubleshooting

What is it?

The “Import Successor” feature allows you to add, update, delete, and transfer successors using a csv file.

1. Use the Action Search and locate Import Successors.
2. Export the template using the "Export Template" button.
3. Fill the template with the required data and save it as a CSV file.
4. Go to the Import Successors page again > browse for the CSV File > click on "Import Successors".

The process will be submitted and you'll receive the results via e-mail.



What Succession Nomination Methods Can Use this Tool?

The import successors tool covers error analysis on any of the nomination methods: role/person, legacy position, MDF position as well as MDF Talent pool nominations.

Understanding the Template

The template is dynamically generated based on the nomination method being used in the environment. This happens because you need different fields to update nomination data, depending on your nomination method.

- When you have Role-Person Nomination Method, you will need the fields INCUMBENT_USERID and JOBCODE.
- When you have Legacy Positions, you will need the field POSITION_CODE.
- When you have MDF Positions, you will need the field GENERIC_POSITION_CODE.
- When you have Talent Pools, you will need the field POOL_CODE.

How to complete the template?

There are two key aspects of the Import Successors feature: (1) Identifying which incumbent/position you are trying to add successors to or modify existing nominations and

(2) identifying what you want to do to the nominations (action) and the nomination information (who is the successor and what is the associated readiness/ranking values).

Identifying the incumbent/position

For the Import Successors to work properly, you will need to provide information to allow the system to identify to which incumbent/position you are trying to add successors or modify nominations. Which fields you need to fill will depend on your nomination method and on the action you are taking.

See below the required fields for each nomination method and action:

For Add / Update / Delete:

Nomination method	Fields that need to be completed
Position	POSITION_CODE
MDF Positions	GENERIC_POSITION_CODE
Role-person	JOBCODE and INCUMBENT_USERID
Talent Pools	POOL_CODE

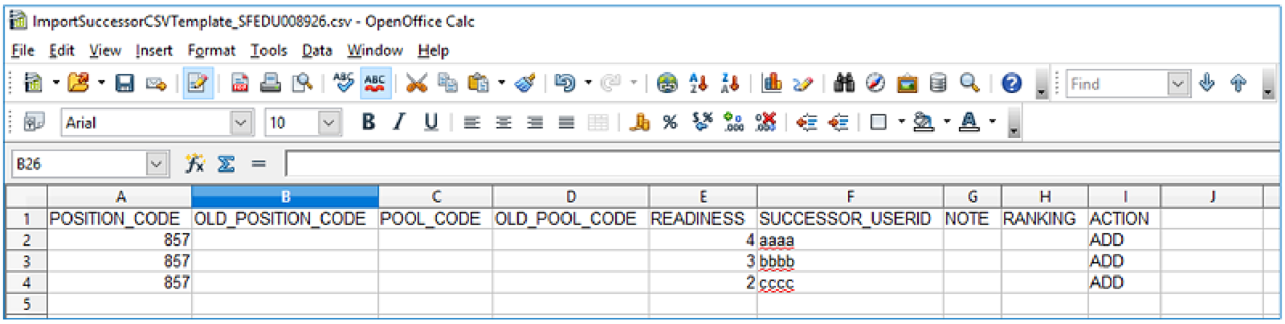
For Transfer:

Nomination method	Original successors come from	Successors will be transferred to
Position	OLD_POSITION_CODE	POSITION_CODE
MDF Positions	OLD_GENERIC_POSITION_CODE	GENERIC_POSITION_CODE
Role-person	OLD_JOBCODE + OLD_INCUMBENT_USERID OR OLD_JOBCODE + OLD_TBH_ID	JOBCODE + INCUMBENT_USERID OR JOBCODE + TBH_ID + TBH_MANAGER_USERID
Pool	OLD_POOL_CODE	POOL_CODE

Action and Nomination Information

1. **ACTION**: We support 4 types: ADD, TRANSFER, UPDATE, and DELETE. Currently leaving it as empty/ADD/UPDATE has no difference - system will try to update exist record first, if no record found, will create a new one.
2. **SUCCESSOR_USERID**: Required for ADD / UPDATE. For TRANSFER & DELETE, you can leave it blank and it will affect all existing successor/pending successors of a position/incumbent.

3. **READINESS**: Here, you need to use the Readiness Score number (from the Readiness Rating Scale), and not the label. You can find out what is the Readiness Score Number by going to Admin Center > Rating Scales > select "Readiness" rating scale. It is required for most cases, except for Talent Pools that don't require Readiness and for transferring and deleting nominations.
4. **RANKING**: Optional. It will only be available in the template if the setting "Enable ranking of successors" is enabled in Admin Center > Nominations Setup page.



	A	B	C	D	E	F	G	H	I	J
1	POSITION_CODE	OLD_POSITION_CODE	POOL_CODE	OLD_POOL_CODE	READINESS	SUCCESSOR_USERID	NOTE	RANKING	ACTION	
2	857				4	aaaa			ADD	
3	857				3	bbbb			ADD	
4	857				2	cccc			ADD	
5										

If enabled Talent Pool Nomination, for each row in input file, we will always validate the fields for the regular nomination method first. If failed, then validate for Talent Pool next.

Error Handling

The "Import Successors" tool offers a very detailed and concise analysis of failed imports, enabling system admins to easily fix wrong entries to achieve a 100% successful import.

The email notification with import status includes details about each failed line item, including recommendations how to resolve the issue.

The error analysis is part of the status email notification which the user who triggered the import will receive.

It covers error analysis of "succession nominations" on any of the nomination methods:

- role/person,
- legacy position,
- MDF position,
- MDF Talent pool nominations.

This option speeds up all successor import processing and self-service trouble-shooting for admin users. Typical errors often include invalid position codes, invalid talent pool codes, invalid user IDs, etc.

EC

Mon 11/5/2018 1:05 PM

Emily Clark <system@successfactors.com>

Import Successor Process Status (Mon Nov 05 07:05:11 EST 2018)

To BARRE, Olivier

Company: SFEDU008926.
Successors created: 0.
Successors updated: 1.
Successors deleted: 0.
Successors transferred: 0.
Successors failed: 2.
Successors without changes: 0.

Release: 20181101170038.
Server: 112ps4bcf63t.
Timestamp: 2018-11-05T07:05:11.757-0500.

Line 3: [29, null, 2, aaaabcieoipzp, This is from the import file, 2, null]
SUCCESSOR_USERID aaaabcieoipzp is invalid.

Line 4: [15678987, null, 2, aaaa, This is from the import file, 2, null]
POSITION_CODE 15678987 not found.

Lesson Conclusion – Import Successors Tool

You are now familiar with the Import Successors tool and the potential error messages associated with the import.

Lesson 7-2 – Nominations Setup Overview

Lesson Overview

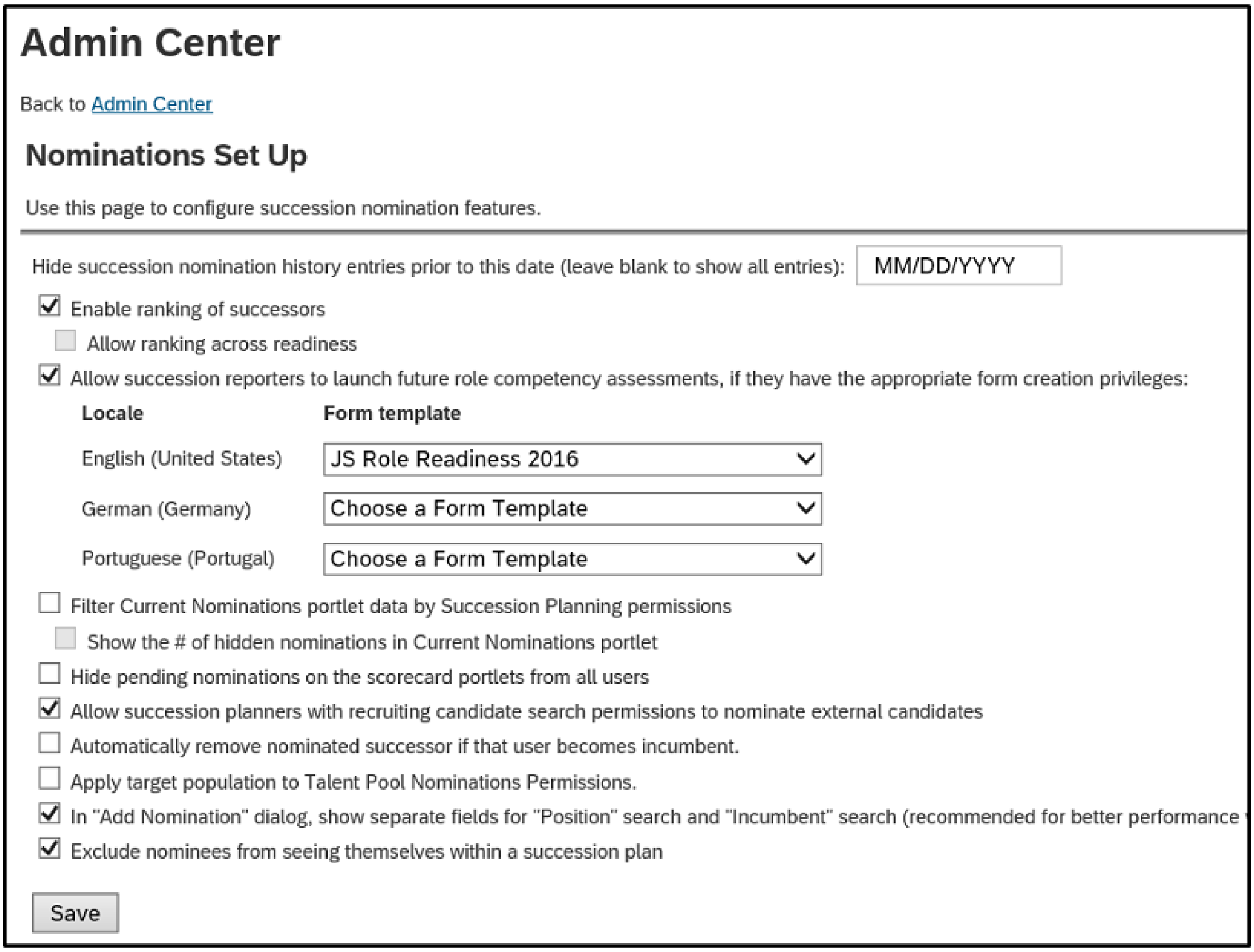
The purpose of this lesson is to introduce the nominations setup options and actions within Admin Center.

Lesson Objective

Become familiar with the most commonly utilized options for succession nominations and be able to enable desired features.

Nominations Setup Overview

Using the Action Search, find Nominations Setup. This area of Admin Center is used to configure succession nomination features.



Several of these features like successor ranking will be highlighted in this content. Below is a brief description of each option and their primary purpose:

Option Description	Primary Purpose
Hide succession nomination history entries prior to this date	Acts as a nomination history filter based on populated date
Enable ranking of successors	Allows the ranking option when nominating a successor

Option Description	Primary Purpose
Enable ranking across readiness	Allows further ranking to include the readiness level of the nominations
Allow succession reporters to launch future role competency assessments	With correct permissions to create forms, this option allows the launching of an assessment form for competencies related to a future role
Filter current nominations portlet data by Succession Planning permissions	Restricts data based on Succession Planning Permissions within Role-based permissions
Hide pending nominations on the scorecard portlet from all users	Restricts visibility of nominations within the scorecard
Allow succession planners with recruiting candidate search permissions to nominate external candidates	If you have SAP SuccessFactors Recruiting implemented, you can enable succession planners to add or nominate external candidates from the Recruiting candidate pool
Automatically remove nominated successor if that user becomes incumbent	If an employee, who was nominated as a successor to a position, actually becomes the incumbent, you can enable the system to remove that employee from the successor list for this position automatically.
Apply target population to Talent Pool Nominations Permissions	Extends access to other user groups where target populations to the talent pool object have also been enabled for the relevant RBP settings
In "Add Nomination" dialog, show separate fields for "Position" search and "Incumbent" search	This configuration option splits the position search in the nomination dialog into two fields: one to search by incumbent name and the other to search by position.
Exclude nominees from seeing themselves within a succession plan	Restricts nominees from seeing themselves within succession org chart, lineage chart, position tile, and other succession tools or a list of employees that contains themselves using Talent Search. Also restricts ability to nominate themselves.

Once you decide which features to utilize, simply enable the checkbox and save your choices. Be sure to log out and log back in as a best practice when making changes within the Admin Center.

Lesson Conclusion – Nomination Setup Options

You are now familiar with the nomination setup options and actions.

Lesson 7-3 – Enabling Successor Ranking

Lesson Overview

The goal of this lesson is to provide details around the successor ranking options.

Lesson Objective

- Enable Successor Ranking

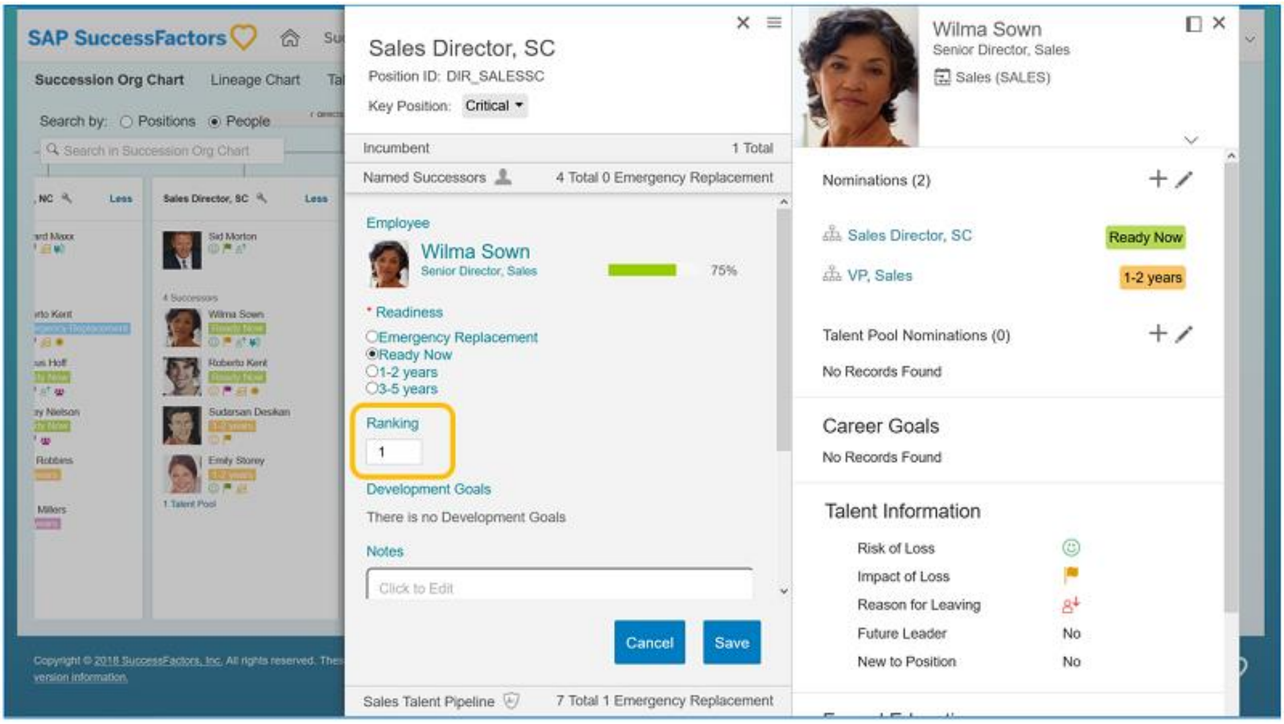
Successor Ranking Overview

It is possible to enable users to rank successors for a position, within or across their readiness ratings depending on the selected option. A ranking value is not required, but successors who are ranked (with a value) are ordered ahead of successors who are not ranked.

Activating in Nomination Setup

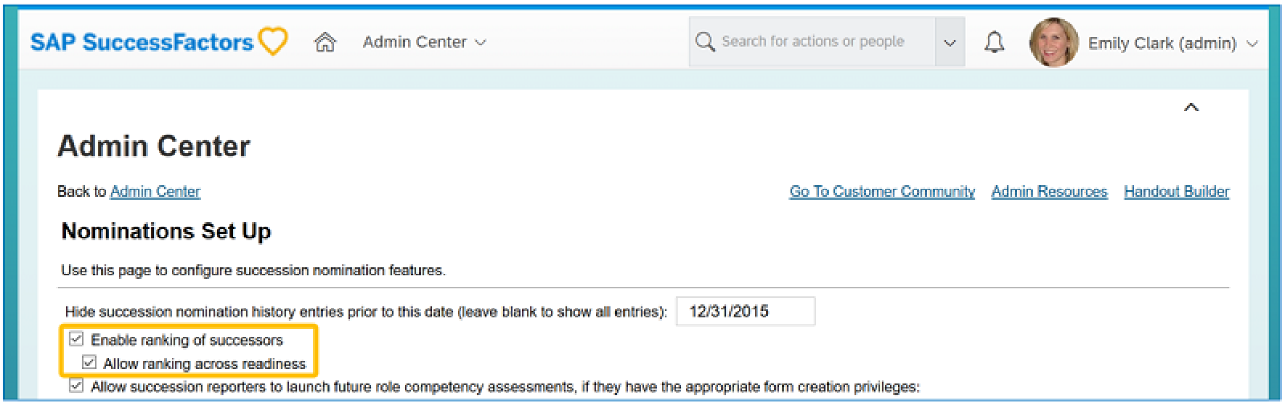
1. Go to Admin Center → Succession → Nomination Setup
2. Select Enable ranking of successors

When this option is enabled, users can enter an optional, numeric ranking in the nominations dialog. The system sorts successors for a position by their readiness rating by default. When this option is enabled, users can rank the successors within each readiness level so that successors are sorted first by readiness, then by the raking values you assign, and then by their full names.



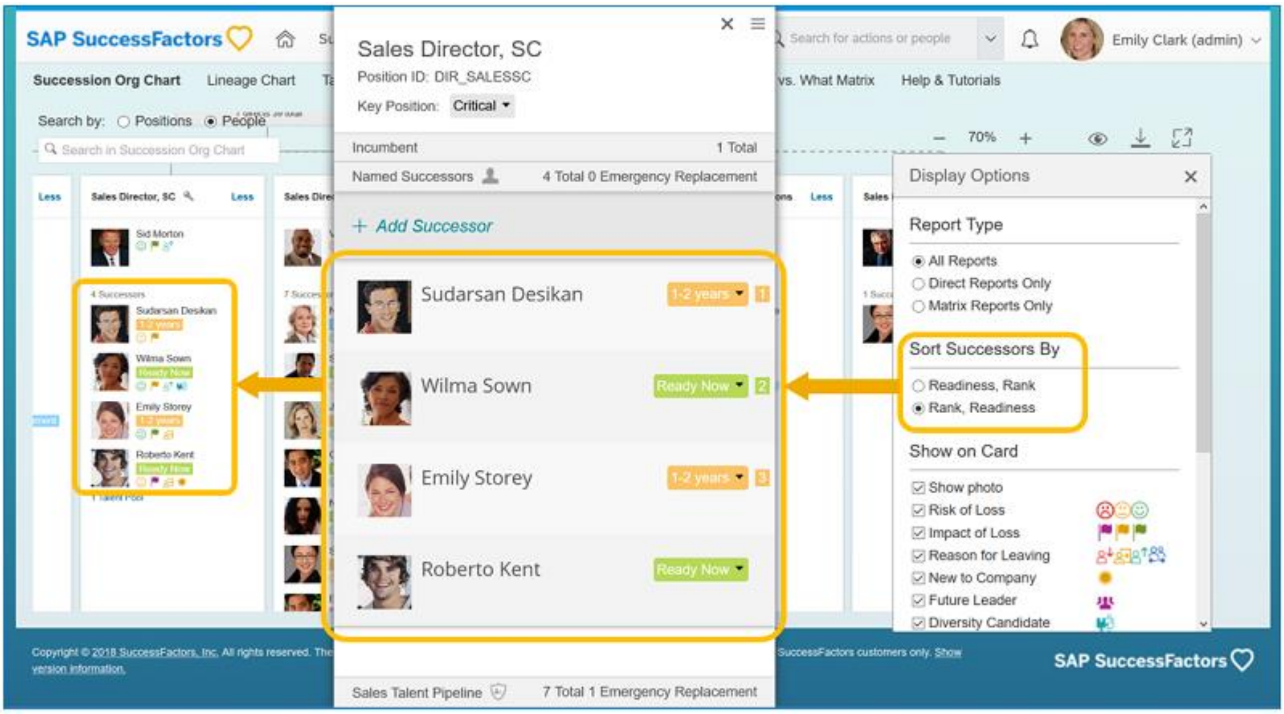
Ranking Across Readiness

If you want to allow succession planners to rank successors to a position regardless of their readiness level, the option Allow ranking across readiness has to be selected as well.



With both settings selected, a sorting option is available on the Succession Org Chart V12 under Display Options. Users can sort successors by:

- Readiness, Rank: this sorts the successors first by their readiness rating and then their rank
- Rank, Readiness: this sorts the successors by rank first



Lesson Conclusion – Enabling Successor Ranking

You are now familiar with the successor ranking options.

Lesson 7-4 – Formless Nominations and Approvals

Lesson Overview

The goal for this lesson is to discuss Formless Nomination and Approvals in Succession Management.

Lesson Objective

- Introduce the formless (also known as instant) nominations and approvals features and the permissions needed to execute the approval.

Advantages of Formless Nominations and Approvals

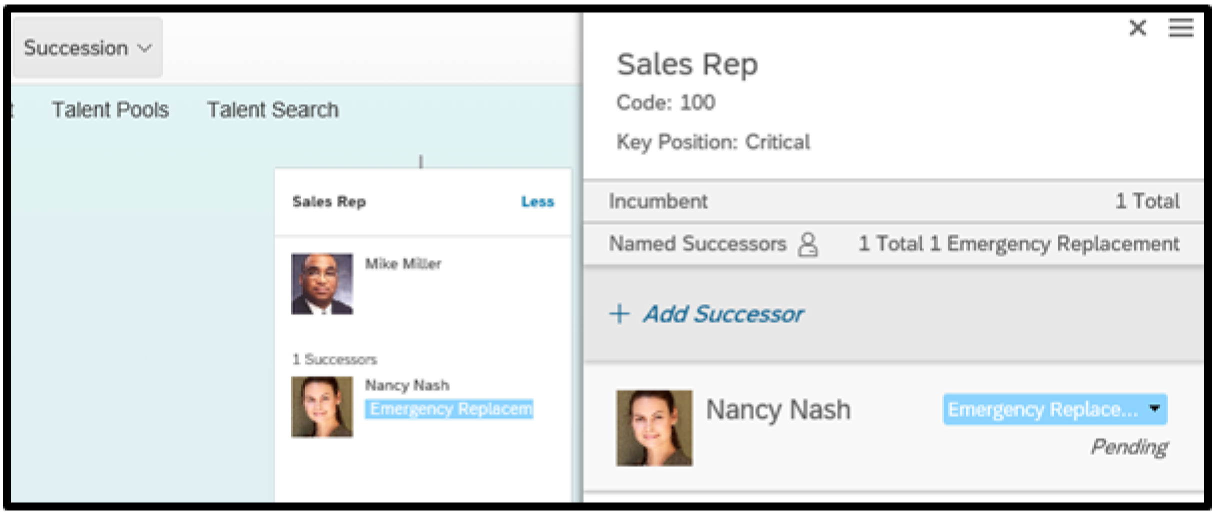
Formless nominations and approvals have many advantages as listed below:

- Designs plans directly on the Succession Org Chart that are an easier/faster process for users
- Allows individual additions or removals from succession plans
- Supports simultaneous changes to the same succession plan by different users
- Creates a workflow that starts with the nominee instead of the incumbent
- Supports Pool-based nominations and successor ranking within readiness
- Works with Position and Role-Person nomination methods
- Records all new and changes to readiness and comments within the Nomination History

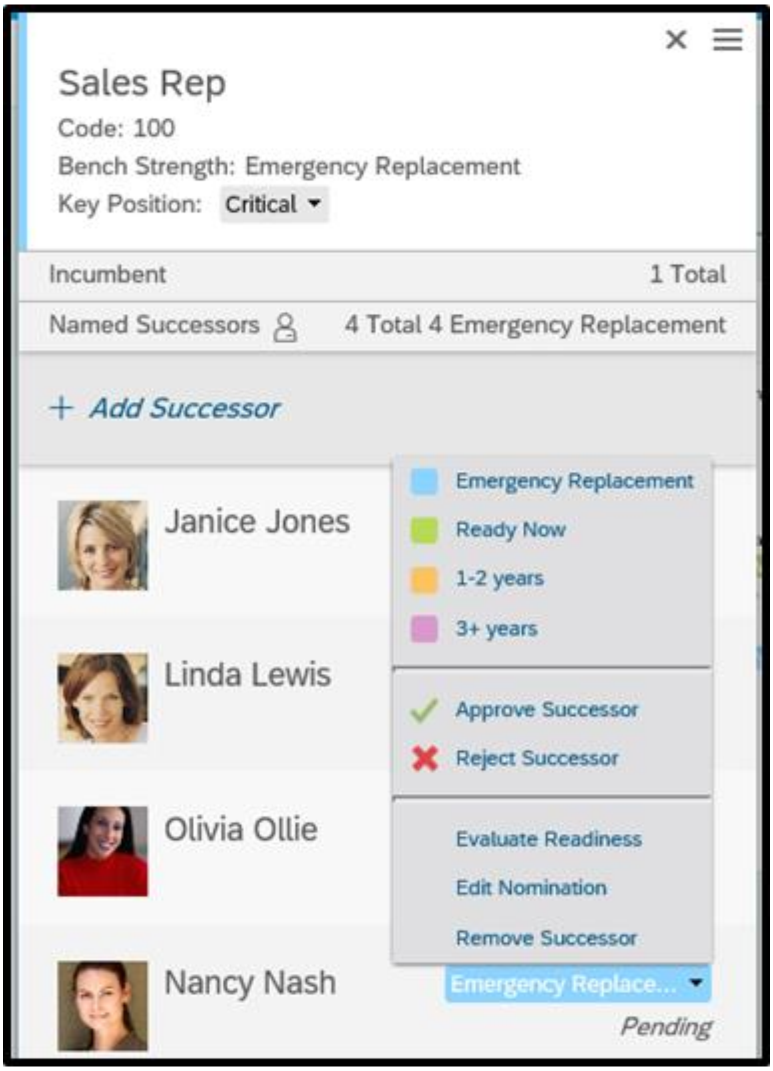
Approvals Feature

If approvals are not enabled, all nominations take effect immediately and go straight to "approved" status. If approvals are enabled, new nominations (as well as removals and readiness changes) will be in a "Pending" status until a user approves the change as in screenshot below:

!	If these features were not enabled during your implementation, you will need the assistance of your Professional Services partner or Customer Success.



The approve or reject successor option appears when a role with the approval permission accesses the Succession Org Chart and clicks on the dropdown of the nominee:



Role-Based Permissions for Approvals

Once these features are properly configured in your system, make sure that the Succession Planner or designated approval role holds the correct permissions. To verify this information, navigate to Admin Center > Set User Permissions > Manage Permission Roles. Click on the appropriate role and then the Permission button. After completing these steps, you should see a similar screen as below. Select Succession Planners to view the Succession Approval Permission. Enable the permission by checking the box and click Done. You will also need to select the Save Changes button to complete this change.

Rules Applying to Nomination and Approval Permissions

- If more than one person is set as an approver for a particular incumbent or position, only one approval (from any of the approvers) is required to approve the nomination or change.
- Approvers will go to the Succession Org Chart to approve nominations. Pending nominations requiring approval will be displayed on the succession org chart nodes in a separate section below the approved nominees (if any).
- Nominees in a pending state are only visible to users with succession planning permissions or succession approval permissions for that incumbent/position.
- Users can be both planners and approvers. If a user has both permissions, nominations he/she creates take effect immediately and go straight to "approved" status.
- An approver has a scope of permissions to approve for positions when the position management method is used or incumbents when the role-person method is used.
- If the approval process was enabled during succession planning activities and is then disabled in Provisioning, pending nominations or changes will be lost---only approved nominations and changes will be retained.

Exercise – Grant Approver Permissions, Nominate a Successor, and Approve Nominee (2)

In this exercise, you will grant approver permissions, nominate a successor and approve nominee.

Task 1: Changing Approvers Role in RBP

Once the formless nomination approval workflows are enabled in Provisioning, you need to grant the permission to your approvers to approve the forms.

1. Connect to your instance as an Administrator.
2. Use the Action Search to locate Manage Permission Roles.
3. Select your Succession Planner role and the Permission button.
4. Click Succession Planners in the left menu.
5. Check the Succession Approval Permission checkbox.

6. Since this permission requires a target to be set, confirm that the target is set to everyone.
7. Save your changes.

Task 2: Test Your Changes

It is now time to test the changes you have made to your instance from a manager's perspective (without approval permissions) first, and then from a Succession Planner perspective (with approval permissions).

Manager View
The managers do not have permission to approve nominations, but they can nominate. You will test this behavior in that first part.

1. Connect/proxy as Manager.
2. From the SOC, nominate a successor to a position.
3. You should now see a nomination pending to be approved in the successors list.

Succession Planner View
You have granted the permission to the Succession Planners to approve nominations. Test the approval permissions by following these steps:

1. Connect/proxy as Succession Planner. From the SOC, go to an employee with a pending nomination.
2. Approve the pending nomination.

Nominating as an Approver

Being an approver, the nominations you create do not need to be approved. Test this behavior by:

1. Connecting as Administrator. The admin user also has the Succession Approval permissions.
2. From the SOC, navigate to the position with the nominee.
3. Nominating a successor for that position.
4. The nomination displays in the named successors lists, without having to be approved.

Lesson Conclusion – Formless Nominations and Approvals

In this lesson, you were exposed to the Formless Nominations and Approvals process.

You should now be able to:

- Permission and approve a nomination

Unit Wrap-Up

In this unit, you covered:

- Lesson 7-1 – Import Successors Tool
- Lesson 7-2 – Nominations Setup Overview
- Lesson 7-3 – Enabling Successor Ranking
- Lesson 7-4 – Formless Nominations and Approvals

You should now be able to import successors for any succession nomination method, activate the successor raking option, and define the rules for the successor nomination approval.

Unit 8 – Succession Nomination Tools and Reports

Unit Objectives

This unit contains six lessons:

- Lesson 8-1: Succession Org Chart v12
- Lesson 8-2: Lineage Chart Access
- Lesson 8-3: MDF Talent Pools and Permissions
- Lesson 8-4: Talent Search v2
- Lesson 8-5: Matrix Grid Reports v12
- Lesson 8-6: Position Tile View

Upon completion of this unit, you will be able to:

- Define Succession Nomination Tools and Usage
- Identify options located within Admin Center for the Succession tools

You should also be equipped to maintain or modify Admin Center settings and view nomination data using the Succession Org Chart v12, Lineage Chart, MDF Talent Pools, Talent Searchv2, and Matrix Grid Reports v12.

Lesson 8-1 – Succession Org Chart v12

Lesson Overview

The Succession Org Chart v12 provides a new user experience with talent card emphasis.

Lesson Objectives

- Discuss the design and layout of the Succession Org Chart and the Succession Administrator's ability to modify the information presented on the Succession Talent Card
- Learn to edit features of the Succession Org Chart which change the display to the user
- Define the Bench Strength

How Can I Turn On the Succession Org Chart v12?

Once the feature is enabled, your original icon setup of the succession org chart will translate to the new user experience. If you would like to modify your original icons or display text options, you will need to contact Customer Success or Professional Services.

	To activate or enable the Succession Org Chart v12, you will need to contact Customer Success or look for the option in the upgrade center.

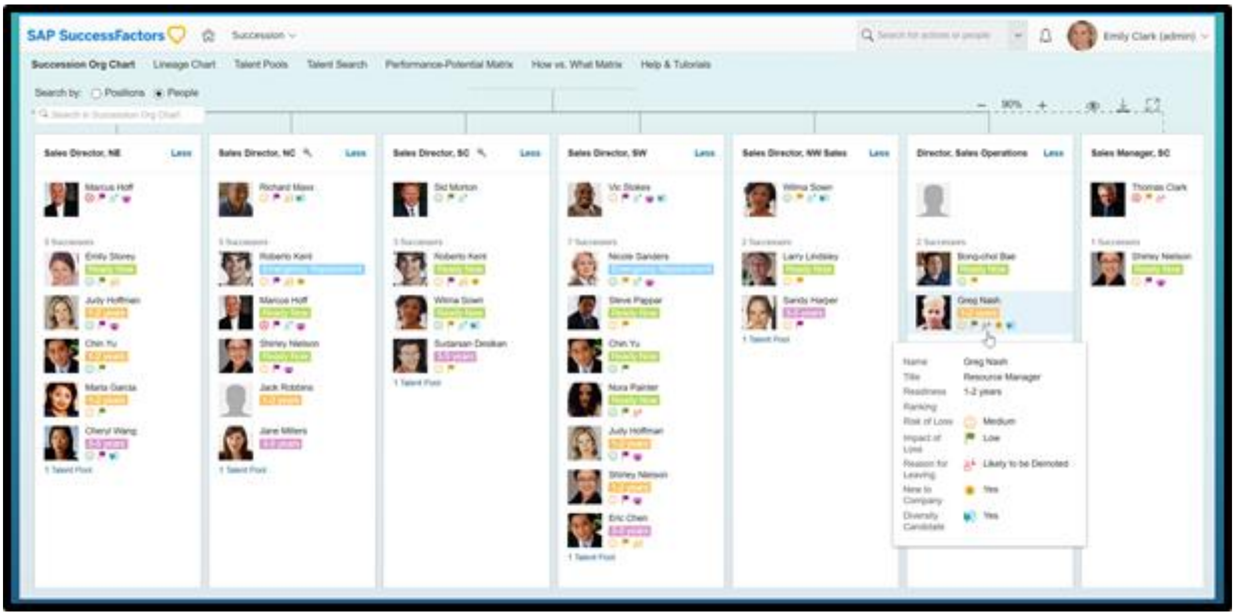
What are the Benefits of Succession Org Chart v12?

Benefits introduced by the Succession Org Chart:

- No flash
- Easy access to key functions
- Talent Card
- Close integration with development planning
- Support for multi-incumbent positions (for EC customers)
- Smart layout
- Recent searches

Succession Org Chart v12

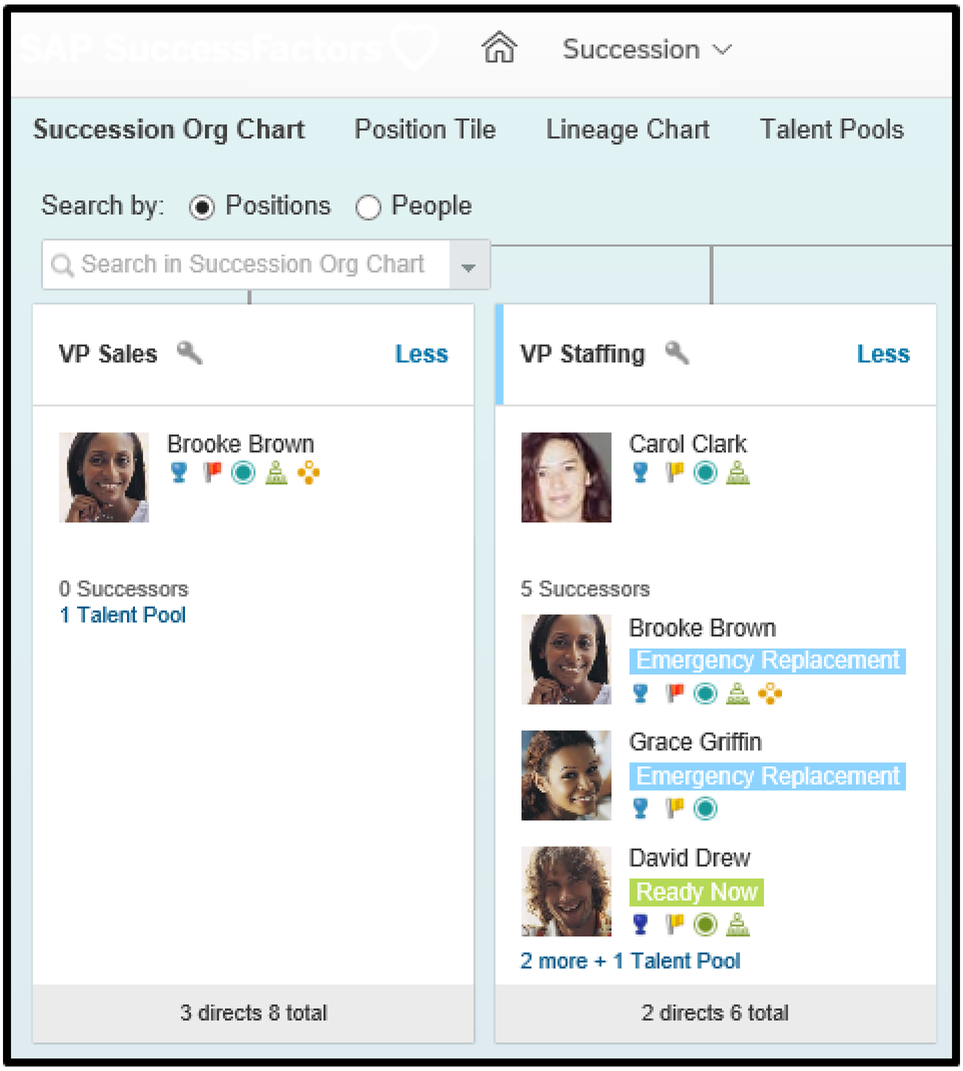
The Succession Org Chart v12 is unique in its format. The clean, precise look allows for easier viewing of the hierarchy and presents data within the Succession Talent Card layout.

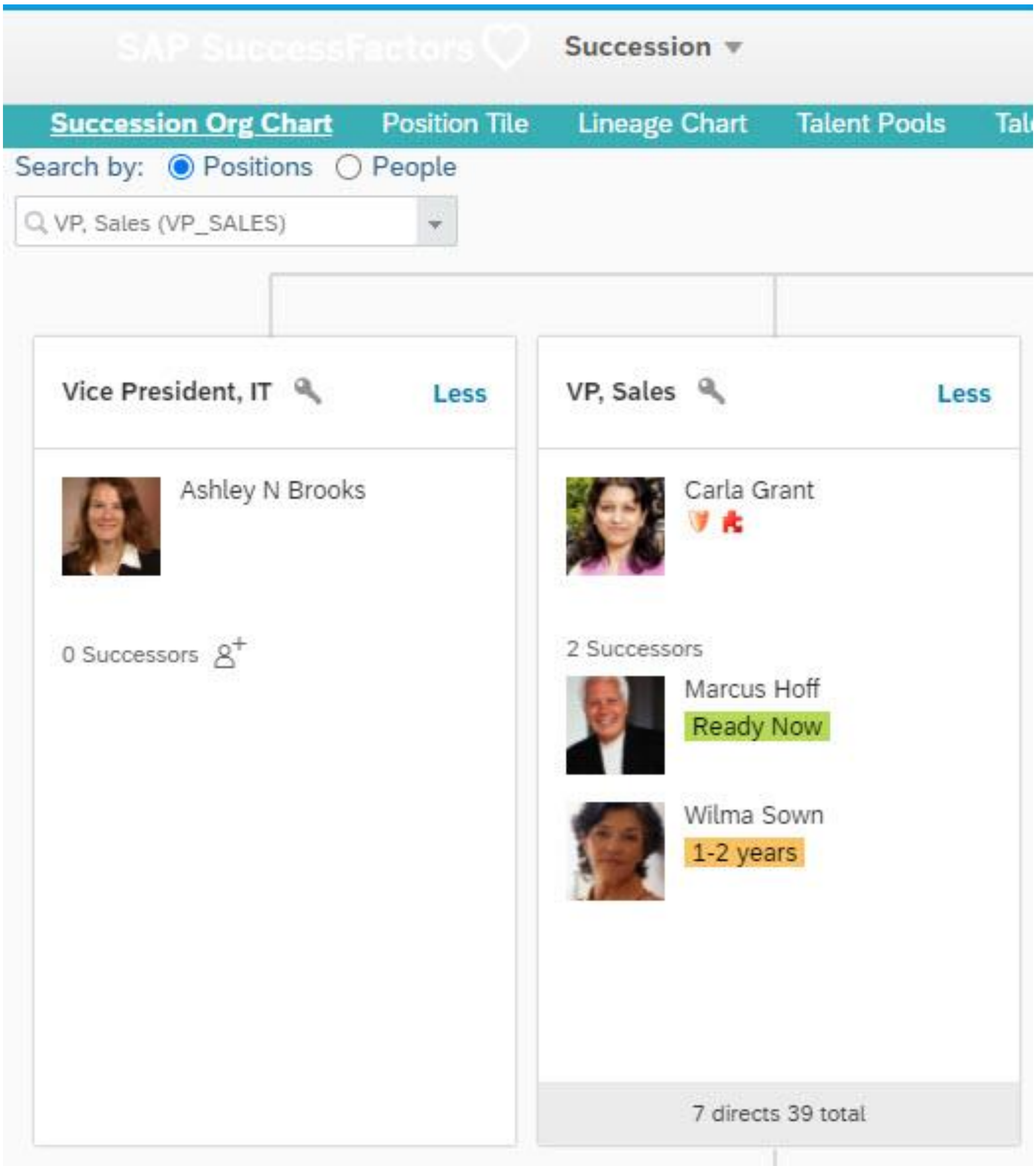


Search by Position or People

When using the search feature, simply place your cursor into the search box and begin typing the position or person's name. The fact that there are two radio buttons to define if we want to search by Positions or People is only relevant with the MDF Position based nomination method is used. If the legacy position based nomination is used, there will only be one search field with the label “Search in Succession Org Chart”.

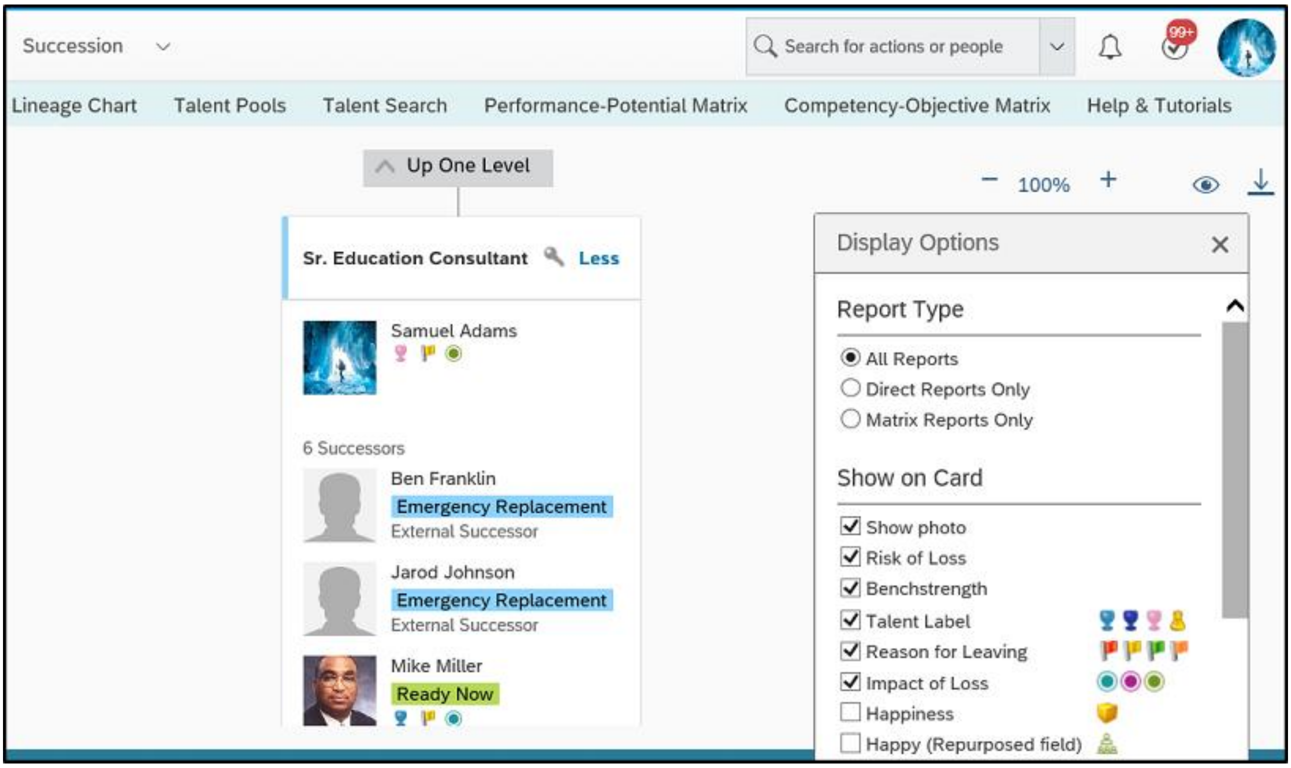
To access the Show and Edit Position and Hide Position options, click on the Succession Org Chart. Keep in mind that these options are controlled by permissions.


Succession
Succession Org Chart
Position Tile
Lineage Chart
Talent Pools
Search by: Positions People
Search in Succession Org Chart
VP Sales
Less
Brooke Brown
0 Successors
1 Talent Pool
3 directs 8 total
VP Staffing
Less
Carol Clark
5 Successors
Brooke Brown
Emergency Replacement
Grace Griffin
Emergency Replacement
David Drew
Ready Now
2 more + 1 Talent Pool
2 directs 6 total



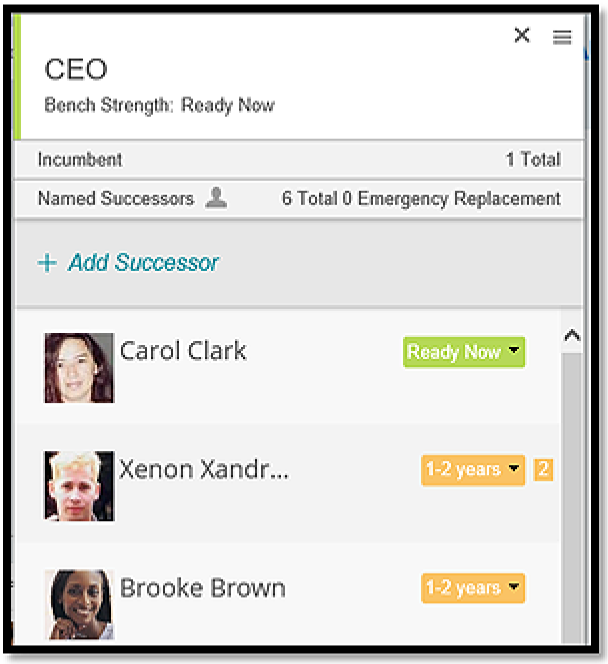
Display Options

Display Options play a very important role as to what you see on the Succession Org Chart. Simply access these options by clicking on the eye icon on the right side of the page.

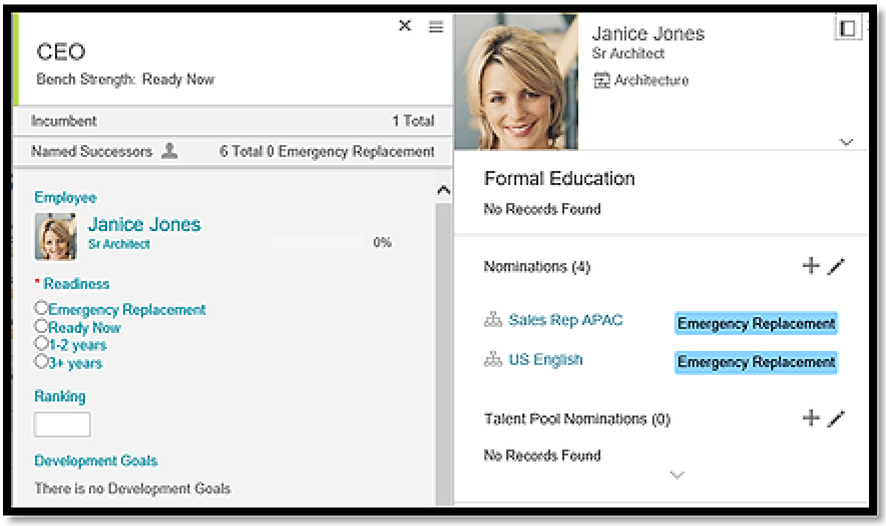


Nominations

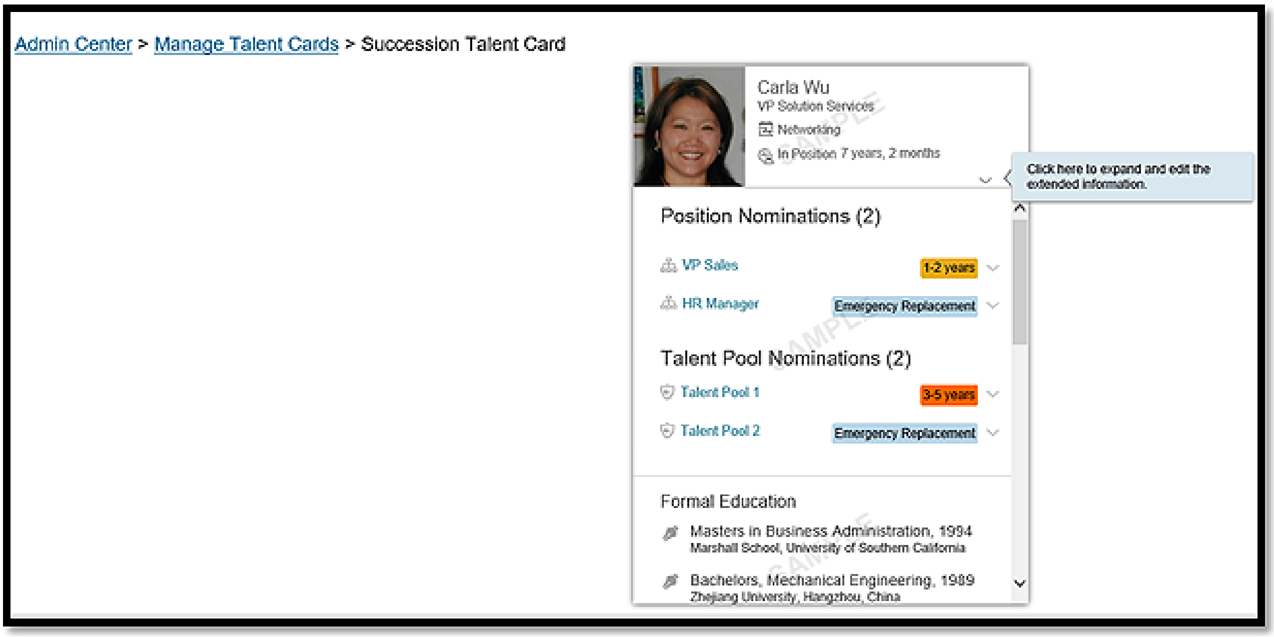
To nominate to the SOC v12, click on the chart and the Add Successor like below:



Then, search for the employee name or click on Advanced Search. When searching on a specific employee, the system pulls data on the nominee and allows actions like below:



Do note that the information within the Add Successor Talent Card section is configurable if you have Administrator privileges. To add more details within the Succession Talent Card, navigate to Admin Center > Presentations > Manage Talent Card. Click on Succession Talent Card link:

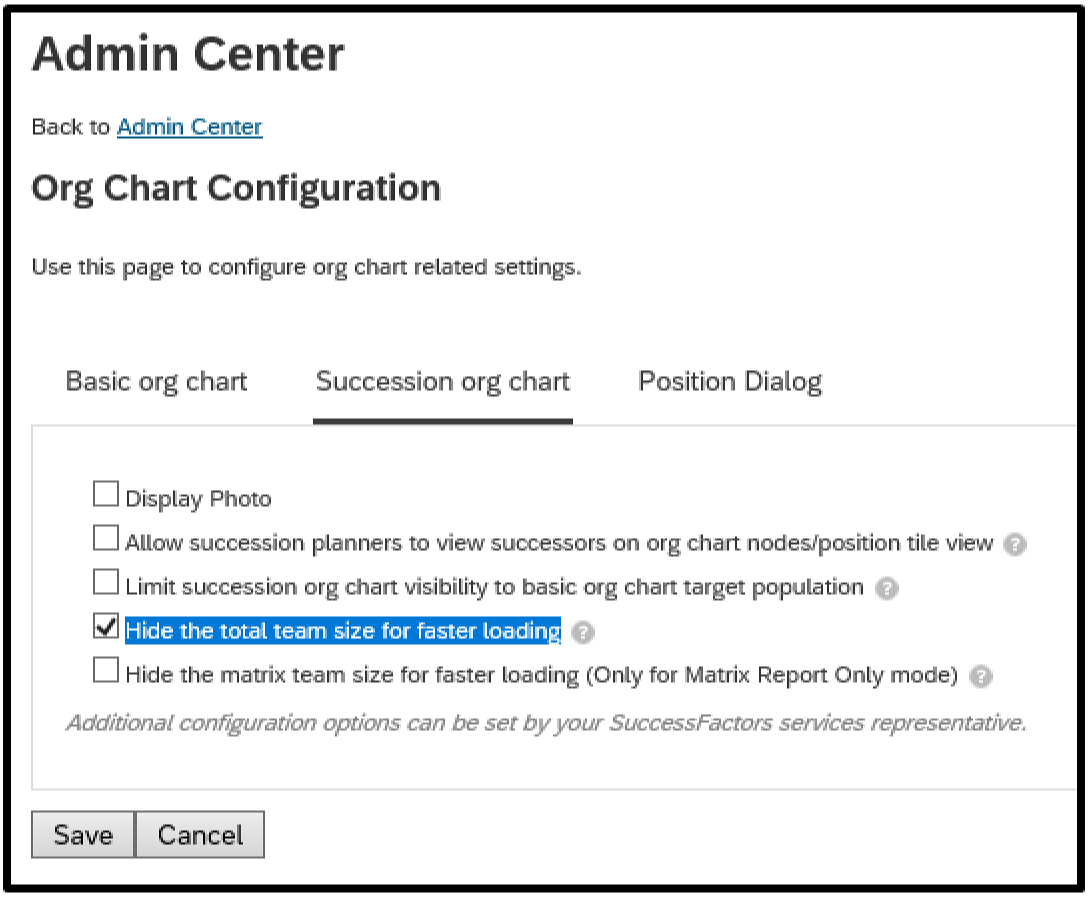


Be sure to scroll to the bottom of the card if you would like to Add a Section.

Once you have completed this action, navigate to Succession > Succession Org Chart and click a person within the chart to view Succession Talent Card information.

What Configurations Can be Modified with the Succession Org Chart?

The Succession Org Chart v12 visually shows employees, position information, and nominated successors. You can control many options within the chart by enabling or disabling the checkboxes within Admin Center > Succession > Org Chart Configuration.



Below is a list and brief description of the options controlled within this section:

Feature	Description
Display Photo	Displays employee photo on the Succession Org Chart when this feature is enabled
Allow succession planner to view successors on org chart nodes	Controls whether or not users with Succession Reporting permissions can view successors on the org chart nodes
Limit succession org chart visibility to basic org chart population	Limits Succession Org Chart visibility to basic org chart target population
Hide the matrix team size for faster loading (Only for Matrix Report Only mode)Limit succession org chart visibility to basic org chart population	Hides the matrix team size for faster loading (Only for Matrix Report Only mode)Limits Succession Org Chart visibility to basic org chart target population
Hide the total team size for faster loading	Hides the total team size for faster loading

When using MDF Position Nomination Method, the system also loads the total size of his or her team and the relevant position and succession information. Then, you can expand the org chart and navigate to any user along the reporting line.

The Succession Org Chart may take a long time to be loaded for a senior executive who might have hundreds or even thousands of users reporting to him or her. To make sure that it loads faster, you can specify that the chart doesn't load the total team size and only the direct reports are loaded.

From Admin Center > Org Chart Configuration > Succession Org Chart, select Hide the total team size for faster loading.

	This area of Admin Center as well as others may have different options or features depending on which succession nomination method you are utilizing.

Bench Strength Overview

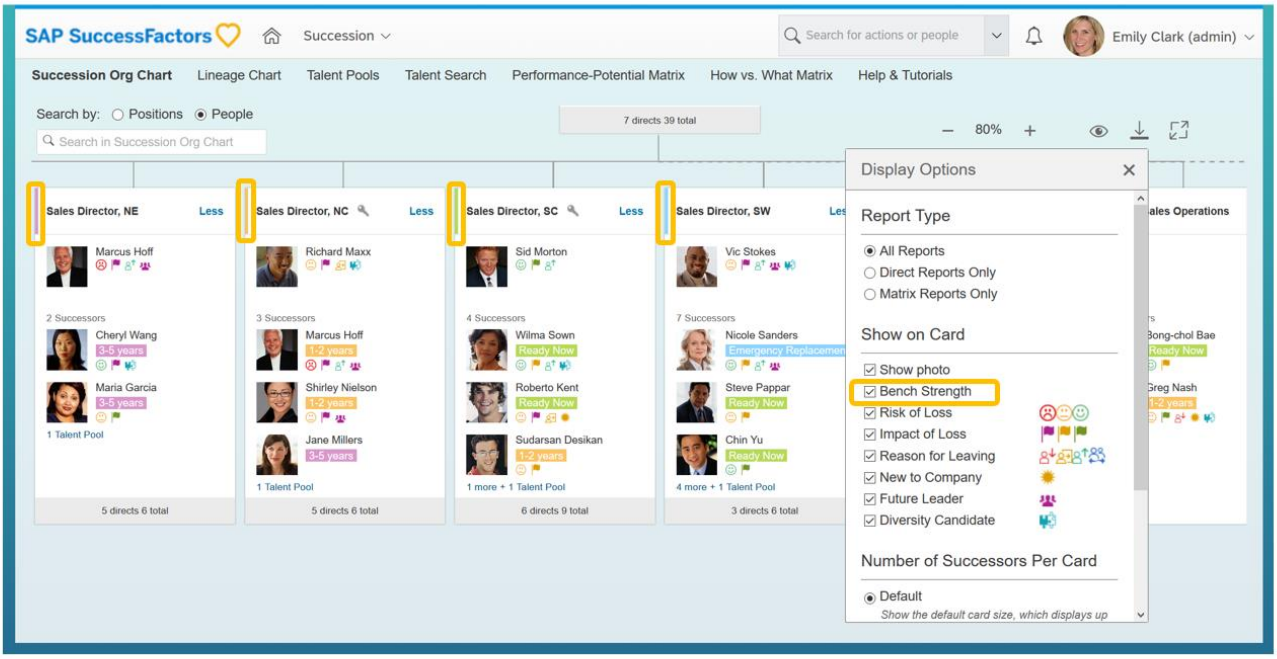
The bench strength indicator provides a quick visual cue to succession planners of the overall state of the Succession Org Chart. It allows to spot those positions most at risk due to low successor readiness, or bench strength.

The system calculates the bench strength for each position based on the highest readiness level among all the successors nominated for that position.

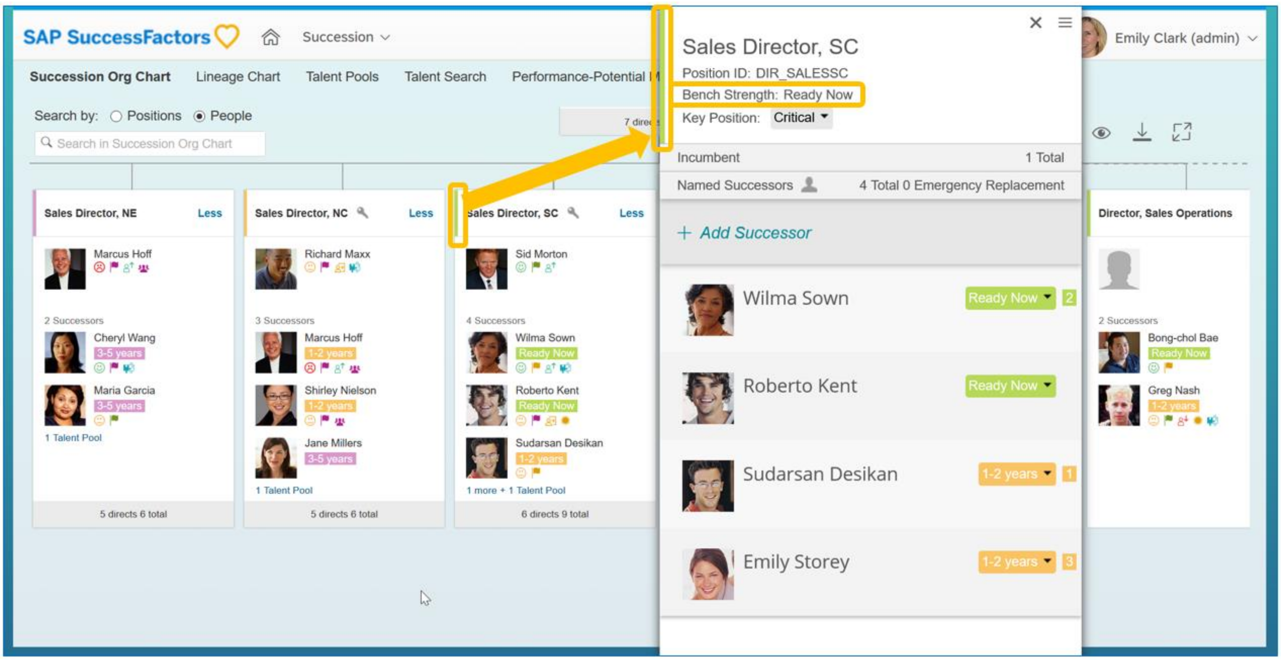
For example, if the highest readiness value is Emergency Replacement and then Ready Now, when a position has a successor who is Ready Now and no successors have Emergency Replacement for that position, then the bench strength will be Ready Now.

When it is configured correctly, the bench strength will be available in the Display option and it will be visible directly in the Succession Org Chart with a color code.

	The configuration of the Bench Strength is essentially done from the back-end which can be done by the Professional Services consultant during an implementation project.



The Bench Strength is also visible in the Position Dialog Card.



Lesson Conclusion – Succession Org Chart v12

In this lesson, you were introduced to the basics of the Succession Org Chart v12 and the Succession Talent card.

You should now be able to:

- Perform next steps for the enabling and previewing the features
- Perform the necessary changes which are unique to your company environment
- Define the Bench Strength

Lesson 8-2 – Lineage Chart Access

Lesson Overview

The Lineage Chart allows you to quickly identify gaps and risks in the readiness chain.

Lesson Objective

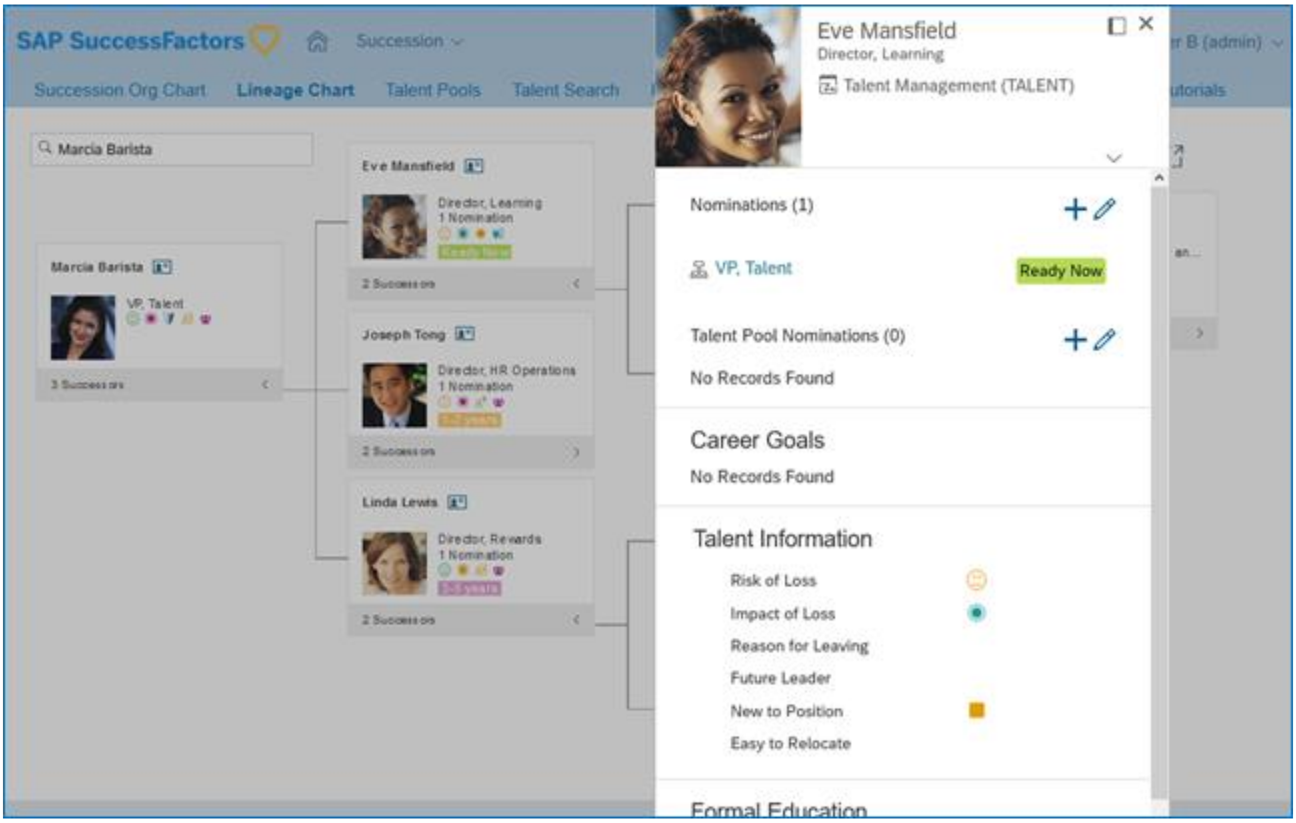
- Describe the Lineage Chart.

Lineage Chart Overview and Benefits

The lineage chart offers you a way to examine overall succession coverage below a given incumbent or position. Lineage Chart helps analyze the likely effect before a high-level succession plan is taken into action.
It shows the succession linage, or continuity, starting from a given incumbent or position. In line with the overall SAP Fiori design standards, Lineage Chart offers a more intuitive and modern user experience.

There are several benefits for the Lineage Chart v12:

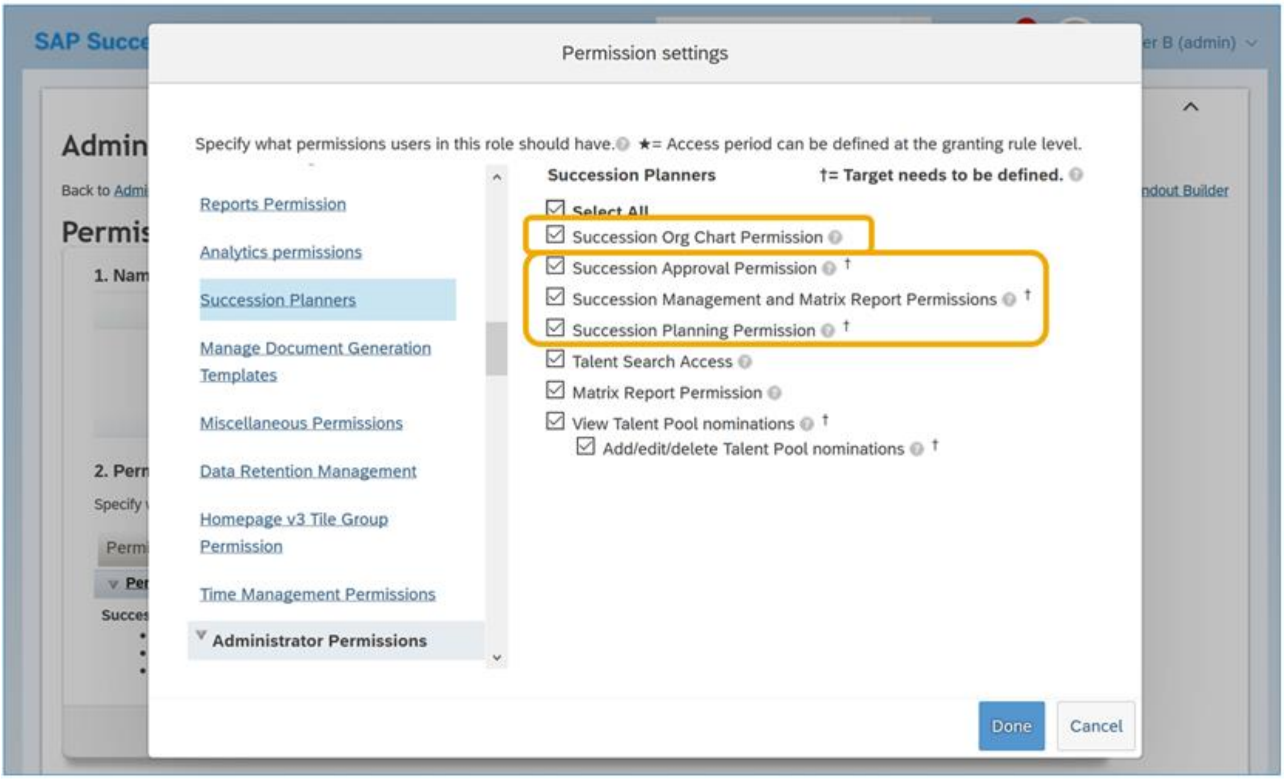
- With Lineage Chart V12, you can see as many levels of successors as you want. Similar to Succession Org Chart V12, you can open the successors per node.
- Adobe Flash technology is no longer required.
- You can check the Talent Card of a user by clicking the icon next to the name of the user. The Succession Talent Card configuration applies to both Succession Org Chart and Lineage Chart v12.



Accessing the Lineage Chart v12

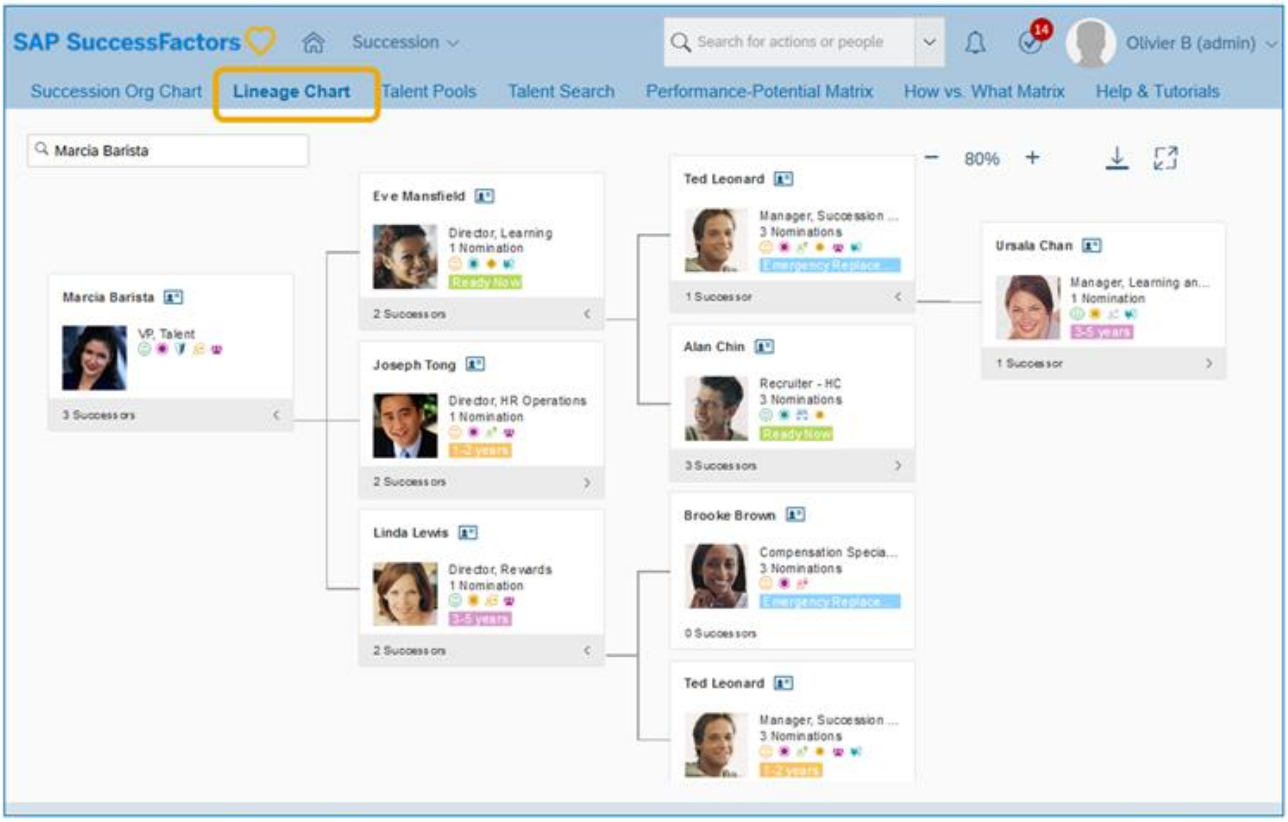
The prerequisites are:

- The Lineage Chart is enabled
- You have the Succession Org Chart Permission to access the Lineage Chart tab. Both tool use the same access permission.
- You have the Succession Management and Matrix Report Permission, the Succession Approval Permission (if applicable), and the Succession Planning Permission. These permissions will allow users to see nominations for a certain position or a certain status, for example, whether you can see pending nominations.



Once the prerequisites are met:

1. From the main navigation menu, go to Succession.
2. Go to the Lineage Chart tab
3. Search incumbent or position in the “Search in Lineage Chart” area. A Lineage Chart with two levels displays.
4. You can click the right arrow icon to see levels down in the hierarchy.
5. You can click the left arrow icon to roll up levels.



Lineage Chart Components

There are several components you should know to understand better what information you can check with the Lineage Chart. It is composed of a starting node and other levels of nodes depending on the company succession hierarchy.

The starting node includes the following components:

- Employee name
- Employee title
- Number of nominations of the user
- Number of successors for the position

The other levels include the same component and also the readiness.

!	You can mouse over the nomination area to see the ranking value and details of the talent flags.

Lineage Chart Icons

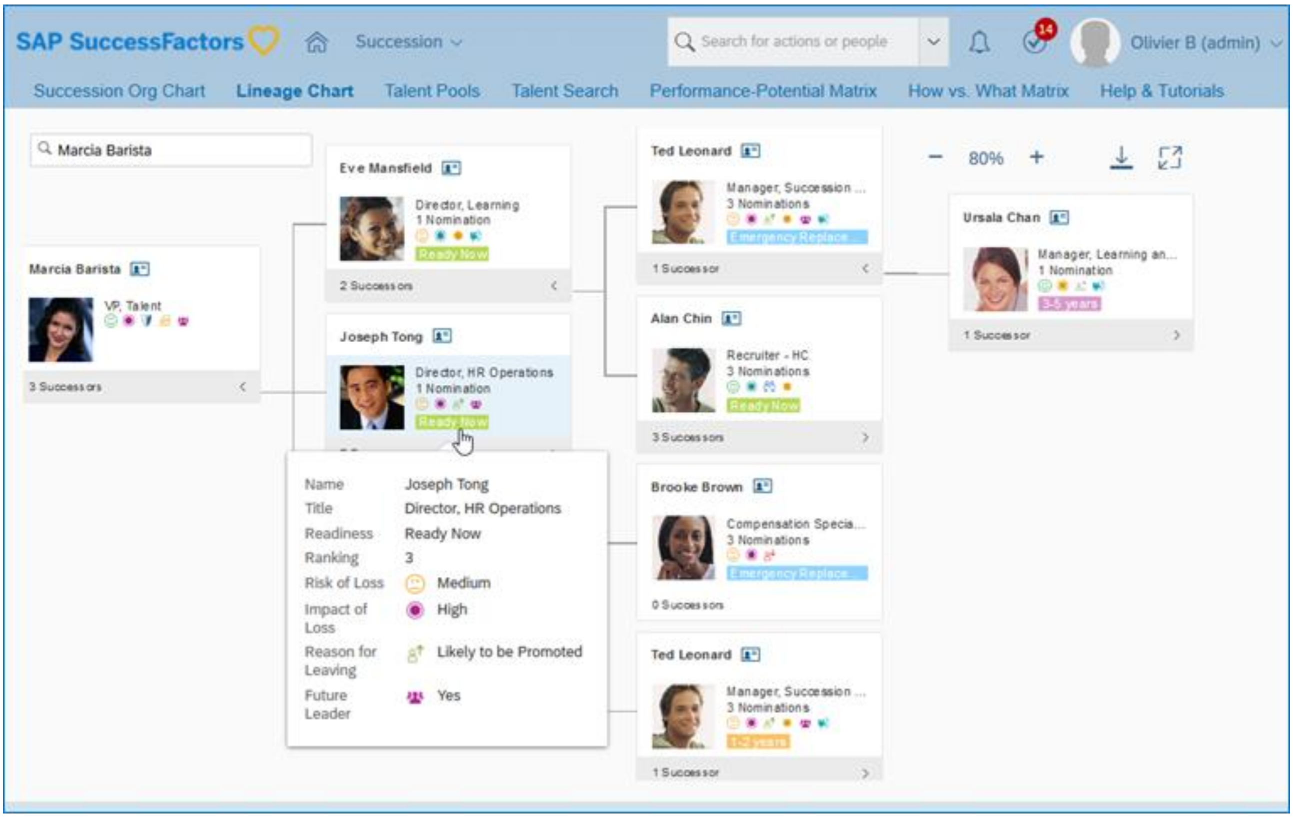
The Lineage Chart V12 icons are the same as those used in the Succession Org Chart, they are configured in the Succession Org Chart xml. To change them, you can go to Provisioning and under Succession Management, click on Edit Org Chart Configuration.

The talent flags are displayed for each user shown, regardless whether it is the starting node or a successor.

There is no Employee Profile based permission check for these flags. All flags that are configured show for all employee.

There are no talent flags for external successors.

For internal successors, the profile icon calls the Talent Card. For external successors, the profile icon calls the recruiting candidate quickcard.



Changing the Lineage Chart Label

The Lineage Chart label can be changed with Text Replacement.

1. Go to Admin Center > Company Settings > Text Replacement
2. Choose the locale

3. Find the key COMMON_SUCCESSION_LINEAGE_REPORT_TAB
4. Type the new label in the column Replace With Text for that key.
5. Save your changes

Lesson Conclusion – Lineage Chart v12

In this lesson, you were introduced to the basics of the Lineage Chart.

You should now be able to describe the Lineage Chart.

Lesson 8-3 – MDF Talent Pools and Permissions

Lesson Overview

The goal of this lesson is to introduce the purpose, location and nomination process for MDF Talent Pools.

Lesson Objective

- Discuss the distinctions of the MDF Talent Pool and the features available for configuration.

What is a Talent Pool or Pool-Based Planning?

A Talent Pool is a grouping of individual employees who have the right mix of skills, abilities and/or experience to address specific resource needs within an organization.

Talent Pool nominations are a new way of aggregating nominees for similar target positions. Pool-Based Planning enables organizations to scale their succession planning effort and begin identifying, tracking and preparing candidates for future roles-even before a specific target position is defined-by allowing managers to nominate an employee to a talent pool.

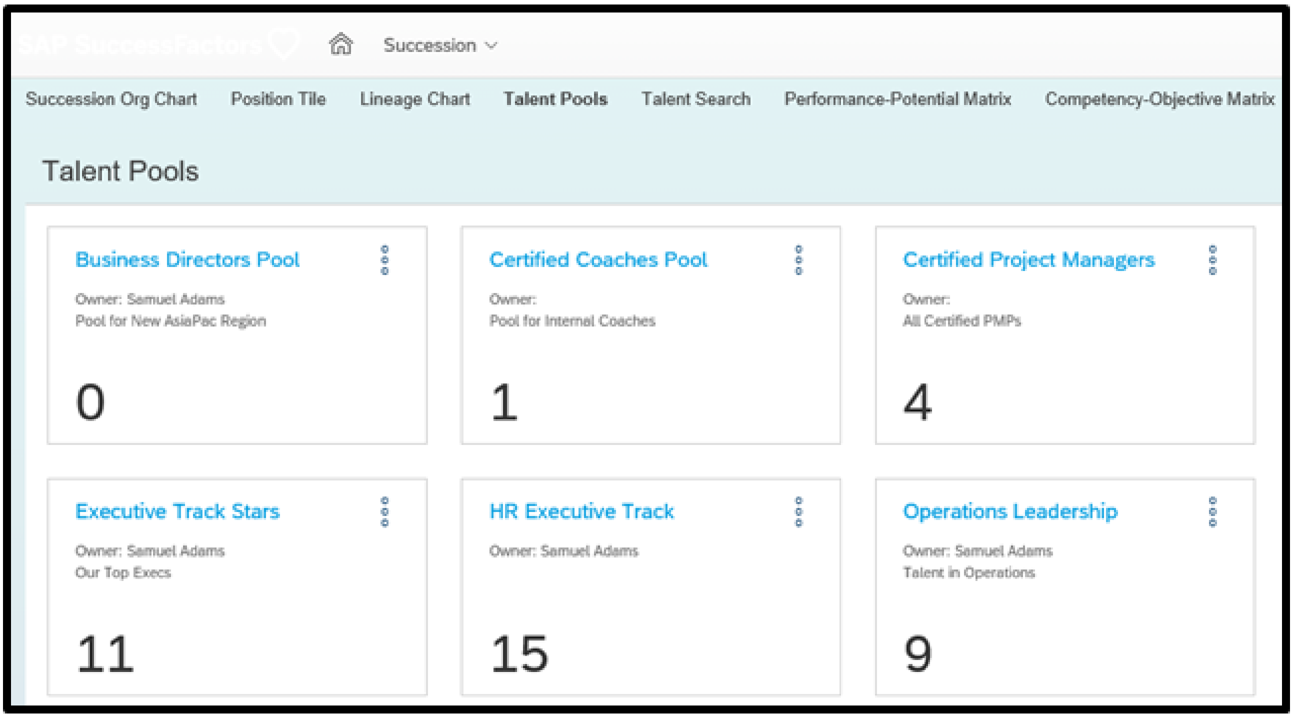
Succession offers only MDF Talent Pools. Important to note that the MDF Talent Pools for Succession are a separate feature and functionality from the Recruiting Management Talent Pools which are located on the candidate search page. Below are different ways a company may choose to set up talent pools within SAP SuccessFactors.

Common Structure for Talent Pools:

- Role-specific
- Job-family based
- Cross-functional
- Top talent/critical talent
- Leadership/organizational level
- Competency-based
- Time-bound

- Diversity
- Development need-based
- Talent gaps

For initial configuration of MDF Talent Pools (also known as MDF Pool-based Succession Planning), you may use the Upgrade Center within Admin Center. However, the Metadata Framework and Role-based Permissions are required for use of this tool.



MDF Talent Pools Permissions

When working on a Talent Pool with the appropriate permissions, it is possible to:

- Add a new nominee to a talent pool
- Delete a nomination from a talent pool
- Edit a nomination from a talent pool to change the readiness or the notes

There are actually several types of permission when dealing with MDF Talent Pools. All reside in the Manage Permissions Roles within Admin Center and play a special role in viewing nominations, editing nominations, viewing the talent pool object data and editing such data. Three permission areas control such options: Succession Planners, Miscellaneous Permissions, and Manage Succession.

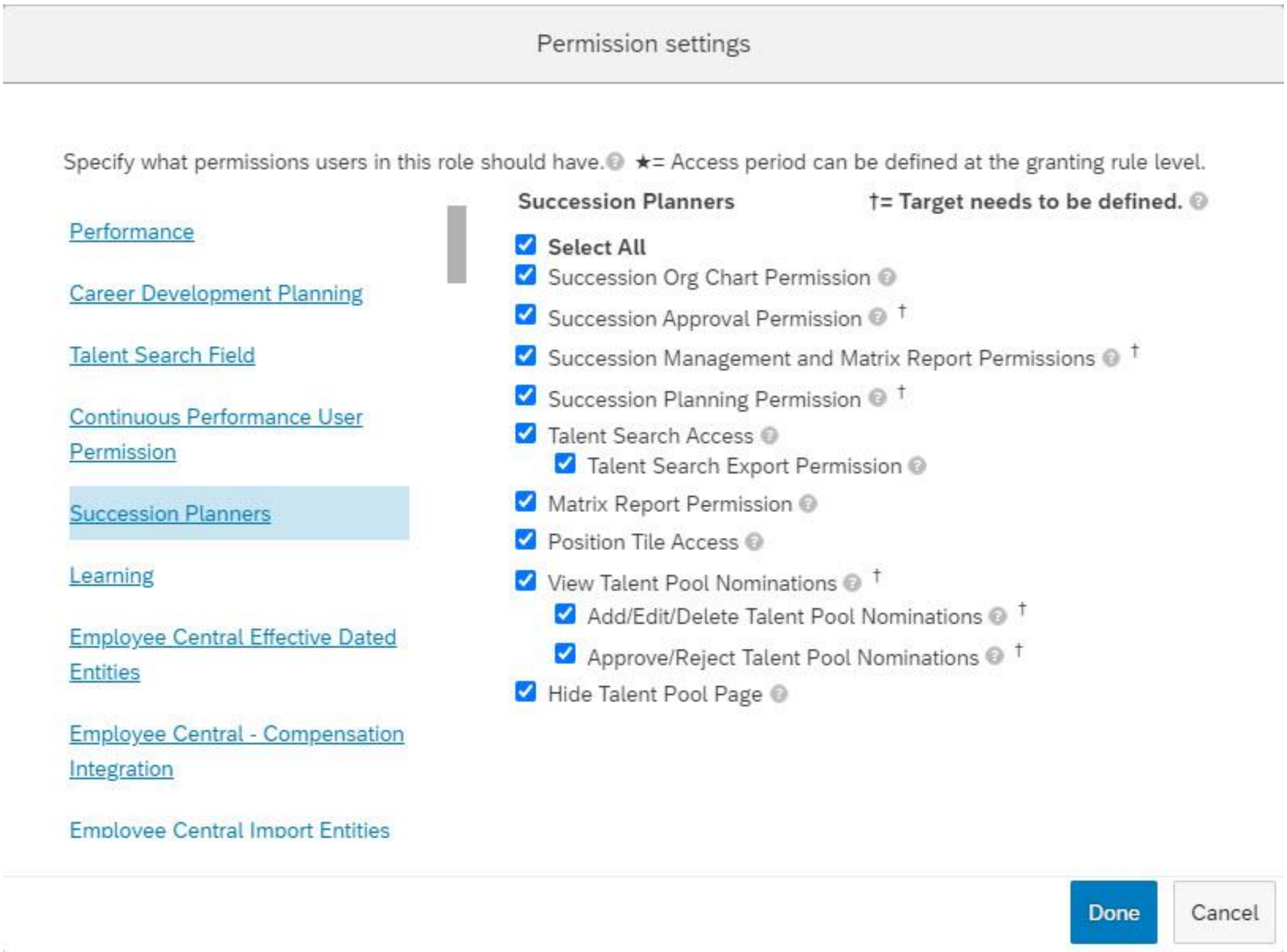
Succession Planners Permissions for Talent Pools

View Talent Pool Nominations Permission

When this permission is active, users will see nominations within Talent Pools. If this is inactive, users can see talent pools but not the nominations within the Talent Pools. With this permission enabled, the **add/edit/delete talent pools nominations** may be selected to provide the ability to add, edit or delete nominations to talent pools.

Hide Talent Pool Page Permission

If the Hide Talent Pool Page Permission is enabled, it prohibits roles from viewing the Talent Pool page from other Succession features and People Profile. In the People Profile nomination portlet, there is no link to talent pool nominations page. In the position card, the label Manage Pool is invisible or hidden. And the main Talent Pool tab access within Succession is invisible or hidden.



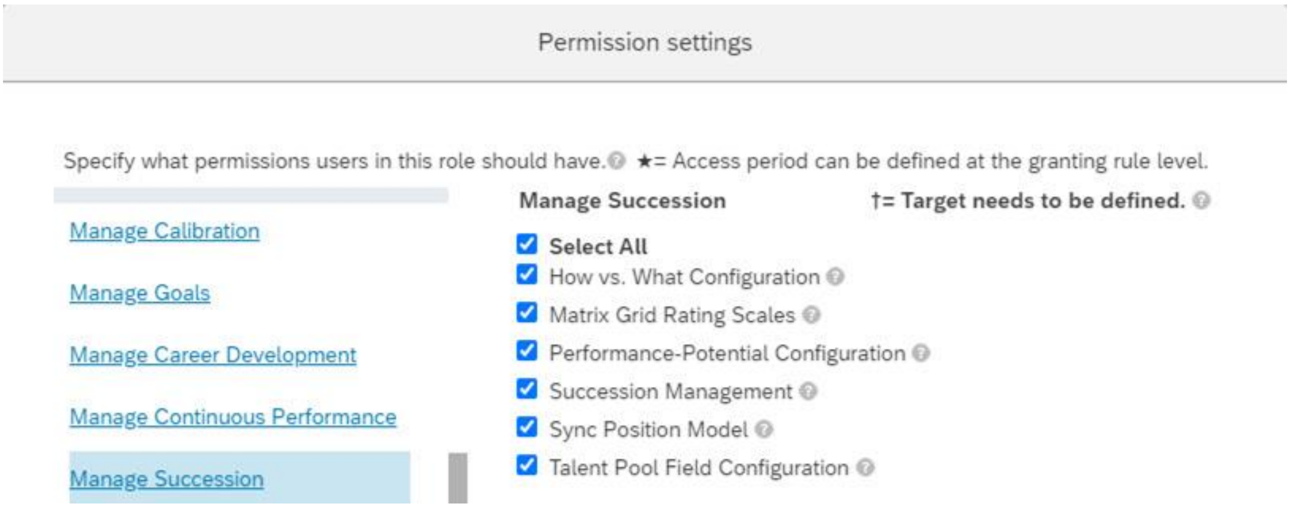
Miscellaneous Permissions for Talent Pools

Talent Pool Object Permissions

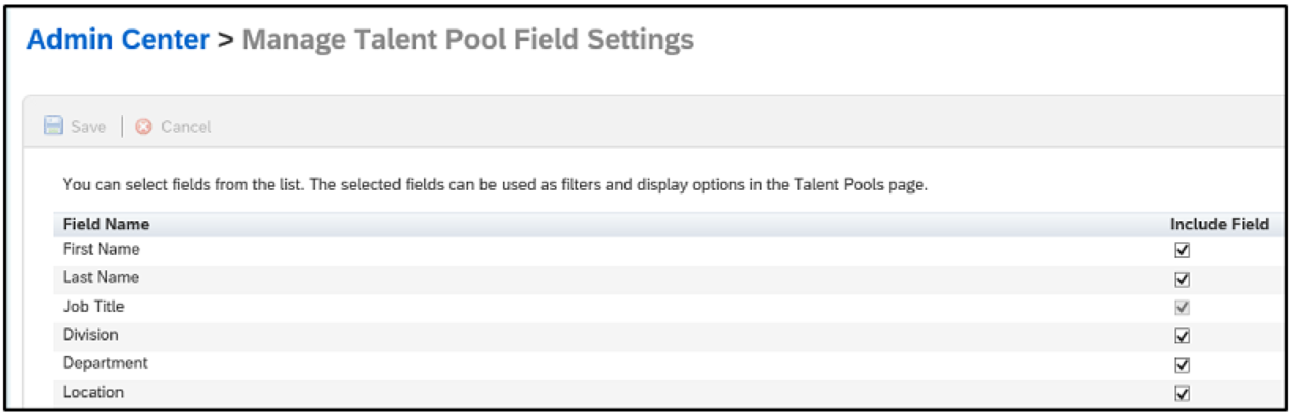
When this section is created from securing the talent pool object within configure object definition in Admin Center, the granular security of the metadata framework becomes your advantage. Simply choose which options you would like each role to have based on the visibility or actions regarding the object data. If you would like to restrict certain sensitive fields by role, utilize the field level overrides. Each option is discussed further when configuring the Talent Pool Object later in this area.

Permissions for Administrators within Manage Succession

In order to make changes to Succession within Admin Center, Administrators need certain permissions within Manage Permissions Roles. Be sure to enable the **Talent Pool Field Configuration permission** which allows a role to access the Manage Talent Pool Field Settings within Admin Center.



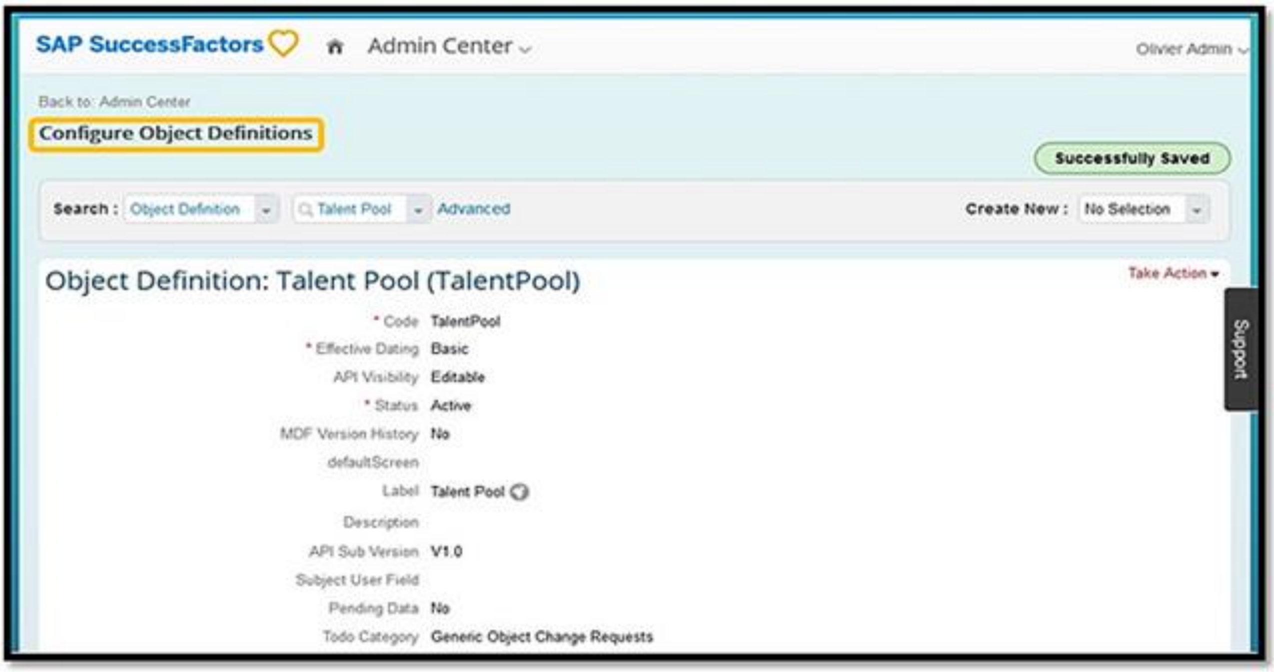
Once this permission is granted, the Administrator or user can select the fields available for talent pool end users to build personalized filters according to their preferences.



To Configure the Talent Pool Object

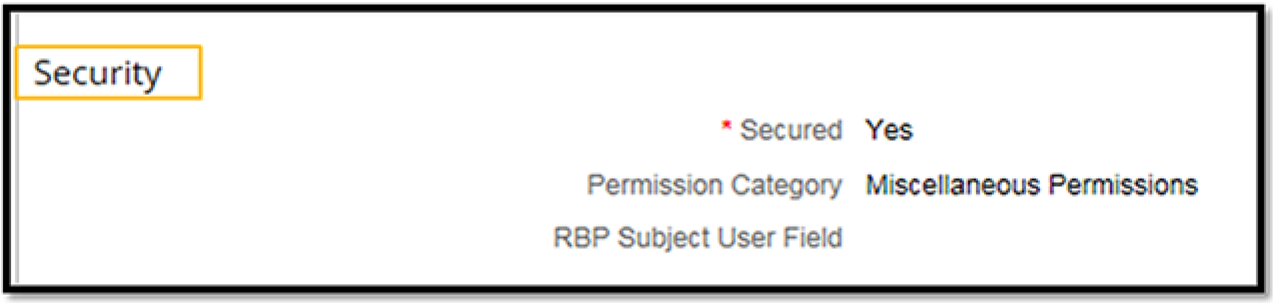
To begin using MDF Talent Pools, you must be sure to configure the Talent Pool Object inside Admin Center. Log in as an Administrator with MDF Permissions and navigate to Configure Object Definitions using the Action Search.

Choose Object Definition from the dropdown and being typing Talent Pool in the search.



To select different options, choose Take Action > Make Correction from the Talent Pool Object definition.

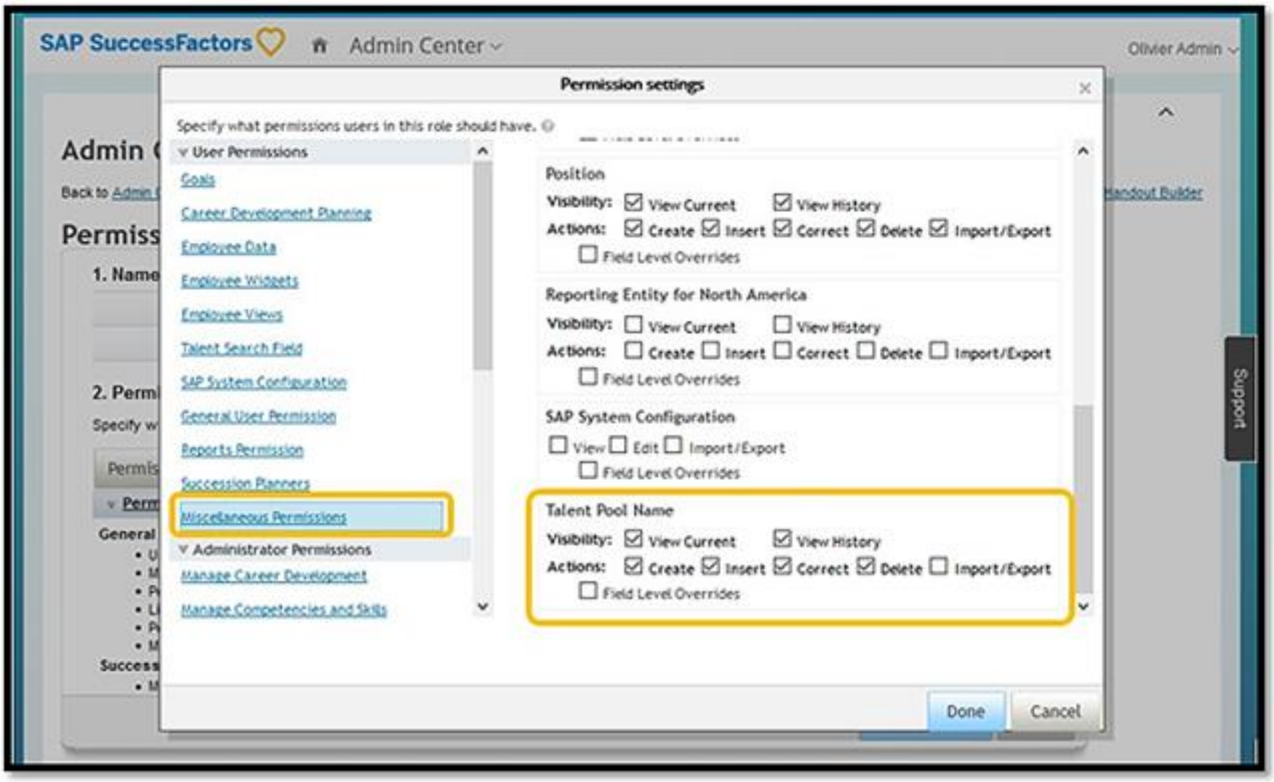
Navigate to the bottom of the definition and update Security of the object to associate with Role-Based Permissions: Choose Yes for Secured and Miscellaneous Permissions for Permission Category.



While in this same section, add custom fields or localize labels by clicking on the Details link next to any field. Save the object and exit.

To Configure the Miscellaneous Permissions

Now, navigate back to Manage Permission Roles using the Action Search and select the Miscellaneous Permissions to utilize MDF Talent Pools.



Below are the setting definitions for the Talent Pool object within Miscellaneous Permissions:

- View Current/View History: Allows users to view the current or effective dated history of the object
- Create: Allows users to create Pools (needed for anyone who wants to create a Pool)
- Insert: For inserting an effective dated version of the Pool

- Correct: Allows users to edit values of the Pool attributes
- Delete: Allows users to delete Talent Pools
- Import/Export: Allows administrators to import or export data for Talent Pool
- Field level overrides: Used to remove access to certain fields on the Pools

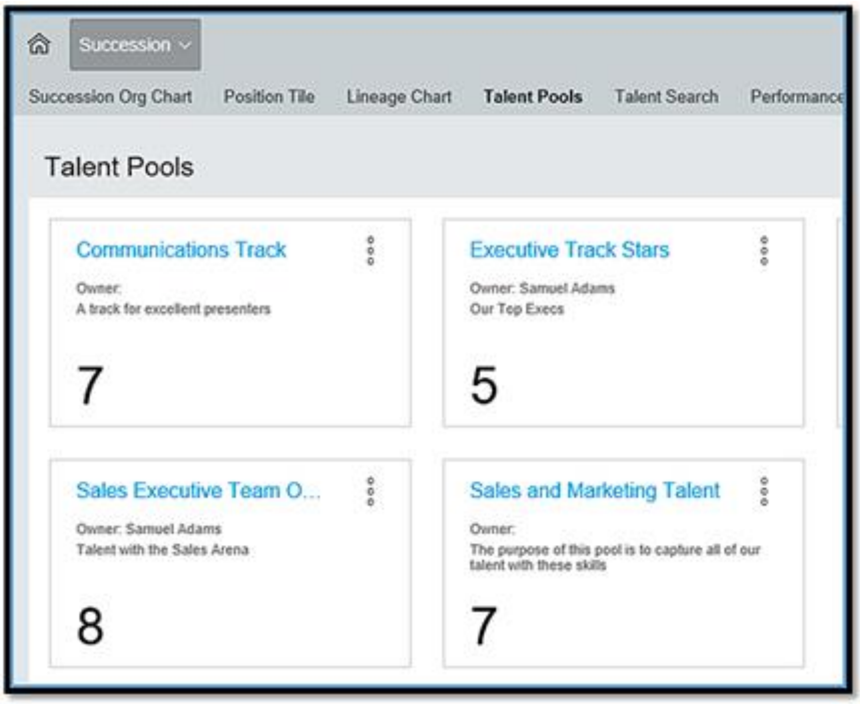
⚠	These object level permissions will only control ability to add/edit/delete Pool properties. Ability to add/edit/delete nominations will only require the user to at least "view" the pool. Create/Insert/Delete will have no impact on the users' ability to manage nominations.

Remember to also give the ability to view, add / edit / delete Talent Pool Nominations within Succession Planners section and specify the target population for the Talent Pool within Manage Permission Roles in Admin Center.

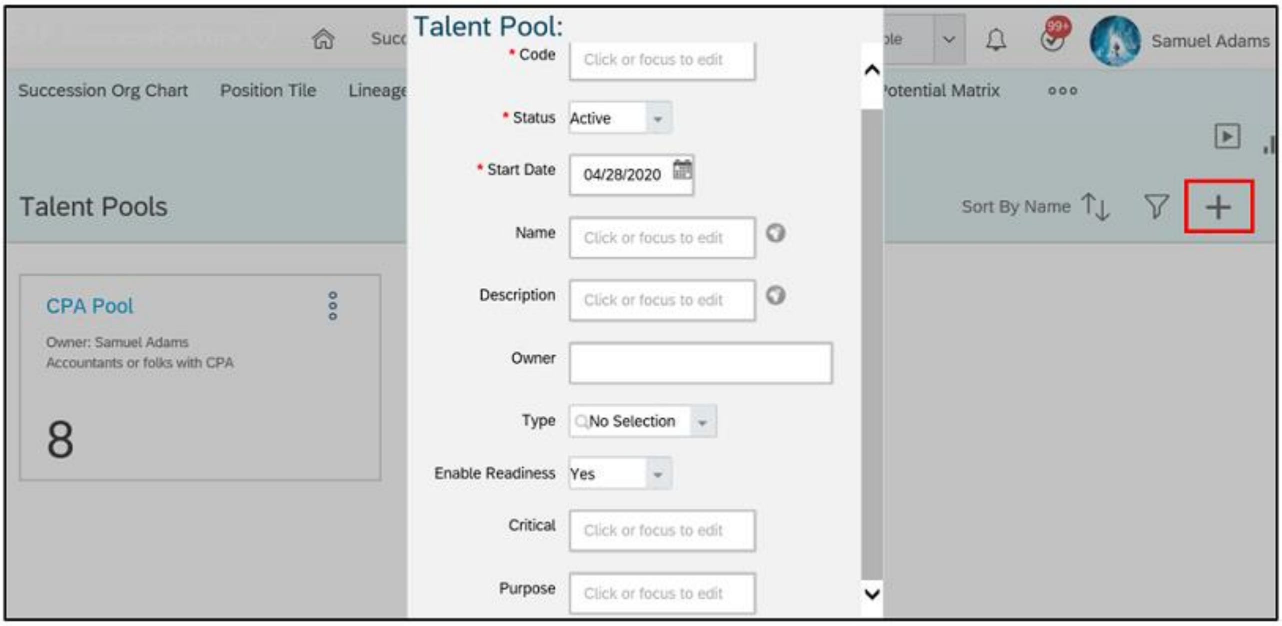
To Create and Manage the MDF Talent Pools

Now that you have set up the Talent Pool Object and provided the necessary permissions, the Succession Planner is able to create and manage the Talent Pools by performing the following:

Navigate to Succession > Talent Pools.



If you would like to create a new talent pool, click on the + to add a Pool in the top right. Fill in the required and desired fields.

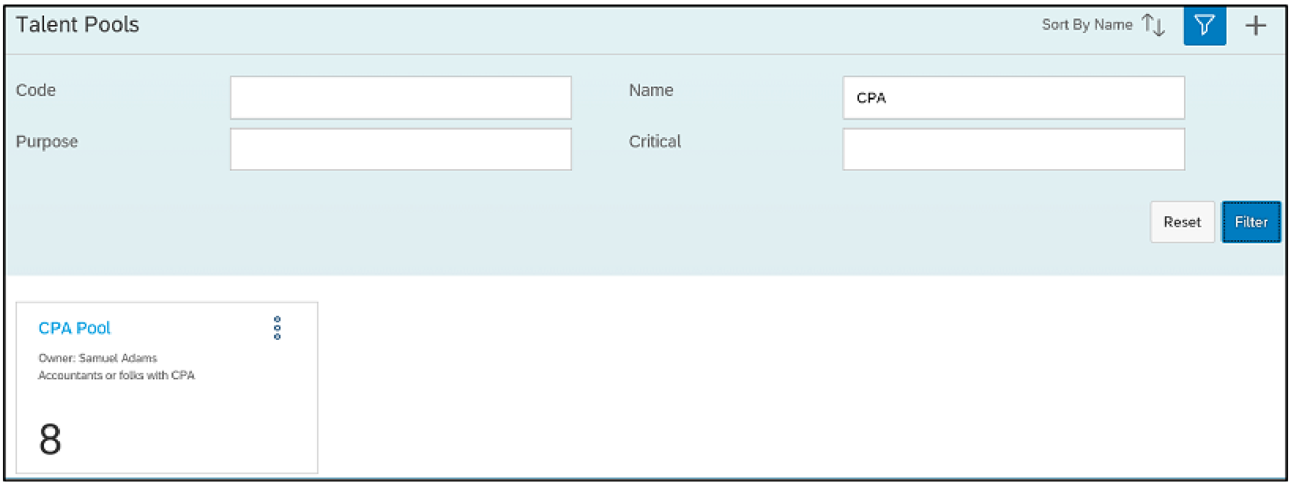


Important Note:

If effective dating is active, the metadata framework tracks the changes made as well as the user who modified the data. Be aware of this factor when exporting data from the system for the changes are tracked through multiple lines of data.

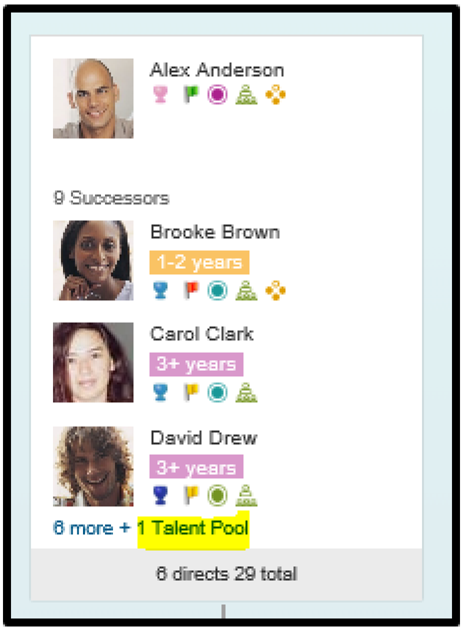
Filtering Talent Pools

Within the main page of talent pools, the user may use filters to work with a specific pool. Enter the term to narrow down the information and then focus on the area of interest:

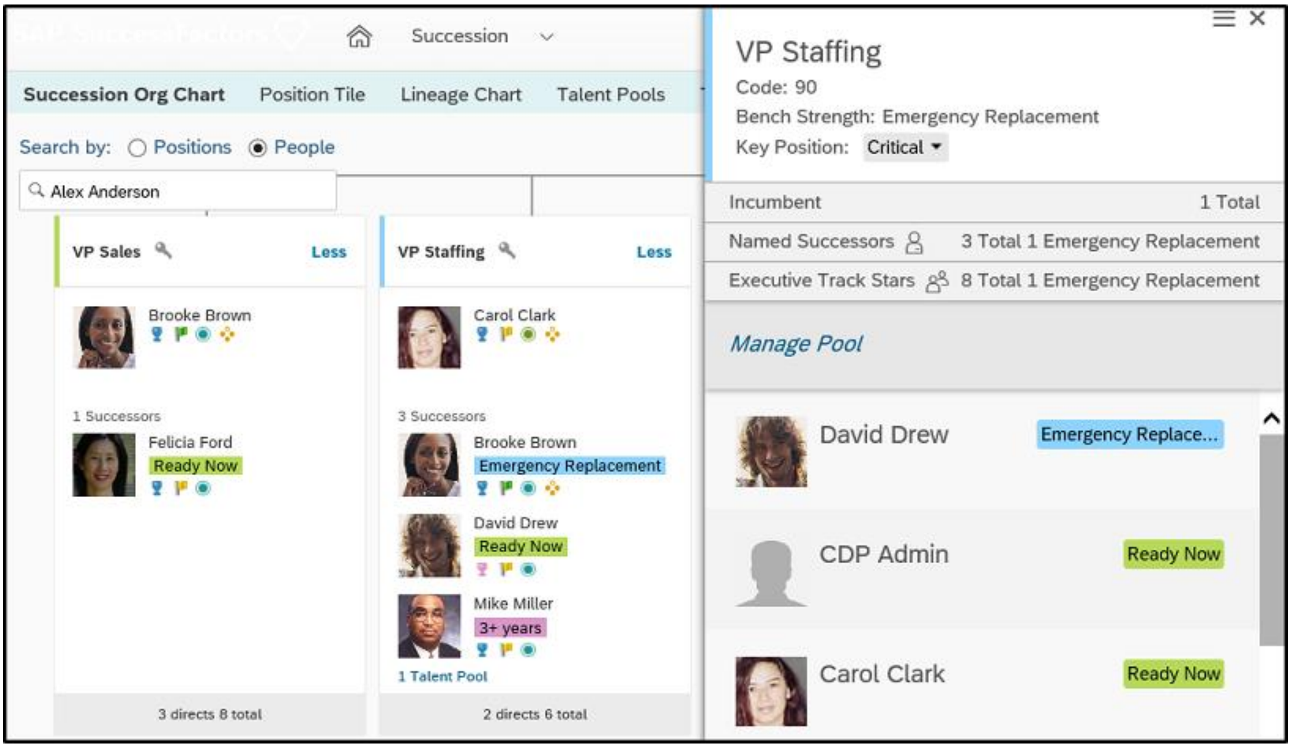


Nominations to a Talent Pool

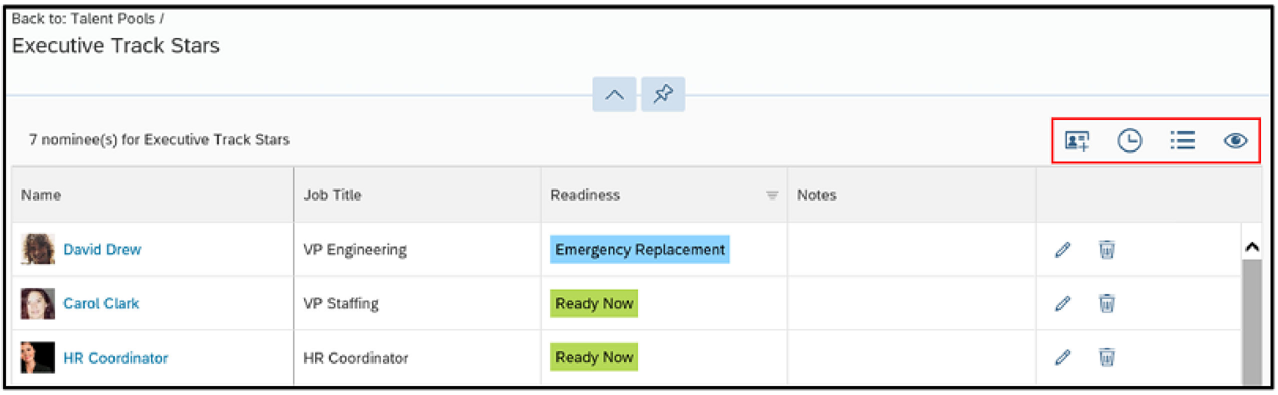
The MDF talent pools display on the Succession Org Chart (SOC) v12 as seen here:



To review the nominees of a talent pool on the Succession Org Chart v12, open the position card and shuffle to the talent pool. In this example, the name of the pool is Executive Track Stars:



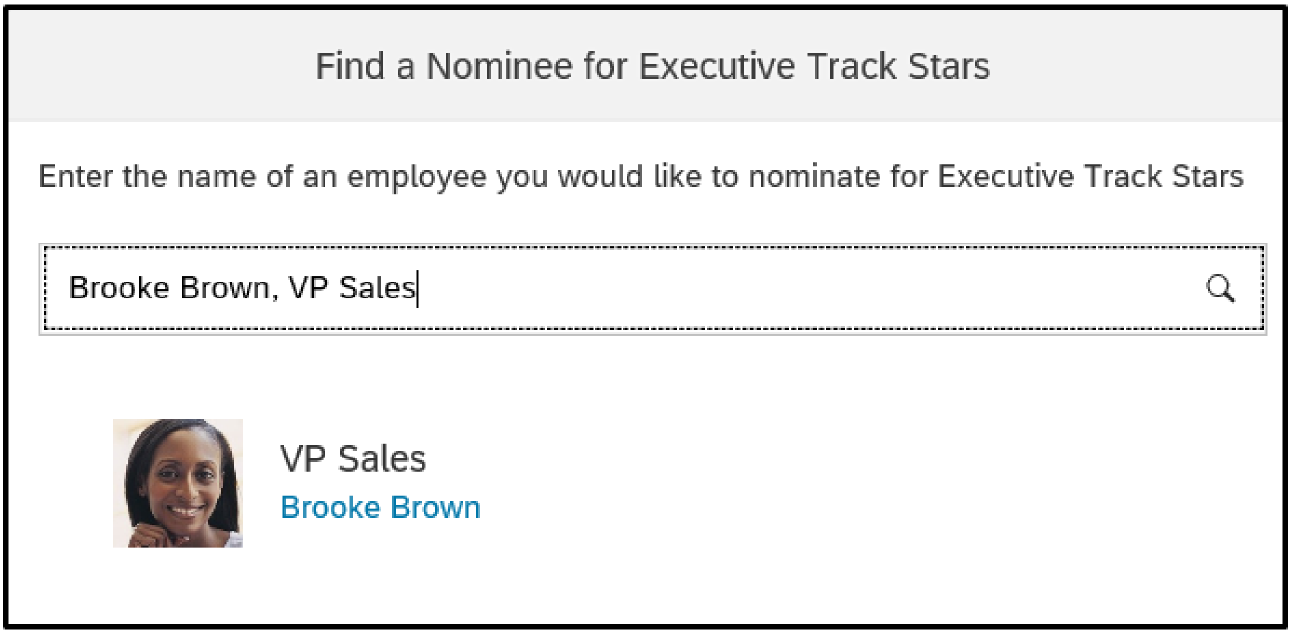
When you click the Manage Pool option, the system takes you to the talent pool nomination area where one can add a nominee, view the nomination history, show / edit the pool, or define column properties as presented in the symbols below:



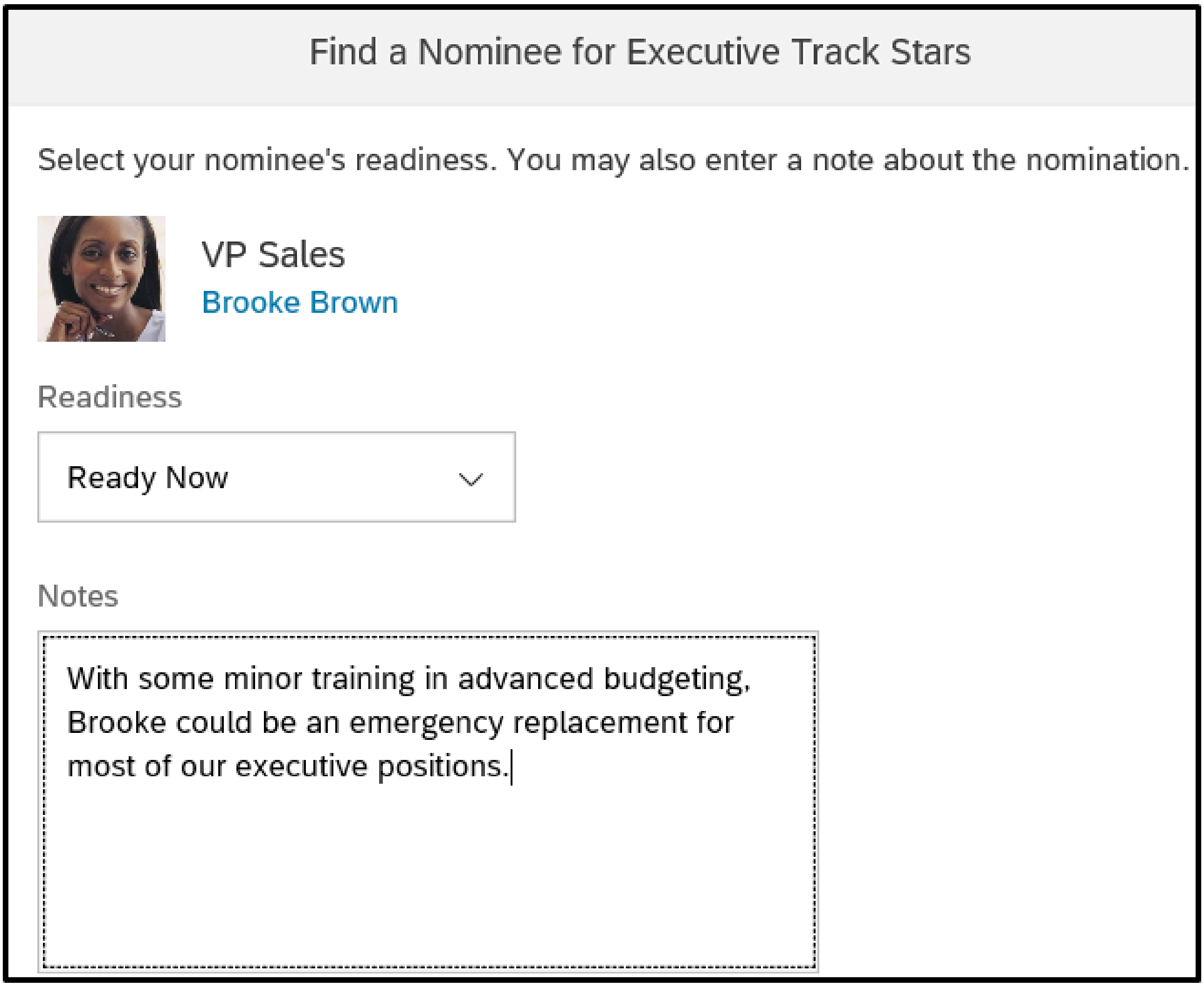
Adding a Nominee to a Talent Pool

To add a nominee to a talent pool, simply click on the icon highlighted to begin:

Find the employee name you desire and click next:

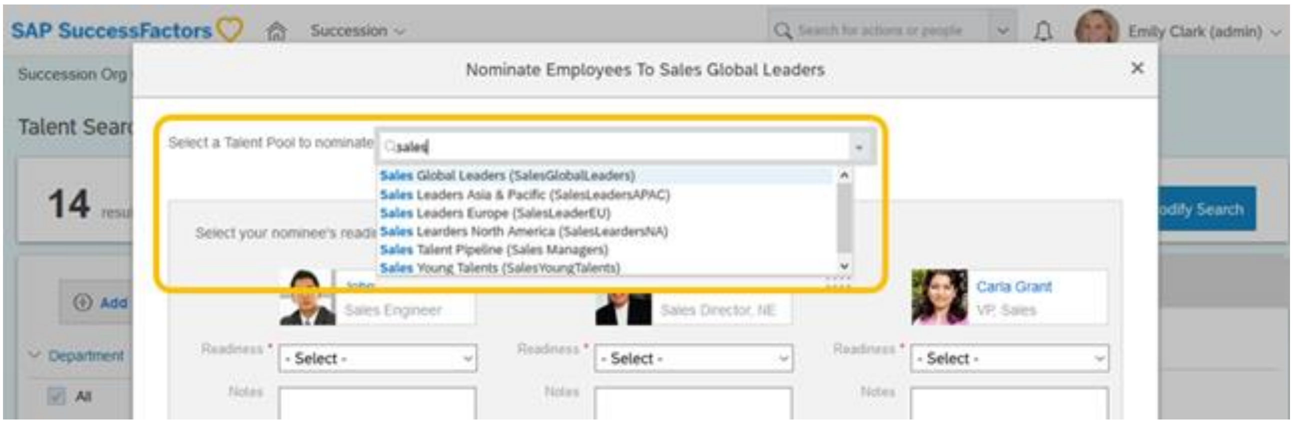


Enter the readiness level along with any important notes and click submit:

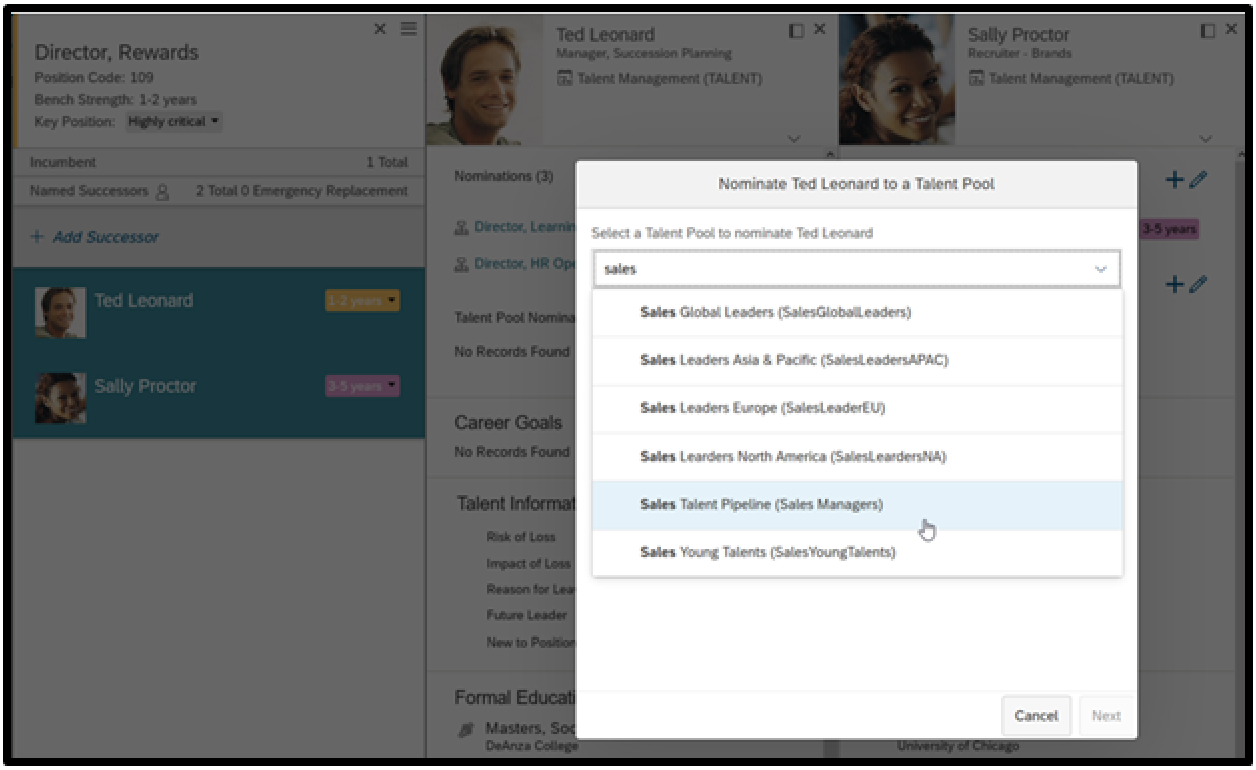


Employees can also be nominated to Talent Pools from other areas:

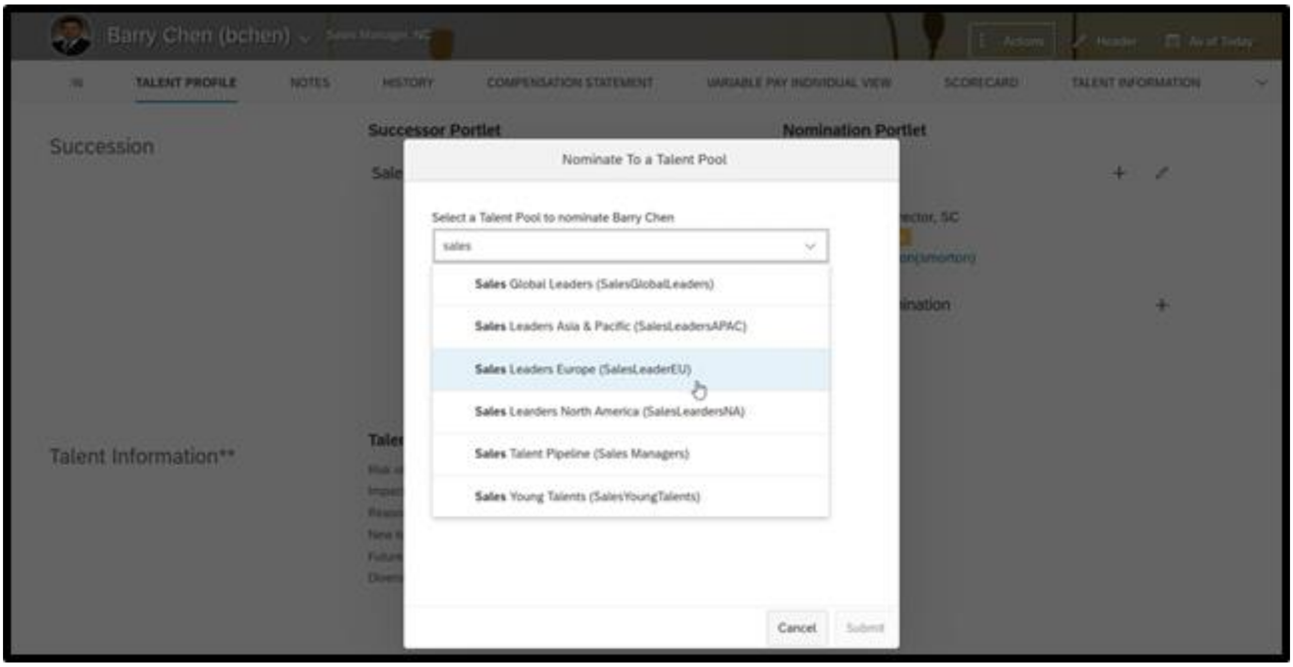
- Talent Search



- Talent Card



- People Profile Nomination Portlet



In these three cases, an easy search field will make it faster to select the appropriate talent pool.

Viewing the Nomination History

Talent Pool Nominations may be viewed with the proper permissions through role-based permissions and talent pool object level permissions. However, users without the Talent Pool object level permission can now view Talent Pool nominations of employees in the following:

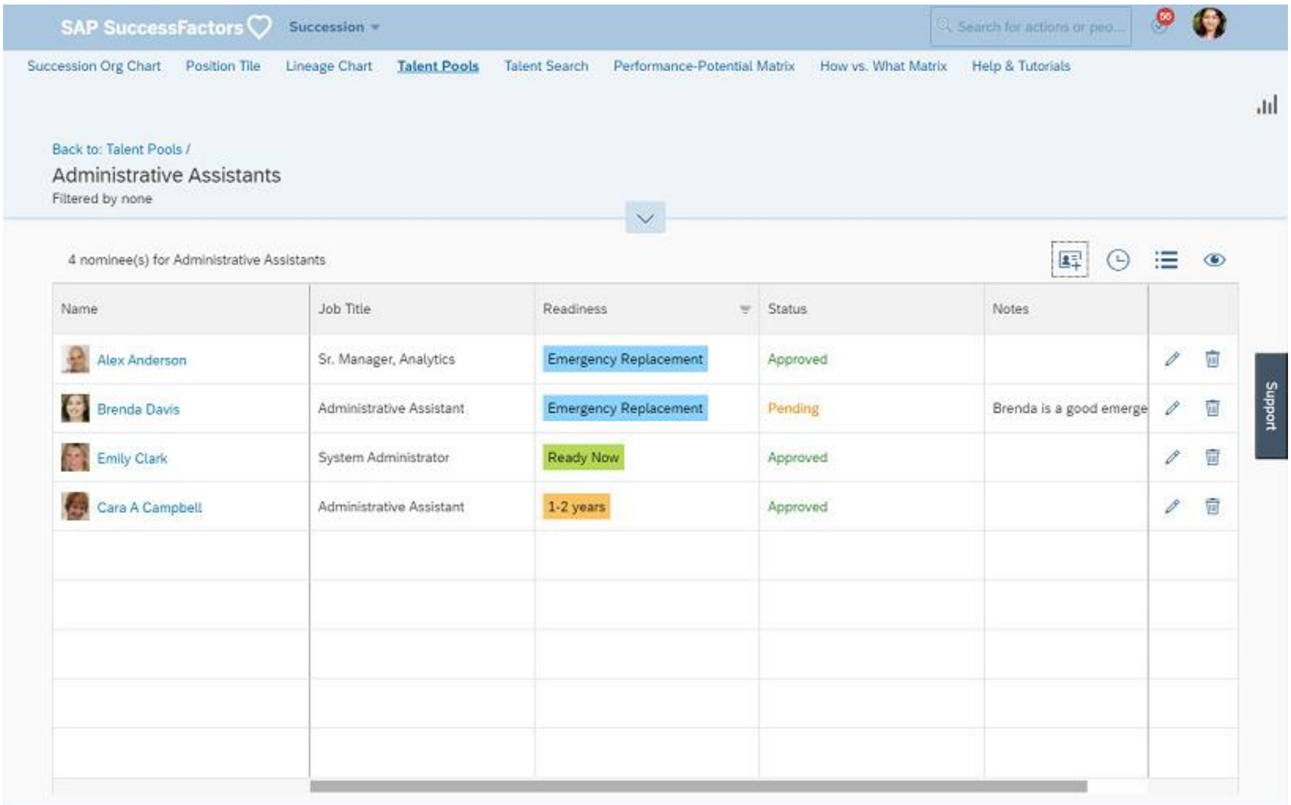
- Nomination Block in People Profile
- Nominations section of the Talent card

To utilize this functionality, contact professional services of customer success to enable it.

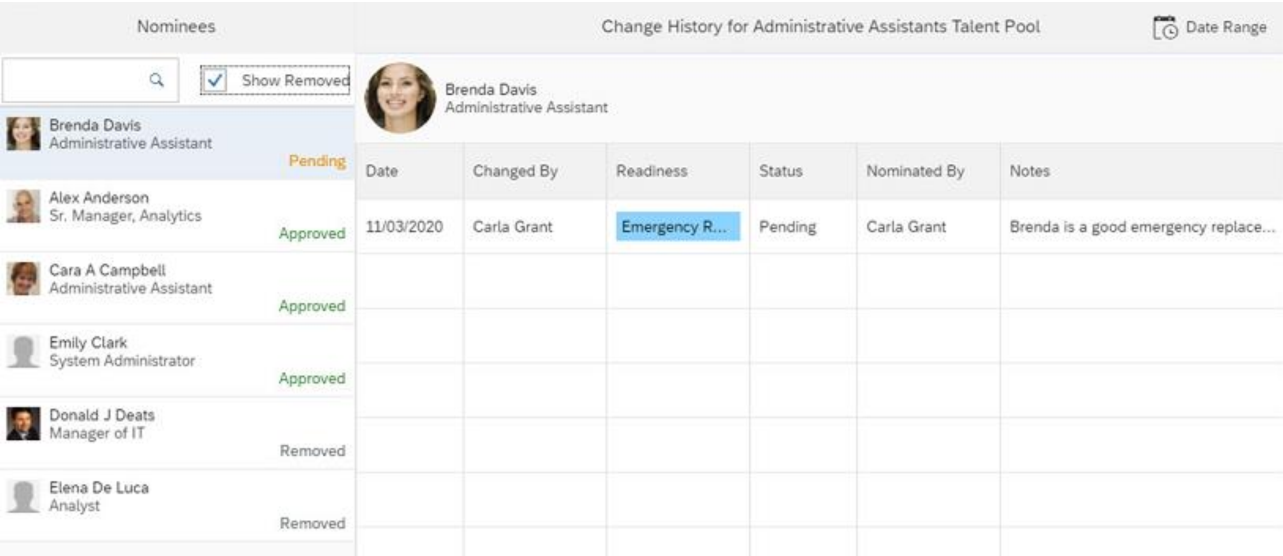
Managing Talent Pool Nominations

When managing nominations, a user can nominate employees one by one, either on the Talent Pool nominations overview page or from the talent card when working with the Succession Org Chart (v12) or Position Tile view. You can also nominate one or many employees at once from the Talent Search results page.

To display the history of nominees in a selected talent pool, choose the View Nomination History icon as highlighted below:



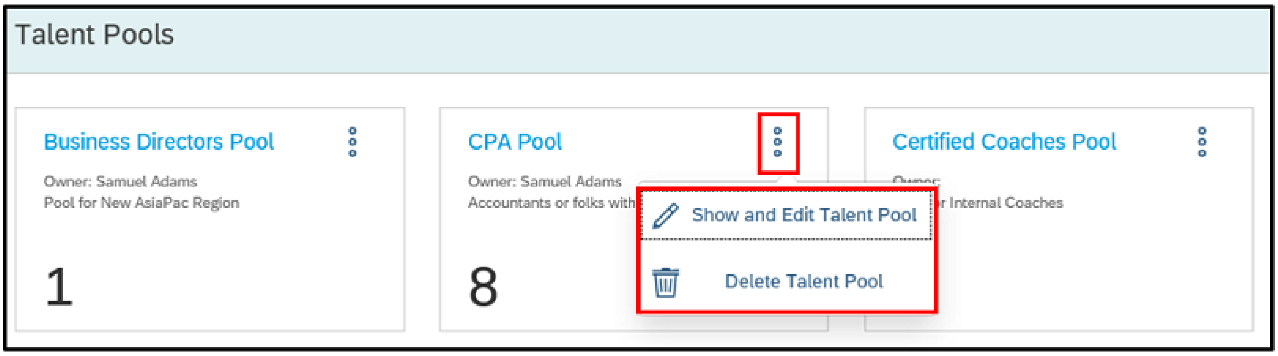
To view nominees that are in the Removed status, select Show Removed checkbox in the left pane. By default, removed nominees aren't displayed in the left pane. To view the nomination history in a specified date range, choose Date Range in the upper right corner. Select a start date and end date to filter information.



There is also a To-Do tile available called Approve Talent Pool Nominees that alerts talent pool owners when they have pending nominations.

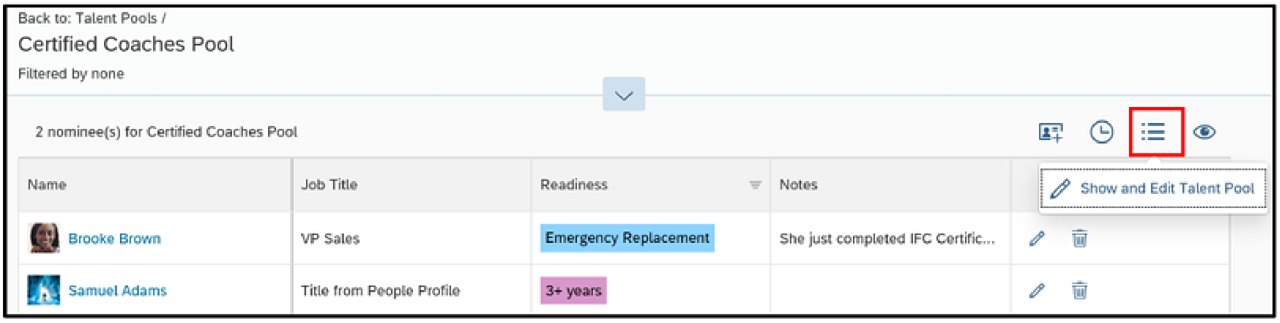
Show or Edit the Talent Pool

With proper permissions, a user or administrator is given two options to show and edit talent pools. The first option is located on the main landing page of talent pools. To access or edit the talent pool information, click on the three dot icon in the right hand corner to reveal the button. Additionally, one may delete a talent pool if desired.

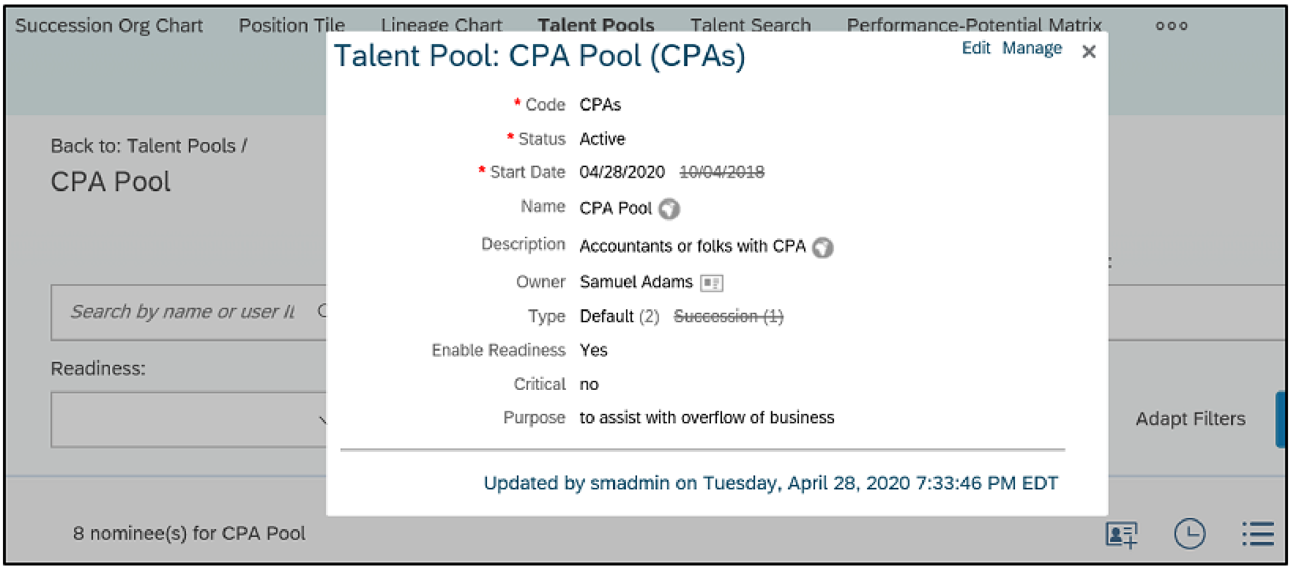


When deleting the Talent Pool, your nominations will be deleted as well.

The second option lives inside the individual talent pool. Simply click on the talent pool to access a specific pool. Within this area, an icon in the right hand corner grants access to the talent pool object:

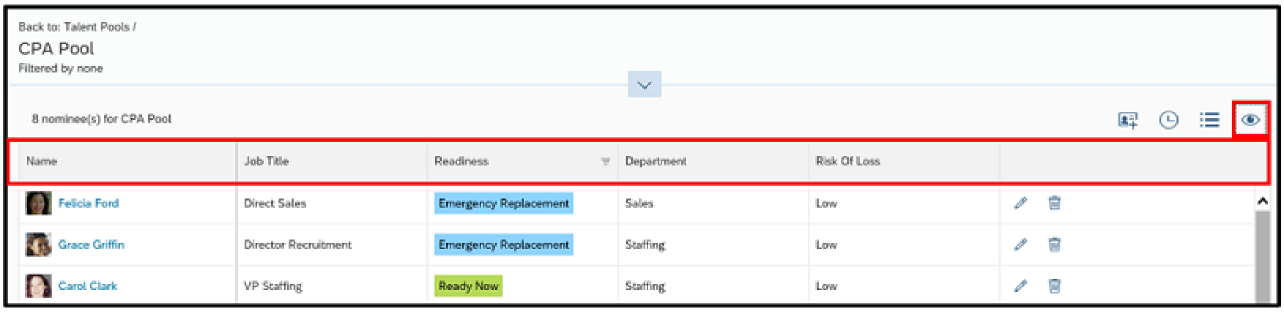


Once you select the Show and Edit Talent Pool option, details within the talent pool object can be modified and changes tracked as in this example:

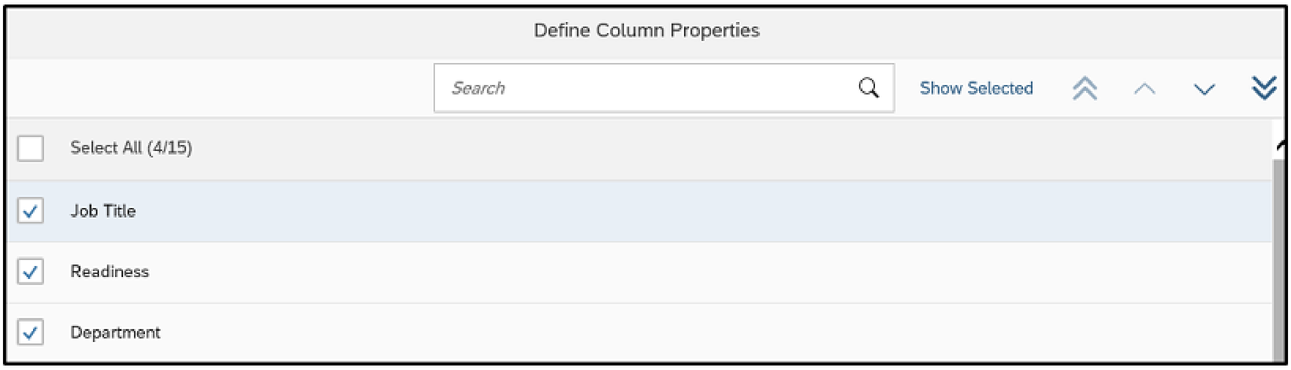


Defining Column Properties

The eye icon allows a user to customize the columns displayed within this section.

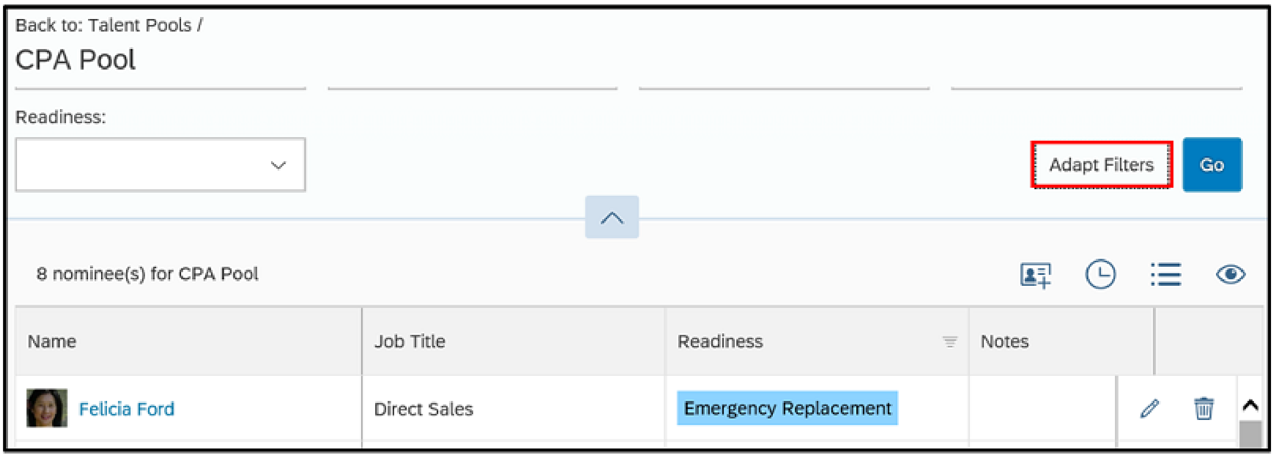


Check the box located next to the field or column you wish to see. Rearrange the columns using the arrows in the right corner and click Ok:

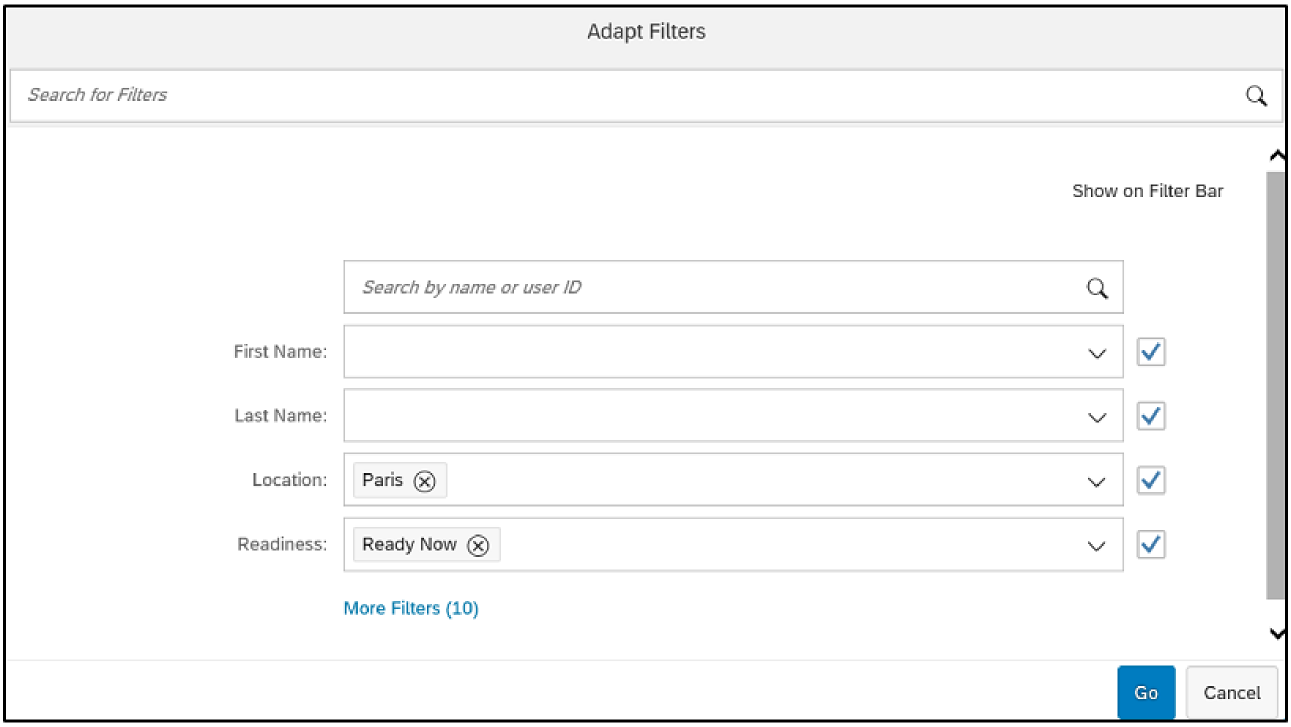


Filters within a Specific Talent Pool

If you have a large number of nominees within a talent pool, using filters to differentiate the employees quickly assists in the decision process. To configure these filters, first choose the Adapt Filters button:

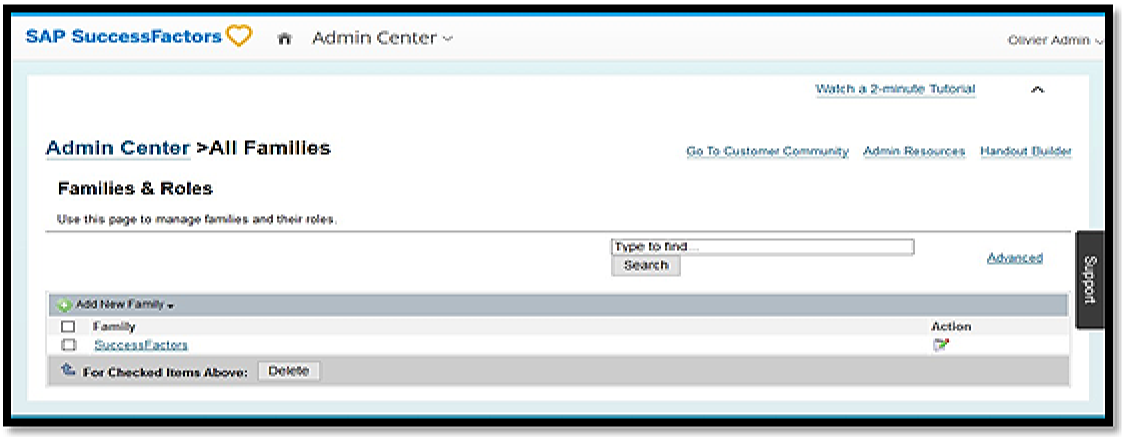


Turn filters on and off by enabling the checkbox beside the field label. Also, set a default value from the picklist selection and select Go:

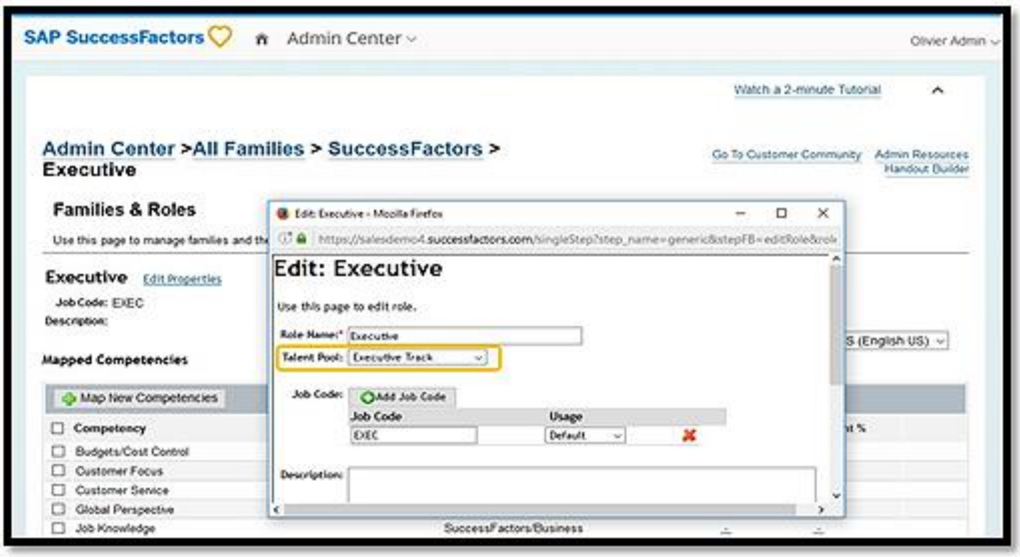


To Associate Pools with Roles Using Manage Job Roles

To associate a pool with a role, be sure to navigate to Admin Center > Company Settings > Manage Job Roles. Select the SAP SuccessFactors link and then the appropriate role.



Once inside the role, click on Edit Properties. A new window will open where you can connect the Talent Pool, add a job code, create a description, or change the role name.



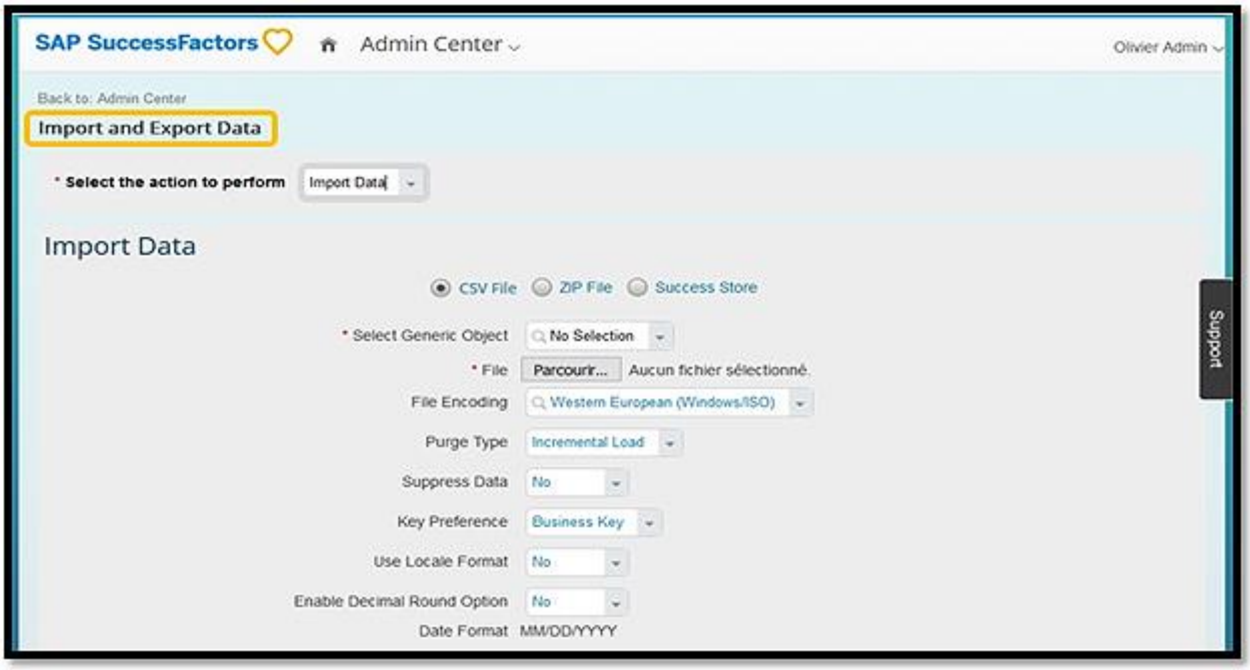
Make the necessary modifications and click Save and Close.

	Only one talent pool may be associated with a role but the same talent pool can be associated with more than one role.

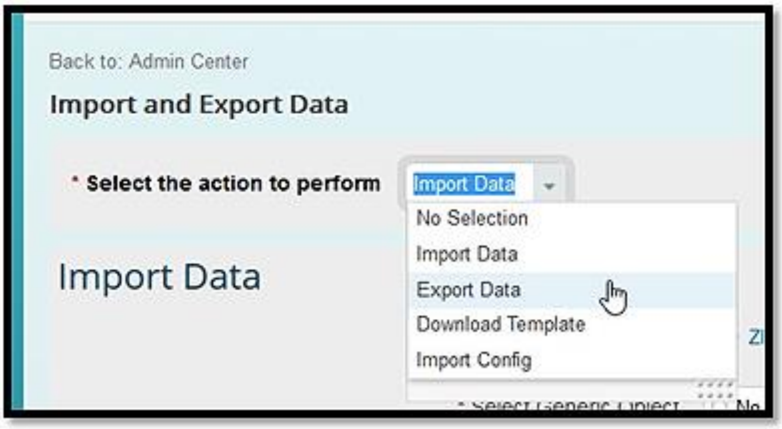
	If your system configuration is utilizing Job Profile Builder (JPB), the actions steps and terms may differ within Admin Center. Please contact Customer Success or Professional Services for more information.

MDF Talent Pools Import

The MDF Import option, located in Admin Center > Employee Files > Import and Export Data, allows you to import MDF Talent Pools into the Talent Pool object. Select the action to perform as Import Data and the Generic Object as Talent Pool. Browse to pick up the import file. Leave all other set to the default values and click Import.



	If this is your first import, be sure to download the template or export existing data using the MDF Import function located in Admin Center > Employee Files > Import and Export Data.



Lesson Conclusion – MDF Talent Pools and Permissions

In this lesson, you were introduced to specific details of MDF Talent Pools.

You should now be able to locate, create, and nominate to MDF Talent Pools.

Lesson 8-4 – Talent Search V2

Lesson Overview

The goal for this lesson is describe the features available with Talent Search v2.

Lesson Objectives

- Introduce the flexible look, feel and functionality of the Talent Search v2.
- Discuss the ways to nominate and navigate Advanced Search.

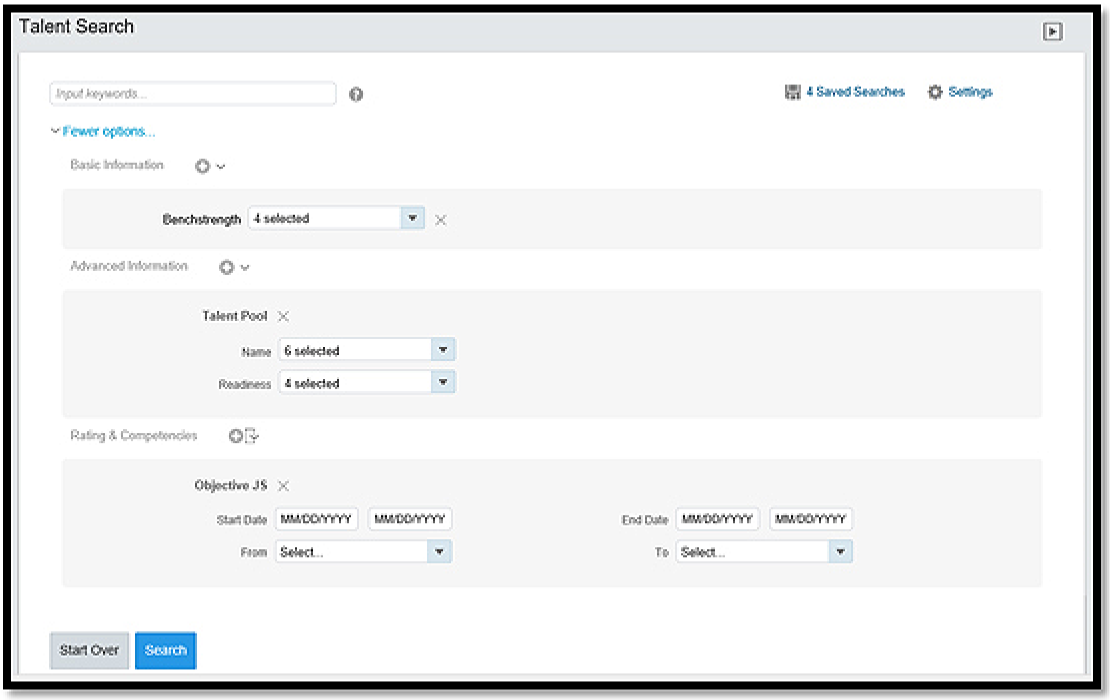
What is Talent Search v2 and its Advantages?

Talent Search v2, which is an opt-in enhancement, provides the customer a more modern user experience and allows the following:

- Perform effective talent searches
- Find people to staff projects
- Make global assignments
- Look up individuals quickly

Talent Search v2 offers new flexible advantages:

- A New Talent Search User Interface
- Faceted Filters and Expanded Actions
- Support for Multi-Select Searches
- Specialized Permission Section within Role-Based Permissions
- More Powerful Comparison of Employee Profile

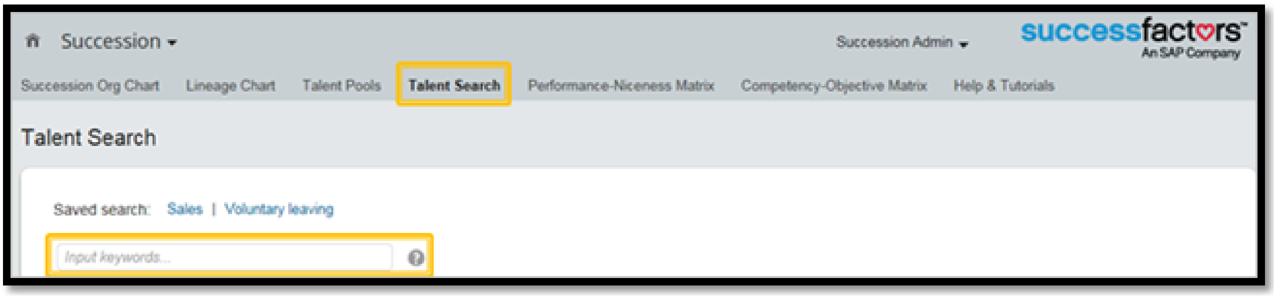


Be aware that you can enable Talent Search v2 feature via the Upgrade Center within Admin Center.

Talent Search v2 interface has flexible attributes like:

- Keyword Search and Saved Search
- Permissioned Field Selection
- Basic Information Fields
- Advanced Information Fields
- Ratings and Competencies
- Search Results Export Options
- Hyperlink Configuration Option

Keyword Search

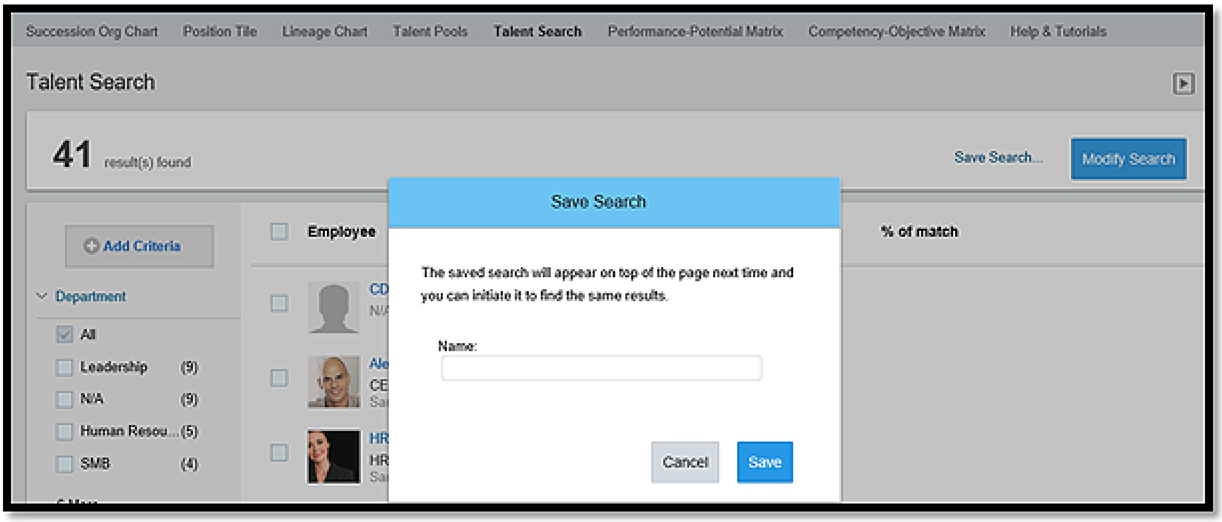


The keyword search configuration does not change in Talent Search v2 and is configured in the same way as the original Talent Search. You can choose this function within Admin Center > Succession > Talent Search Settings.

💡	If you are turning on the keyword search feature for the first time, you must contact SAP SuccessFactors Customer Success to prepare your instance even if you enable it within Admin Center > Succession > Talent Search Settings. (Only data elements that have read permissions for all roles in the data model are indexed and available for keyword search).

Saving a Search

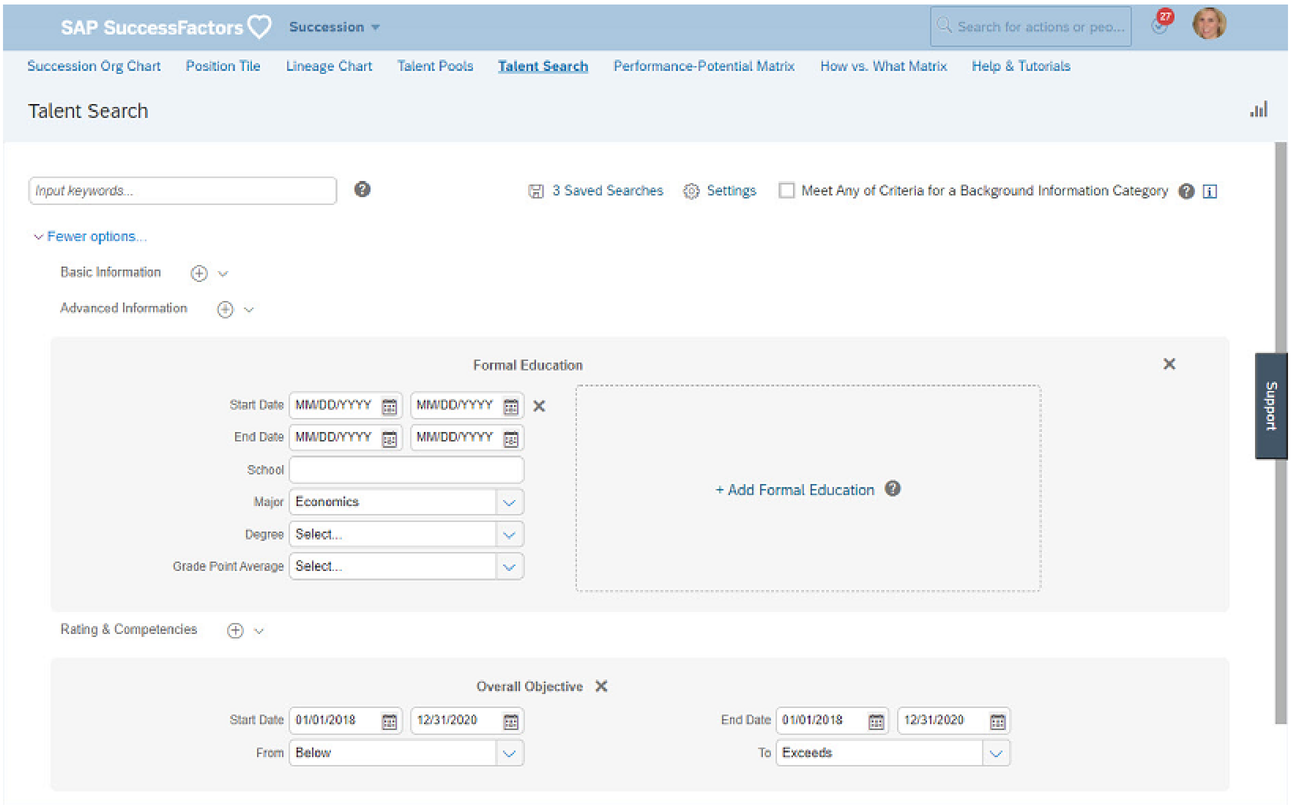
To save a search, simply enter the criteria and run the search. Then, click on save search and fill-in the name. Later you can also delete a saved search if not needed anymore.



When the save is completed, the save search successfully message will appear in the upper right hand corner.

Permissioned Field Selection

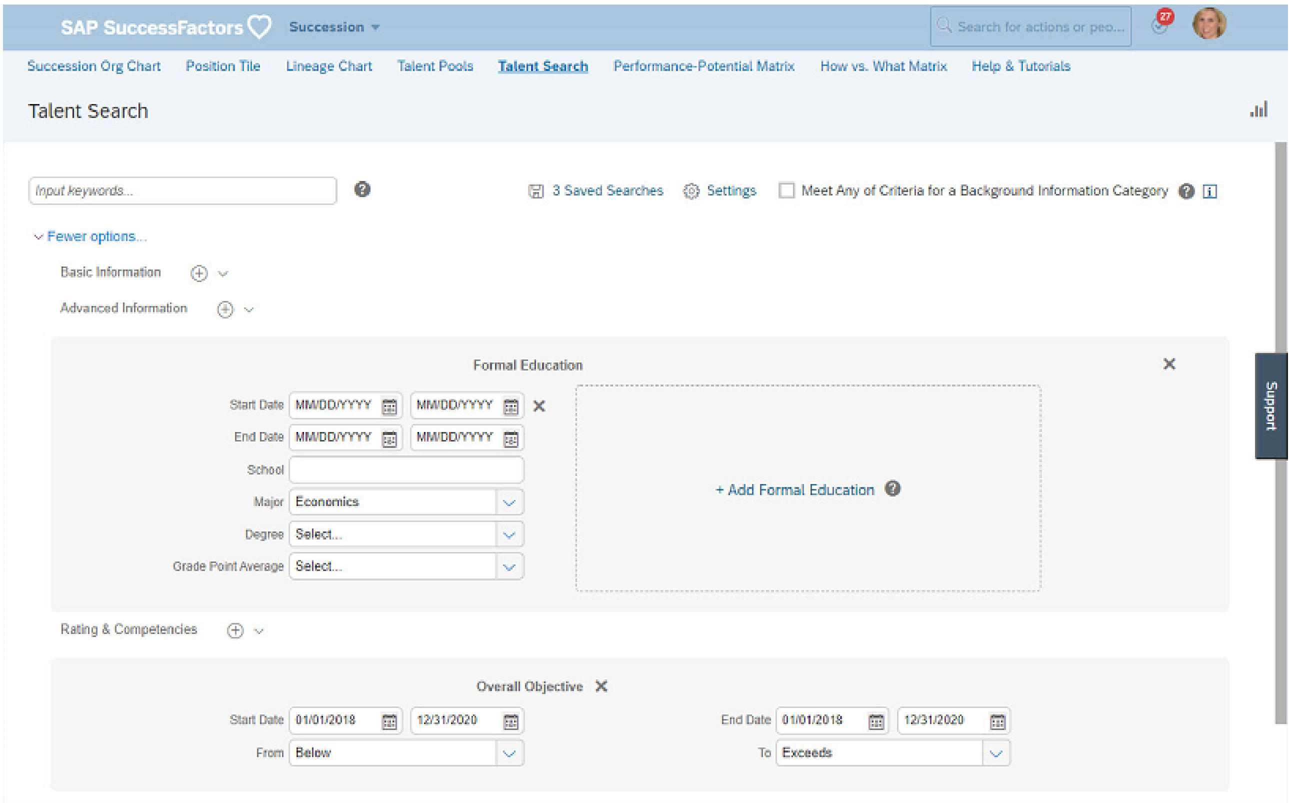
A unique quality of Talent Search v2 surrounds its segmented permissions. The Administrator determines the Basic Information, Advanced Information or Ratings and Competencies.



Including Inactive Users

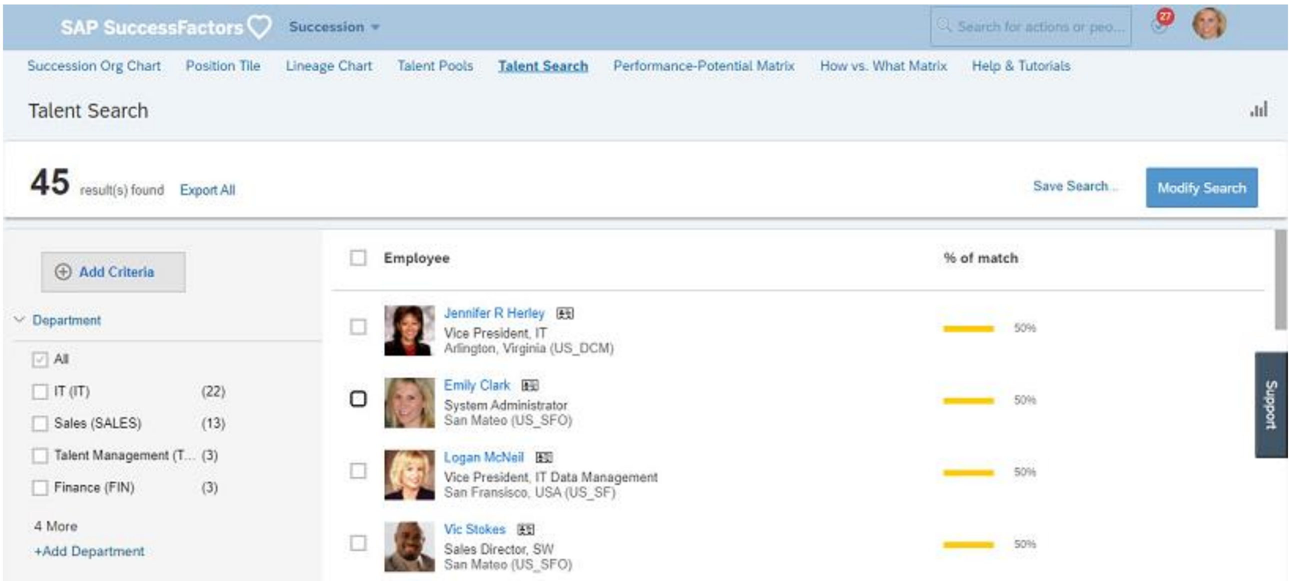
To include inactive users, the Administrator must complete the following steps:

- Give access to the inactive field by enabling it within the Talent field permission section of Role-Based Permissions.
- Check the box within the search form to include the inactive users.



Refining the Search Criteria

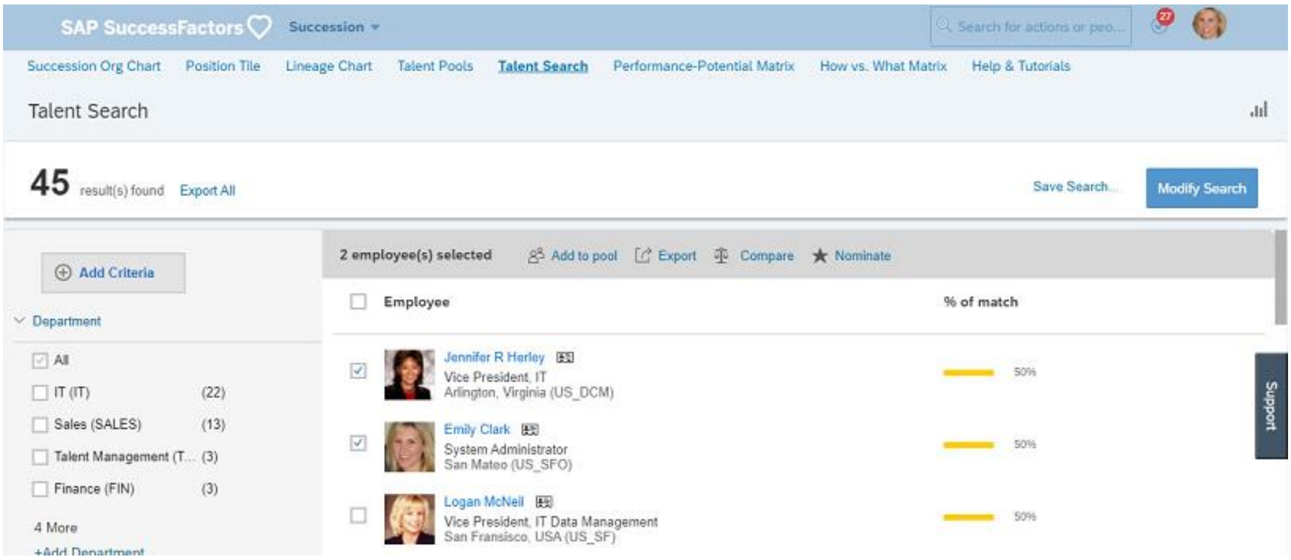
Succession Planners or any permissioned end users are now able to add or remove filters for more refinement. Basic Information, Advanced Information, and Rating & Competencies can all be configured. You can also add up to six search criteria to each background information category under Advanced Information. You can view the search results that meet both all criteria for the same background information category (AND logic) and any of criteria for different background information categories (OR logic).



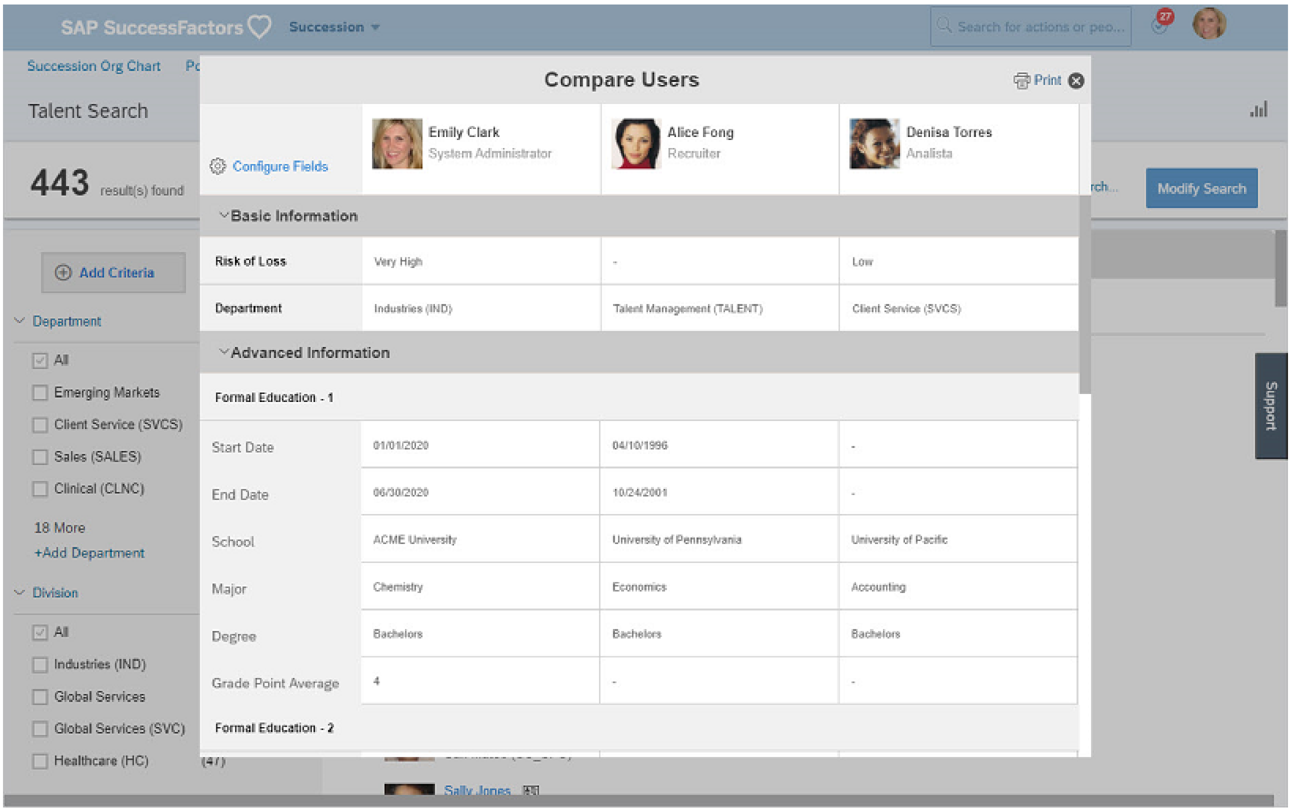
	Department, Division, and Location are default filters within your configuration. If you would like additional filters added into the list received when clicking the Add Criteria button, you will need to work with Customer Success or Professional Services.

Action Toolbar

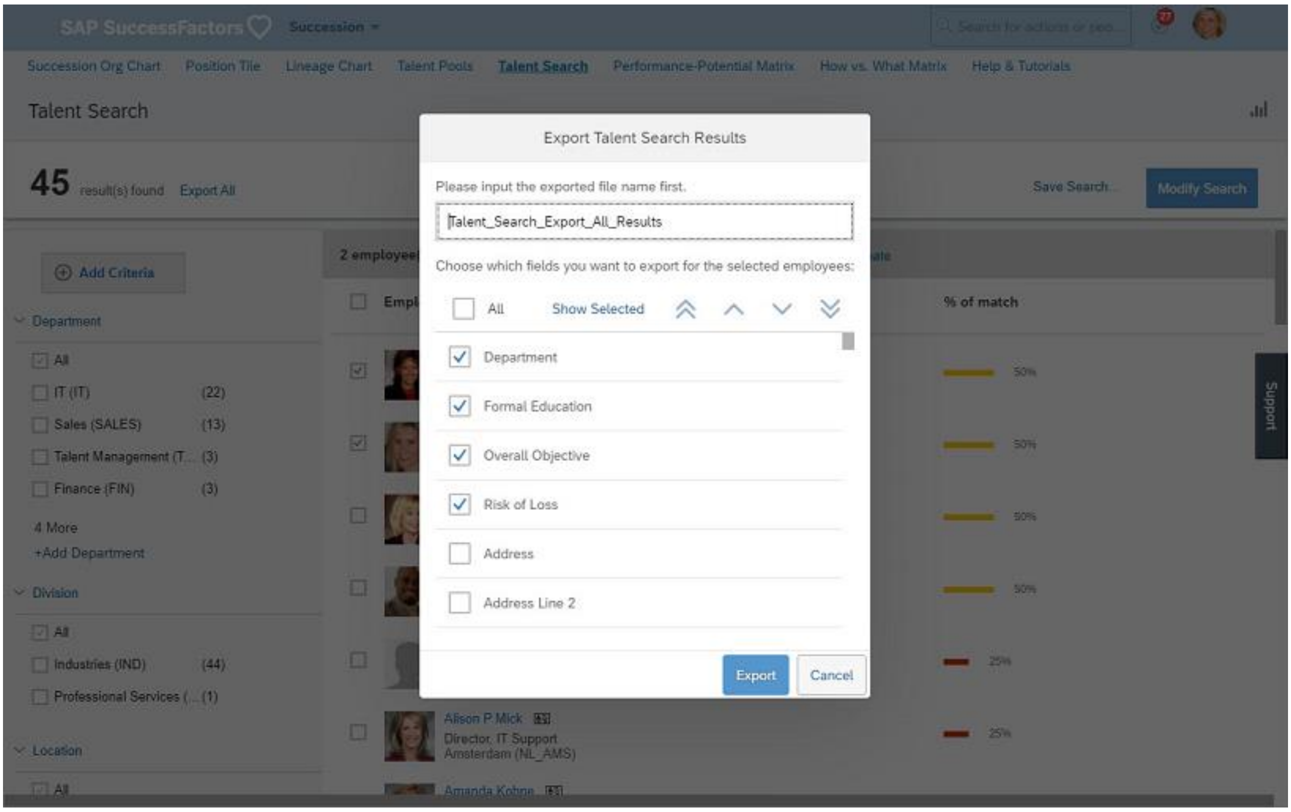
In order to see the Action Toolbar within Talent Search v2, the Succession Planner or end user must select at least one employee. Once this is done, you will see the following:



After selecting 2-5 users and clicking the Compare icon will present a table that compares users on the selected criteria.

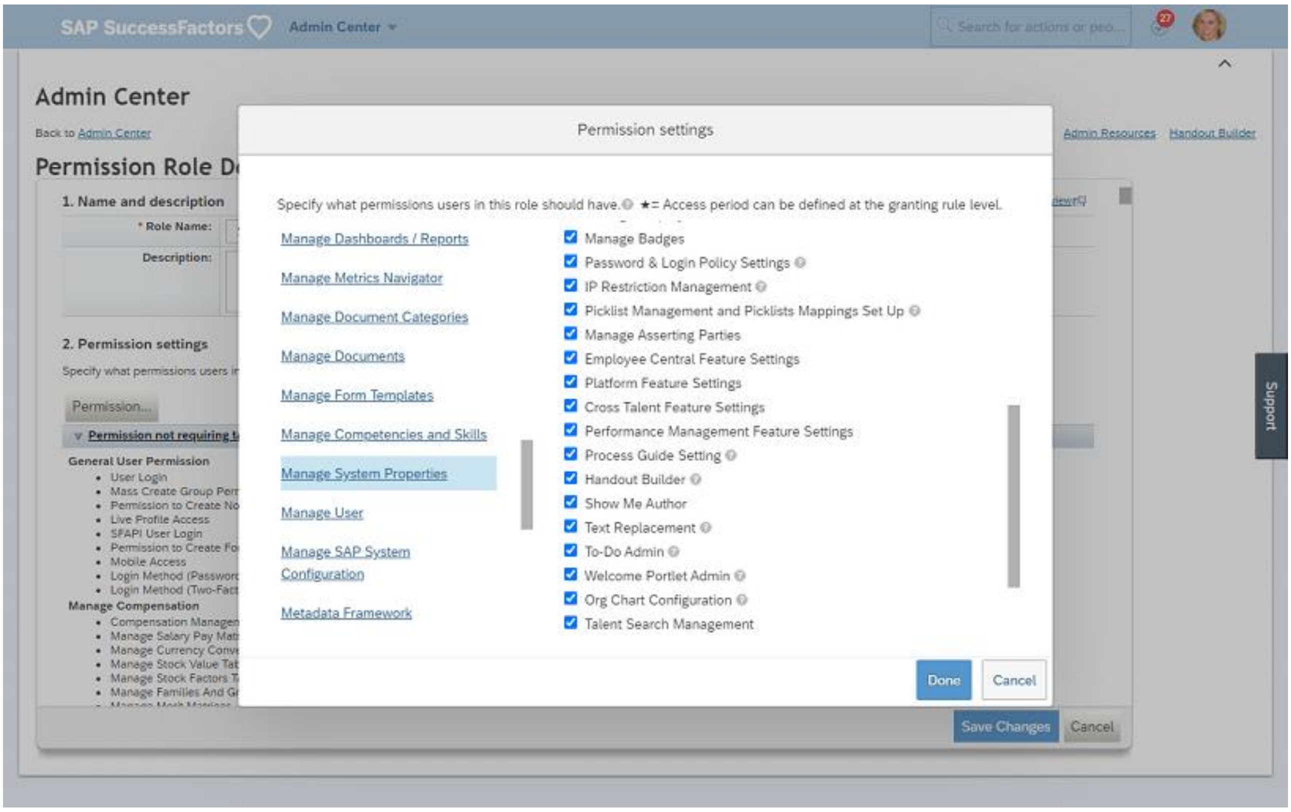


And, you can also add to an MDF Talent Pool or nominate using position or MDF position nomination methods. The Export All option and the Export option on the Action Bar both allows users to configure an export by selecting and sorting various fields. The difference is that the Export All option exports every user that the search returns whereas the Action Bar Export allows you to select specific users to export.



Talent Search Settings for Talent Search v2

The first step in choosing the Talent Search Settings begins in the Manage Permission Roles section of Role-based Permissions in order to grant Administrators access to these options.

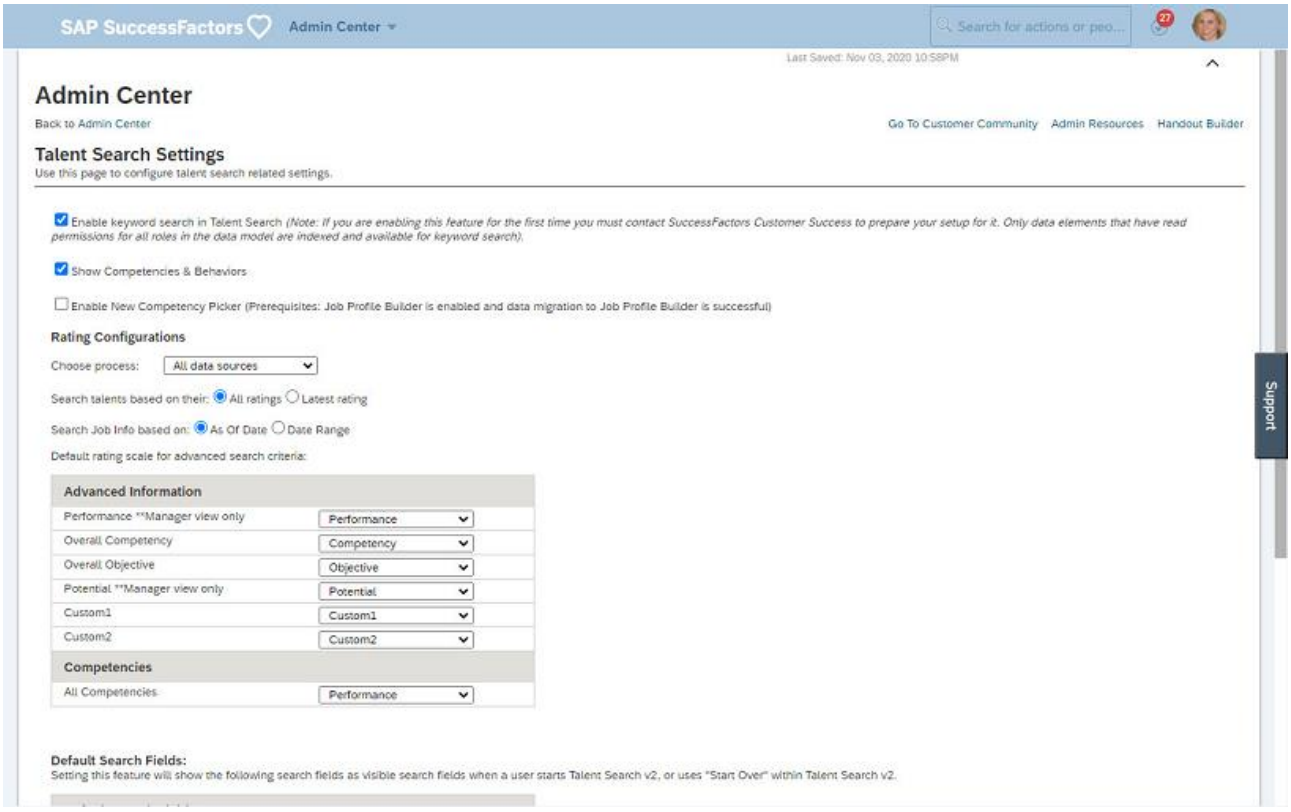


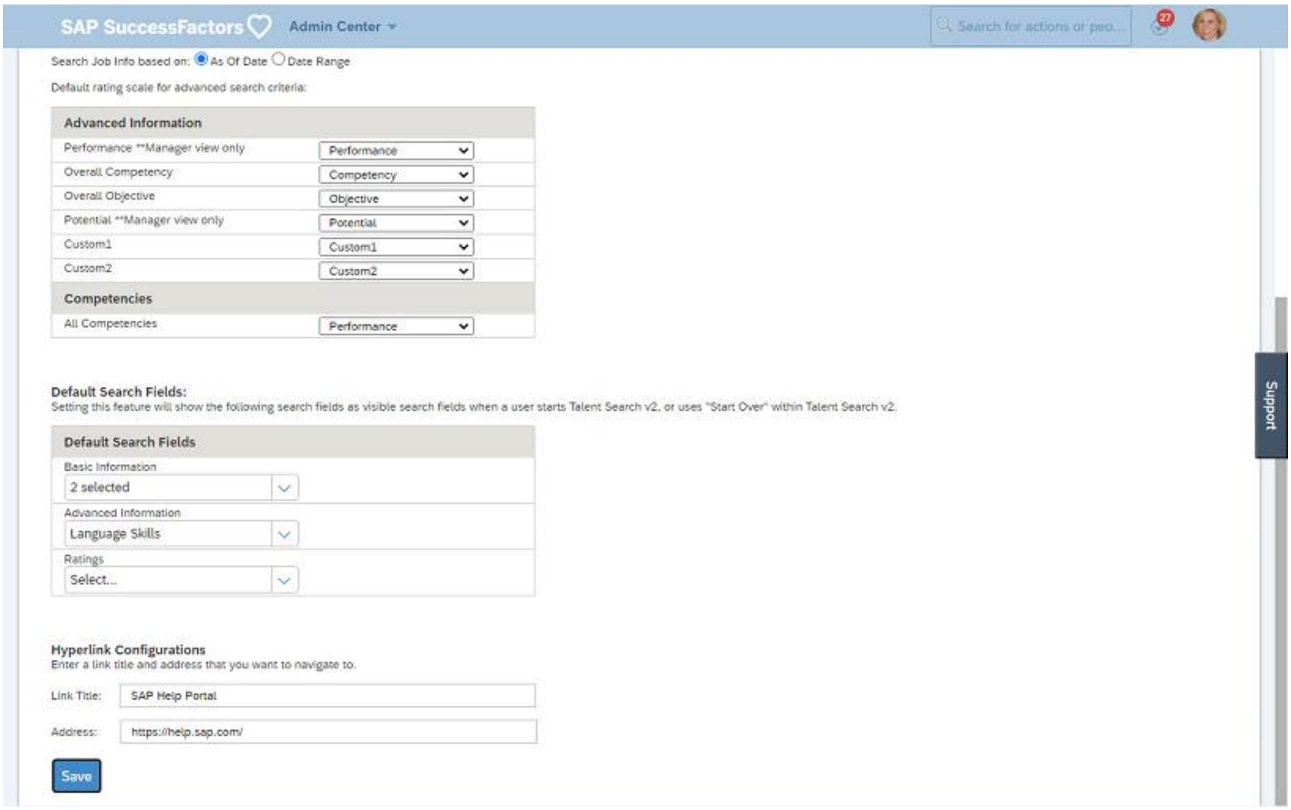
Once you have given the role the correct permissions by enabling Talent Search Management within Role-Based Permissions, you can see the Talent Search Settings by navigating to Admin Center > Succession > Talent Search Settings.

Options within Talent Search Settings

Whether during initial setup or troubleshooting, make sure to review or modify the settings of Talent Search. They can be found by navigating to Admin Center > Succession > Talent Search Settings. In this area, the Administrator determines the following:

- Select the Enable keyword search in Talent Search check box to turn on the keyword search for the instance.
- Choose the Show Competencies and Behaviors check box to activate a search on competencies.
- Choose the Enable New Competency Picker (Prerequisites: Job Profile Builder is enabled and data migration to Job Profile Builder is successful) checkbox to add competencies in Talent Search.
- Use the Rating Configurations section to choose rating scales to be used in Talent Search.
- Set Default Search Fields which are visible when a user starts or restarts a search.
- Define Hyperlink Configurations to add a hyperlink to the Talent Search page that can be used for example to help users navigate to help documentation from the Talent Search page.

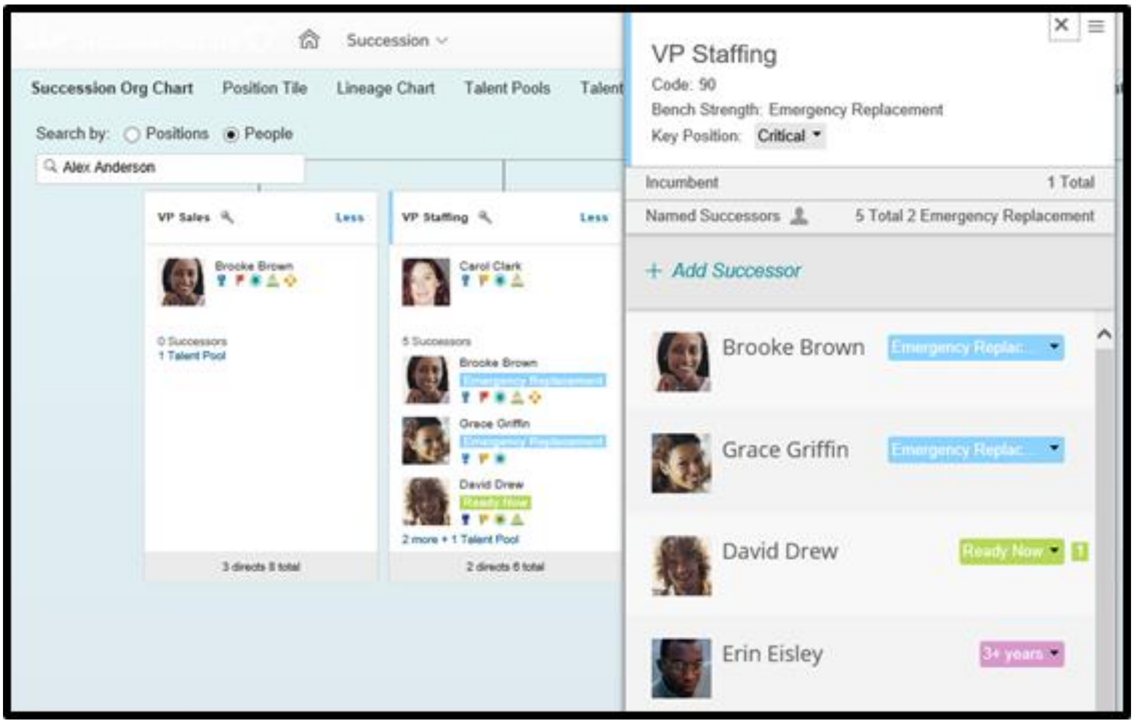

SAP SuccessFactors
Admin Center
Search for actions or peo...
Last Saved: Nov 03, 2020 10:58PM
Admin Center
Back to Admin Center
Go To Customer Community
Admin Resources
Handout Builder
Talent Search Settings
Use this page to configure talent search related settings.
Enable keyword search in Talent Search (Note: If you are enabling this feature for the first time you must contact SuccessFactors Customer Success to prepare your setup for it. Only data elements that have read permissions for all roles in the data model are indexed and available for keyword search).
Show Competencies & Behaviors
Enable New Competency Picker (Prerequisites: Job Profile Builder is enabled and data migration to Job Profile Builder is successful)
Rating Configurations
Choose process:
All data sources
Search talents based on their: All ratings Latest rating
Search Job Info based on: As Of Date Date Range
Default rating scale for advanced search criteria:
Advanced Information
Performance **Manager view only
Performance
Overall Competency
Competency
Overall Objective
Objective
Potential **Manager view only
Potential
Custom1
Custom1
Custom2
Custom2
Competencies
All Competencies
Performance
Default Search Fields:
Setting this feature will show the following search fields as visible search fields when a user starts Talent Search v2, or uses "Start Over" within Talent Search v2.
Support


SAP SuccessFactors
Admin Center
Search for actions or peo...
Search Job Info based on: As Of Date Date Range
Default rating scale for advanced search criteria:
Advanced Information
Performance **Manager view only
Performance
Overall Competency
Competency
Overall Objective
Objective
Potential **Manager view only
Potential
Custom1
Custom1
Custom2
Custom2
Competencies
All Competencies
Performance
Default Search Fields:
Setting this feature will show the following search fields as visible search fields when a user starts Talent Search v2, or uses "Start Over" within Talent Search v2.
Default Search Fields
Basic Information
2 selected
Advanced Information
Language Skills
Ratings
Select...
Hyperlink Configurations
Enter a link title and address that you want to navigate to.
Link Title:
SAP Help Portal
Address:
https://help.sap.com/
Save
Support

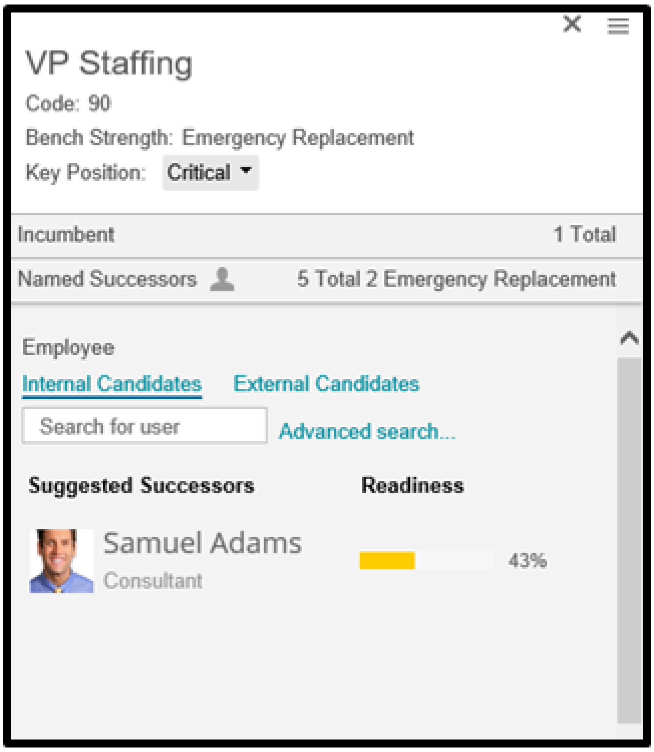
Advanced Search

Advanced Search is very similar in its capabilities as Standalone Talent Search with the major exception of how you access the search.

To access Advanced Search, navigate to Succession > Succession Org Chart (SOC) tab. Click on the position to access the menu. Select Add Successors to view the screen.

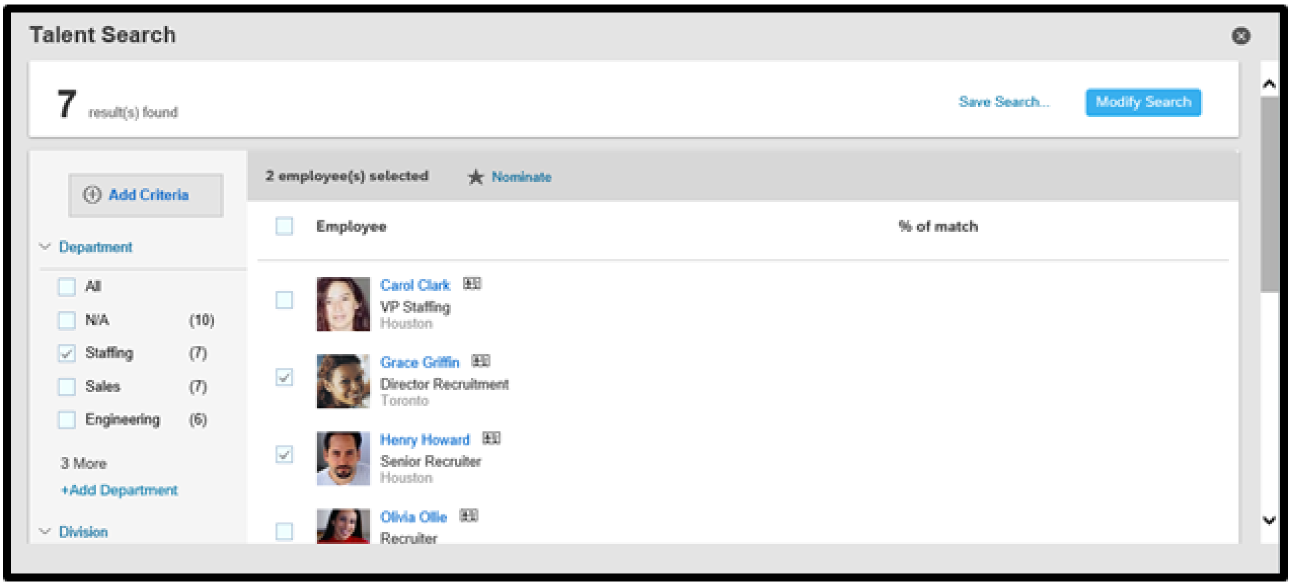


Next, click on the Advanced Search link and please note that you will only see the internal and external candidates' option if your instance is utilizing Succession and Recruiting Management. And, you will only see suggested successors when utilizing Succession and Career Development Planning.

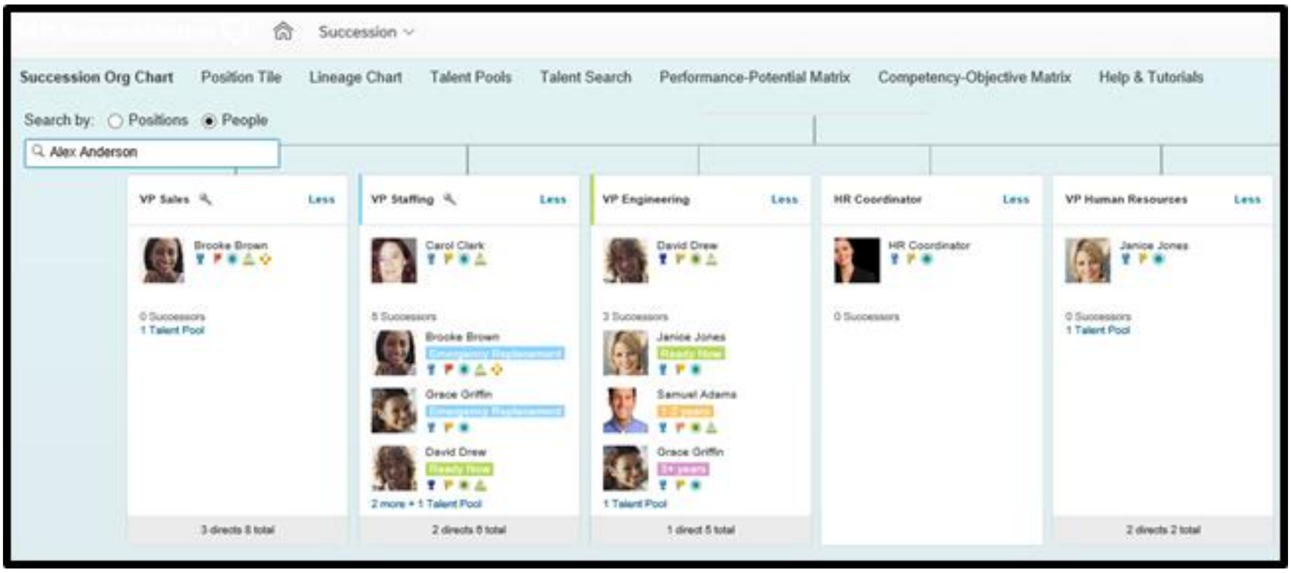


Once you click on Advanced Search, run the search with your favorite criteria and follow these steps (Do notice that you only have one action button to use. Standalone Talent search, which is one on its own page in the instance, has multiple action buttons based on permissions):

- Check the box next to the employee name
- Click the Nominate button in the page



When nominations are approved or completed, the name along with other details will appear at the bottom of the Succession Org Chart and other areas.



Troubleshooting Talent Search

If experiencing difficulties using the Talent Search feature, check these possible reasons:

- Too many required criteria may return no results.
- If you are often finding you return too many results, you may want to ask your PS or CS rep about the limit set. It can be 50, 100, 200, or 400. The default is 50.
- If you are getting no results, make sure you have Succession Management and Matrix Report Permissions. If you cannot see the StandAlone Talent search, check the Talent Search permission.
- If you are searching for ratings and aren't finding anyone, make sure you are searching for a % of the scale, not the actual rating. On a 5 scale, a search for 60-100 will return the 3-5 ratings. A search for 3-5 is looking for 3%-5%. Since 1 is at 20%, nothing will fall in that range. Set default search fields for when user starts a search.

	Remember there are two permission areas controlling Talent Search: Talent Search Access and Talent Search Field.

Lesson Conclusion – Talent Search V2

In this lesson, you were exposed to various options and features within Talent Search v2.

You should now be able to:

- Nominate or troubleshoot Talent Search v2
- Nominate using Advanced Search

Lesson 8-5 – Matrix Grid Reports v12

Lesson Overview

The goal for this lesson is to discuss the areas that impact the Matrix Grid Reports.

Lesson Objective

- Introduce the Matrix Grid Reports and identify change options within Admin Center

Matrix Grid Reports

The Matrix Grid Reports visual display of a team member's overall ratings allowing managers to compare performance and identify talent in the organization for succession planning, internal recruiting, and development plans.

There are two matrix grid reports most commonly available within Succession:

- Performance and Potential (Overall PM and Potential Ratings)
- How vs. What (Overall Competency and Objective Ratings)

The way the Matrix Grid report works is as follows:

- Employees are placed on the matrix grid based on their ratings and when they have ratings for both the X and Y axis
- Icons are populated by imported data (gender, minority, or other personal information) or icons are populated by options selected in the Talent Review fields in People Profile (generally, manager view only like risk of loss, impact of loss, talent pool)

As the Administrator, you can control these areas within Admin Center:

- Matrix Rating Scale
- Matrix Colors, Labels, and Process Rating Scale
- Matrix Grid Icon Configuration
- Retirement Eligibility Settings

Matrix Grid Report Example

To understand the setup of the Matrix Grid Reports, it is helpful to review the report from the Succession Planner perspective. This report is built in quadrants on an x and y axis. In this example below, the matrix grid relays the information for Performance and Potential ratings where both are using a 3-point rating scale. When this occurs, the matrix grid creates 9 blocks or quadrants. Often, the matrix grid report is referred to as a 9-block or 9-box because the configuration of the scales. Should either of the rating scales change to a 5-point, the report then becomes a 15-box or even a 25-box.

Terms and Definitions

Term	Definition
Performance-Potential	Matrix tool to plot employees on a graph based on performance (based on reviews) and potential (based on manager’s judgment); used to quickly identify high performing high potentials for succession management purposes.
How vs. What (Competencies-Objectives)	Matrix tool to plot an employee’s competency rating relative to his/her objective rating in a matrix grid chart. This chart visually demonstrates the impact of an employee’s overall performance.

Filter Data in the Matrix Grid Reports

There are several filter options for the Matrix Grid Reports.

- **Review Period:**

  There is only one field for the time period, the first date is the start date and the second date is the end date.

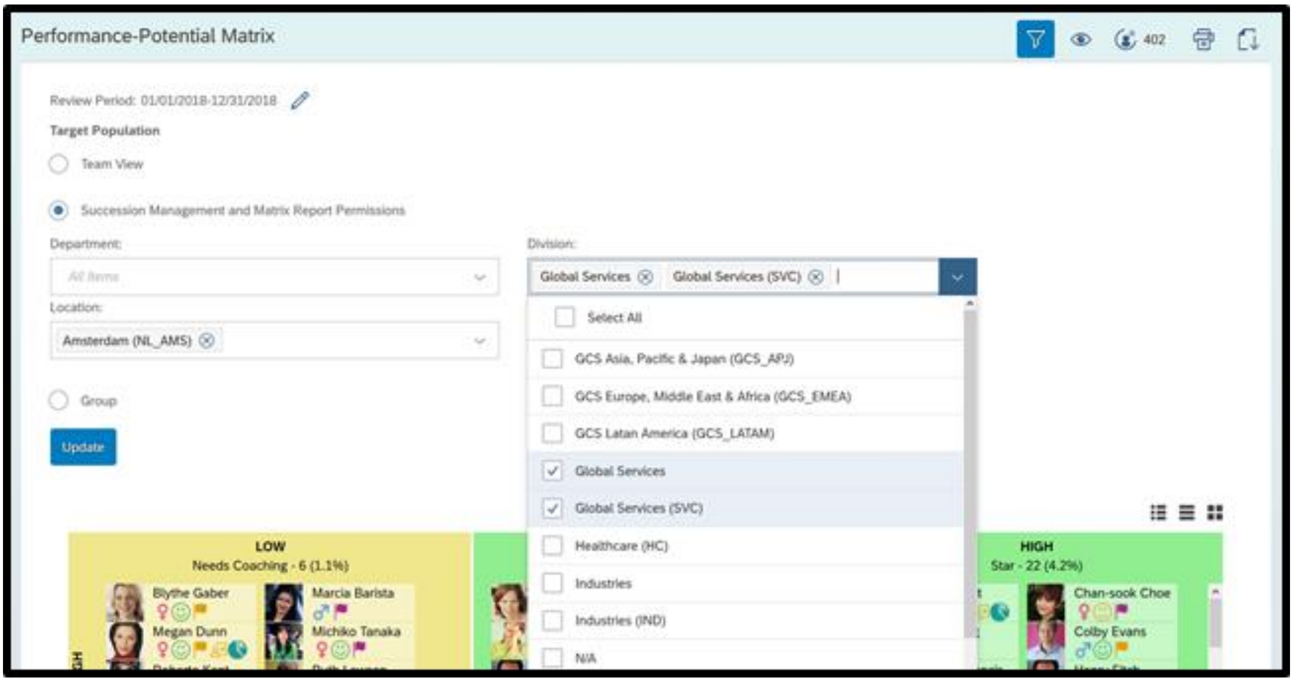
- **Target Population:**

  The target population can be based on
  - Team View
  - Succession Management and Matrix Report Permissions

- Dynamic Groups

Additional criteria such as the Department, the Division or the Location will allow user to restrict further the target population when they generate the report. More standard fields can be defined as filter for the Matrix Grid Reports from the Succession Data Model xml.

The filter values can always be adjusted by opening the filter area again and then choosing the button Update.



Talent Flags and Trend Data

Talent Flags (also known as talent review fields) track data within the employee profile portlet and display onto the Matrix Grid Report when an icon is configured. Although an administrator is able to modify the label of this portlet called Talent Information within Admin Center, you cannot change the label Risk of Loss or others listed below without consultation.

Trend data fields for use on the matrix grid report are typically performance and potential. Yet, there are six fields in total to include performance, potential, competency, objective, custom1, and custom2. These custom fields are similar in behavior to the four standard trend elements but can only be used to do the following:

- Import ratings into live profile with the trend data import
- Enter ratings directly into live profile
- Display ratings on the matrix grid reports

As the Administrator, you do not have the ability to change any of the following:

- Modify talent review field definitions, labels, or related items
- Add custom1 or custom2 as a trend field to the succession data model
- Display the source column within the people profile portlet

To move forward, contact Customer Success or Professional Services.

Permissions for the Matrix Grid Reports

When using Role-based permission, the Matrix Grid Reports permission grants access to the Performance-Potential Matrix. This permission also controls access to the How vs. What Matrix. There is not a separate permission for each matrix; both reports are controlled by the Matrix Grid Reports permission. If you do not see one of the matrices, it means that it was not enabled for your organization during configuration.

While this permission allows access to the Performance-Potential Matrix, the target population of employees a user is able to view in this tool is determined by the Succession Management and Matrix Report Permissions.

Succession Management and Matrix Report Permissions

The Succession Management and Matrix Report Permissions allow a succession planner to view employees within the Succession Tools (Succession Org Chart and Lineage Chart, Talent Search and Performance-Potential Matrix). The target population of employees that the succession planner can view is defined within the permission role, and controls visibility within ALL of these tools; therefore, it is not possible to give different levels of visibility to the different tools.

The visibility granted to a user within SAP SuccessFactors Succession will vary by organization. Some companies have very clearly defined rules and processes for visibility across the organization, while others may have more transparency. For example, a company may have a specific group of people who are responsible for succession planning throughout the entire organization, so these people would have visibility across the whole organization. Another company may task succession planning to management, where each manager has visibility to his or her direct reports, and no one else in the organization is responsible for succession planning.

This section describes how to grant the Succession Management and Matrix Report Permissions to a target population. The strategy behind your organization's processes will have to be defined internally when deciding which users a person should have access to when using the Succession Tools.

Matrix Grid Rating Scales

Matrix Grid Rating Scales show in several places within People Profile and Succession based on your configuration. When capturing data, these scales utilize the people profile portlets for trend elements like performance, potential, objectives, competencies, custom1 or custom2. These scales also serve as the ratings within the matrix grid reports if denoted as such within the proper Admin Center section. To get started, you can easily create or modify the desired scale by navigating to Admin Center > Succession > Matrix Grid Rating Scales.

To change a Matrix Grid Rating Scale:

- Select and edit one of the six rating scale options from the drop-down menu
- Modify the values as necessary and click Save Changes

Once you have completed this action, you need to make some additional configuration changes to the actual Matrix Grid Report within Admin Center.

Performance-Potential

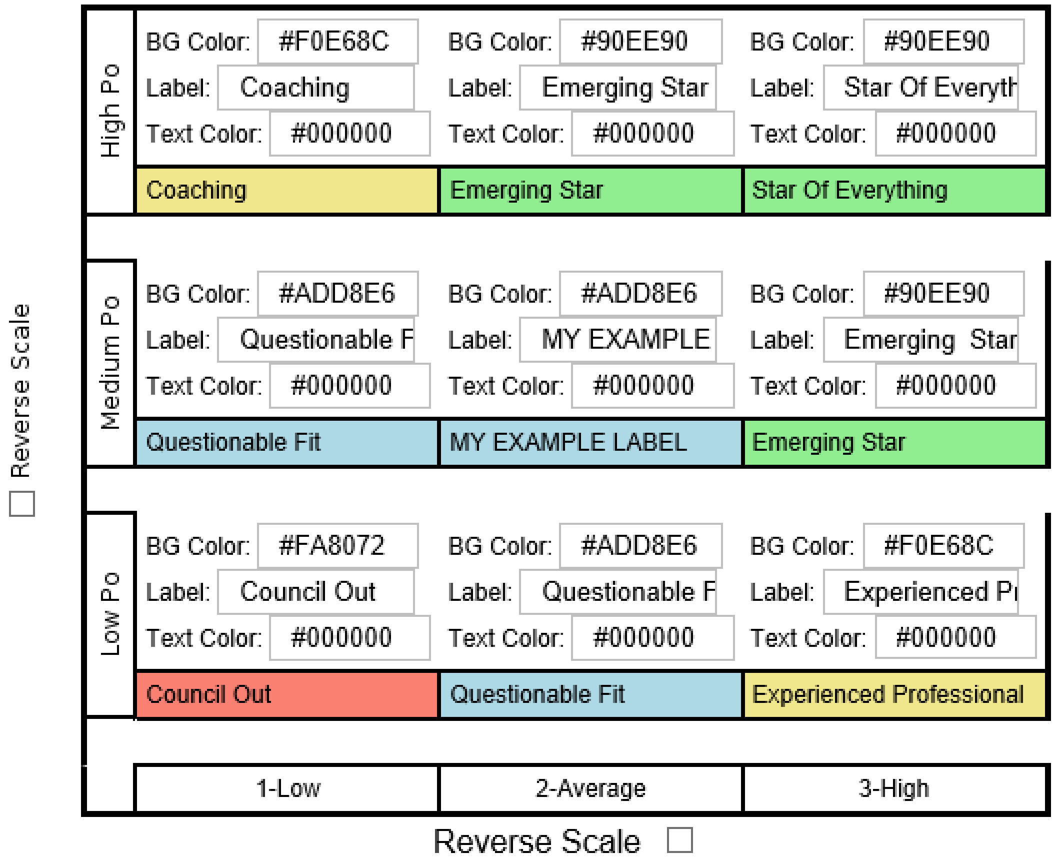
The Matrix Grid Reports offer great flexibility when it comes to its name, labels, data, process, weights, actions, and colors. You can control what text or trend data to use in addition to the process and custom weights. The process determines what data or forms to use in the report and customer weights allow for custom distribution over normalization. Normalization occurs when converting from a 5-point rating scale to a 3-point rating scale, which divides the range into 3 equal partitions. Custom weights simply modify the distribution by the numerical value entered.

Be aware of the powerful action checkboxes within this section. When checked, the system will perform specific actions like excluding in-progress forms or opening the Quickcard in a new browser window. To find out more, search for knowledge base articles within the Customer Success portal.

As the administrator, you can select the process from the dropdown within this area. However, the process is originally created within Admin Center > Reporting and Analytics > Processes and Forms. For more information, go to Lesson 8-8 in this guide.

Matrix Grid Colors and Text

Our customers like to have the ability to change colors or text to be more reflective of their culture. With the matrix grid report, you can build the quadrants, labels and text to what is meaningful to your Succession Planners or users. Simply make changes within the lower half of Admin Center > Succession > Matrix Grid Report: Performance-Potential and click save changes. Also, note that there are additional options for unrated or too new to rate designations. Checking the box enables or executes the feature and unchecking the box disables the feature.



	If you would like to modify the How vs. What (Competency-Objective) Matrix Grid Report, navigate to Admin Center > Succession > How vs. What and perform the same steps.

	Be sure the How vs. What Matrix Grid Report was activated in your original setup by your Professional Services Consultant or the report will not be visible from the Succession Planner or Administrator. If you would simply like to upgrade to the Matrix Grid Report v12, you may utilize the Upgrade Center.

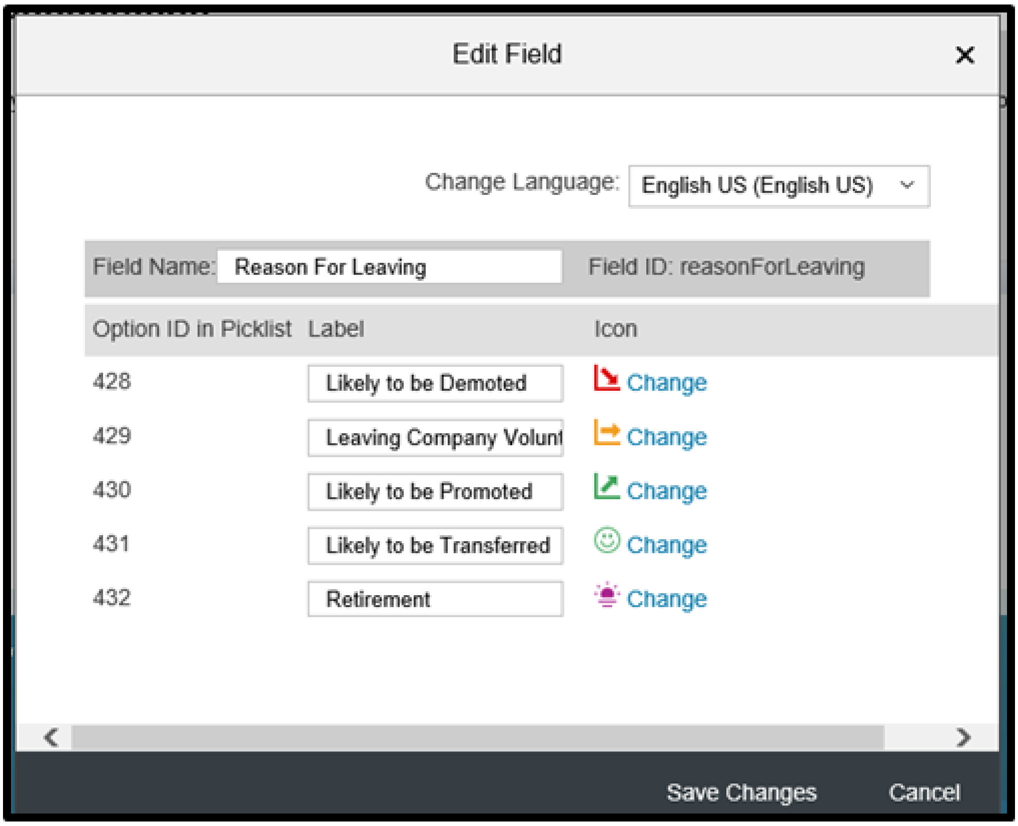
Matrix Grid Report Icons

Another way you can represent data within the matrix grid report is through icons.

Succession offers many icon choices with the Admin Center, where you can select a different icon if you would like. As in the Screenshot below, the icons are displayed to the right and you can adjust the order of the icons. You can have up to 8 icon sets, but for best usability 4 or fewer are recommended. If you use multiple matrix grid reports, the same icon configuration will apply to both.

As the administrator, you can take action on an existing icon from this area. However, the fields must be previously defined and the label included by your Professional Services Partner or you will need additional assistance for full execution of this change.

To make icon modifications, navigate to Admin Center > Succession > Matrix grid report icon configuration. And, you can select from the new Fiori icons if you prefer. Example:



Retirement Eligibility Settings

Once the retirement eligibility field is configured for your system, you can build simple logic within the retirement eligibility settings. These settings are found in Admin Center > Succession > Retirement Eligibility Settings. Here, you are able to trigger the retirement eligibility icon by age or tenure.

All matrix grid icon configurations can be achieved within Admin Center except retirement eligibility. You will need to consult Professional Services or Customer Success for initial setup of this field.

The icon configuration is used for both matrix grid reports. For example, the system does not allow for additional icons on the Performance-Potential Matrix Grid Report and less icons on the How vs. What Matrix Grid Report.

Troubleshooting the Matrix Grid Report

The Matrix Grid Report is a very powerful but easily misunderstood tool by the Succession Planner or end user. For this reason, the chart below is included to assist with minor troubleshooting:

If employees do not appear on the matrix grid	• Do they have ratings for both x and y axis? • Is the correct process selected in the Matrix set-up? • Does the "date range" in the filter options include the data? • Do the filtering options include the correct population?

Lesson Conclusion – Matrix Grid Reports v12

In this lesson, you were introduced to the Matrix Grid Reports and the options in Admin Center.

You should now be able to introduce the Matrix Grid Reports and identify change options within Admin Center.

Lesson 8-6 – Position Tile View

Lesson Overview

The goal for this lesson is to discuss Position Tile View.

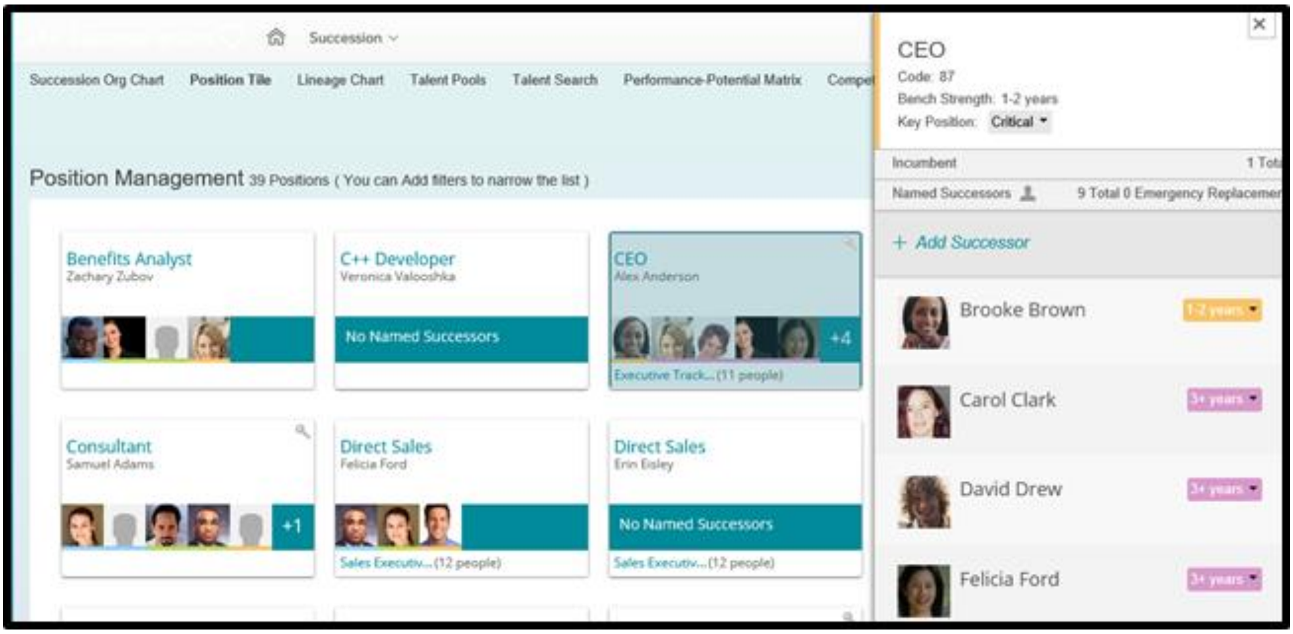
Lesson Objectives

- Define Position Tile View and present the prerequisites and the benefits.
- Identify the permissions pertaining to Positions.

What is Position Tile View?

The Position Tile View for MDF Positions allows succession planners to manage plans for a group of position without having to navigate an organizational hierarchy.

The Position Tile View is especially useful for planners who are responsible for managing by department or level, discrete positions that are not necessarily connected by a position hierarchy. The Tile View lets planners to narrow down a list of positions and manage the corresponding succession plan. You are also able to view the succession talent card.



Prerequisites for Position Tile View

The Position Tile View can be activated from the Upgrade Center if the prerequisites are enabled in the back-end or consultants can also activate the Position Tile View directly from the back-end.

The position Tile View requires the following features:

- Succession Module
- MDF Position Nomination Method
- V12 UI
- Role Based Permission

!	The Position Tile View also works only with Position level permissions. Customers who have not implemented position level permissions in RBP, will not see their Position Tile View being populated.

Benefits of Position Tile View

Some of the benefits of the Position Tile View include:

- Complements the Succession Org Chart by providing a view of group of positions that the planner is responsible for
- Allows for advanced search and filter based on position attribute
- Integrates with the Talent Card for insights into successors and incumbents
- Provides a modern consumer grade user experience
- Ability to print and export tiles with succession information

The Position Tile View is not an alternative to the Succession Org Chart. It is complementary to the org chart which still remains the key entry point for several succession transactions.

Managing Permissions

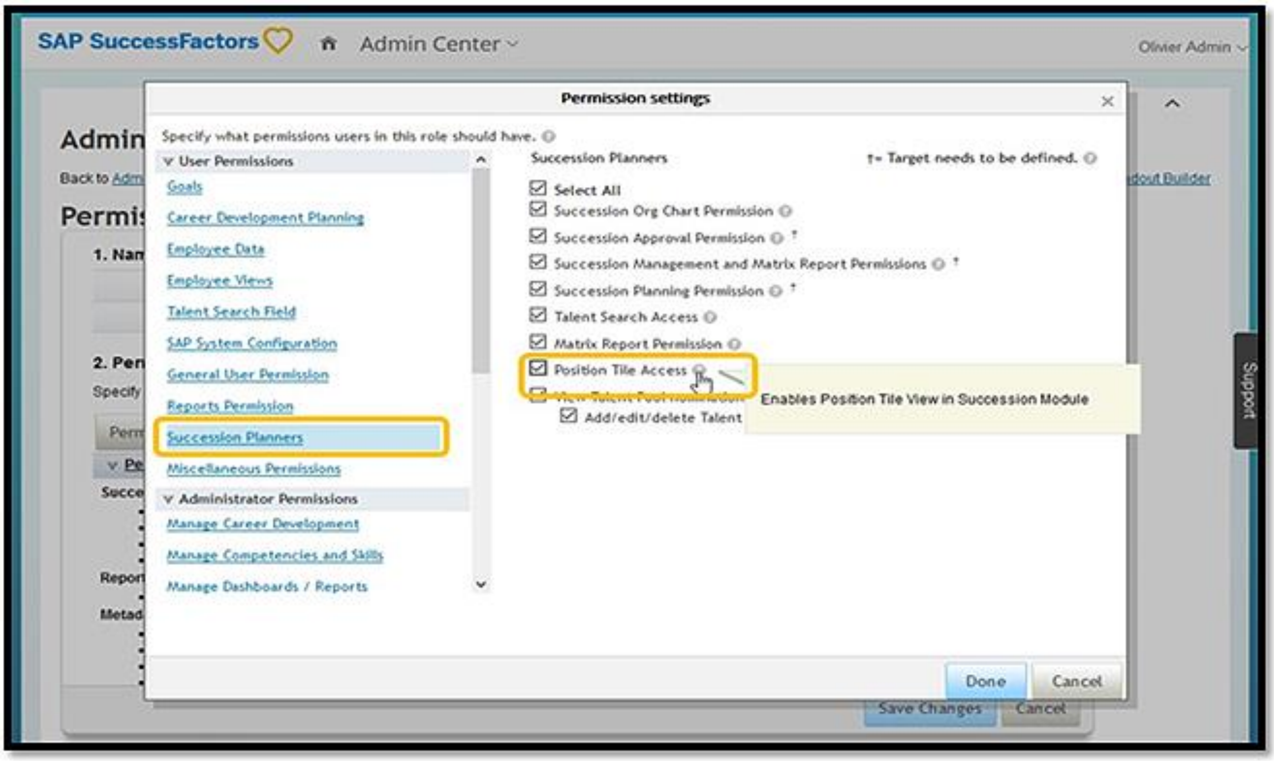
Position Tile View requires two levels of permissions that the company administrator need to configure:

1. Access Permissions: Two permissions that control access to the Position Tile tab and the Talent card designer tool.

2. Position Permissions: These permissions are generally configured during Succession implementation, meant to provide position level access to users.

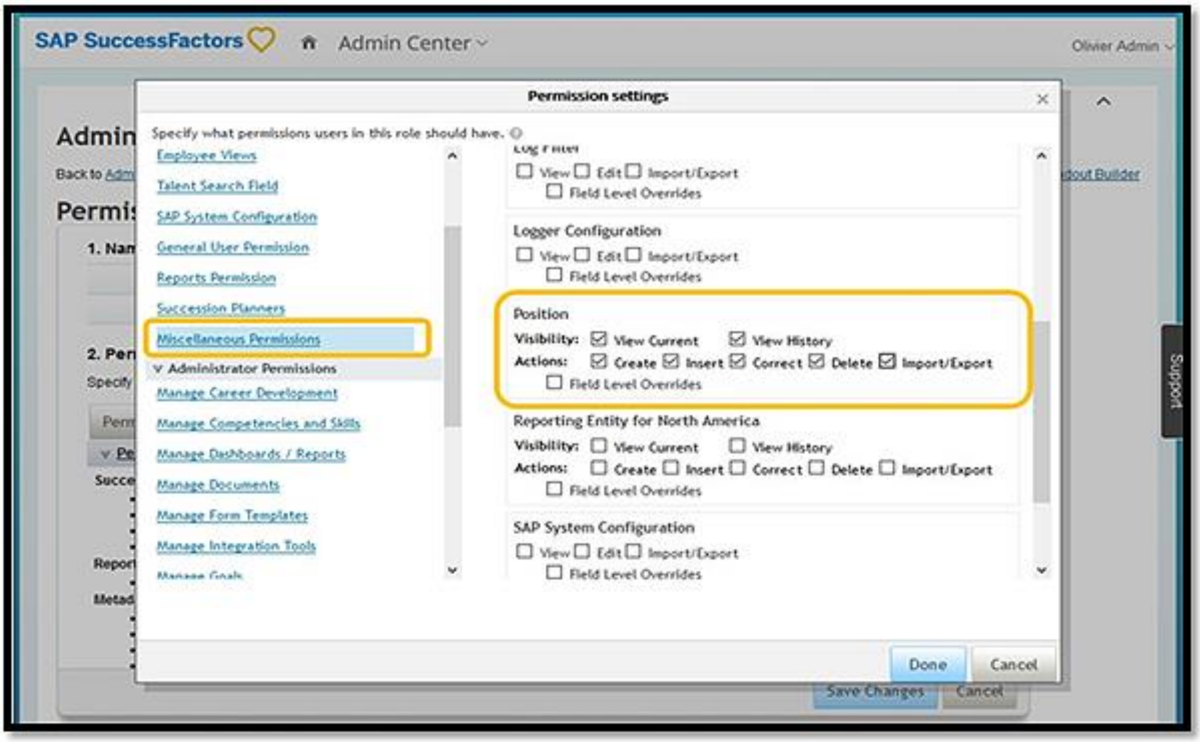
Access Permissions

1. From Admin Center > Manage Permission Roles > Select the desired role (e.g. HR Planners).
2. Click on Permissions and Succession Planners.
3. Check Position Tile Access permission to provide access.

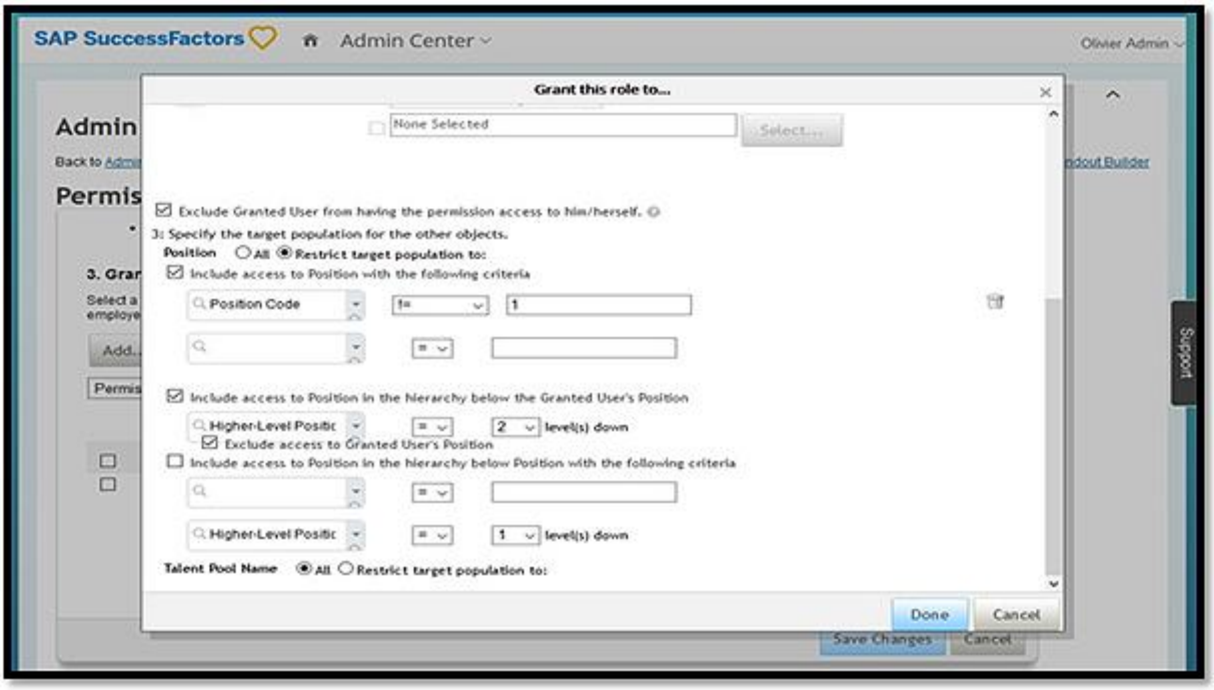


Position Level Permissions

Roles needing access to the Position Tile View will also require access to the MDF Position object. To grant this navigate to Miscellaneous Permissions in RBP and select your desired View/Create/Insert/Delete options. At a minimum View, permission is required to view the Position Tile.



Only positions that are in the target population of the role will be displayed on the Tile View.



Lesson Conclusion – Position Tile View

In this lesson, you could review the definition, prerequisites, benefits and permissions pertaining to the Position Tile View.

You should now be able to permission the Position Tile View.

Unit Wrap-Up

In this unit, you covered:

- Lesson 8-1: Succession Org Chart v12
- Lesson 8-2: Lineage Chart Access
- Lesson 8-3: MDF Talent Pools and Permissions
- Lesson 8-4: Talent Search v2
- Lesson 8-5: Matrix Grid Reports v12
- Lesson 8-6: Position Tile View

You should now be able to maintain or modify Admin Center settings and view nomination data using the Succession Org Chart v12, Lineage Chart, MDF Talent Pools, Talent Search v2, Matrix Grid Reports v12, and the Position Tile. You should also have basic concepts in the areas below:

- Define Succession Nomination Tools and Usage
- Identify options located within Admin Center for the Succession tools

Unit 9 – Presentations

Unit Objectives

This unit contains four lessons:

- Lesson 9-1: Overview and Enabling Presentations
- Lesson 9-2: Key Features of Presentations
- Lesson 9-3: Creating a Presentations
- Lesson 9-4: Managing Presentations

Upon completion of this unit, you will be able to:

- Enable Presentations
- Describe the key features for presentations
- Create Presentations
- Manage Presentations

Lesson 9-1 – Overview and Enabling Presentations

Lesson Overview

The goal of this lesson is to provide an overview and to describe how to enable Presentations.

Lesson Objectives

- Describe Presentations
- Enable Presentations

Overview

Presentations is a simple and intuitive way for you to create and present interactive presentations that include dynamic SAP SuccessFactors content.

Presentations is a solution to challenges faced by CHROs and senior HR leaders who deliver talent review presentations to CEOs, executives, and board members multiple times each year. Preparing, delivering, and managing these presentations offline is effort-intensive and provides poor user experience. Typical challenges include:

- HR leaders and staff spend weeks or even months copying & pasting content to assemble these presentations.
- Custom reports, manual effort, and reams of paper are used to produce binders of printed talent cards which are unwieldy and not portable
- Presentations and binders often have outdated static data, raising questions about accuracy

- Static data and a linear presentation format lead to a poor audience experience

Presentations was built to address these challenges. It is a tool for preparing and delivering talent review presentations, or any other presentation that includes dynamic data from SuccessFactors. Key benefits include:

- **Easy assembly:** You can quickly assemble talent review presentations by merging static PowerPoint and dynamic SAP SuccessFactors content.
- **Outstanding user experience:** SAP SuccessFactors data is presented in a visually compelling way and centered on presentation focus areas.
- **Dynamic content:** Live content from the SAP SuccessFactors HCM Suite eliminates the need for screenshots.
- **Integration with Talent Cards:** Talent Cards , enables dynamic talent conversations.

How Does it Work?

There are three steps in the process:

Step 1: Upload

- Upload PowerPoint a file to SuccessFactors application from your desktop
- Processing of the imported file may take a couple of minutes based on the size of the file

Step 2: Assemble

- Add dynamic SuccessFactors "live slides", such as Succession Org Chart or 9-box, and interactive "hotspots".
- Drag and drop slides to rearrange your presentation.

Step 3: Present

- Present directly from the SuccessFactors application, with live data
- Use full-screen presentation mode
- Use your keyboard to navigate slides

	Presentations is available to all SAP SuccessFactors customers. No license or feature prerequisites are required. Some “live slide” content depends on which SAP SuccessFactors modules are included in the subscription and how the instance is configured.

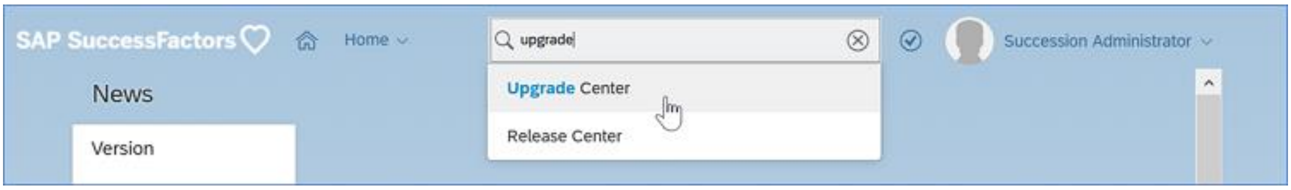
Getting Started With Presentations

Enable and configure the Presentations feature in your instance so that people can start using it.

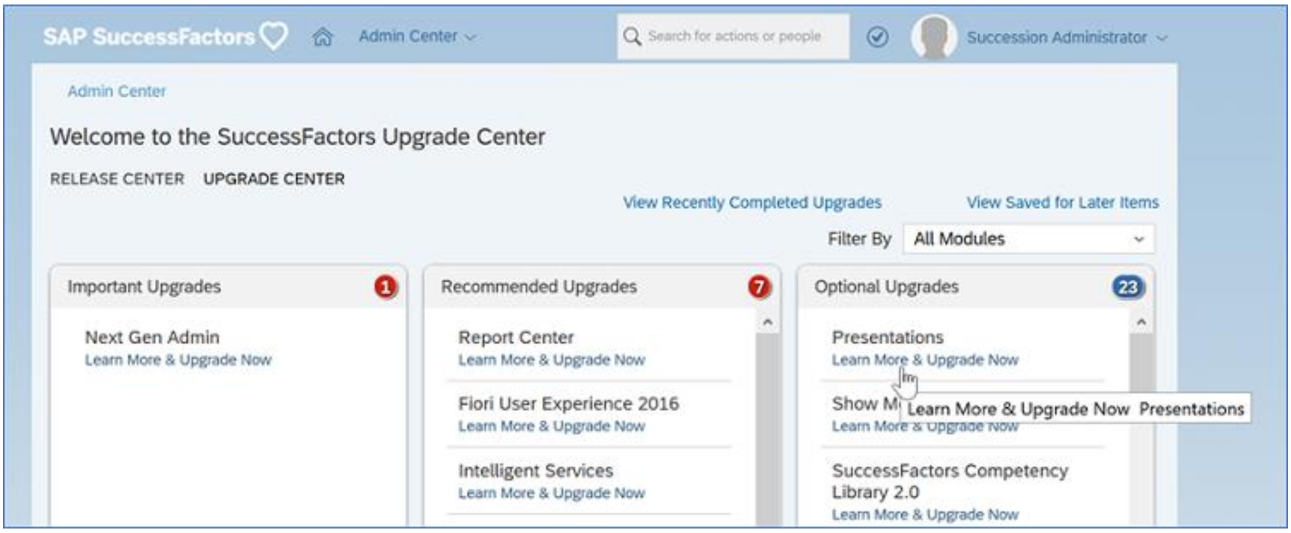
There are three steps to enabling Presentations so that people can use it:

1.*Turn on the feature*
To complete this task you need to have permission to access the Upgrade Center. If you do not use the Upgrade Center, contact SAP SuccessFactors to have the feature turned on and then accept the user agreement separately for your company.

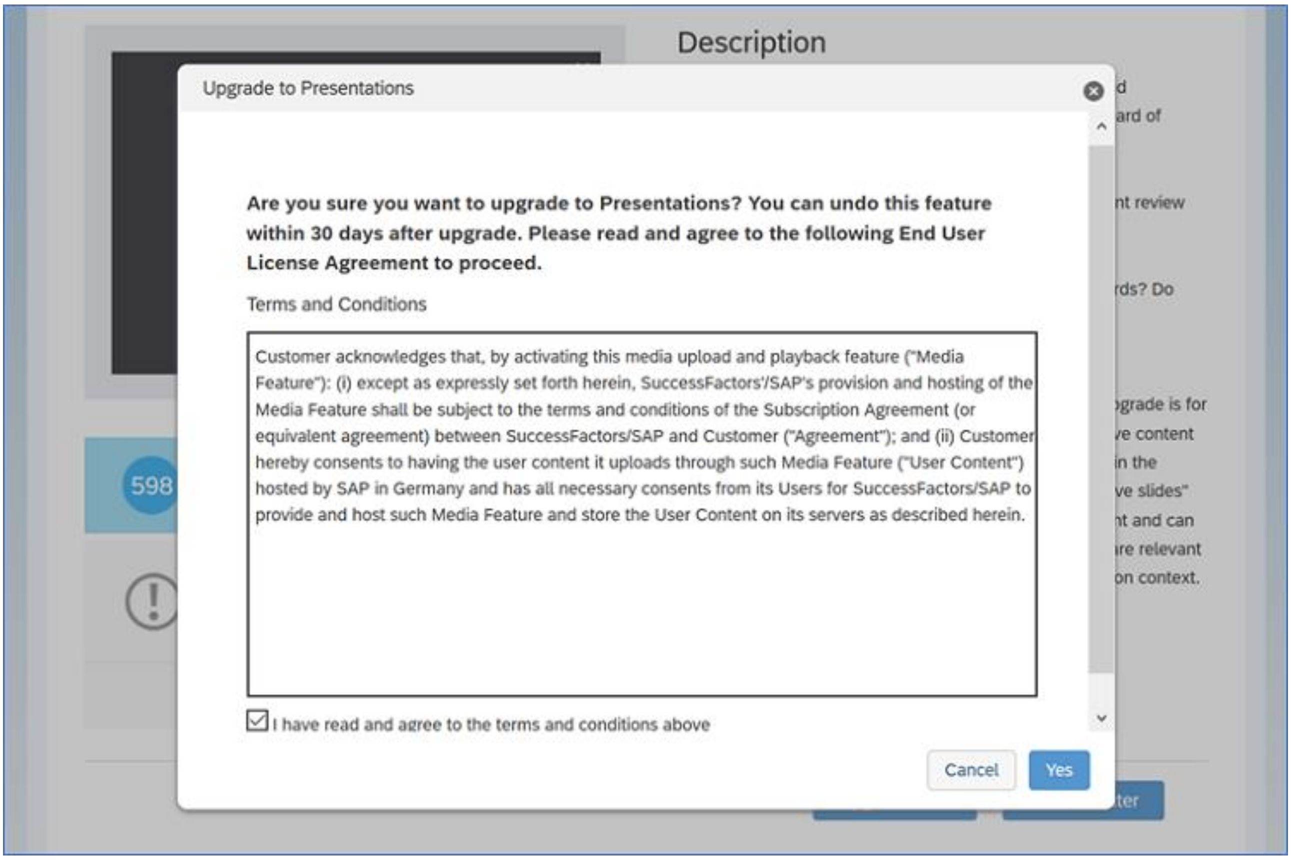
You can go to the Upgrade Center for the Action Search or from Admin Center.



Under the Optional Upgrades, for Presentations, click on Learn More & Upgrade Now.

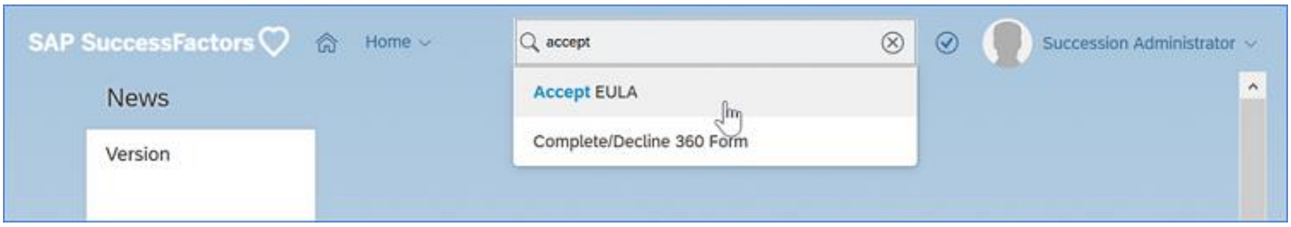


You can read more information about Presentations and click on Upgrade Now. When activating Presentations from the Upgrade Center, you need to *accept the end user licence agreement* during the activation process. Read the terms and conditions, check the box, click on Yes and then OK to finish.

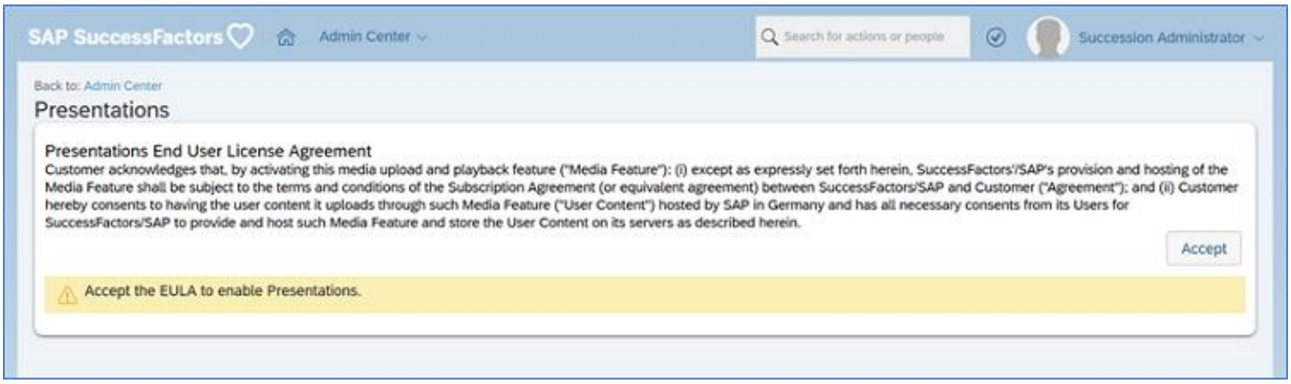


2. *Accept the end user license agreement*
This is only necessary if the first step to turn on the feature was done from Provisioning (the back-end of the instance).
It recognizes the processing of media content through a service that may be outside your geographic region.

From the Action Search, go to Accept EULA.



To confirm that you agree to the terms and conditions described, click on Accept.



Acceptance of the agreement is a one-time, company-wide decision by an administrator. It is not required by end-users of the Presentations feature.

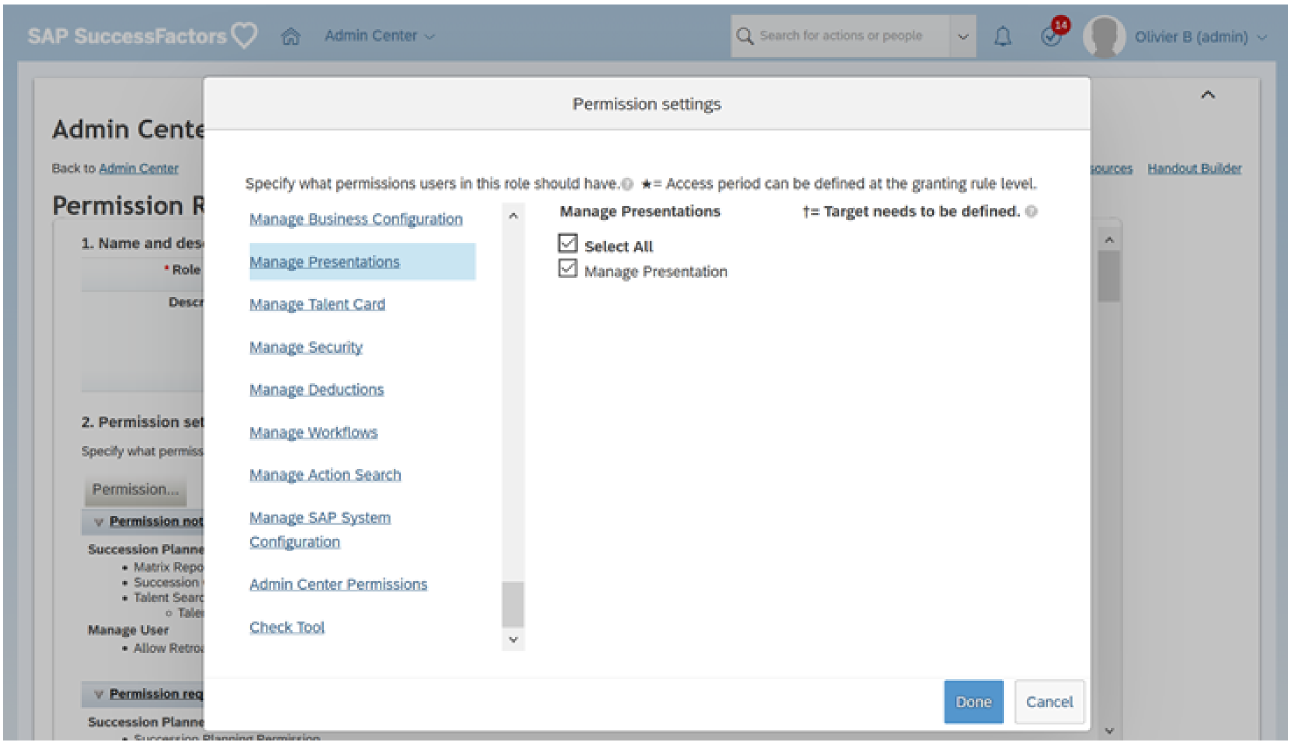
Purpose of this agreement: One customer administrator needs to accept an end-user agreement, to acknowledge that slides and images uploaded to Presentations are temporarily stored in an SAP datacenter in Germany during processing, regardless of the where your instance and other data is stored.

The Presentations feature uses a technology called the SuccessFactors Media Service, which is based in our datacenter in Germany. Static slides are uploaded to the Media Service for processing. The Media Service is located within our production datacenter in Germany. Because these files may be temporarily stored outside of your geographical region, separate from other SuccessFactors data, an end-user license agreement (EULA) is required.

This end-user agreement does not relate to any of the employee data pulled from your SuccessFactors system and displayed in a presentation. Personal data is not processed by the Media Service or affected by use of the Presentations feature. The agreement only applies to the processing of uploaded static content.

Only one administrator needs to accept the agreement on behalf of your company, in order to enable the Presentations feature for the first time. It is not required by each individual user of Presentations.

3. *Grant users' permissions to Manage Presentations*
Access permissions are granted in the usual way, using either role-based or user-based permissions.
To access and use the Presentations feature, you need to have the Manage Presentations permission. People with this permission can create, manage, and present presentations.



	If a presentation is shared with a user, he or she does not need the “Manage Presentation” permissions from RBP to see Presentations from the main menu (sometimes called module picker).

The visibility of dynamic content in a presentation, such as live slides and talent cards, is further controlled by additional permissions.

- First, to use some live slides you need to have permission to access a particular SAP SuccessFactors solution or feature. For example, only users who have Org Chart Access permission can add or view the Succession Org Chart live slide.
- Second, to view dynamic content within a live slide, about a given person or business process, you need to have the appropriate permission. For example, to view incumbents and successors on a live slide, you need to also have permission to do so in SAP SuccessFactors Succession and Development.

Lesson Conclusion – Overview and Enabling Presentations

In this lesson, you could have a general overview of Presentations and learned how to enable it.

You should now be able to:

- Describe Presentations
- Enable Presentations

Lesson 9-2 – Key Features of Presentations

Lesson Overview

The goal of this lesson is to describe the key features Presentations: Talent Cards, Live Slides, Hotspots, Custom Profile Slides.

Lesson Objectives

- Describe Talent Cards
- Describe Live Slides
- Describe Hotspots
- Describe Custom Profile Slides

Talent Cards

A talent card is a concise profile of an employee and their talent related attributes.

Talent cards display a subset of Employee Profile information and are designed to display strategic talent information about a person.

There are three different talent cards available, each associated with a specific SAP SuccessFactors module:

- **Succession Talent Card**
  The talent card you configure for Succession is used in the Succession Org Chart (v12 and higher), the Lineage Chart, the Position Tile View, the Matrix Grid reports (v12 and higher), and MDF Talent Pools.
- **Presentation Talent Card**
  The talent card you configure for Presentations is used on some live slides and can be linked to hotspots on static slides.
- **Calibration Talent Card**
  While all three have the same set of features, you can configure each differently based on your requirements. For example, there may be certain background elements you want to use for succession planning or calibration sessions that you don't need for your executive reviews.

Some of the benefits of using talent cards include:

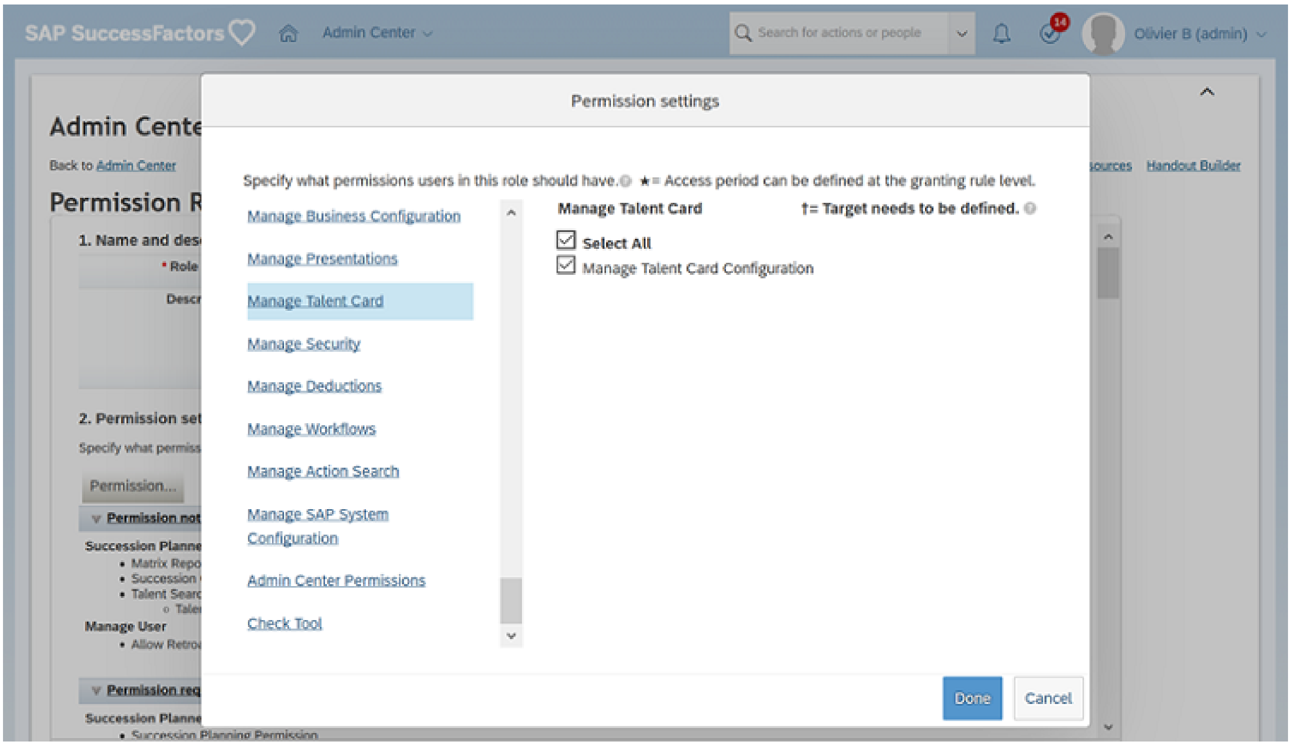
- A layout designed for stacking and side by side comparison
- Streamlined information
- Flexibility to configure a layout that works best for you
- Synchronized scrolling when multiple cards are open
- Support for existing user information and many background portlets

1. *Granting Role Based Permissions to Manage Talent Cards*

Generally, you only need to grant administrators access to managing talent cards.

- From the Action Search, go to Manage Permissions Roles
- Select the role to which you want to give this permission
- Scroll to Manage Talent Card under the Administrator Permissions and grant the Manage Talent Card Configuration permission
- Save your changes

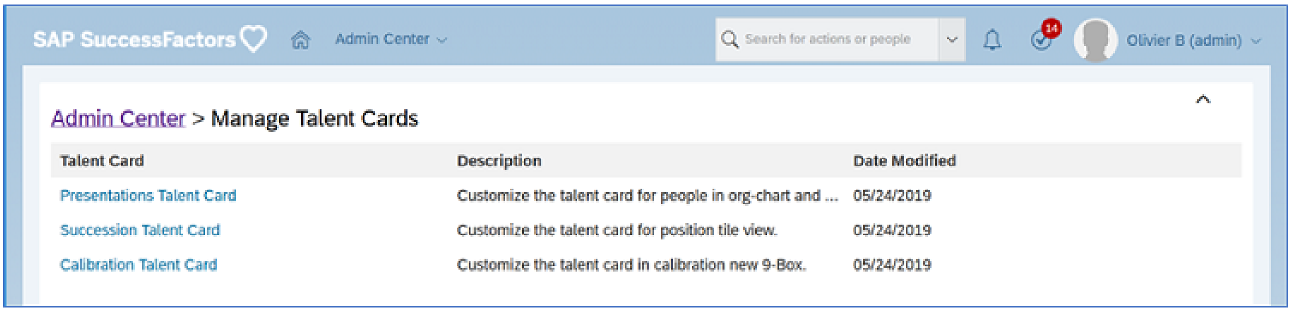
!	Employee data shown on the talent card is subject to system permissions. The talent card only displays employee data that the logged-in user has permission to view. When used in a presentation, presenters should ensure that members of the audience are also allowed to view this information.



2. *Designing the Talent Card*
While the vertical layout of the card cannot be altered, you can choose content from a wide range of sources to configure the talent card. Talent Cards do not support html tags.

!	For any instance, there is only one configuration and layout for each of the three types of talent card. For example, when you design the Presentations Talent Card, all presentations created in that instance will use the same talent card design.

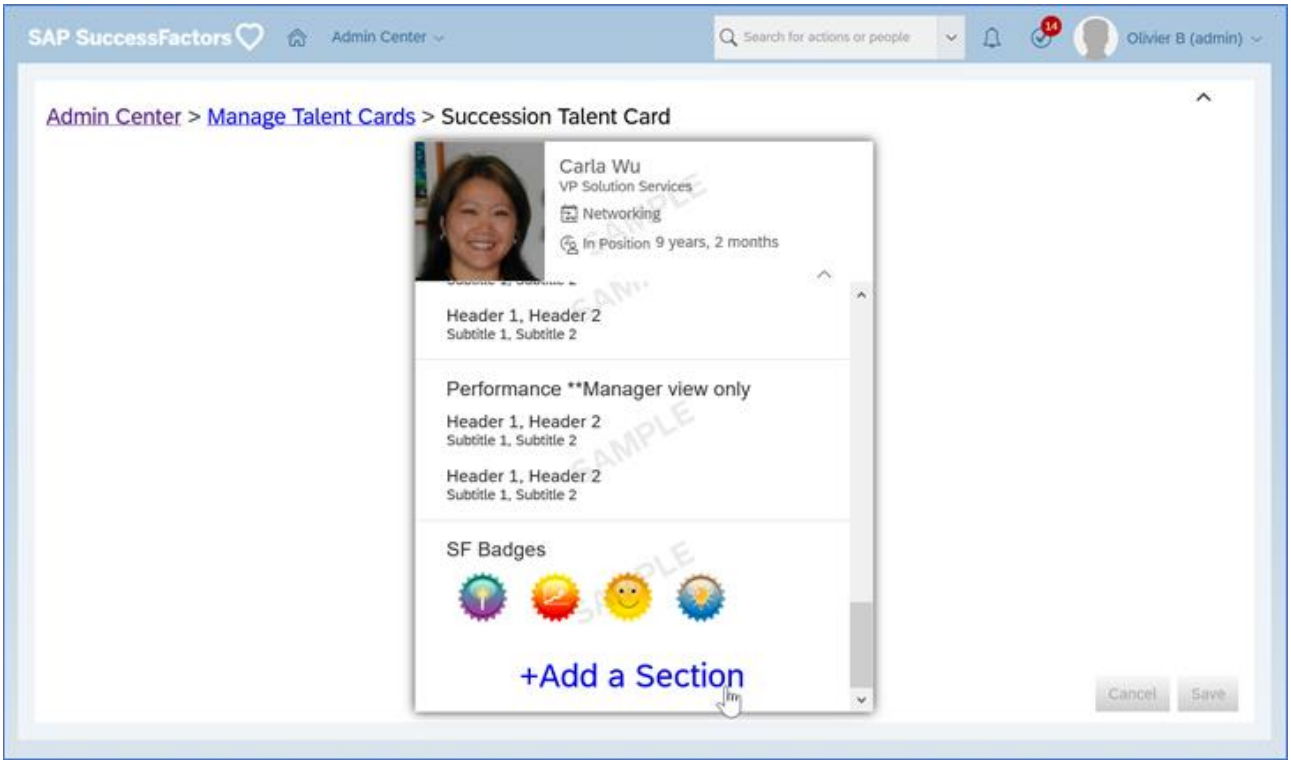
From the Action Search or from Admin Center, navigate to Manage Talent Cards. Select the type of talent card you want to edit. You only need to configure the talent cards for the modules you use.

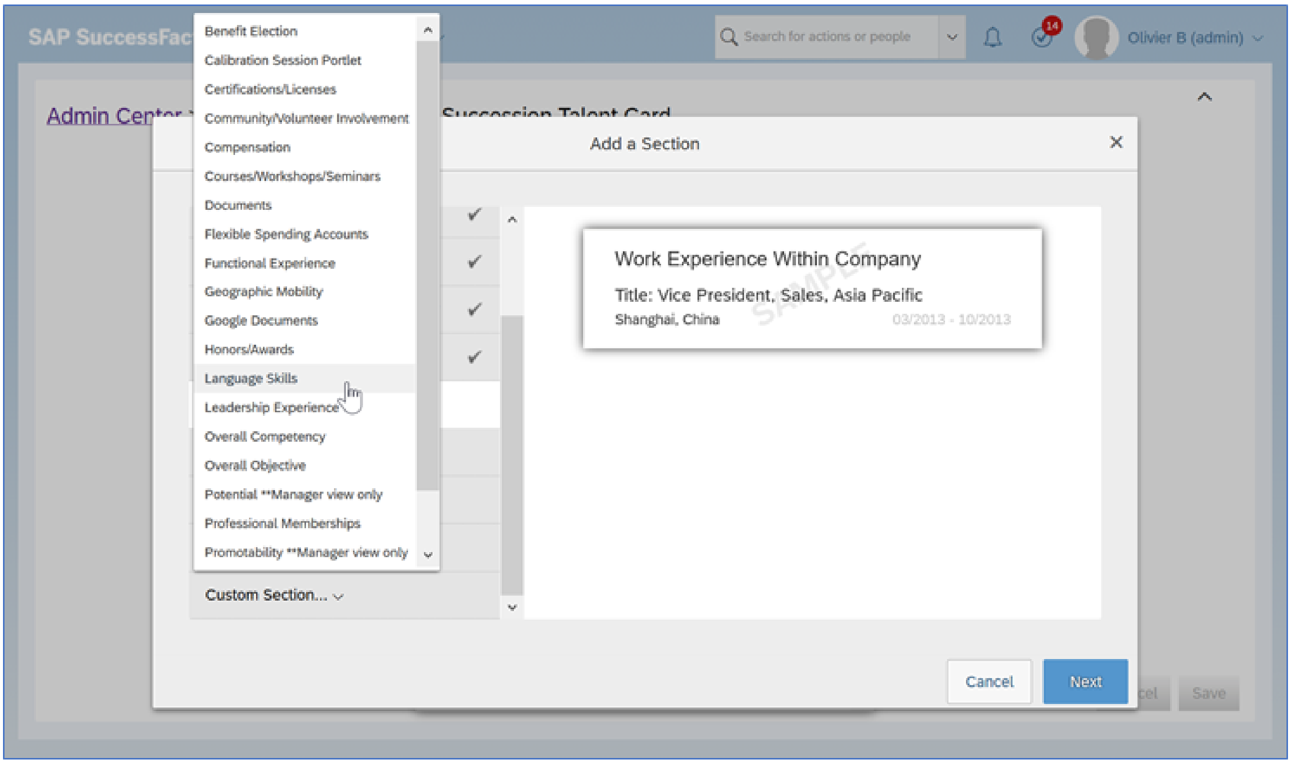


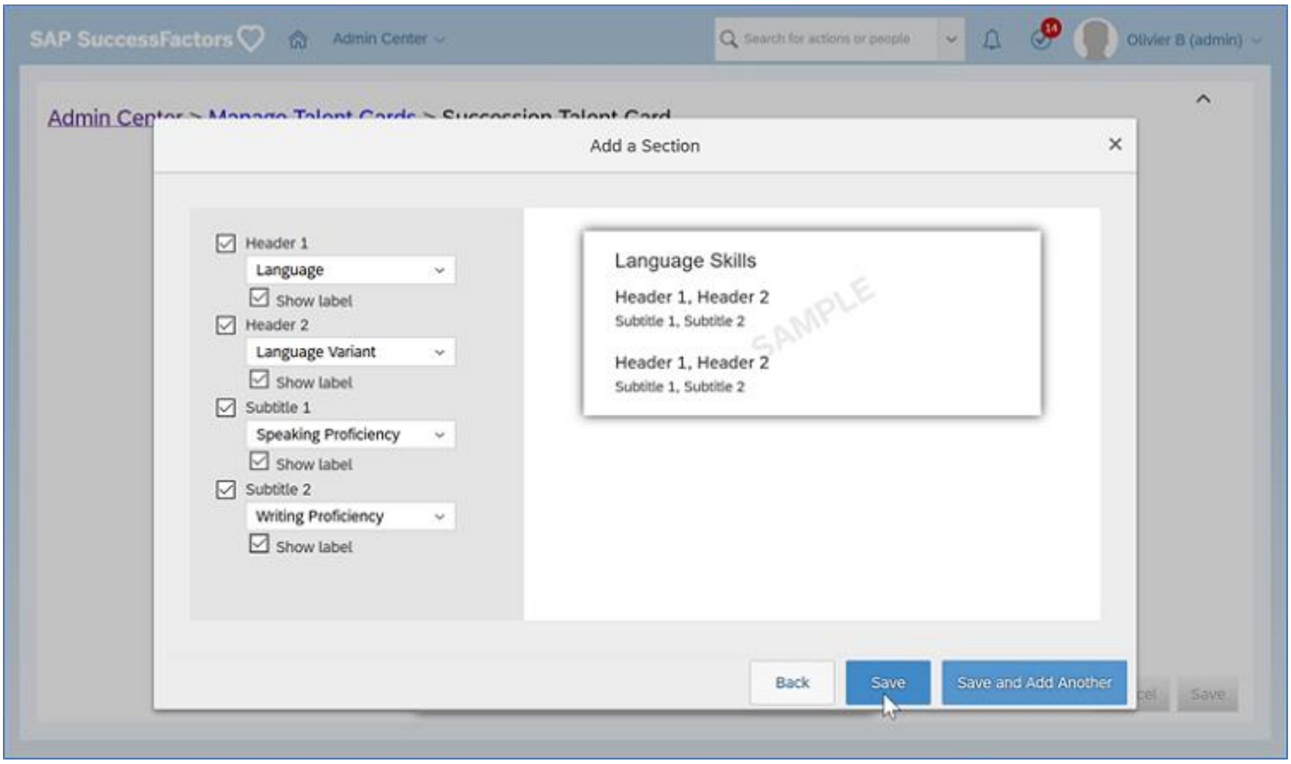
You are presented with an example talent card reflecting the current layout. By default, the overview, and extended information sections are populated with basic information and the background section is blank.

Hover on any section to see the options available for editing. The example talent card does not reflect changes to the overview or extended information sections. These sections are static images and do not change.

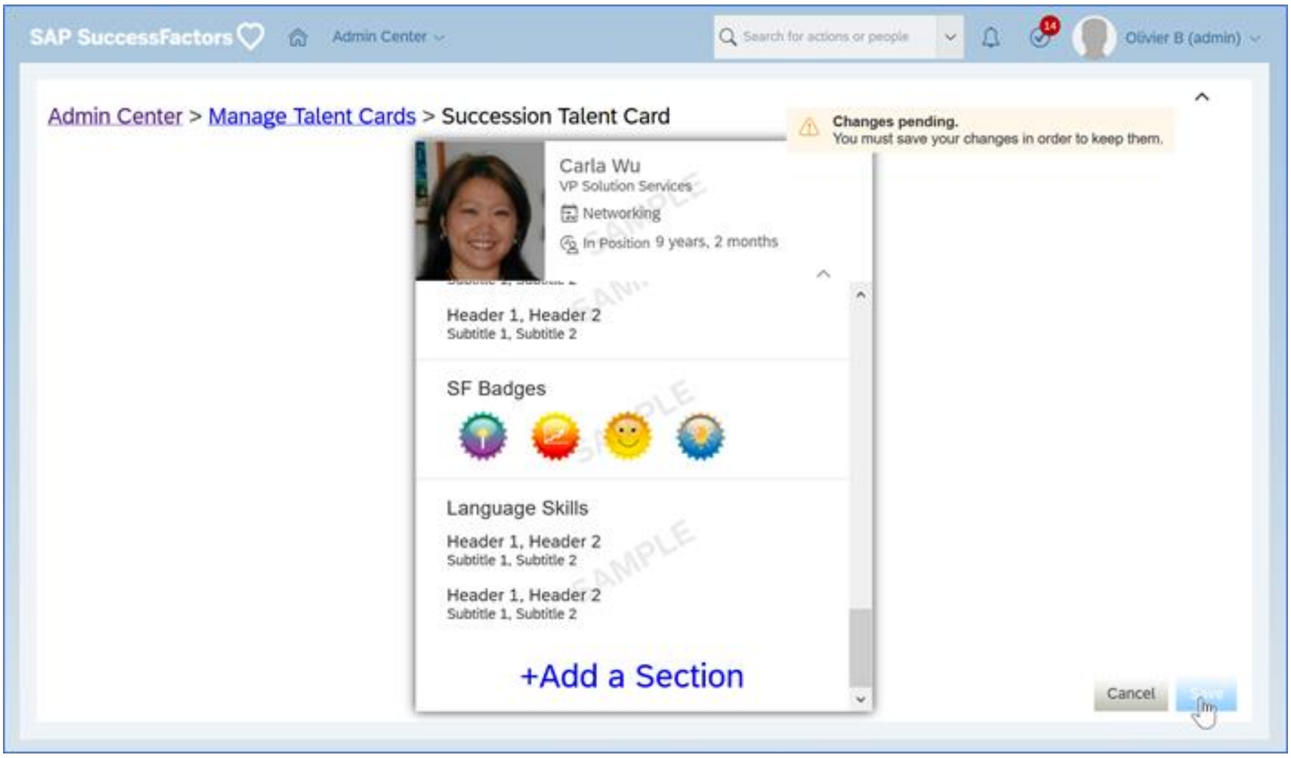
To add background sections, choose Add a Section. The example talent card does display the background sections you add, but it does not reflect any field-level configurations. Each section shows a static image and does not change.







Save your changes. To view your changes, open the talent card in one of the areas it is used, like in the Succession Org Chart for succession talent cards.



Live Slides

"Live slides" are slides in your presentation that display dynamic content using live data from the SAP SuccessFactors application. Live slides can be inserted among slides created from uploaded offline content or they can be used independently to create an entire presentation of dynamic content.

Although live slides are not technically required, they are the primary benefit of the Presentations feature, so using them is highly recommended.

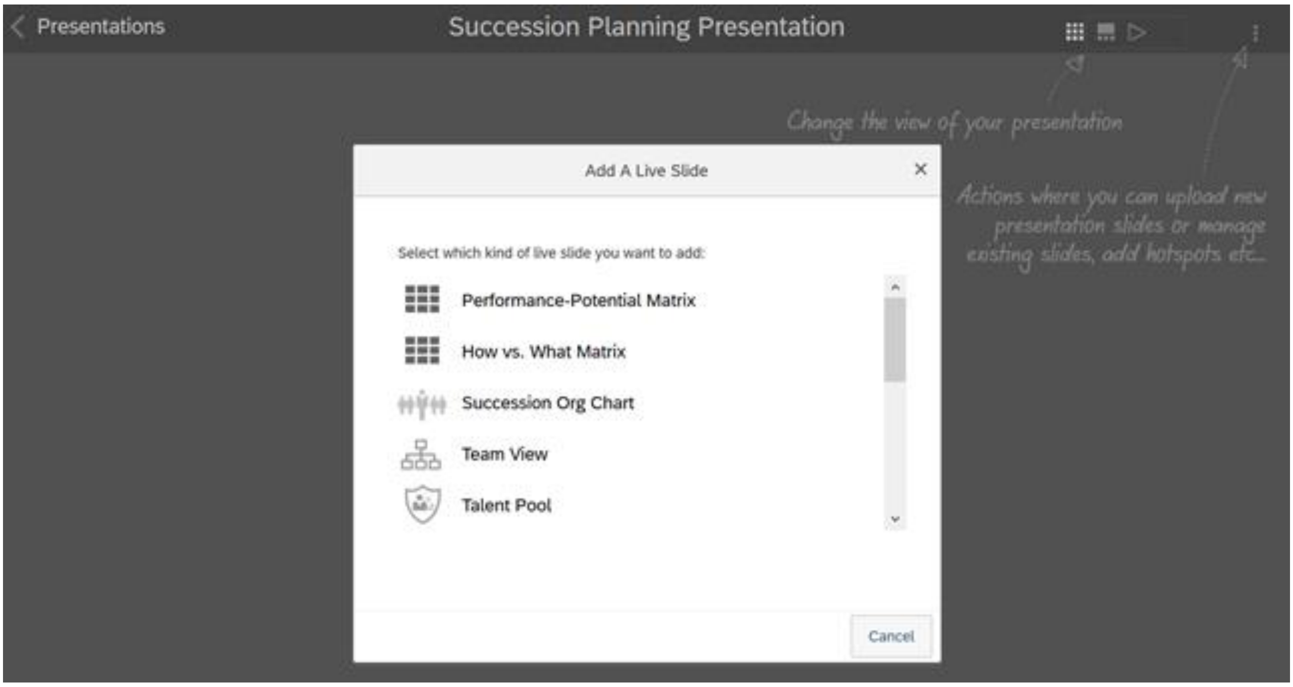
You can add a variety of different types of live slides to your presentation and each live slide is configured differently, depending on the data it displays. Live slide configuration settings determine what SAP SuccessFactors data is displayed on the slide by default. Because live slides are dynamic and interactive, in many cases, you can also navigate away from the default view and display other SAP SuccessFactors data during the course of your presentation.

The following table describes the types of live slides that are available in the Presentations feature. Some live sides have their own unique prerequisites, in addition to those of the Presentations feature as a whole.

Live Slide	Description	Prerequisites
Matrix Grid Report (9-box)	This slide shows the matrix grid reports. You can choose	This slide requires: SAP SuccessFactors

Live Slide	Description	Prerequisites
	between two types of matrix grid live slides: the Performance-Potential Matrix and the How vs What Matrix.	Succession & Development Matrix grid reports configured
Succession Org Chart	This slide shows a specified manager and team (both direct and matrix reports), along with their successors.	This slide requires: SAP SuccessFactors Succession & Development Succession nominations with MDF Positions configured
Team View	This slide shows a specified manager and his or her team, both direct and matrix reports. It is similar to the "basic" org chart.	No prerequisites are required for this live slide to be available in Presentations. User must have Org Chart Navigation permission.
Talent Pools	This slide shows MDF Talent Pools. You can click to view their members.	This slide requires: SAP SuccessFactors Succession & Development MDF Talent Pools configured
People Grid	This slide shows groups of people in various layouts.	No prerequisites are required for this live slide to be available in Presentations.
Compensation Review	This slide shows compensation data based on executive review compensation templates	This slide requires: SAP SuccessFactors Compensation Executive review template configured User must have permission to view executive review templates for the selected population.
Position Tile	This slide shows MDF Position and related Succession plans in a tile-like format. You can filter positions and display them based on their business need. Position filters are configured as part of the “Position Tile” tab in Succession	This slide requires: MDF Position Tile tab User must have permission to view the positions being displayed on the slide.

Live Slide	Description	Prerequisites
People Profile	This slide shows a specified employee's entire one-page profile. You can navigate the profile within the slide just as you would on the People Profile page.	This slide requires: People Profile
Performance History	This slide shows the history of performance ratings for a chosen population over a period of time. The performance rating is derived from the selected process. The rating scale associated with the process is used for the Y-axis and ratings are normalized to that rating scale. Hovering over a “dot”, displays a line chart tracking the performance rating throughout the period	This slide requires: SAP SuccessFactors Performance and Goals Performance History portlet configured on Employee Profile (either V12 or People Profile) Users must have permission to access the performance history portlet for the selected population.
Analytics	This slide shows charts and metrics from Analytics dashboards. You can display up to four charts on a slide, in various layouts.	This slide requires: Dashboards 2.0 Tile-based dashboards (standard dashboards are not supported) Users must have Dashboard 2.0 access permission for the selected tiles.



Hotspots

A hotspot is a specified area on one of your uploaded static slides that you can interact with during your presentation. Use hotspots to make your static content more dynamic and engaging.

You can link a hotspot to any specified URL or you can use it to open up the talent card for a specified employee. You can only add hotspots to static slides created from uploaded PowerPoint or PDF content.

Custom Profile Slides

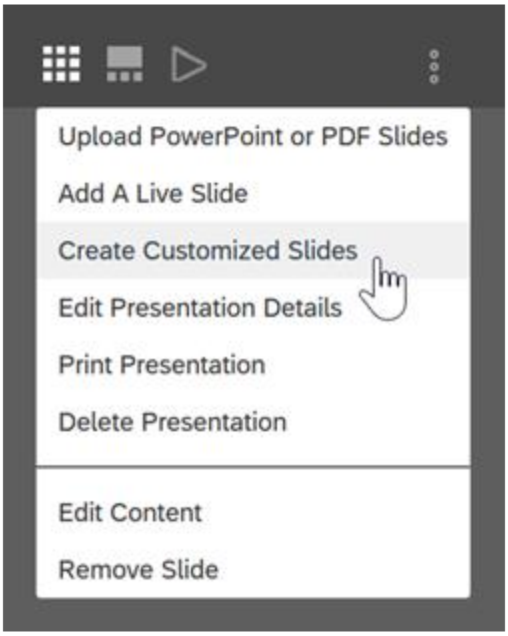
Custom profile slides are slides based on an existing uploaded static slide with added information from the profile. Custom profile slides give greater control over slide content that the People profile live slide. Previously, you had to use a People Profile live slide that displayed the person’s entire profile. Now, you can create slides with just the necessary content for the purpose of the talent review meeting.
Custom profile slides are a good alternative to the Pixel-Perfect Talent Card (PPTC). Although they are not as flexible as the PPTC, these slides can be created by customers themselves, with a simple drag-and-drop interface.

In the custom slide editing mode, it is possible to:

- Design a template for a selected population
- Preview the template with real employee data
- Adjust the template layout as needed before applying the template to the selected population.

Static slides are necessary to create customized slides. So make sure that you uploaded either static slides that you want to use as the basis for your custom profile slides. The static content provides the background on top of which you insert dynamic profile data.

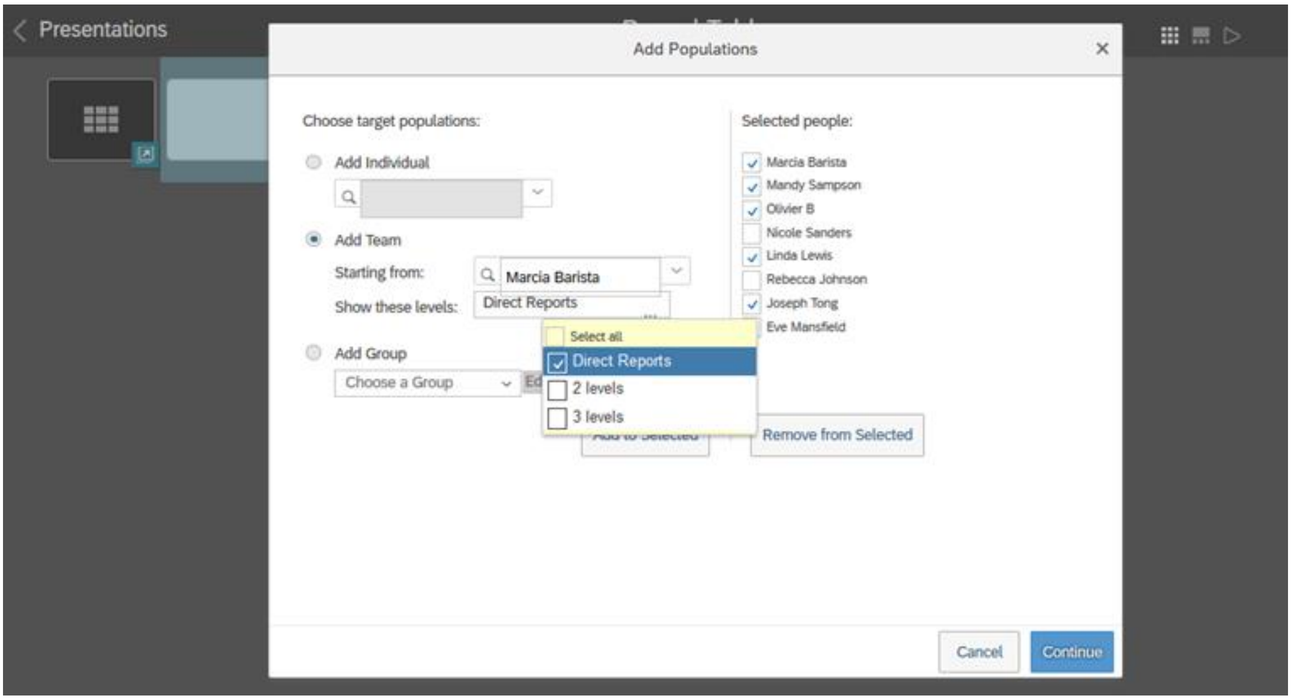
Find the uploaded content in the Slide Holding Area and add it to the presentation. Then, from the Presentation menu select Create Customized Slides.



In the Add Populations dialog, select the population for whom you wish to create a custom profile slide. Then click Add to Selected to add them to your presentation. To ensure optimal performance, do not add more than 200 people.

You can create slides for:

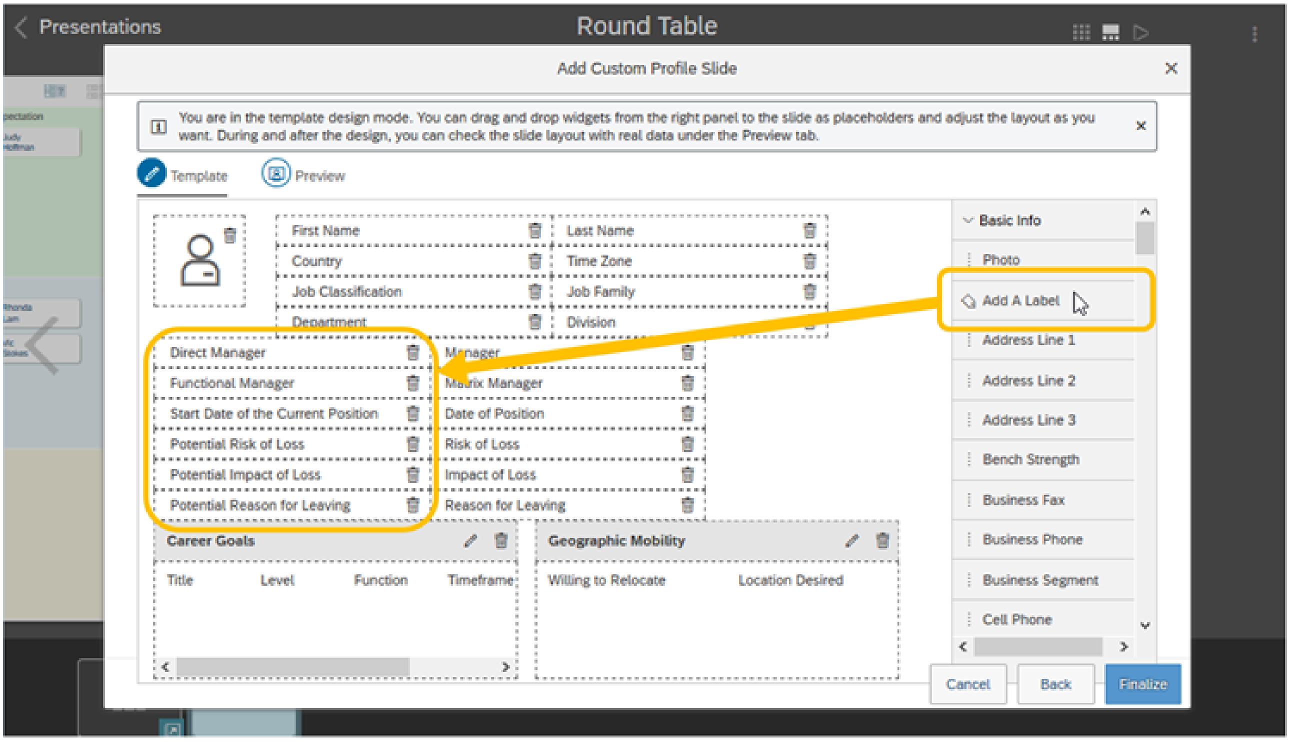
- An individual user
- A team, starting from a given manager and including a specified number of levels
- A dynamic group that you define



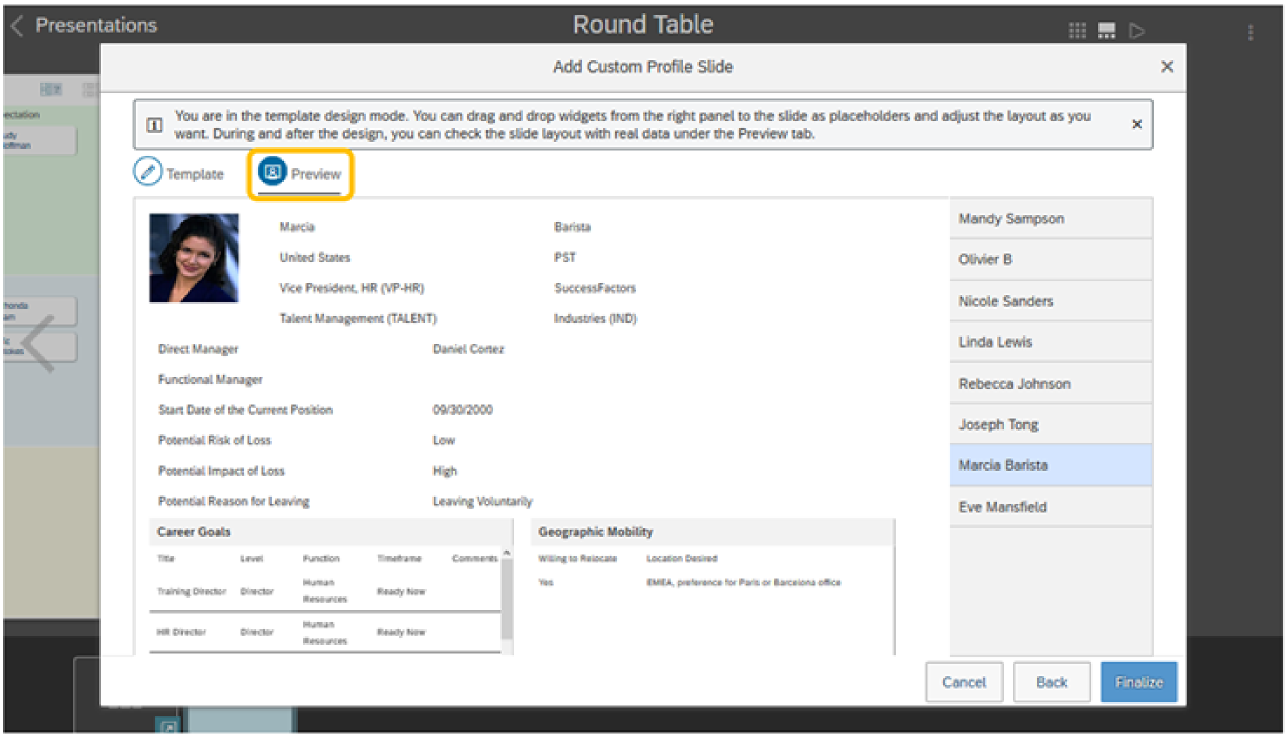
A wizard displays the static background and lists the available profile data in the side panel. This is the template design mode. You can drag and drop widgets from the right panel to the slide as placeholders and adjust the layout as needed.

Different components can be added:

- Profile photo
- Labels: You can add customized texts with labels
- Basic user info fields
- Background info fields



During and after the design, you can check the slide layout with real data under the Preview tab and make necessary adjustments back in the Template design mode.



Finally, click Finalize to close the wizard and add custom profile slides for each person to your presentation.

It is not possible to go back and edit custom profile slides once they are created. To change the data or layout of your custom profile slides, you have to create and add them again.

Lesson Conclusion – Key Features of Presentations

In this lesson, you were introduced to the key features of Presentations.

You should now be able to:

- Describe Talent Cards
- Describe Live Slides
- Describe Hotspots
- Describe Custom Profile Slides

Lesson 9-3 – Creating Presentations

Lesson Overview

In this lesson, you will learn how to create Presentations.

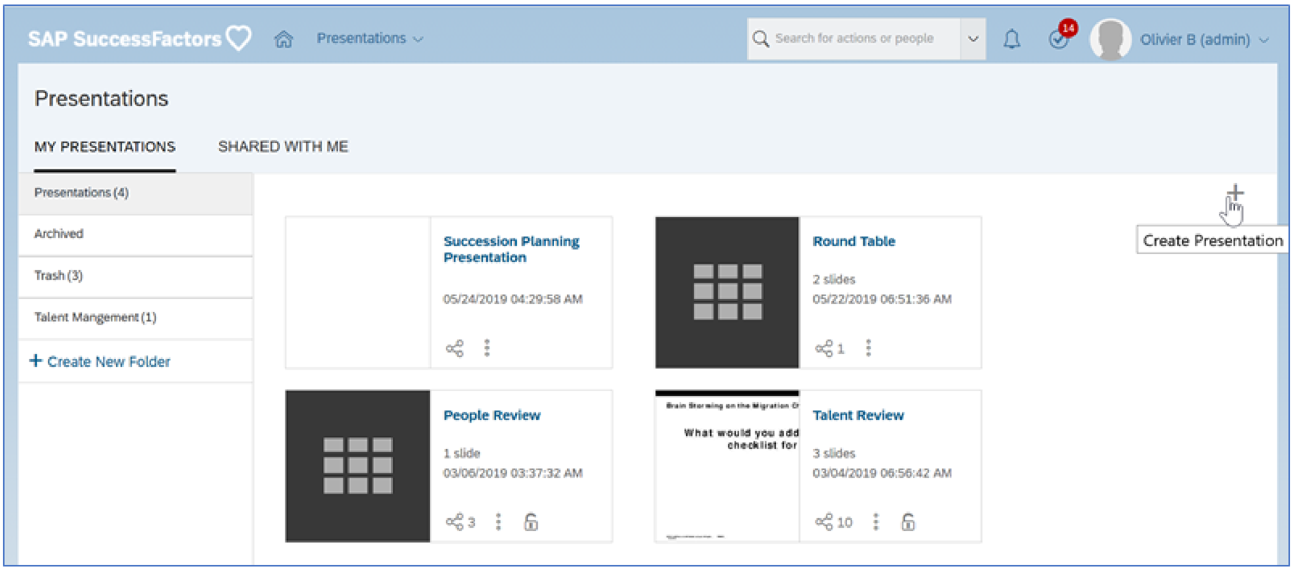
Lesson Objectives

- Create Presentations
- Enable Presentations

Procedure

Use SAP SuccessFactors Presentations to enhance your presentations with dynamic content and live employee data from the SAP SuccessFactors application.

1. Select Presentations from the main navigation menu.
2. On the My Presentations tab, click the "plus" icon to add a presentation.
3. Give your presentation a name.



Then, here are the basic steps:

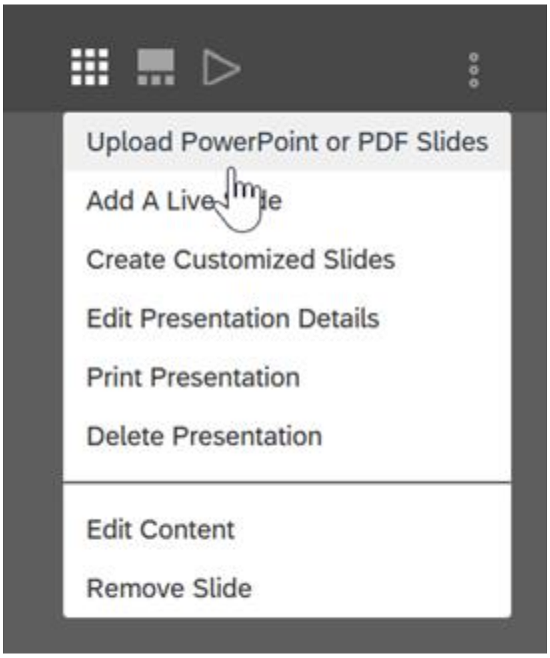
- Upload static content to SuccessFactors (in slide or PDF format).
- Add dynamic content, such as live slides, hotspots, talent cards, profile slides, and analytics.
- Arrange the slides and finalize your presentation.
- Present.

Adding Static Content to a Presentation

Uploaded static content is visible in the Slide Holding Area. It is not automatically added to your presentation. You can add some or all of the slides in the holding area to your presentation.

Uploaded content is saved and stored in the holding area for future use and you can have more than one uploaded file in holding area.

1. To add all of the uploaded slides, click the "plus" icon.
2. To select one or more of the uploaded slides manually, click the "slides" icon and then select the slides you want to add. To multi-select, hold down the CTRL button as you select the slides.
3. To replace one or more slides already in your presentation with newly uploaded content, first select the slides you want to replace. Then select the slides in the Slide Holding Area that you want to replace them with and click Replace. To multi-select, hold down the CTRL button as you select the slides.



Adding a Live Slide

Add a live slide with dynamic content to your presentation so that you can make your presentation more interactive.

1. In View Slide Sorter or View Slide Timeline mode, open the action menu dropdown, and select Add a Live Slide.
2. Select the type of live slide you want to add.
3. Configure the live slide using the configuration wizard.
4. Click Add Live Slide or Done to add the slide to your presentation.

Adding a Hotspot to a Presentation

Add a hotspot to your presentation so that you can open a talent card or link to a specified URL from a static slide.

1. In Slide Sorter mode, hover over the slide, open the options menu, and click Add Hotspot.
2. In Slide Timeline mode, open the action menu dropdown and select Edit Content.
3. Drag your cursor around the area that you want to define as a hotspot.

In the pop-up window, link the hotspot to one of the two available options:

4. **Option**	**Description**
5. Link	To point the hotspot to an external URL, select this option and enter a URL.
Talent Card	To make the hotspot open a talent card, select this option and choose an employee in the search box.

6. Click Done to save the hotspot and return to timeline mode.

In Presentation Mode, the hotspots is not visible but the defined area is now clickable and interactive. "Link" hotspots open the URL in a new window. “Talent Card” hotspots open the talent card on top of the live slide.

In Slide Timeline mode, the hotspot now appears as a shaded rectangle on the slide. Slides with a hotspot are also indicated in the timeline with a "link" icon in the corner of the thumbnail.

To edit an existing hotspot, find the slide in Slide Timeline mode, open the action menu dropdown, and select Edit Content to enter edit mode. Then, hover over the hotspot to reveal the edit and delete icons.

Rearranging a Presentation

This is a simple process:

1. Open your presentation in Slide Sorter mode
2. Drag-and-drop slides into the desired order. Live slides are represented in the sorter by special icons.
3. Save your changes.

Editing an Exiting Presentation

1. *Edit Live Slide Configuration Settings*
   To do this, open your presentation in Slide Sorter mode. In this mode, hover your cursor on the slide and open the options menu. For uploaded content, you can choose one of the following options: Add Hotspot, View Slide, Remove Slide, and Clone Slide. For live slides, you can choose one of the following options: Edit Slide, View Slide, and Remove Slide.
   To edit the configuration settings of a live slide, select Edit Slide to open the same dialog window you used to create the slide.

2. *Edit Hotspots*
   To do this, open your presentation in Slide Timeline mode. In this mode, open the action menu dropdown and select Edit Content to enter edit mode. While in edit mode, you can add and edit hotspots to uploaded content.

Lesson Conclusion – Creating Presentations

In this lesson, you were introduced to the options available when you create a Presentation.

You should now be able to:

- Create a Presentation

Lesson 9-4 – Managing Presentations

Lesson Overview

The goal of this lesson is to provide information to manage Presentations.

Lesson Objectives

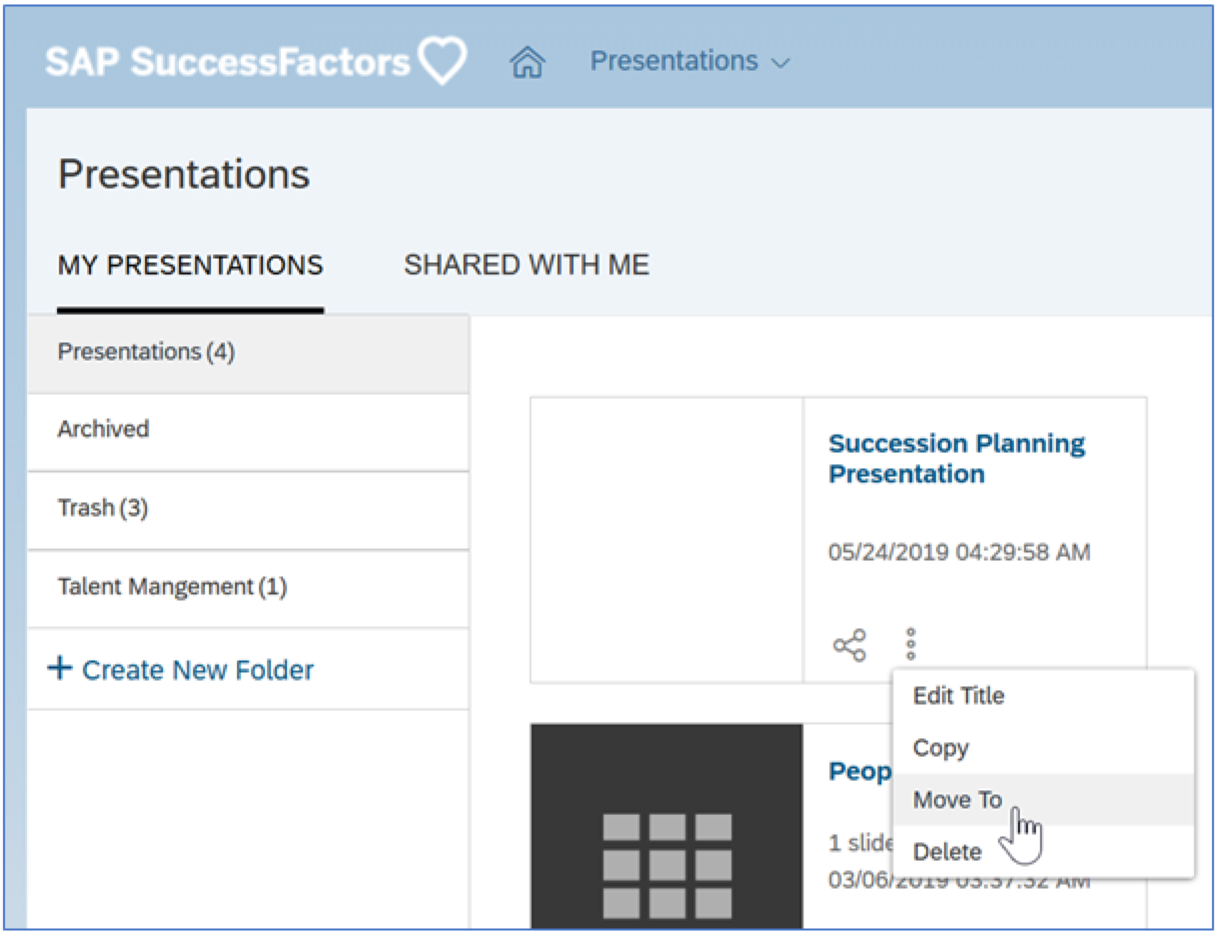
- Organize Presentations
- Copy Presentations
- Share Presentations
- Print Presentations

Organizing Presentations

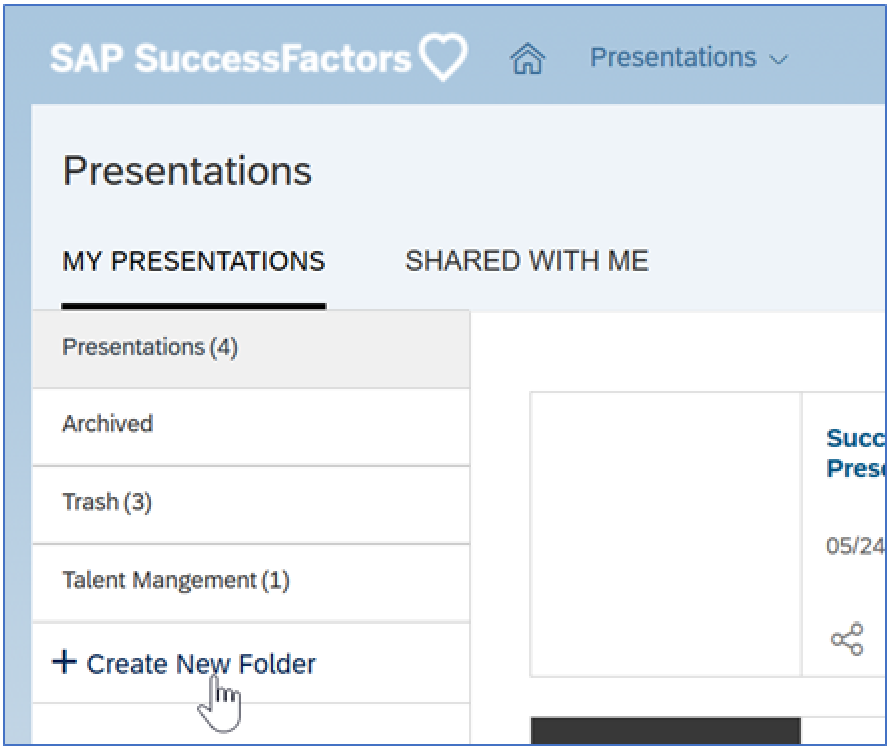
Over time, you might create many different presentations, each year for different business processes. To avoid clutter on the screen and save past presentations for future reference, you can organize them in folders.

1. Go to Presentations > My Presentations.
2. By default, you have three folders available on the side of the screen:
   • The Presentations folder contains active presentations and is displayed by default when you arrive on the page.
   • The Archived folder contains presentations that you want to save but don't need to keep in view.
   • The Trash folder contains presentations that you have deleted.

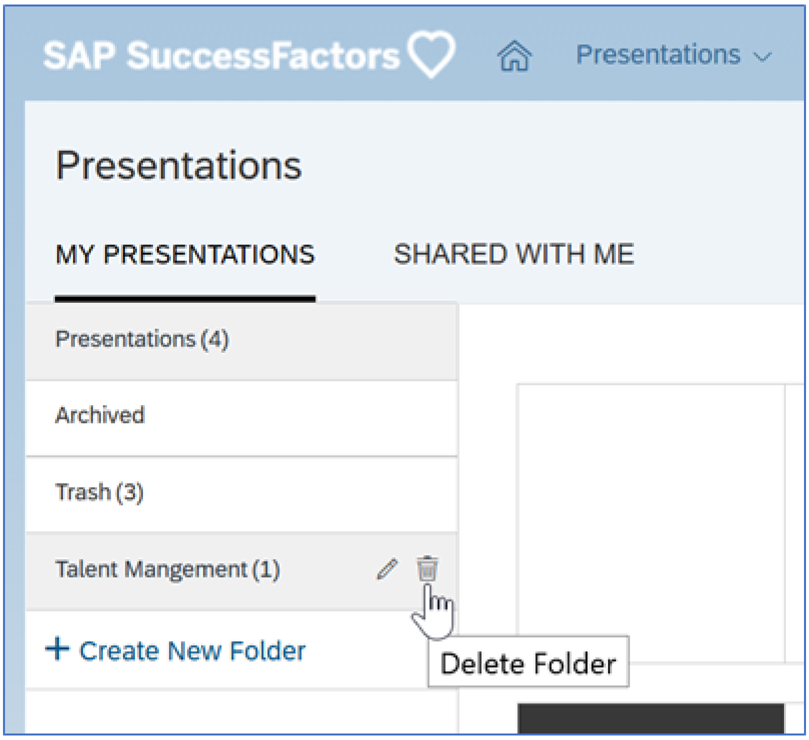
3. To view the contents of a folder, just click it.
4. To move a presentation to a new folder, click the "more" icon (three stacked dots) and select Move To. Then select the folder where you want to move the presentation.



5. To create a new folder, click Create New Folder and give the folder a name.

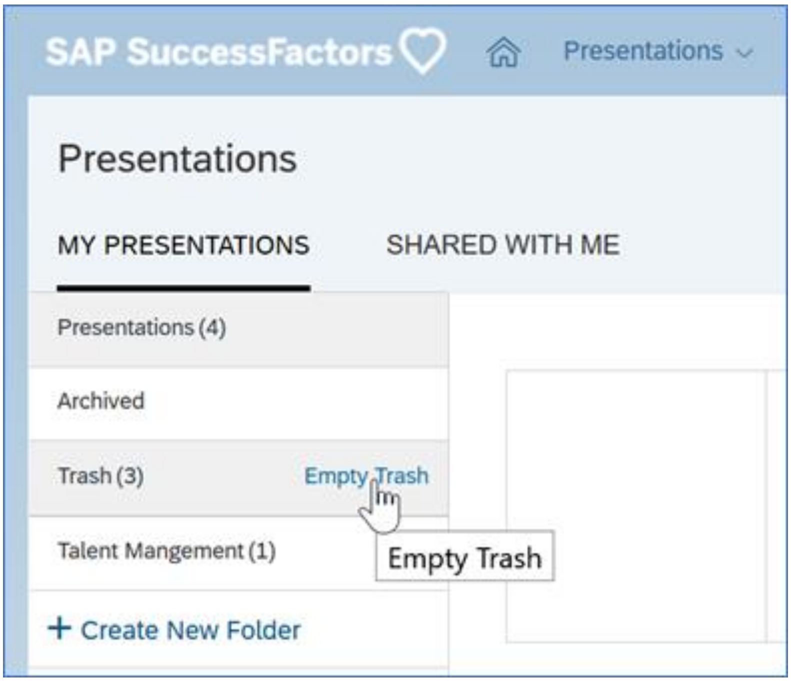


6. To edit or delete a folder after you create it, hover over the folder and click the "edit" or "trash" icons.

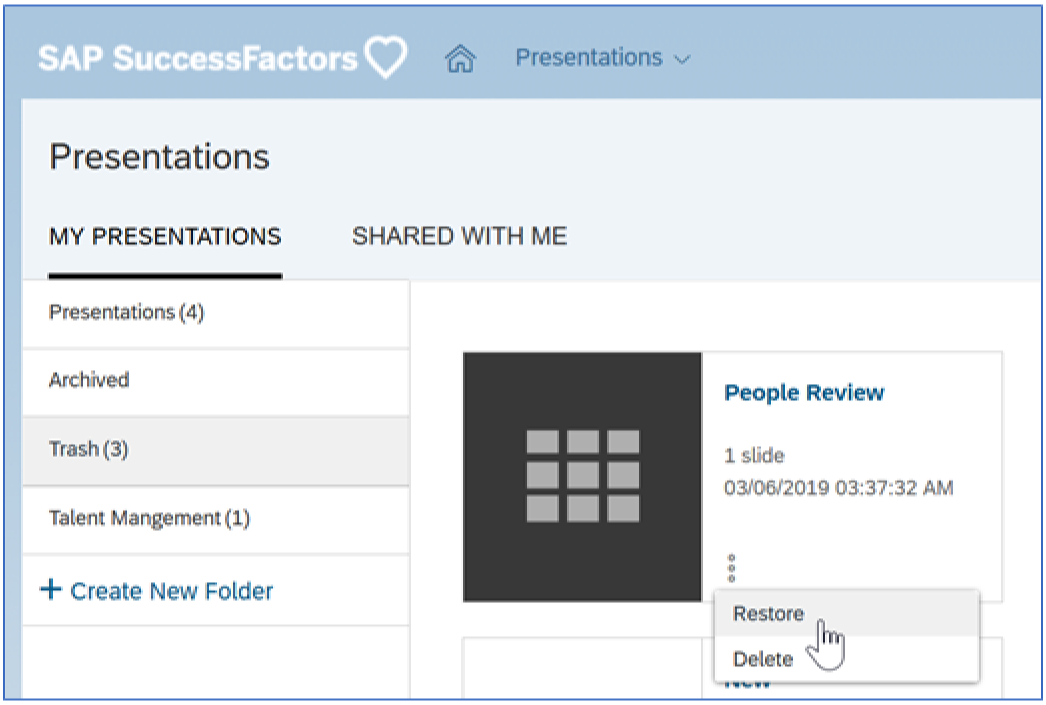


7. To delete a presentation, find it in a folder and click the "more" icon (three stacked dots). Then click Delete. The deleted presentation is moved to the Trash folder.

8. To empty the Trash and permanently delete presentations, hover of the folder and click Empty Trash.



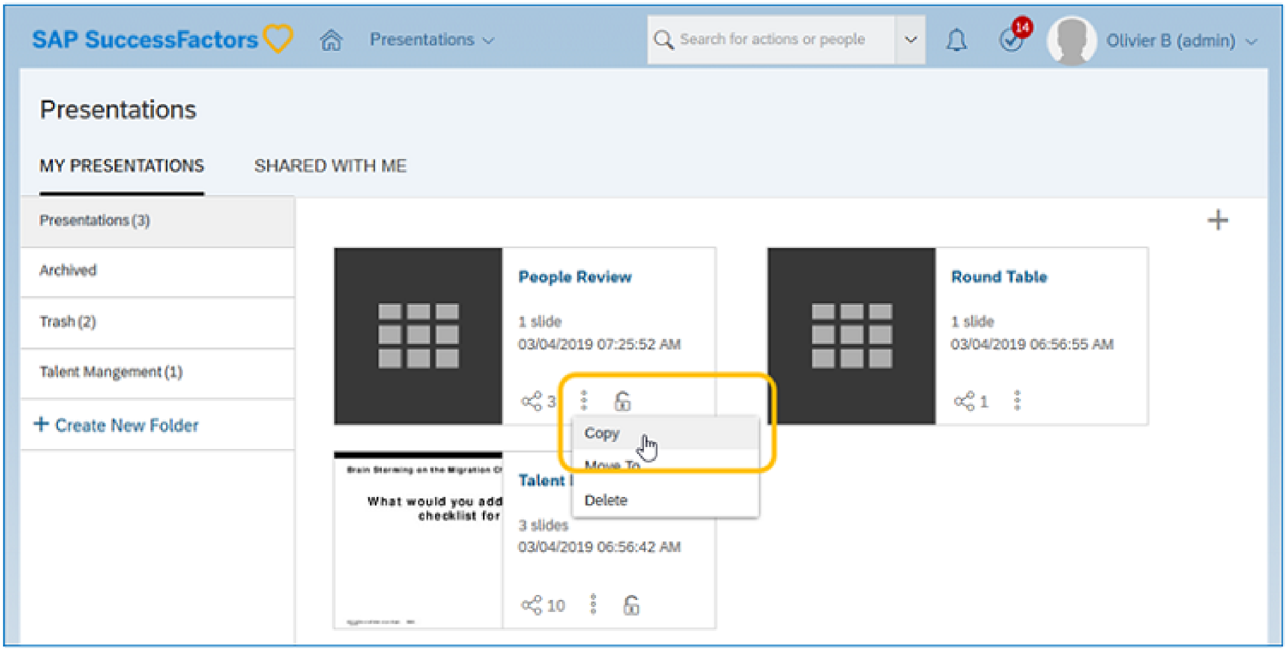
9. To restore a presentation, find it in the Trash folder and click the "more" icon (three stacked dots). Then select Restore.



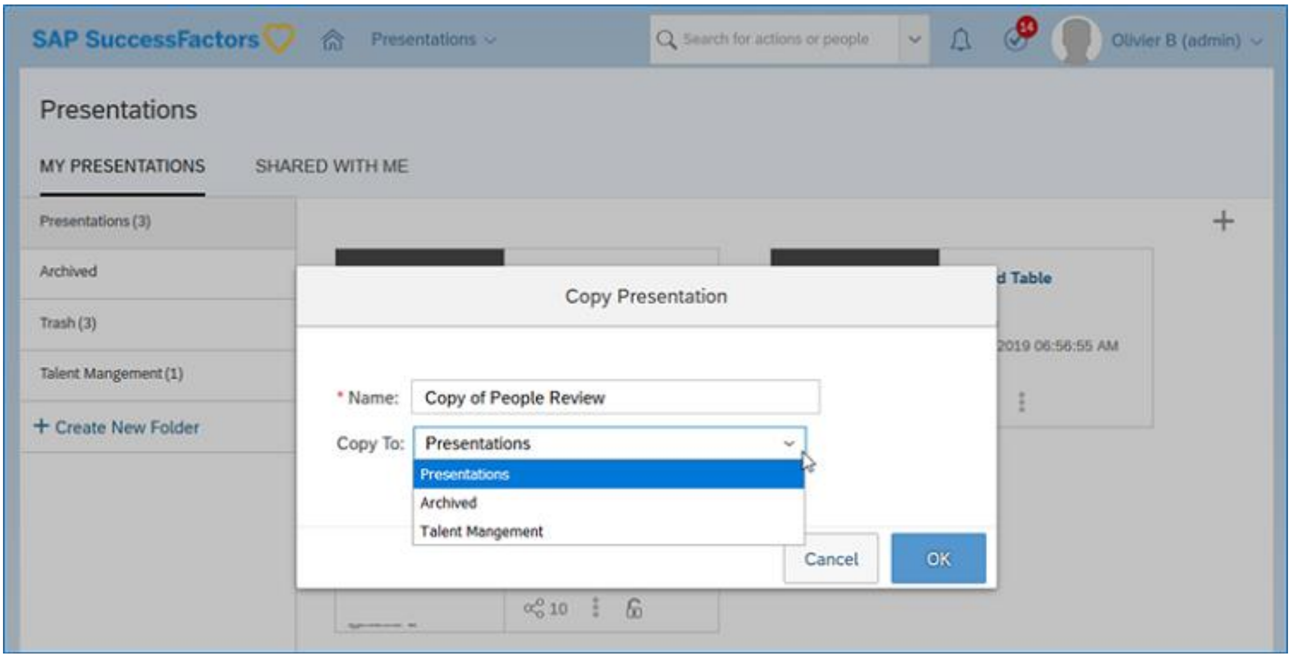
Copying Presentations

For each presentation, in the action menu, the action "Copy" allows users to make a copy of the selected presentation.

With this option, it is easy to create new presentations based on legacy presentation. Similarly, it is possible to prepare a presentation as a standard template and spread it company wise.



When you copy a presentation, you can choose a name for the copy and decide in which folder the presentation should be.

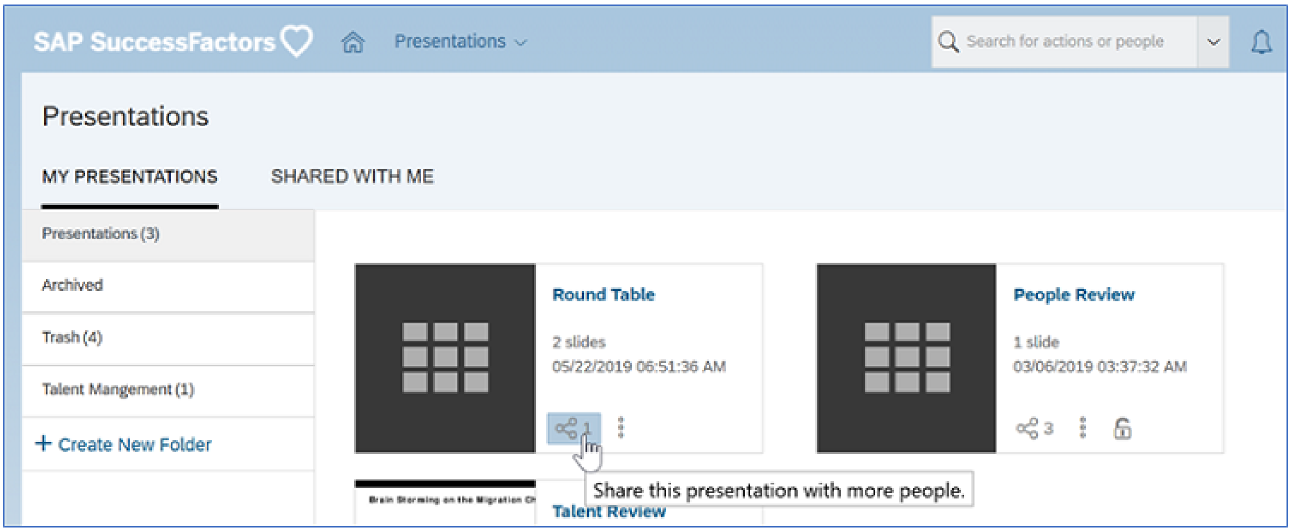


Sharing Presentations and Giving Edit Permission

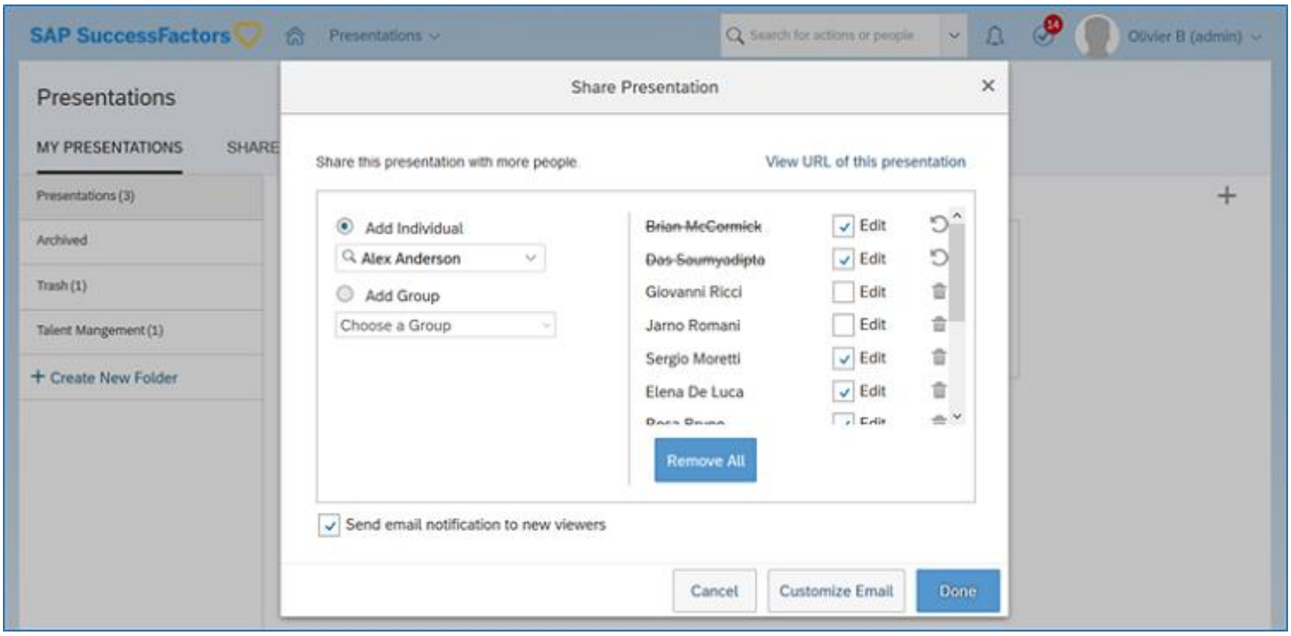
The process is simple:

1. Go to Presentations > My Presentations.

2. Click the “share” icon.

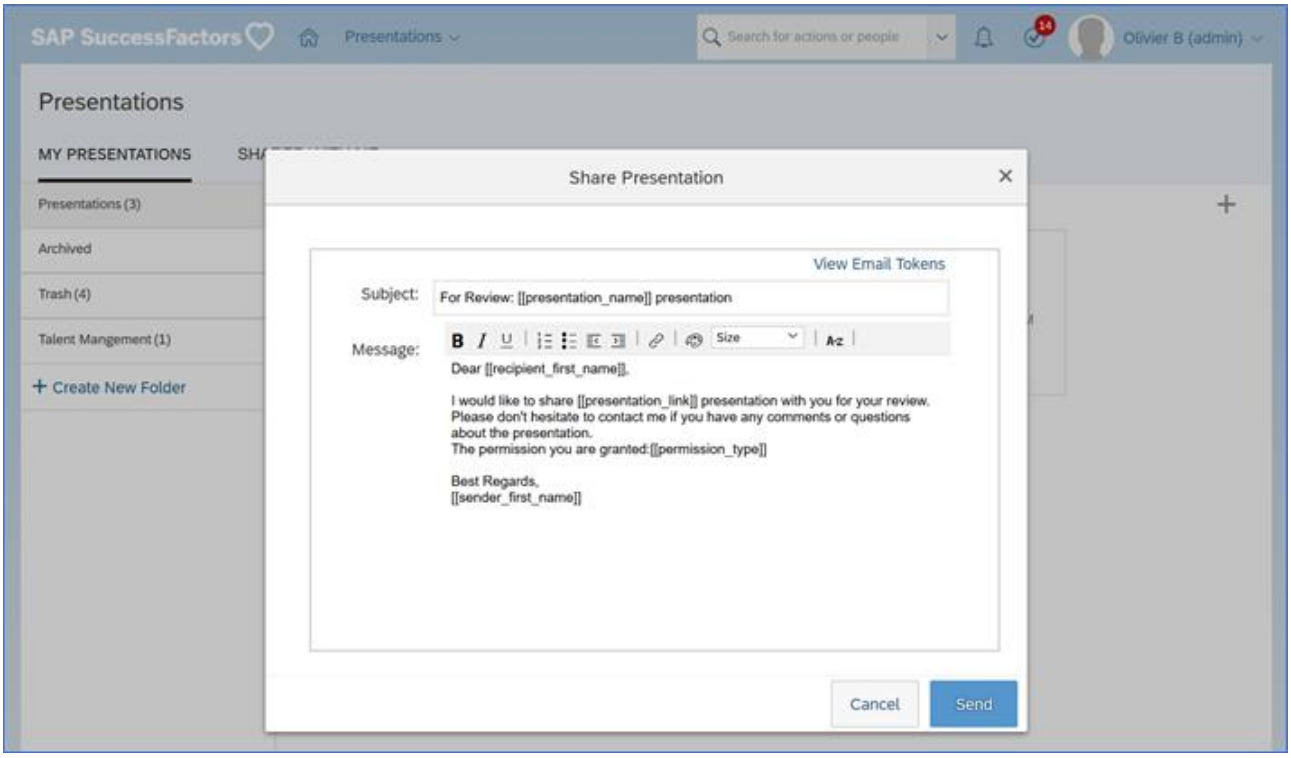


3. Use search boxes to add individuals or groups to whom you want to send the presentation.
4. You can also grant editing permissions to the people you are sharing with. Simply select the Edit checkbox.



5. The Send email notification to new viewers option is selected by default. If you do not want to send an email notification to the people you are sharing with, unselect the checkbox.

6. To view the exact URL of the presentation to be shared, click on the link *public share URL* of this presentation.
7. Click Customize Email to customize the text of the email notification.



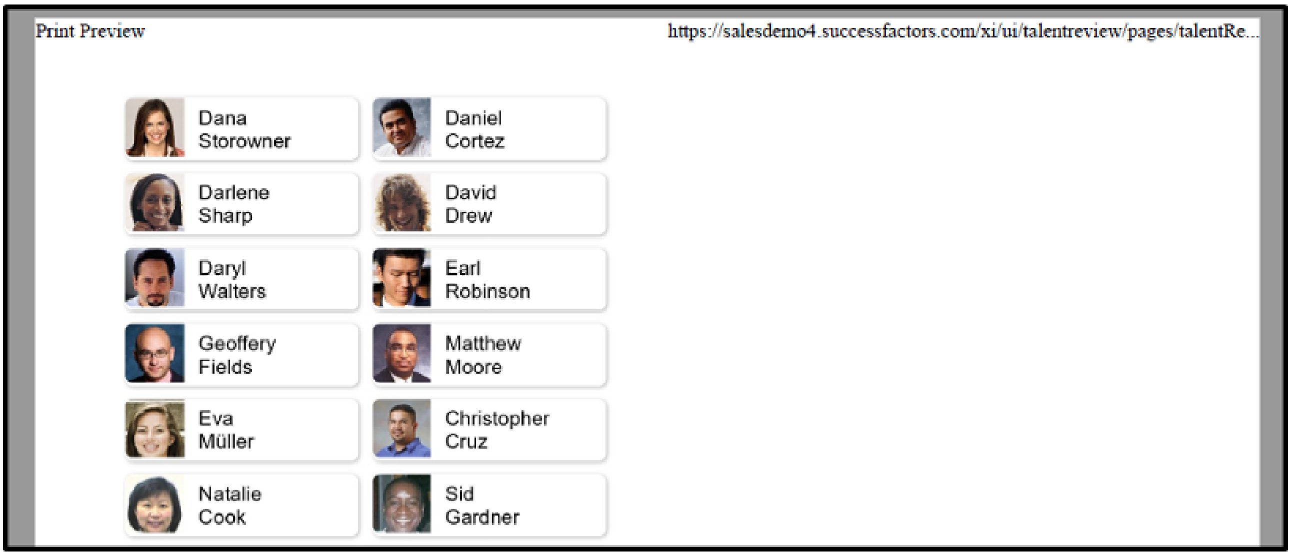
7. Email tokens dynamically insert information about the presentation and the recipient into the email. You do not need to use them, but if you delete them accidentally and want to add them again, you can click View Email Tokens to see a list of available tokens and add them again.

8. Click Done to finish. The specified people can now view the shared presentations on the Shared With Me tab.

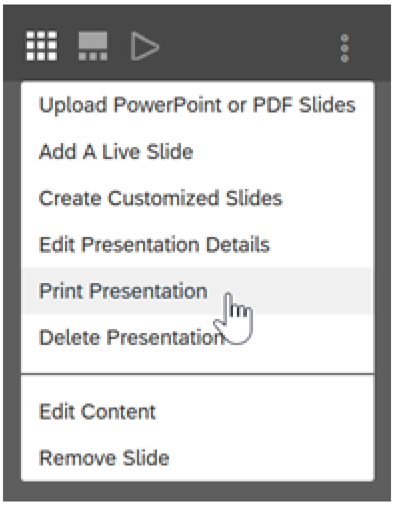
Printing Presentations

You can print Presentations or save them as pdf files.

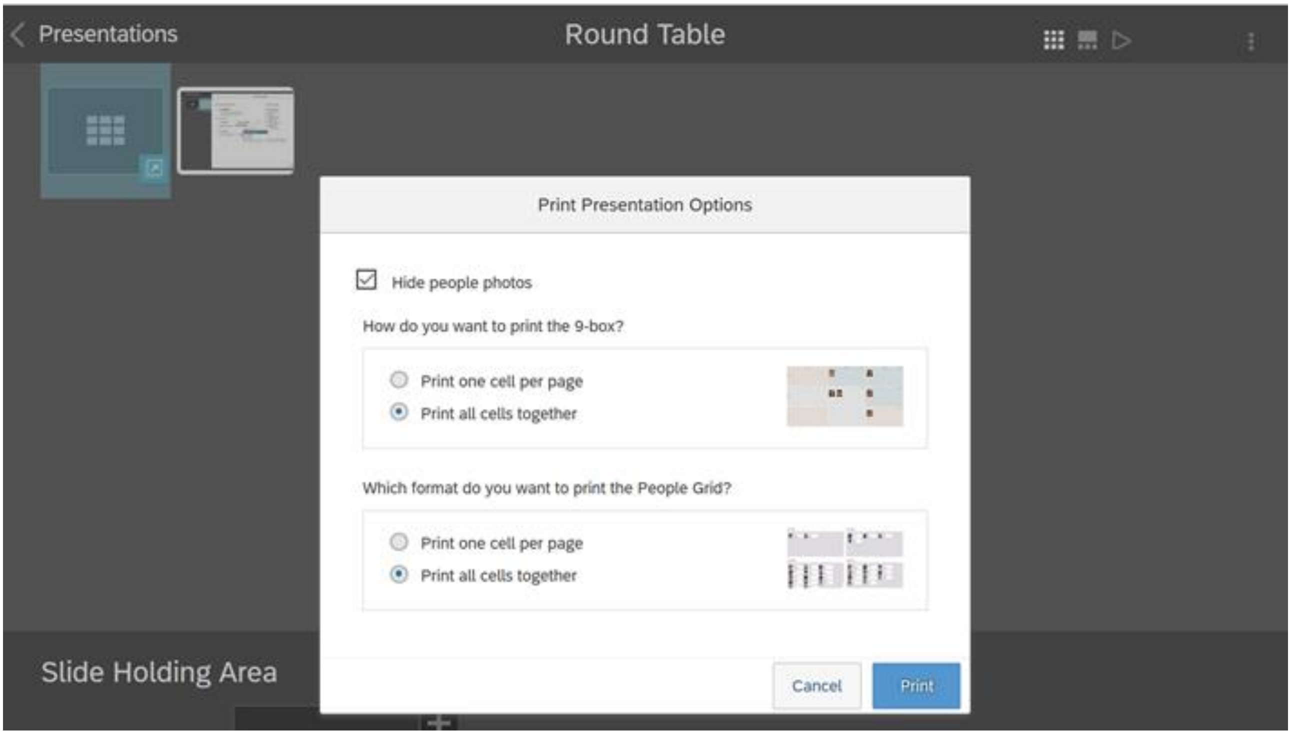
Users can print all types of slides, including customized slides. Additionally, user cards on a People Grid Live Slide will automatically be printed on two or more pages if they are more than one page.



1. Go to Presentations > My Presentations.
2. Open a Presentation.
3. Choose Print Presentation from the Presentation Menu. You can print presentation slides in either View Slide Sorter mode or View Slide Timeline mode. A Print Presentation Options popup shows.



4. Select from the options. As for 9-box and people grid, you can preview layout with demo images on the right.



5. Click Print. A print preview window displays.
6. Choose either Send to Printer or Close Preview.
7. Further customize your printing preferences in the Print Preview window. You can also save the presentation slides as a PDF file.
8. Click Print.

Custom slide printing is not supported.

Lesson Conclusion – Managing Presentations

In this lesson, you learnt how to manage Presentations.

You should now be able to:

- Organize Presentations
- Copy Presentations
- Share Presentations
- Print Presentations

Unit Wrap-Up

In this unit, you covered:

- Lesson 9-1: Overview and Enabling Presentations
- Lesson 9-2: Key Features of Presentations
- Lesson 9-3: Creating a Presentations
- Lesson 9-4: Managing Presentations

You should now be able to:

- Enable Presentations
- Describe features for presentations
- Create Presentations
- Manage Presentations

Appendices

Appendix A – Importing / Exporting Extended User Information

Data Management

Data management is critical for client data integration from other systems. An HRIS is generally the source for user/employee data uploads. It can also be the source for additional personal information (i.e., Minority), trend data (i.e., Ratings), and multiple-records for background sections (Work Experience). You may have other systems that can integrate to provide data like badge systems to provide photos as well.

When working with the extended user information imports or exports, it is helpful to understand the terms, definitions and file types to ensure success. The charts below will assist in explaining these determinants.

Terms and Conditions

Term	Definition
Boolean	True/false elements.
Float	Numeric elements.
Varchar	Variable character (alpha numeric) elements.
Elements (Field)	Defined data (standard, user, trend, or background).
Sections and Fiel ds	Defined background elements create sections in the Live Profile with a set of fields (e.g., Awards [section includes type, description, and date] fields).

File Types

File Type	Description
User Data/Employee Data	Populates employees and one-to-one data.
User Info/Personal Info	Supplemental one-to-one data.
Background Data	Many-to-one data resulting in multiple records for each employee and multiple sections.
Trend Data	Rating data can be many to one and multiple sections.

Personal Data

- Personal data file contains supplemental one-to-one data (i.e., there is one record for each employee)
- Every employee has a record whether or not any data has been entered
- When importing, you can limit which employees and/or which columns you want to import
  - If you include an employee and column, it will overwrite data, even if left blank
- This file does not include fields from the UserDirectory data file (UDF) that populates employees in the system

Trend (Rating) Data

- Contains rating information
  - May include Performance, Potential, Competency, Objective, or custom ratings
  - Includes multiple sections, and can include multiple records in a section for an employee
  - Does not include ratings that come from Performance Management forms; only those ratings entered in the live profile or imported (Exception: You can include form ratings in a report)
- Columns may not be changed, but you can import specific sections or employees
- When importing:

- If you do not select Overwrite Existing Data, all records will be added as new records, even if it's a clone of a record
- If you do select Overwrite Existing Data, all records in sections you are importing will be deleted before importing except for those ratings from forms: this affects all employees

Background Data

- Data includes "many to one" data (each employee can have multiple records in each section)
- File includes multiple sections of data
- Permissions are at the "element" (section) level, not the "field" level
- Custom background sections may be created (Enterprise only)

- Background elements support attachments:
    - Each background element can have one field of attachment type
    - Each row of background element can only have one attachment; to have multiple attachments in a row, you will need to create multiple rows
    - The following file formats are supported: Microsoft Office documents, HTML, text and PDF

Exporting Extended User Information

If your system was fully configured by a Professional Services consultant, it is a best practice to export the data and examine the format or populated fields prior to a new import. You can do this by navigating to Admin Center > Update User Information > Export Extended User Information.

Once within the export section, follow the steps below.

To Export:

- Select the file type.
- Select the language you want to export into.
    - If needed, you can also change character sets.

- Specify additional options:
    - Exporting as a batch option allows you to export the report, let it process, and pick it up later instead of waiting. If it's a large report, it will automatically become a batch.
    - The Valid users' only option will ignore records that are not correctly formatted in their data.

Importing Extended User Information

Once you have analyzed the data or created an import file, navigate to Admin Center > Update User Information > Import Extended User Information.

Within the import section, you can download a template if just getting started with data input or you can follow the steps on the next page.

- Click Choose File to search for the file you are going to import.
- Select the file type.
- Specify the locale and character encoding options as necessary.
- Specify additional files options.

	Use caution when selecting the additional file options described below. If you don't select Import by re-loading all data with your new changes, all records will be added as new records, even if it's a clone of a record. If you do select Overwrite Existing Data, all records in sections you are importing will be deleted before importing. This affects ALL employees.

The Import by re-loading all data with your new changes option is extremely important to be aware of, and it behaves differently for each file type:

- When not selected, all records are treated as new records.
- Personal Information always has this option selected.
- Trend Information will delete all ratings (performance and potential) that didn't come from forms, including for users not in the file.
- Background Information will delete all records for each section you have a header for. This affects all employees, not just those in the file.
- You can import specific sections and not others, but you must include all columns for a section.

	If you need more specific information on importing or exporting extended user information, refer to Customer Success, the Support Knowledge Base Articles or Customer Community.

Appendix B – Processes and Forms

Processes and Forms for Succession

Inside Succession, there are many significant tools where you define or utilize a pre-determined process. The main tools are the Succession Org Chart v12, the Matrix Grid Report v12, and Talent Search v2.

This process, originally created in Admin Center > Reporting and Analytics > Processes and Forms, is critical to understand what data is pulled and displayed to the Succession

Planner or end user. This guide first reviews where the processes are designated within Admin Center and then how a processes are defined.

Processes and the Matrix Grid Report

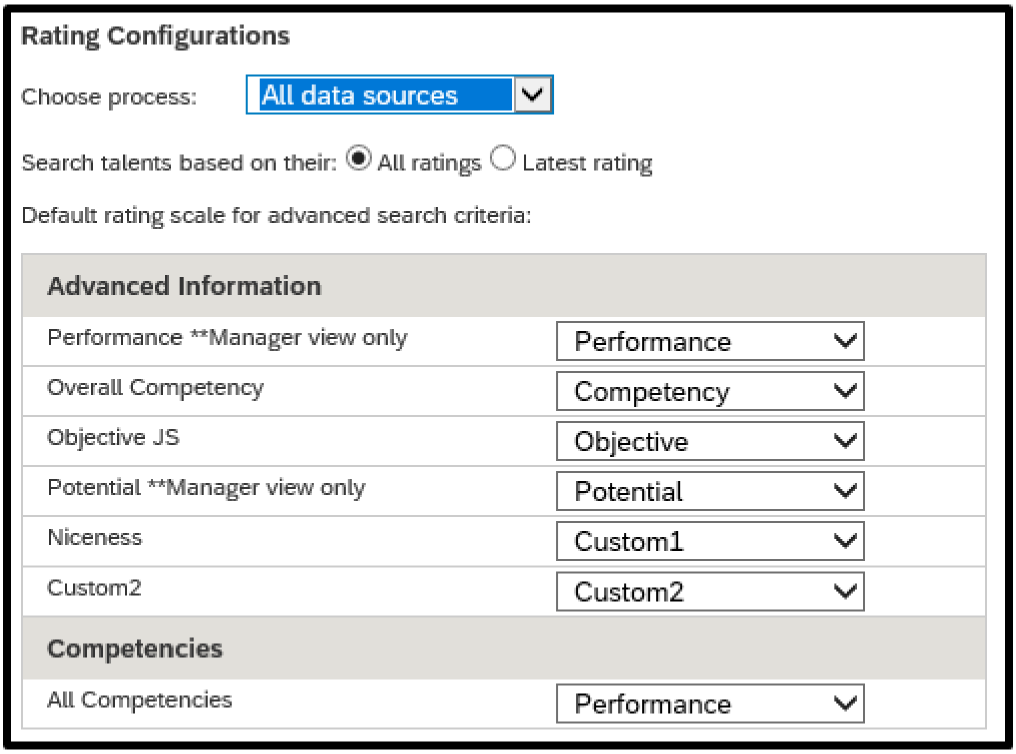
When changing the process for the Matrix Grid Report, go to one of the following areas:

- Admin Center > Succession > Matrix Grid Reports: Performance-Potential
- Admin Center > Succession > Matrix Grid Reports: How vs. What

Locate Process and make your dropdown selection for the x and y axis.

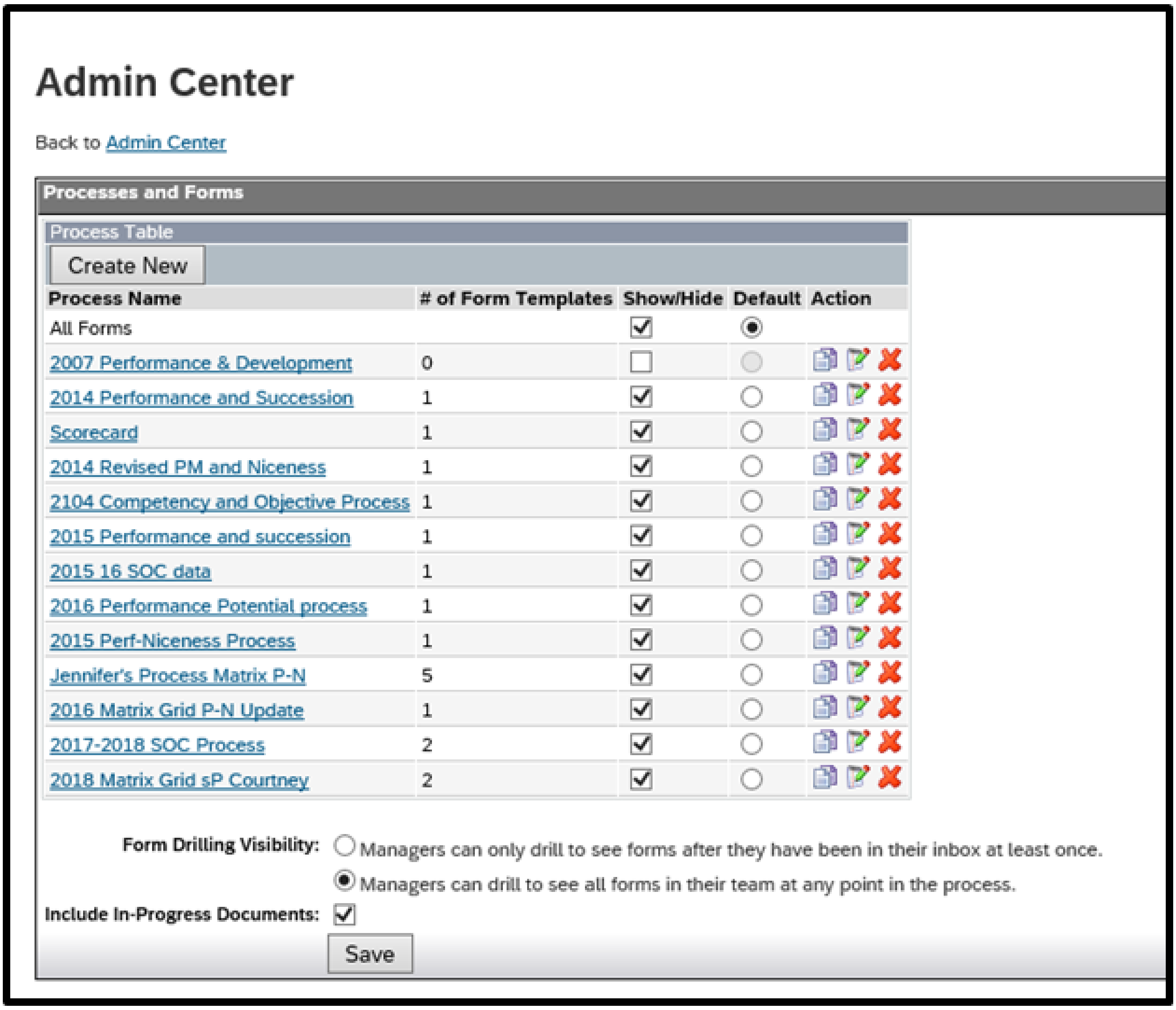
Processes and Talent Search v2

With Talent Search v2, you have many new options within the Talent Search Settings compared to the original Talent Search. One very important selection relates to the process used in Talent Search. Simply navigate to Admin Center > Succession > Talent Search Settings to Choose Process from the dropdown.



Defining or Creating a New Process

When defining or creating a new process, you must navigate to Admin Center > Reporting and Analytics > Processes and Forms. The screen below begins with a decision as whether to edit a previous or to create a new process. To view an existing process, click on the process name link. To create a new one, press the Create New button. Other actions like copy, edit or delete are chosen using the icons to the far right.



Choosing the Create New button brings you to the following screen where the name, forms, data, plans, and rating scale are selected. At this point, the Administrator has the opportunity to decide the information to include in the process. Start by giving your process a name that is memorable and applicable. As a best practice, the name typically states the year or date for easy recognition. Then, choose the forms, data or rating scale by clicking on the type or name and click the Add button.

If you do not see the rating scales, use the plus sign to the left. Select the rating scale of interest and Save.

	Don’t forget to connect the new process you create to the appropriate succession tool or report like the Succession Org Chart, Matrix Grid Report, or Talent Search. For details, revisit the beginning of this lesson.