

Oracle

Talent Management Cloud

Using Talent Review and Succession Management

Release 12

This guide also applies to on-premises implementations

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Preface

This preface introduces information sources that can help you use the application.

Oracle Applications Help

Use the help icon  to access Oracle Applications Help in the application. If you don't see any help icons on your page, click the Show Help icon  in the global header. Not all pages have help icons. You can also access Oracle Applications Help at <https://fusionhelp.oracle.com>.

Using Applications Help

 **Watch:** This video tutorial shows you how to find help and use help features.

Additional Resources

- **Community:** Use [Oracle Applications Customer Connect](#) to get information from experts at Oracle, the partner community, and other users.
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1 Talent Review Overview

Talent Review: Explained

The talent review process involves one or more talent review meetings. Its purpose is to evaluate trends, assess strengths, and address areas of risk for the organization. This topic summarizes the activities that occur before and during talent review meetings. Manage the process in the Talent Review work area. Select **My Workforce - Talent Review**.

The talent review meeting participants, typically managers in the relevant organization, review worker profile, performance, goals, and compensation data. Data from each meeting is retained automatically for use in future meetings. You can use this data to compare worker progress between talent review processes.

The human resource (HR) specialist (or other HR business partner), organizational business leader, managers, or any other assigned meeting facilitator manage the meetings.

Calibration of Worker Ratings

As a meeting participant, you can review relative positioning of workers and calibrate their ratings to give a clear picture of worker strengths and weaknesses. You view the ratings on an n-box, a box chart matrix, for the following ratings:

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

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

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

You can also update data, such as competencies and degrees, in the Details dialog box that you open from the Talent Review dashboard.

Organizational and Individual Review

You can review worker ratings for any level of the organization. For example, you can review workers in an organization as a single group. Alternatively, you can filter workers by job, location, or other categories. You can view an individual's data, including performance and potential ratings, experience, education, licenses, certifications, and willingness to relocate.

Evaluate Risk and Impact of Loss

Compare the risk of loss and impact of loss ratings provided by participants for workers to ensure workers in key positions can be retained. Managers can use the data to develop development plans or incentives for valuable workers who are likely to leave or whose loss would be significant.

Compensation

You can configure talent reviews to review current compensation for workers, including salary, last increase, and stock options.

Worker Goals

You can view current worker goals. You can also:

- Create performance goals for worker performance evaluations.
- Create development goals for worker development plans.

Workers and managers can manage these goals. Goals that you create in a talent review appear automatically in worker profiles. They don't appear in the goal library.

Notes and Tasks

You can create tasks and associated notes to address issues that participants identify for a talent review. You can also create tasks for workers whose risk or impact of loss ratings are high. You track tasks to completion using the Manage Notes and Tasks page.

Talent Pools and Succession Plans

You can review talent pools and succession plans that the talent review includes. You can move workers to talent pools and succession plans, and update the readiness levels of workers in succession plans. You can also create talent pools and succession plans.

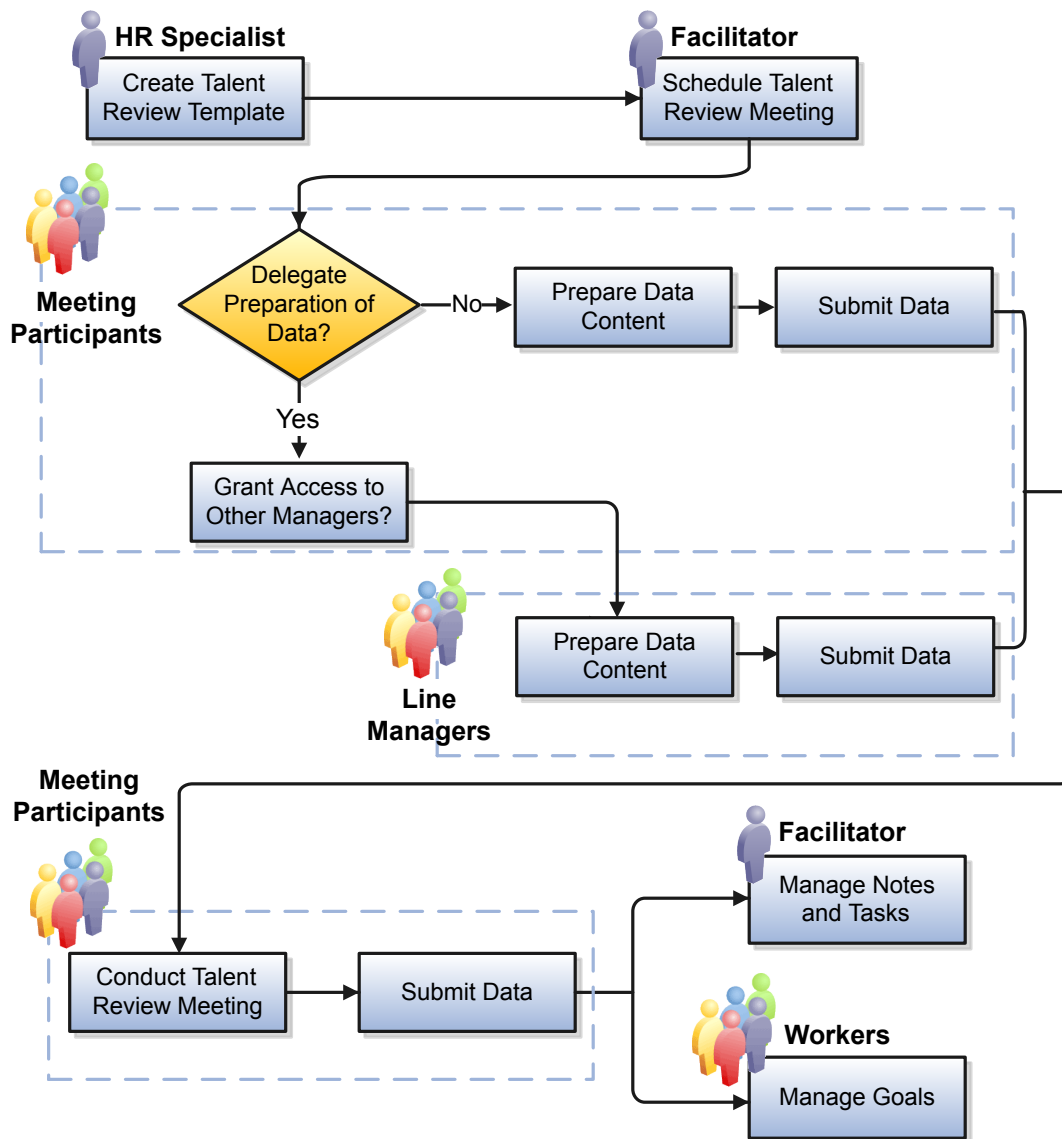
Related Topics

- Succession Management: Explained
- Succession Plans, Talent Pools, and Talent Reviews: How They Work Together
- Talent Pools: Explained

Talent Review Life Cycle: Explained

The life cycle of a talent review includes tasks from creating the meeting template through conducting the review meeting to managing notes and tasks created for the meeting. This topic summarizes key stages in the talent review and identifies responsibilities. Manage talent reviews in the Talent Review work area. Select **My Workforce - Talent Review**.

The following figure shows the life cycle of the talent review.



Creating the Meeting Template

The human resource (HR) specialist creates a talent review template in the Setup and Maintenance work area. Multiple talent reviews can use a single template. The template controls:

- The size of the review population
- Whether the review includes succession plans and talent pools
- The box-chart matrix options and default presentation
- The data available to meeting participants
- The actions that participants can perform

Creating and Scheduling a Meeting

Meeting facilitators, who must have the HR specialist role, create talent review meetings. They:

- Select a talent review template and schedule the meeting.
- Select the content available for reviewers to prepare before the meeting, from the options specified in the talent review template.
- Select meeting participants and designate them as either reviewers or participants.
- Identify the review population.

A meeting can have multiple facilitators, any of whom can perform the facilitator tasks. Reviewers can rate workers before the meeting, and attend the meeting. Participants attend the meeting and can provide feedback about worker ratings during the meeting.

Preparing and Submitting Content

Reviewers submit content for their direct and indirect reports before the meeting. The content can include ratings for the following profile data:

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

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

The facilitator can track content submission and notify reviewers when the deadline approaches. Workers for whom no one submitted current data appear in the meeting Holding Area, if it's available.

Conducting the Talent Review Meeting

The facilitator starts the meeting in the Talent Review work area. During the meeting, participants provide information about what worker ratings should be. The facilitator then calibrates the ratings on the dashboard. The facilitator performs all actions during the meeting, as directed by the participants.

Depending on template options, the meeting participants can:

- View and update the meeting box chart.
- Review profile and compensation details of individual workers.
- Compare current data to that from previous meetings.
- Compare a worker to another worker or to a job profile.
- Access the organization chart of the organization under review.
- Assign performance and development goals to workers.

- Assign tasks to anyone in the organization as part of an action plan.
- Save the meeting or submit it to freeze the data.

Profile changes from a submitted meeting appear in the worker's profile record. Goals, notes, and tasks are saved immediately. The meeting is also automatically saved periodically, and when participants perform actions outside the Talent Review work area.

Managing Notes and Tasks and Working on Goals

After the meeting, facilitators can manage and monitor notes and tasks, and review them for all workers for all meetings. Workers can access performance goals assigned to them from their goal management pages, and manage development goals from their career development pages.

Related Topics

- [Talent Review Template: Explained](#)
- [Selecting Participants for a Talent Review: Points to Consider](#)
- [Preparing Content for a Talent Review Meeting: Explained](#)

Talent Reviews: How They Work with Profiles, Goals, Performance Documents, and Compensation

Talent review templates control how talent reviews integrate with profiles, goals, performance documents, and compensation. This topic describes each of these integrations. Create talent review templates on the Manage Talent Review Templates page. Select **Setup and Maintenance - Configure Talent Review Dashboard Options**.

Profiles

Talent reviews place workers on a box chart according to their rating-level scores from their worker profiles. In the talent review template, you select from the following ratings and their associated rating models to set up the box chart:

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

The talent review template can include profile data from the worker Skills and Qualifications tab in Person Spotlight, including competencies, degrees, languages, areas of expertise, and mobility rating. Custom content types that you set up with Talent Review as a subscriber also appear on the Experience and Qualifications tab of the Details dialog box you open from the Talent Review dashboard.

The latest overall performance rating for a worker can come from the:

- Overall rating in the performance document
- Rating that a participant provides before the meeting
- Career Planning card

Latest overall competencies and goals ratings come from the Competencies and Goals sections of the most recent performance document. Alternatively, the Oracle Fusion Compensation Management business process can provide these ratings.

Latest worker profile data appears in the talent review. Updates made before and during the talent review meeting appear in the profile record, including the box label of selected views where the worker ends up. Instance qualifiers associate the updates with the talent review.

Goals

If Oracle Fusion Goal Management is available, talent review participants can view the review population's current performance goals. If Oracle Fusion Career Development is available, they can review the review population's development goals. Participants can create and assign new goals during the talent review meeting. They can also assign goals from the goal library.

Goals that participants create in a talent review don't appear in the goal library. They appear in worker profiles as content items.

Workers and their managers can view assigned performance goals from their goal management pages and add performance goals to performance documents. They can view and manage assigned development goals from their career development pages.

Performance Documents

The template can enable participants to view and update overall worker competencies and overall goals ratings in the box chart. The ratings are the manager ratings from the Competencies and Goals sections in a performance document. The ratings are available if the performance template supports overall section ratings.

If the talent review template includes performance details, then participants can view the overall ratings and comments from the worker's most recent performance evaluation. Participants can open the three most recent performance documents in the talent review.

Compensation

The talent review template can make worker compensation data, including salary, variable compensation, and stock grant information, available to view in the talent review meeting.

2 Talent Profiles

Managing Talent Profiles: Overview

Managers and HR specialists can maintain information within person profiles about the skills, qualifications, accomplishments, and career preferences of their workers. They can also maintain information in model profiles about the targeted skills and qualifications of the jobs and positions within the company. Workers can manage their own careers by keeping their talent profiles current so that their skills, qualifications, accomplishments, and career preferences reflect their current performance and future career goals.

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

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

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

Pages	Features for Managers and HR Specialists	Features for Workers
Skills and Qualifications	<ul style="list-style-type: none"> • Use the competency gaps chart to compare the competencies of a worker to that of a job from the worker's interest list, to identify if the worker is a suitable candidate for the job or needs further training. • Review areas of expertise and other qualifications for workers. 	<ul style="list-style-type: none"> • Use the competency gaps chart to compare their competencies to that of a job from their interest list, to identify whether they are suitable for a job or to identify training needs. • Identify areas of expertise, such as a specific software package. • Maintain competencies, degrees, and other accomplishments.
Career Planning	<ul style="list-style-type: none"> • Add jobs or positions to the interest lists of their workers. • Review career preference information for workers, such as job or job family of their next career move. • Review and edit talent ratings such as performance and potential of workers, and the risk and impact of losing them. 	<ul style="list-style-type: none"> • Add jobs or positions to their interest lists. • View the suggestions list and determine whether to add any of the suggested jobs or positions to their interest list. • Identify career preferences such as the job or job family of their next career move.

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

Related Topics

- [Talent Profile Summary: Explained](#)

Compare Profiles and Find the Best Fit

Comparing Items: Explained

Use comparison to quickly identify and evaluate differences between items. Compare any person, job, and position items. For example, you can compare a person with another person or with a job profile. You can compare items in the Profiles work area and on the talent review dashboard.

Selecting Items

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

Controlling Results

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

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

Performance Information in Comparison Results: Explained

The comparison displays the performance data of only those persons who are evaluated using the enterprise-wide designated rating model, because you can't compare persons who are evaluated using different rating models.

For each person, the comparison displays up to three performance documents. These performance documents include the latest document using the designated rating model plus the two most recent previous documents that use the same performance template as the latest document. However, the performance documents and performance periods for the persons being compared may be different. The comparison indicates the performance attributes' differences only if the performance documents are the same for the persons being compared.

Best-Fit Analysis: Explained

The best-fit analysis includes the review of all profiles of the match type required and calculation of the overall score compared to the source profile. The overall score appears in the Overall Fit column in the results section on the Find Best Fit page. Employees, managers, and HR specialists can use the Best-Fit feature to match and compare profiles with the selected match criteria. The Best-Fit feature finds profiles that closely match the source profile (person or job). You can

associate both jobs and positions with the job profile type. Therefore, in a best-fit analysis, a job profile can be either a job or position.

Best-Fit Analyses Types

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

- **Person to Job:** Using a person profile as the source profile, you can find the job that best fits a worker.
Example: As a manager, use this tool to help a worker to identify job profiles for which the worker is best suited and decide the next career move.
- **Person to Person:** Using a person profile as the source profile, you can find the worker with skills that match that of a particular worker.
Example: Your company is planning to launch new technology. As an HR specialist, you know a worker who has the required skill to use the new technology. To assess the scope of workers who need development in this particular skill, you can select the worker's profile. You can then use the Best-Fit feature to view a list of other workers who may come close to the skill requirements.
- **Job to Job:** Using a job profile as the source profile, you can find the job profile that closely matches a job profile.
Example: As an HR specialist, you can use this tool to help locate jobs to identify areas for outplacement, training requirements, or areas of organizational strength.
- **Job to Person:** Using a job profile as the source profile, you can find the best-fit worker for a job.
Example: As an HR specialist, you can use this tool to help locate the most qualified workers for a job opening within your company.

The Best-Fit Feature Accessibility

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

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

Filtering Best-Fit Results

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

Accessing the Best-Fit Feature as an HR Specialist: Procedure

Depending on the privileges associated with the HR specialist role, an HR specialist can find:

- The best-fit job or person for a person profile.
- The best-fit job or person for a job profile.

Finding the Best-fit Job or Person for a Person

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


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


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

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

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

- From the Profiles page:
 - a. Select **My Workforce - Profiles**.
 - b. Select the Job Profiles tab, search for the job profile.
 - c. Select the profile in the Results section.
 - d. From the Actions menu, click the corresponding link to find the best-fit job or person for the selected profile.
- From the Select Candidates page when creating or editing a succession plan:
 - a. Select **Navigators - My Workforce - Succession Plans**.
 - b. Select the Succession Plans tab, if not already selected.
 - c. Click **Create** to create a plan, or select an existing plan and click **Edit** from the tab toolbar.
 - d. Enter or edit the necessary details and click **Next** to open the Select Candidates page for the succession plan.
 - e. On the page toolbar, click **Find Best Fit** to find the best fit person for a job profile and add the person as a candidate.

 **Note:** If a manager is the owner of a succession plan and has security privileges to access the Succession Management work area, the manager can also use this navigation to access the best-fit feature and add a candidate to the plan.

- From the Select Members page when creating or editing a talent pool:
 - a. Select **Navigators - My Workforce - Succession Plans**.
 - b. Select the Talent Pools tab.
 - c. Click **Create** to create a talent pool, or select an existing pool and click **Edit** from the tab toolbar.
 - d. Enter or edit the necessary details and click **Next** to open the Select Members page for the succession plan.
 - e. On the page toolbar, click **Find Best Fit** to find the best fit person for a job profile and add the person as a member.
-  **Note:** If a manager is the owner of a talent pool, the manager can also use this navigation to access the best-fit feature and add a member to the pool.

Accessing the Best-Fit Feature as a Manager: Procedure

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

Finding the Best-fit Job or Person for a Person

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

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




Tip:

- From the My Team page:
 - a. Select **Navigators - My Team - My Team**.
 - b. Click the link to a report. The Employment Information page of the report opens.
 - c. Select **Actions - Talent Management** and then select the corresponding link to find the best-fit job or person for the selected profile.

Accessing the Best-Fit Feature as a Worker: Procedure

Depending on the privileges assigned to the employee role, workers can:

- Find the best-fit job profile for their person profile.
- Add the job profile to their careers of interest list.

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

Finding the Best-fit Job

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

- From the Talent Profile page:
 - a. Select **Navigator - About Me - Talent Profile**.
 - b. In the Related Links panel on the Actions tab, click the corresponding link to find the best-fit job for your role.

Best Fit: How It's Calculated

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

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

How Best Fit Is Calculated

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

- Competencies
- Honors and awards
- Work requirements

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

- Languages

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

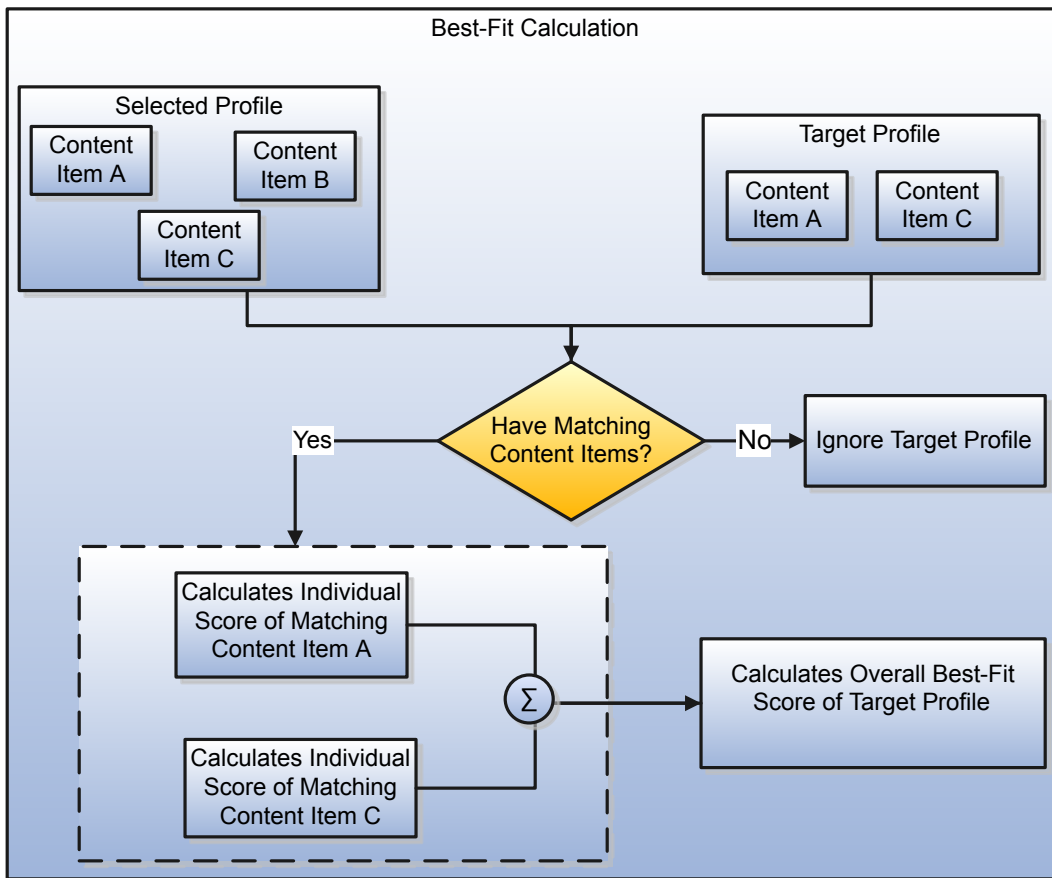
- Degrees
- Memberships
- Licenses and certifications

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

Overall Score in a Best-Fit Analysis: How It's Calculated

The Best-Fit feature calculates the overall score for a target profile using an algorithm rule. The overall score appears in the Overall Fit column in the results section on the Find Best Fit page. The algorithm for the best-fit analysis is automatically processed by the application.

The following image shows the best-fit algorithm rule.



Selected Profile

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

Target Profile

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

Individual Score

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

Overall Score Calculation Rule

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

Examples:

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

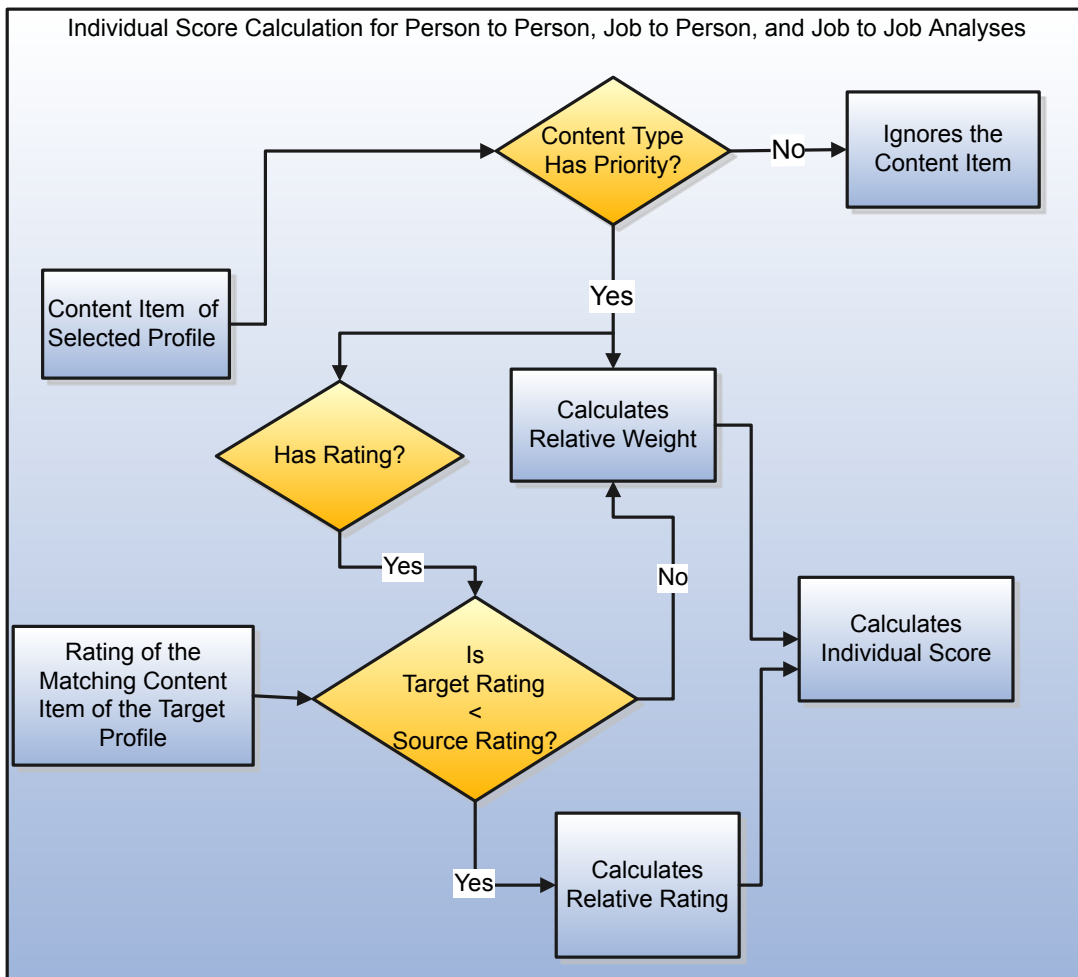
Person to Person, Job to Person, and Job to Job Analyses: How the Individual Score is Calculated

In the following best-fit analyses, each content item of the selected profile must match the target profiles:

- Person to person
- Job to person
- Job to job

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

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




Deciding the Priority

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

To specify priority using details:

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

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

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

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

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

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

Profile Ratings in Best-Fit Calculations

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

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

Rating Level	Value
Foundation	1
Intermediate	2
Skilled	3

Rating Level	Value
Advanced	4
Expert	5

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

Rating Level	Value
Low	1
Moderate	2
High	3

Relative Weight

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

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

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


- In the Competencies content type = $2 / (2 + 2 + 2 + 2 + 2 + 2 + 1) = 2 / 13 = 0.153846$
- In the Degrees content type = $1 / (2 + 2 + 2 + 2 + 2 + 2 + 1) = 1 / 13 = 0.076923$

Relative Rating

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

Relative Rating = Target Rating / Source Rating

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

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

Individual Score of a Content Item

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

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

In the earlier table:

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

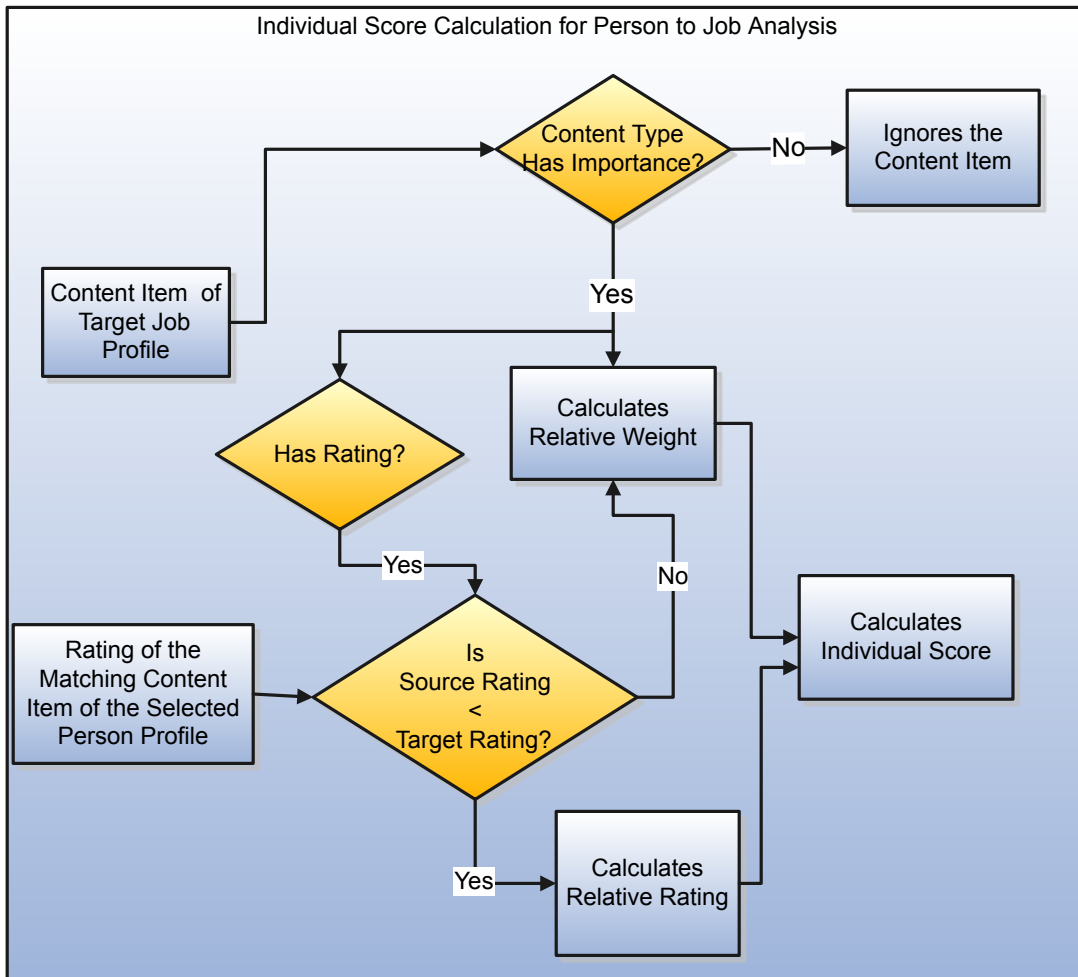
Related Topics

- [Rating Models: Explained](#)

Person to Job Analysis: How the Individual Score is Calculated


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

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



Verifying the Importance

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

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

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

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

Profile Ratings in Best-Fit Calculations

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

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

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

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

Rating Level	Value
Low	1
Moderate	2
High	3

Relative Weight

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

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

Example: The target job profile has in all three content types Competencies, Degrees, and Languages. The Competencies content type has in all six content items, the Degrees content type has one content item, and the Languages content type has one content item. The target importance already specified for each content item in Competencies and Degrees is Medium (2) and for Languages is Low (1). The relative weight for each content item:


- In the Competencies content type = $2 / (2 + 2 + 2 + 2 + 2 + 2 + 1) = 2 / 15 = 0.133333$
- In the Degrees content type = $1 / (2 + 2 + 2 + 2 + 2 + 2 + 1) = 2 / 15 = 0.133333$
- In the Languages content type = $1 / (2 + 2 + 2 + 2 + 2 + 2 + 1) = 1 / 15 = 0.066667$

Relative Rating

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

Relative Rating = Source Rating / Target Rating.

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

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

Individual Score of a Content Item

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

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

In the earlier table:

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

- Relative Rating = Source Rating / Target Rating

Related Topics

- [Rating Models: Explained](#)

Best-Fit Analysis: Examples

Use the best-fit analysis to find the profiles that most closely match a selected profile. You select a person or job profile (job or position) as a source profile and use the Best-Fit feature to find profiles that best match the source profile. The best-fit analysis results are based on how well the content items of a target profile match content items of the source profile.

Best-Fit Person Profile

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

John's person profile has the following content:

- Competencies as shown in the following table.

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

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

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

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

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

Content	Priority (Numeric Value of the priority)
Competencies	Medium (2)

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

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

Alex's person profile has the following content details:

- Competencies as shown in the following table.

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

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

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

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

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

- Competencies: Communication
- Degrees: Bachelor of Engineering

- Languages: English
- Work Requirements: Travel Domestically and Travel Internationally

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

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

The overall score is calculated as follows:

- The source profile John has in all seven content items with the priority for all content items set to Medium (2) at the content type level. Therefore, the relative weight for each content item = $(2 / 14) = 0.1428571$ (where, Relative Weight = Content item priority / Sum of all content item priorities).
- The application calculates the individual score of the matching content using the appropriate equation as displayed in the following table.

Content	Criteria	Relative Rating	Individual Score Equation	Individual Score
Competencies (Communication)	Target Rating < Source Rating	Target Rating / Source Rating = 4 / 5	Individual Score = Relative Rating * Relative Weight * 100	$(4 / 5) * 0.1428571 * 100 = 11.428568$
Degrees (Bachelor of Engineering)	Not applicable	Not applicable	Individual Score = Relative Weight * 100	$0.1428571 * 100 = 14.28571$
Languages (English)	Target Rating > Source Rating	Not applicable	Individual Score = Relative Weight * 100	$0.1428571 * 100 = 14.28571$
Work Requirements	Both travel requirements, Travel Domestically and Travel Internationally, of source and target profiles matches.	Not applicable	Individual Score = Relative Weight * 100	$0.1428571 * 100 = 14.28571$

- The total score is the sum of all individual scores. Therefore, total score = 54.285698.

- The application rounds off the total score to the nearest whole number. Therefore, the overall score of the target profile is displayed as 54.

Best-Fit Job Profile

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

Beth's person profile has the following content:

- Competencies as shown in the following table.


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

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

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

- Memberships: ICAS

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

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

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

- Competencies as shown in the following table.

Competency (Content Item)	Proficiency (Numeric Value)	Importance (Numeric Value)
Action Oriented	Intermediate (2)	Medium (2)
Communication	Intermediate (2)	Medium (2)
Leading People	Intermediate (2)	Medium (2)
Working Globally	Intermediate (2)	Medium (2)

Competency (Content Item)	Proficiency (Numeric Value)	Importance (Numeric Value)
Analytical Skills	Intermediate (2)	Medium (2)
Embrace Change	Intermediate (2)	Medium (2)
Manage Risk	Intermediate (2)	Medium (2)
Market and Industry Knowledge	Intermediate (2)	Medium (2)
Resource Management	Intermediate (2)	Medium (2)

- Degrees as shown in the following table.

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

- Languages as shown in the following table.

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

- Memberships

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

- Work Requirements:

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

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

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

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

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

The overall score is calculated as follows:

- The target job profile Accountant has in all 15 content items with the importance (or priority) for all content items at the content type level set to 2. Therefore, the relative weight for each content item = $2 / 30 = 0.066667$ (where, Relative Weight = Content item importance / Sum of all content item importance).
- The application calculates the individual score of the matching content using the appropriate equation as displayed in the following table.

Content	Criteria	Relative Rating	Individual Score Equation	Individual Score
Competencies (Action Oriented)	Target Rating = Source Rating	Source Rating / Target Rating = $2 / 2$	Individual Score = Relative Rating * Relative Weight * 100	$(2 / 2) * 0.066667 * 100 = 6.6667$

Content	Criteria	Relative Rating	Individual Score Equation	Individual Score
Competencies (Communication)	Target Rating = Source Rating	Source Rating / Target Rating = 2 / 2	Individual Score = Relative Rating * Relative Weight * 100	$(2 / 2) * 0.066667 * 100 = 6.6667$
Competencies (Leading People)	Target Rating > Source Rating	Source Rating / Target Rating = 1 / 2	Individual Score = Relative Rating * Relative Weight * 100	$(1 / 2) * 0.066667 * 100 = 3.33335$
Competencies (Working Globally)	Target Rating = Source Rating	Source Rating / Target Rating = 2 / 2	Individual Score = Relative Rating * Relative Weight * 100	$(2 / 2) * 0.066667 * 100 = 6.6667$
Degrees (Technical Diploma)	Not applicable	Not applicable	Individual Score = Relative Weight * 100	$0.066667 * 100 = 6.6667$
Languages (English)	Not applicable	Not applicable	Individual Score = Relative Weight * 100	$0.066667 * 100 = 6.6667$
Memberships (ICAS)	Not applicable	Not applicable	Individual Score = Relative Weight * 100	$0.066667 * 100 = 6.6667$

- The total score is the sum of all individual scores. Therefore, total score = 43.3335.
- The application rounds off the total score to the nearest whole number. Therefore, the overall score of the target profile is displayed as 43.

Related Topics

- [Rating Models: Explained](#)

FAQs for Compare Profiles and Find the Best Fit

How are the differences between comparison attributes identified?

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

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

How is risk of loss assessed?

Line managers and human resource specialists enter the risk of loss information in a person's profile manually; there is no automated risk assessment process. They evaluate the risk of workers changing jobs or leaving the enterprise and select the ratings .

Can I add additional data sets to the comparison?

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

What happens if I remove the comparison base?

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

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

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

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

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

Creating and Updating Profiles

Model Profiles: Explained

Model profiles identify the competencies, qualifications, skills, and experience required for a workforce structure, such as a job or position. Use the Manage Model Profiles task in the Profiles work area to create a model profile.

You must use the job profile type to create model profiles. Jobs and positions are workforce structures optionally included in a profile. A job or position profile can exist as an abstract profile that just groups requirements and doesn't reference an existing or planned job or position.

 **Note:** You must use the Job profile type to create model profiles.

Workforce Structure

You can optionally associate the model profile with a workforce structure. The available workforce structures depend on how the profile type is defined. The workforce structures are limited to jobs, positions, organizations, and job families. However, to create a model profile you must use the Job profile type as the template.


You can associate:

- A model profile with more than one workforce structure. Associating model profiles with jobs and positions enables you to define for the job or position the competencies, educational qualifications, and other skills that are required.
- Multiple model profiles with a workforce structure. However, only one profile can be in effect at a time for the workforce structure. Therefore, the effective start and end dates of multiple profiles associated with a workforce structure must not overlap.

When you associate jobs and positions with a model profile, you can compare profiles and use the best-fit analysis for tasks such as finding the worker best-suited for a job or for helping workers identify their next career moves.

Requirements

Identify requirements for the model profile by selecting from the content types. For example, the job profile type might contain these content types: competencies, degrees, honors and awards, languages, licenses and certifications, memberships, and work requirements. If you create a model profile, you can define the requirements for the job using content items in those content types. To add other content types, you must first add them to the job profile type.

 **Note:** A free-form content type contains only a code, name, and a description, and doesn't have any properties until you add it to a profile type. Free-form content types don't include any content items.

Performance Document Information

You can configure a performance template section to populate competencies defined for a model profile in the performance document.

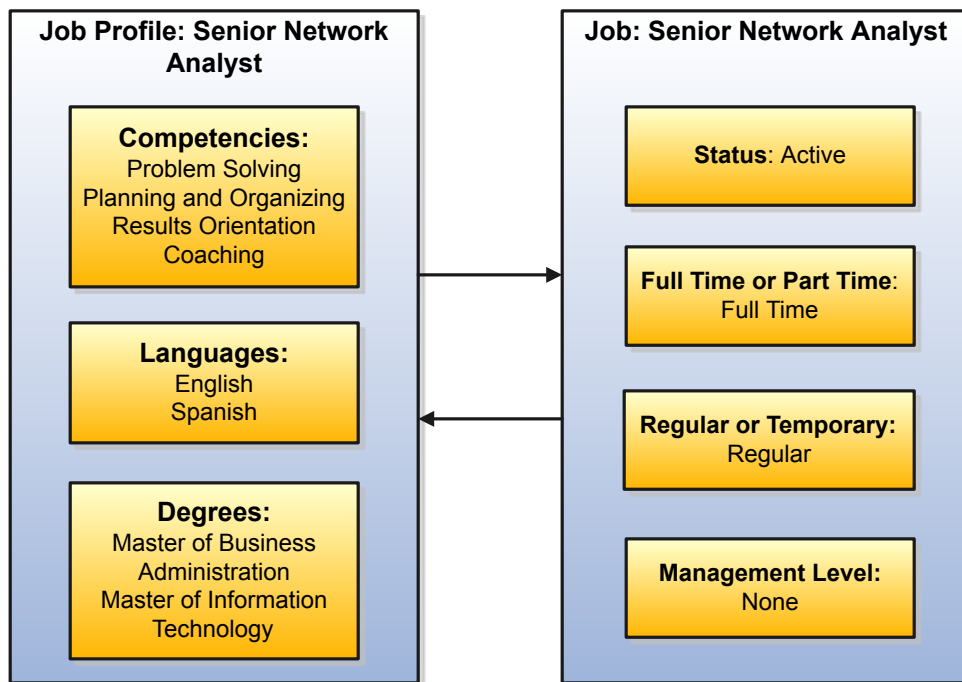
Related Topics

- [Profile Types: Explained](#)
- [Performance Template Section: Critical Choices](#)

Jobs and Positions: How They Work with Model Profiles

You can associate a model profile with a job or a position. This association enables you to define the work requirements and the required competencies, degrees, and other skills for the job or position. This association also enables you to compare profiles and use the best-fit analysis for tasks such as finding the worker best-suited for a job or for helping workers identify their next career moves.

This figure illustrates the information that is contained in a model profile versus that contained in a job.



Associating a Model Profile with a Job or Position

You must use the Job profile type to create model profiles and associate them with a job or position. You can have only one association with a model profile active at one time.

Editing a Profile

You can associate a model profile with multiple jobs and positions. Use the Manage Model Profiles task in the Profiles work area to:

- Create or edit model profiles by using the Job profile type
- Associate model profiles with jobs and positions
- Remove associations between a model profile and jobs or positions

Related Topics

- [Jobs and Positions: Critical Choices](#)
- [Profile Types: Explained](#)

Creating Job Profiles: Procedure

You can associate a job profile with a job to define the work requirements and the required competencies, degrees, and other skills for the job. Using this association, you can compare job profiles and use the best-fit analysis to:

- Find the worker best-suited for a job.

- Help workers identify their next career moves.

You must use the Job profile type to create profiles for jobs. To create a job profile:

1. Sign in as an HR specialist.
2. Select **Navigator - My Workforce - Profiles**. The Search Profiles page opens.
3. On the Tasks tab in the right panel, click **Manage Model Profiles** to open the Manage Model Profiles page.
4. On the **Search Results** section toolbar, click **Create** to open the **Create Model Profile** dialog box.
5. From the **Profile Type** list, select **Job**.
6. Enter values for the fields shown in the following table.

Fields	Description
Code	Enter a unique code for the profile.
Name	Enter a unique name for the profile.
Description	Enter a description for the profile.

7. Click **OK** to open the Job Profile page.
8. Expand **Workforce Structures**.
9. On the **Workforce Structures** section toolbar, click **Add**.
10. From the **Workforce Structure** list, select **Job**.
11. From the **Name** list, search for and select the job with which you want to associate the profile.
12. In the **Effective Start Date** field, enter the date from which you want to associate the profile with the job. At a time, you can associate only one active profile with a job. If multiple profiles exists for a job, ensure that their dates in the **Effective Start Date** and **Effective End Date** fields don't overlap.
13. Optional: In the **Effective End Date** field, enter the date until when you want to associate the profile with the job.
14. In the **Requirements** section, add required content types.
15. Click **Submit**. An active job profile for the selected job was created using the Job profile type.

Related Topics

- [Profile Types: Explained](#)
- [Content Types: Explained](#)
- [Content Section Properties: Explained](#)

Creating Position Profiles: Procedure

You can associate a position profile with position to define the work requirements and the required competencies, degrees, and other skills for the position. Using this association, you can compare position profiles and use the best-fit analysis to:

- Find the worker best-suited for a position.
- Help workers identify their next career moves.

You must use the Job profile type to create profiles for positions. To create a position profile:

1. Sign in the application as an HR specialist.
2. Select **Navigator - My Workforce - Profiles**. The Search Profiles page opens.

3. On the Tasks tab in the right panel, click **Manage Model Profiles** to open the Manage Model Profiles page.
4. On the **Search Results** section toolbar, click **Create** to open the **Create Model Profile** dialog box.
5. From the **Profile Type** list, select **Job**.
6. Enter values for the fields shown in the following table.

Fields	Description
Code	Enter a unique code for the profile.
Name	Enter a unique name for the profile.
Description	Enter a description for the profile.

7. Click **OK** to open the Job Profile page.
8. Expand **Workforce Structures**.
9. On the **Workforce Structures** section toolbar, click **Add**.
10. From the **Workforce Structure** list, select **Position**.
11. From the **Name** list, search for and select the position with which you want to associate the profile.
12. In the **Effective Start Date** field, enter the date from which you want to associate the profile with the position. At a time, you can associate only one active profile with a position. If multiple profiles exists for a position, ensure that their dates in the **Effective Start Date** and **Effective End Date** fields don't overlap.
13. Optional: In the **Effective End Date** field, enter the date until when you want to associate the profile with the position.
14. In the **Requirements** section, add required content types.
15. Click **Submit**. An active model profile for the selected position was created using the Job profile type.

Related Topics

- [Profile Types: Explained](#)
- [Content Types: Explained](#)
- [Content Section Properties: Explained](#)

Identifying Job and Position Risk: Explained


Use the Job or Position Risk content section within a model profile to identify the level of risk if the job or position is left vacant. This content section is available on the job and position model profile types. Use the Manage Profile Types task in the Profiles work area to manage job and position profile types.

Risk Level and Reason

You can enter a level of risk and the reasons for the level of risk, such as skills gaps, future business leadership, market volatility, and organization hierarchy. You can select up to five reasons for risk.

Succession Planning

The Job or Position Risk content section also includes an option to indicate whether the job or position must be included in a succession plan.

 **Note:** The Requires Succession Plan option is for informational purposes only.

Creating Person Profiles: Explained

The person profile is a profile type you create for individual workers. Person profile data, such as the skills, qualifications, accomplishments, and career preferences of a person, is displayed on Skills and Qualifications and Career Planning pages on a worker's person profile. HR specialists or implementors can create person profiles from the application, or implementors can upload them using tools such as HCM Data Loader.

The application provides the functionality to automatically create person profiles for person records. You can enable or disable this functionality using the **Autocreate Person Profiles** check box. By default, this check box is already selected. The **Autocreate Person Profiles** check box is available on the Edit Profile Type page of the person profile type. Use the Manage Profile Types task in the Profiles or Setup and Maintenance work area to edit the person profile type.

When the **Autocreate Person Profiles** check box is selected:

- The application automatically creates the person profile for that person when someone accesses the Skills and Qualifications page for a person.
- The person profile added for a pending worker is activated on the effective hire date for an employee or the effective placement date for a contingent worker.

If you choose to deselect the **Autocreate Person Profiles** check box for the person profile type and no profile exists for a person, the application displays an error message to create or upload profile when you access that person's Skills and Qualifications page. However, when uploading talent profile data from external sources, you must deselect the **Autocreate Person Profiles** check box to avoid duplication of person profiles.

Related Topics


- [Person Records: Explained](#)

Adding Content to a Worker's Profile: Procedure

Depending on the content section access settings for HR specialists and managers, they can edit content or add it to a worker's profile. To view, add, or edit content of a worker's profile, they must use the worker's Skills and Qualifications page.

As an HR specialist, follow these steps to either edit the content or add it to the worker's profile:

1. Click **My Workforce - Profiles** to open the Search: Profiles page.
2. Click the name of the worker in the Results section to open the Skills and Qualifications page of that worker.

 **Tip:** Alternatively, use the Manage Talent Profile task in the Person Management work area to open a person's Skills and Qualifications page.

3. Click **Edit** on the Skills and Qualifications page to either edit the content, or add it to the worker's profile.

As a manager, follow these steps to either edit the content or add it to a report's profile:

1. Click **My Team - Team Talent**.
2. Click a report's person card to open the Skills and Qualifications page for the report.
3. Click **Edit** on the Skills and Qualifications page to either edit the content, or add it to the report's profile.

Related Topics


- [Content Section Access: Explained](#)

Uploading Talent Profile Data: Explained

Talent profile data is the person and job profiles data displayed on Skills and Qualifications and Career Planning pages. You access these pages for a worker in the worker's person spotlight. Examples of talent profile data include ratings and corresponding rating models, content items, and educational establishments. You can upload talent profile data for initial migration or mass data entry.

The following tools support upload of talent profile data:

- Oracle ADF Desktop Integration (ADFdi) workbook
- Oracle Fusion HCM Data Loader
- Oracle Fusion HCM Spreadsheet Data Loader

 **Note:** The tools available to you for uploading talent profile data depend on the setting of the HCM Data Loader Scope parameter. The ADFdi workbook isn't affected by the HCM Data Loader Scope parameter. You can continue to upload competencies using the ADFdi workbook regardless of the parameter setting.

For more information about:

- Uploading content items using an ADFdi workbook, see [Uploading Competencies and Content Items into Oracle Fusion Profile Management \(1453118.1\)](#) on My Oracle Support at <https://support.oracle.com>.
- All data loaders mentioned earlier, see [Oracle Human Capital Management Cloud Integrating with Oracle HCM Cloud Guide](#).

Uploading Actions

The following table displays the type of talent profile data you typically upload and the actions you perform to load that data.

 **Note:** Use the **Open Competency Excel Template** option to generate the ADFdi workbook for uploading competencies. The option is available on the Manage Content Items page in the Profiles work area.

Uploading Tool	Talent Profile Data Type	Actions
ADFdi workbook	<ul style="list-style-type: none"> • Content item (only Competency) 	<ul style="list-style-type: none"> • Create • Update
HCM Data Loader	<ul style="list-style-type: none"> • Educational establishment • Talent profile rating model • Talent profile type (only Person and Job) • Talent profile content item • Talent profile content item relationship 	<ul style="list-style-type: none"> • Create • Update • Delete
HCM Spreadsheet Data Loader	<ul style="list-style-type: none"> • Educational establishment • Talent profile rating model • Talent profile type (only Person and Job) 	<ul style="list-style-type: none"> • Create • Update

Uploading Tool	Talent Profile Data Type	Actions
	<ul style="list-style-type: none"> Talent profile content item Talent profile content item relationship 	

Related Topics

- Using Desktop Integrated Excel Workbooks: Points to Consider

Updating Talent Ratings: Explained

Talent ratings are ratings that are used to evaluate a worker, including performance, potential, proficiency, readiness, and impact. Ratings are used in multiple products within the HCM product family such as Oracle Fusion Profile Management, Oracle Fusion Performance Management, and Oracle Fusion Talent Review.

Talent Rating Types

The following table displays the talent ratings and their descriptions. Depending on application settings and roles assigned, you can view, add, and update these talent ratings across multiple products within the HCM product family.

Talent Ratings	Description
Talent score	Evaluate a person's overall value to the organization using a rating model your organization defines.
Performance rating	Evaluate an item, section, or overall performance document.
Potential level	Evaluate a person based on the execution of the person's work.
Potential score	Evaluate a person's attainable level of excellence or ability to achieve success.
N box cell assignment	Evaluate a person's current contribution and potential contribution to the organization on a box chart matrix with N boxes. N represents the number of boxes in the grid.
Advancement readiness	Evaluate a person's readiness for the next position in their career development.
Risk of loss	Evaluate the likelihood of a person leaving the company.
Impact of loss	Evaluate the real or perceived effects on an organization when the person leaves.
Proficiency	Evaluate a person's skill level for a competency.
Behavior ratings	Evaluate a person's actions for a behavior associated with a competency.

Updating Talent Ratings

You can update talent ratings depending on application settings and roles assigned to you. The following table shows where talent ratings can be updated.

Talent Ratings	Can Be Updated in Portrait?	Can Be Updated in Talent Review?	Can Be Updated in Performance Management?	Can Be Updated in Succession Management?
Talent score	Yes	Yes	No	No
Performance rating	Yes	Yes	Yes	No
Potential level	Yes	Yes	No	No
Potential score	Yes	Yes	No	No
N box cell assignment	No	Yes	No	No
Advancement readiness	Yes	No	No	No
Risk of loss	Yes	Yes	No	Yes
Impact of loss	Yes	Yes	No	Yes
Proficiency	Yes	No	Yes	No
Behavior ratings	Yes	No	No	No

When you update talent ratings:

- The performance rating on a performance document is always the one entered by the manager during a worker's performance evaluation. The performance rating from the worker's performance document is then displayed on the worker's profile when configured to do so in the performance template.
- In Oracle Fusion Compensation Management, if configured, you can also update the performance, goals section, and competencies section ratings, which appear in performance documents.
- The talent review process uses talent ratings on the worker's profile to build talent review information. When a talent review meeting concludes, a worker's profile is automatically updated with the calibrated ratings. Therefore, the performance rating displayed in a worker's performance document might be different from the one displayed in the worker's profile.

Related Topics

- [Performance Ratings: Points to Consider](#)
- [Rating Models: Explained](#)

FAQs for Creating and Updating Profiles

What happens if I change the status of a model profile to inactive?

If you change the status of a model profile associated with a job or position to inactive, the model profile is no longer available. The profile is visible only to an administrator. The profile isn't available when you perform a best-fit analysis or a comparison of profiles, or when you search for model profiles. Any workforce structures that were associated with the inactive model profile are made available to associate with another active model profile.

The profile is also removed from workers' interest lists. A notification is sent to HR specialists and managers, and to those workers who have the profile in their interest list.

Related Topics

- [Profile Types: Explained](#)
- [Content Types: Explained](#)
- [Content Section Properties: Explained](#)

What's a competency gap chart?

A competency gap chart is a graphical representation of how well your competency ratings match the required proficiency ratings of a job or position profile. The job or position profiles to which you can compare your profile include your assignments and the profiles in your interest list. The application generates competency gap chart using only those competencies that appear in both your profile and the selected job or position profile. Select **Navigator - About Me - Talent Profile** to view the competency gap chart on the Skills and Qualifications page. You can also view the competency gap chart for each explored role or roles added as careers of interest in the Career Development work area.

Use the competency gap chart in your career development to determine whether you're already qualified for the selected job or position, or if areas exist where you need further development. If you identify gaps, you or your manager can also add a goal for the competency for which you have lesser ratings in the Career Development work area. For example, if your rating for the Leadership competency is 3 and the targeted rating for that competency in the Product Manager job is 4, you might research training classes or ask for projects that would help you improve your leadership capabilities. In the Career Development work area, you can also add a goal to the Leadership competency to help you improve your leadership capabilities.

If the job or position profile contains fewer than three competencies, then the competency gap chart is displayed as a bar chart. Otherwise, the chart is displayed as a radar chart. The compatible percentage for a role is automatically calculated using the best-fit analysis tool.

Related Topics

- [Career Development: Explained](#)

What's a career statement?

A career statement is a summary of your career goals. You can enter your career statement on your Career Planning page or on the My Career Development page. Anyone who can view your career planning information can view your career statement. To open your Career Planning page, select **Navigator - About Me - Talent Profile**, and then click the Career Planning tab. Use the Career Development work area to view the My Career Development page.

Career statements are for informational purposes only.

Why did the potential level change when I changed the potential score?

The relationship between the potential score and potential level is defined in the potential rating model. When you change the potential level, the application updates the potential score with the numeric rating for that level. When you change the potential score, the application updates the potential level with the level in the rating model that has a numeric rating closest to the potential score. To change a talent rating of your direct report, click the Edit icon in the Talent Ratings section on the Career Planning page of the selected report's person spotlight. To access a direct report's person spotlight:

- Select **Directory - Directory**, search for the worker, and click the worker's name in the search results
- Select **My Team - My Team** and click the worker's name on the My Team page
- Select **My Team - Team Talent** and click the worker's name on the Team Talent page
- Select **My Team - Team Compensation** and click the worker's name on the Team Compensation page

For example, assume the first two rating levels in the potential rating model contain numeric ratings 1.5 and 2, respectively. If you assign a potential score of 1.7 to a worker, then the potential level for the worker is updated with the first potential level in the rating model, because 1.7 is closer to the numeric rating of 1.5 than it's to the numeric rating of 2.

What happens if I update the talent ratings on the career planning page?

The talent review process uses these ratings on a worker's profile to build talent review information: talent score, performance rating, potential level, risk of loss, and impact of loss.

If you're preparing for a talent review meeting and you update talent ratings, then the changes are reflected on the Prepare Content Review page. When the talent review meeting concludes, the application automatically updates workers' Career Planning page with the final ratings for talent score, performance rating, potential level, risk of loss, and impact of loss. With the exception of the risk and impact of loss, all ratings from the talent review meeting are assigned a unique instance qualifier. The instance qualifier identifies them as those that resulted from the talent review meeting. If you then update these ratings on the Career Planning page, the talent review ratings remain in the database, but you can see your updates on the Career Planning page instead of the talent review ratings. You open the Career Planning page of a worker in the worker's person spotlight.

Updating the career potential information also affects the performance-potential analytic in the performance management business process.

How can I prevent my manager from viewing job or position profiles in my interest list?

On your Career Planning page, click **Edit**, and select the **Private** check box for the job or position profile. To open your Career Planning page:.

1. Select **Navigator - About Me - Talent Profile**.
2. Click the Career planning tab.

Only you can view job and position profiles that are set to private. Anyone who can view your career planning card, can view only those job and position profiles that aren't set to private.

What's the difference between the suggestions list and the interest list?

The suggestions list is automatically generated for you each time you view your Career Planning page. To open your Career Planning page, select **Navigators - About Me - Talent Profile**, and then click the Career Planning tab. This list contains profiles of jobs or positions that are suitable for you. The suggested profiles are based on an analysis of how well your competencies, skills, and qualifications match those of the job or position profile.

You create the interest list by browsing profiles of jobs and positions and adding those that you might like to pursue. Your manager can also add job or position profiles to your interest list as suggestions for the next step in your career. You and your manager can also move profiles of jobs and positions from the suggestions list to the interest list.

Can I edit skills and qualification data of a person's profile?

Yes. Depending on the content section access settings for your role, you can view and edit any of the predefined or custom content of a worker's profile.

Related Topics

- [Content Section Access: Explained](#)

How can I add content to my profile?

On the Home page, select **About Me - Talent Profile** to open the Skills and Qualifications page. Click **Edit** on the Skills and Qualifications page to edit or add the content to your profile. Depending on the content section access settings for your role, you can view and edit any of the predefined or custom content on your profile.

Related Topics

- [Content Section Access: Explained](#)

How can I hide an attribute on the person profile?

You must have the HR specialist role to hide an attribute on the person profile.

To hide an attribute on the person profile:

1. Click **Manage Profile Types** on the Tasks tab in the Profiles work area.
2. Search for the Person profile type and select the row for the profile type in the Search Results section.
3. Click **Edit** in the Search Results section to open the Edit Profile Type page.
4. On the Content Sections tab, select the content section that includes the attribute you want to hide.
5. In the Content Sections region, click the selected content section link to open the Content Section page.
6. In the Content Properties section, select **None** as the **Display** value for the attribute you want to hide.

How can I delete an attribute from the person profile?

You must have the HR specialist role to delete an attribute from the person profile.

 **Note:** You can hide predefined attributes, but you cannot delete them.


To delete an attribute that is not a predefined attribute from the person profile:

1. Click **Manage Profile Types** on the Tasks tab in the Profiles work area.
2. Search for the Person profile type and select the row for the profile type in the Search Results section.
3. Click **Edit** in the Search Results section to open the Edit Profile Type page.
4. On the Content Sections tab, select the content section that includes the attribute you want to delete.
5. In the Content Sections region, click the selected content section link to open the Content Section page.
6. In the Content Properties section, select the row for the attribute and click **Delete**.

Customizing Talent Profiles


Customizing the Skills and Qualifications Page to View Talent Ratings: Procedure

By default, line managers can view or edit talent ratings for a report on the report's Career Planning page. However, by using Oracle Page Composer, you can customize the Skills and Qualifications page of reports to display talent ratings on the Skills and Qualifications page and hide talent ratings on the Career Planning page. To customize a page, you must have the privilege to customize pages. After customization, depending on their accessibility to a talent rating type, line managers can view or edit the talent rating type on a direct report's Skills and Qualifications page. You manage the content section access settings of a talent rating type for a user role using the Manage Profile Types task. The task is available in the Setup and Maintenance, Profiles, or Person Management work area.

 **Note:** You must use an active sandbox to customize the Skills and Qualifications page using Page Composer.

To display talent ratings on a direct report's Skills and Qualifications page:

1. Sign in as a user who has the privilege to customize the Team Talent page.
2. Select **Navigator - My Team - Team Talent**.
3. To open the Skills and Qualifications page of a direct report, click the direct report
4. Click the user name and from the Settings and Actions menu, select **Customize Work Area Pages**.
5. On the **Customize Pages** dialog box, select the **Edit** option for the Site layer and click **OK**.
6. Select **View - Source** at the top-left section of the page to open the Source edit mode.

 **Tip:** By default, the Source window is collapsed in the bottom position. To change the Source window position to the left, select **View - Source Position - Left**. To see the source content, you may need to drag the page splitter.

7. Click the **Skills and Qualifications** icon on the Skills and Qualifications page. The source tree moves to the corresponding region component.

- Under the **panelGroupLayout: vertical** component for the **showDetailItem: Skills and Qualifications** node, select the disabled region component for the location: **/oracle/apps/hcm/profiles/core/publicUi/fuse/page/SkillsTalentRating.jsff** and click **Edit**.

 **Note:** The location is displayed when you hover over a region component.

- In the **Component Properties: region** dialog box, select the Display Options tab.
- Select the **Visible** check box.
- Click **OK** to close the dialog box. The Talent Ratings section appears on the Skills and Qualifications page.
- Click **Close** to close Page Composer.
- Publish your sandbox to make the customization available to users who are line managers.

To adjust the position of sections as they appear on the page, use Page Composer.

Related Topics

- [Content Section Access: Explained](#)
- [Setting Up Sandboxes: Procedure](#)

Customizing the Grid View of the Team Talent Page to Display Talent Score and N Box Cell Assignment Ratings: Procedure

By default, line managers can't view or edit talent score and n box cell assignment ratings for a report on the Team Talent page in the grid view. However, by using Oracle Page Composer, you can customize the Team Talent page to display both the ratings in the grid view of the page. To customize a page, you must have the privilege to customize pages. After customization, depending on their accessibility to a talent rating type, line managers can view or edit the talent rating in the grid view of the Team Talent page. You can display only two ratings on a person card in the grid view of the Team Talent page. Therefore, to display talent score and n box cell assignment ratings, you must customize the existing ratings displayed in the grid view. You manage the content section access settings of a talent rating for a role using the Manage Profile Types task. The task is available in the Setup and Maintenance, Profiles, or Person Management work area.

Prerequisites

Activate a sandbox.

Customizing the Grid View


In the following procedure, the Performance rating is replaced with N Box Cell Assignment and the Potential rating with Talent Score.

To enable a line manager to view n box cell assignment and talent score ratings in the grid view of the Team Talent page:


- Sign in as a user who has the privilege to access the Team Talent page.
- Select **Navigator - My Team - Team Talent**. The Team Talent page appears in the grid view.

 **Tip:** If the grid view isn't selected, click the **View Grid** icon.

- Click your user name in the global area and from the Settings and Actions menu, select **Customize Pages**.

 **Note:** If the **Confirm Task Flow Edit** dialog box appears anytime during this procedure, click **Edit** to continue.

4. On the **Customize Pages** dialog box, select the **Edit** option for the Site layer and click **OK**.
5. Select **View - Source** at the top-left section of the page to open the Source edit mode.

 **Tip:** By default, the Dock pane is collapsed in the bottom position. To see the source content, you can drag the page splitter to the top.

6. Replace existing labels on the person card of the Team Talent page with N Box Cell Assignment and Talent Score:
 - a. Click **Performance** on a person card on the Team Talent page. The source tree moves to the Performance component.
 - b. Right-click the component and select **Edit**. The **Component Properties** dialog box appears.
 - c. In the **Value** field, click the drop-down button and select **Select Text Resource**. The **Select Text Resource** dialog box appears.
 - d. In the **Key** field enter a unique value. For example, NB1. You use this value to reuse the label in other pages.
 - e. In the **Display Value** field, enter the label for the n box cell assignment rating. For example, N Box Cell Assignment.
 - f. Click **OK**.
 - g. Click **Apply** and then **OK** to close the **Component Properties** dialog box.
 - h. Repeat steps 6.1 through 6.8 to change the label Potential as Talent Score on the person card on the Team Talent page. For Talent Score, you can enter values for the **Key** and **Display Value** fields as shown in the following table.

Field	Example
Key	TS1
Display Value	Talent Score

7. Use the expression language (EL) to display the value of the n box cell assignment and talent score ratings below the edited labels:
 - a. In the source tree, select the **outputText** node below the **outputText: N Box Cell Assignment** node.
 - b. Right-click the component and select **Edit**. The **Component Properties** dialog box appears.
 - c. In the **Value** field, click the **Edit** icon and select **Expression Builder**. The **Edit** dialog box appears.
 - d. In the **Type a value or expression** field, enter the **{row.NBoxAssignment}** expression.
 - e. Click **OK**.
 - f. Click **Apply** and then **OK** to close the **Component Properties** dialog box.
 - g. In the source tree, select the **outputText** node below the **outputText: Talent Score** node.
 - h. Repeat steps 7.2 through 7.6 to enter the **{row.TalentScore}** expression for the talent score rating.
8. Click **Close** to close Page Composer.
9. Publish your sandbox to make the customization available to users who are line managers.

Related Topics

- [Content Section Access: Explained](#)

- [Setting Up Sandboxes: Procedure](#)

Customizing the List View of the Team Talent Page to Display Talent Score and N Box Cell Assignment Ratings: Procedure

By default, line managers can't view or edit a report's talent score and n box cell assignment ratings on the Team Talent page in the list view. However, by using Oracle Page Composer, you can customize the Team Talent page to display both the ratings in the list view of the page. After customization, depending on their accessibility to a talent rating type, line managers can view or edit the talent rating in the list view of the Team Talent page. You manage the content section access settings of a talent rating for a user role using the Manage Profile Types task. The task is available in the Setup and Maintenance, Profiles, or Person Management work area.


Prerequisites

Activate a sandbox.


Customizing List View

To enable line managers to view n box cell assignment and talent score ratings in the list view of the Team Talent page:

1. Sign in as a user who has the privilege to access the Team Talent page.
2. Select **Navigator - My Team - Team Talent**. The Team Talent page appears in the grid view.
3. Click the **View List** icon.
4. Click your user name in the global area and from the Settings and Actions menu, select **Customize Pages**.

 **Note:** If the **Confirm Task Flow Edit** dialog box appears anytime during this procedure, click **Edit** to continue.

5. On the **Customize Pages** dialog box, select the **Edit** option for the Site layer and click **OK**.
6. Select **View - Source** at the top-left section of the page to open the Source edit mode.

 **Tip:** By default, the Dock pane is collapsed in the bottom position. To see the source content, you can drag the page splitter to the top.

7. On the Team Talent page, click **Potential** or any other talent rating. The source tree moves to the corresponding rating component.
8. Under the **panelGroupLayout: vertical** component for the **panelStretchLayout** node, select the disabled node **panelLabelAndMessage:N Box Cell Assignment** and right-click.
9. Select **Edit**. The **Component Properties: N Box Cell Assignment** dialog box appears.
10. On the Display Options tab, select the **Visible** check box and click **Apply**.
11. Click **OK** to close the dialog box.
12. Under the **panelGroupLayout: vertical** component for the **panelStretchLayout** node, select the disabled node **panelLabelAndMessage:Talent Score**.
13. Click **Edit**. The **Component Properties: Talent Score** dialog box appears.
14. On the Display Options tab, select the **Visible** check box and click **Apply**.
15. Click **OK** to close the dialog box.
16. Click **Close** to close Page Composer.
17. Publish your sandbox to make the customization available to users who are line managers.

Related Topics

- [Content Section Access: Explained](#)
- [Setting Up Sandboxes: Procedure](#)

3 Talent Review Meeting Creation

Creating Talent Review Meetings: Explained

You create talent review meetings to review workers in the organization you specify. This topic describes the details you configure on the Enter Meeting Details page when creating a talent review meeting. Create talent review meetings on the Talent Review Overview page. Select **My Workforce - Talent Review**.

Talent Review Meeting

Enter a meeting name in the Talent Review Meeting field. The name appears on the Talent Review meeting dashboard, and identifies the meeting in searches and functions, such as comparing one meeting to prior meetings.

Template Name

The template you select specifies which data types, rating models, actions, and filters are available in the meeting. It also determines whether succession plans and talent pools can be used in the meeting. If a facilitator updates the template to include additional features, the meetings that use that template are updated to include those features.


Business Leader and Organization

The business leader is the top manager of the organization under review. The managers in the business leader's organization automatically populate the Select and Add dialog when you select meeting participants. However, you can add managers from other organizations as participants or reviewers. You can also add workers from other organizations to the review population.

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

Facilitators

Facilitators are the HR specialists who conduct and manage the meeting. You can select multiple facilitators. Only facilitators have access to the meeting, so you're recommended to select more than one in case one isn't available. All facilitators can update meeting information and the data under review. By default, the person creating the meeting is a facilitator.

 **Note:** If you select only one facilitator, only that facilitator can access the meeting. If the designated facilitator isn't available, no one else can access the meeting.

Meeting Date

Until the meeting start date, facilitators can open the meeting and view the dashboard. Reviewers can perform the Prepare Review Content task until the data submission deadline. When a facilitator opens the meeting on the meeting date or later, the status changes to **In progress**.

If the facilitator starts the meeting before the meeting date and performs actions on the dashboard:

- The meeting status changes to **In progress**.

- Reviewers can't prepare review content.

Data Submission Deadline

After the data submission deadline, reviewers can no longer use the Prepare Review Content task to update worker profile data. They receive notice that the deadline is reached, if notifications are enabled. The data submission deadline is optional. If you don't enter a date, reviewers can update worker data until the meeting starts.

Meeting Status

Three meeting statuses are available: **Not started**, **In progress**, and **Canceled**. The default status is **Not started**. If the status is **Not started**, and the meeting date hasn't been reached:

- Facilitators can open and review the dashboard.
- Reviewers can update worker data using the Prepare Review Content task until the data submission deadline.

The status changes to **In progress** when the facilitator either:

- Clicks the Conduct Meetings task to open the meeting dashboard on or after the meeting date
- Opens the meeting before the meeting date and performs actions for the meeting; in this case, the application assumes that the facilitator intentionally started the meeting

When the facilitator sets the status to **Canceled**, all meeting participants are notified, if notifications are enabled.

Selecting Review Content for a Talent Review: Points to Consider

When creating a talent review meeting, on the Select Review Content page, facilitators specify ratings that are available to reviewers when they prepare content before the meeting. Facilitators also specify the data validity guideline and select prior meetings to compare to this one. They also select the succession plans and talent pools that appear on the Talent Review dashboard. Create talent review meetings on the Talent Review Overview page. Select **My Workforce - Talent Review**.

Select Ratings for Reviewer

The ratings you select appear on the Prepare Review Content page. Reviewers use that page to update talent ratings for their reports who are members of the meeting review population. You can select all, or any, of the ratings to control reviewer access to the ratings on the Prepare Review Content page. The talent review template controls which ratings appear on the Select Review Content page. The ratings are the same as those that appear on the Talent Review dashboard during the meeting.

Include Data Validity Guideline

Select the period beyond which the profile data for workers isn't considered fresh. Reviewers are expected to update the data on the Prepare Review Content page, but not required to do so. The values in the list are calculated from the current date back. The date selector automatically determines whether a month is 30, 31, 29, or 28 days. The outdated data is highlighted on the Prepare Review Content page to alert reviewers.

Include Prior Meetings

You can include ratings from up to two prior talent review meetings to compare the progress of workers between the previous and current meeting. You can select from noncanceled meetings that use the same ratings models for the ratings used in the meeting.

Include Succession Plans and Talent Pools

You can select existing succession plans and talent pools that you own to appear on the meeting dashboard. The plans and pools also appear on the Prepare Review Content page if they're owned by the reviewer. During the meeting, facilitators can create additional succession plans and talent pools on the dashboard and add workers to those.

Selecting Participants for a Talent Review: Points to Consider

When creating a talent review meeting, the facilitator selects the participants and specifies their roles. This topic describes participant selection.

Schedule the talent review meeting in the Talent Review work area. Select **My Workforce - Talent Review**.

Selecting Meeting Participants

Typically, participants are managers in the organization under review. You aren't required to invite all managers in the organization, even if those managers have reports in the review population.

You can also invite managers outside the organization to participate. For example, you can invite managers who recently transferred from the organization.

The business leader is usually the top manager of the organization under review. The business leader is a meeting participant and receives the same meeting notifications as other meeting participants.

Assigning Roles to Meeting Participants

For each participant you select a Participant Type value, which is either Reviewer or Participant.

By default, meeting participants are reviewers. Before the meeting, reviewers review and update worker profile data for any of their reports in the review population. Reviewers can grant access to managers who report to them directly to prepare content for their own direct and indirect reports. These managers don't have to be meeting participants or reviewers. In turn, they can enable their direct reports to update profile data for their own reports.

Participants attend the meeting, but aren't expected to update profile data before the meeting. They may have no reports in the review population or may be new to the organization. The application notifies reviewers of their responsibility and provides a link to the Prepare Review Content page, where they can make any updates.

Additional Instructions

You can add additional instructions, which appear on the Prepare Review Content page the reviewers use to update worker ratings before the meeting.

Related Topics

- Can reviewers see data for workers they don't manage when preparing content?
- What happens if talent review content isn't complete by the deadline?

Selecting the Review Population for a Talent Review: Points to Consider

When creating a talent review meeting, the facilitator selects the review population. This topic describes review population selection.

Schedule the talent review meeting in the Talent Review work area. Select **My Workforce - Talent Review**.

The facilitator can select the review population using these methods:

- Select and add workers directly from the Select and Add workers dialog box
- Select talent pool members
- Add from analyses

The facilitator isn't restricted to selecting the review population only from the organization of the business leader.

Select and Add Workers

Select **Select and Add** to add workers from the Select and Add dialog box. In that dialog box, you can search and select workers using an extensive list of filters. You can search for a specific worker, or use other filters, such as manager name business unit, department, job, job family, and many others.

When you select search filters, from the **Workers** list you can select either **All reports**, or **Direct reports**. This option applies when the search returns manager names. In the search results you can expand the icon in front of the manager name to view the manager's direct or all reports, according to your selection.

Select Talent Pool Members

Use the **Select Talent Pool Members** action to select a talent pool and add its members to the review population. You can select any talent pool you own to add its members to the review population. If one facilitator adds a talent pool to the meeting on the Select Review Content page, only other facilitators who own it can add its members to the review population.

When you select a talent pool, all members become part of the review population. You can remove any unnecessary members from the review population.

Add from Analyses

Select **Add from Analyses** to add worker names to the review population from one or more analyses your organization has already created. With this option, your organization can create analyses that encompass any criteria required for the talent review, and locate any workers who qualify using the criteria.

After running the analysis, you can select individual workers from the result set to add to the review population.

To use this option, implementors or HR specialists must:

- Enter a folder to store the analysis to the Default Reports Folder for Talent Review profile option
- Create analyses
- Add the analyses to the folder

Related Topics

- [Oracle Fusion Talent Review Profile Options](#)

Social Networking with Talent Review Meetings: Explained

If the pages used to create and edit talent review meetings have a **Social** link, you can invite others to collaborate about planning the meeting using social collaboration. Conversations remain with the meeting plan.

Examples of collaboration:

- The facilitator initiates a discussion about meeting setup details with other facilitators.
- The facilitator conveys information to participants.
- Participants join conversations to provide documentation to support workers' performance and potential ratings.

Collaborating About Talent Review Meetings

Tips for collaborating:

- To get started, click **Social** on the pages used to create and edit talent review meetings to collaborate. Click the **Share** button, or click **Join** if collaboration is in progress.
- Click the name of the meeting to access its wall, where you can start conversations and add members.
- After collaboration starts for a meeting:
 - Anyone at your company can be invited to participate in a conversation about it.
 - A participant can only join in conversations after being invited as a member.
 - Meeting facilitators can initiate conversations and invite members.
- On the wall of the meeting, everyone invited can view basic attributes of the meeting and post documents and comments that all members can see.

Related Topics

- [What does social networking have to do with my job?](#)

4 Talent Review Meeting Content Preparation

Preparing Content for a Talent Review Meeting: Explained

On the Prepare Review Content page, talent review reviewers update the ratings of workers they manage who are part of the review population before the talent review meeting. When they submit the page, the new ratings are reflected on the worker profile. The talent review meeting uses the latest worker profile data to populate ratings.

Access and Notification to Update Ratings

Reviewers receive notification to update ratings with a link to the Prepare Review Content page when the meeting facilitator creates and submits the meeting. They can also select **My Team - Talent Review** to open the participants' Overview page, where you open the Prepare Review Content page. Reviewers can update content until the meeting data submission deadline. Once the meeting starts reviewers can't edit any ratings. They can, however, add and view notes and tasks, and access their view of the box chart matrix to see where their reports appear on it before the meeting starts.

Data Validity Guideline and Latest Data

Meeting facilitators can set a data validity guideline to ensure that ratings are updated within the time frame specified by the guideline. On the Prepare Review Content page, an icon appears next to ratings that fall outside the guideline to warn you to update the ratings. When you change a rating, the icon disappears. However, it doesn't disappear if the rating doesn't change, even if you remove and restore the current rating. All ratings, updated or not, are recorded as updated when you submit the ratings.

Potential Assessment

You can use the Potential Assessment questionnaire to calculate potential for a worker, if it's enabled. When you click the Complete Assessment button, the Potential Assessment questionnaire appears. You must answer all the questions to calculate the rating. You can also select the potential rating manually without using the Potential Assessment questionnaire.

View of Box Chart

Click **View** to open a preview of the Talent Review dashboard to see where your direct and indirect reports appear in the box chart matrix. You can move them on the box chart and their updated ratings are reflected on the Prepare Review Content page. On the dashboard, you can view succession plans and talent pools for which you're an owner if they're added by facilitators when they create the meeting. You can create additional succession plans or talent pools as well. You can also perform many other actions that are available on the dashboard during the meeting. For example, you can create tasks and notes, and add goals for your reports.

Notes

You can view and add notes for the workers in your organization for the talent review. The notes can be viewed on the Manage Notes and Tasks page as well.

Grant Access

As a reviewer, you can grant access to other managers below you in your organizational hierarchy to submit data about their own direct reports. When you grant access to another person, that person receives notification to update the content with a link to the Prepare Review Content page. To open the Grant Access page, select **My Team - Talent Review**, and click **Grant Access** for the meeting for which you are scheduled to prepare content.

Differences Between Saving and Submitting the Content

You can either save or submit the Prepare Review Content page. If you submit the page, the worker profile updates with the edited ratings. If you save the page, the edited ratings are saved and appear in the talent review meeting, but the worker profile does not update. You can also return to the page and continue editing data until the meeting starts.

Related Topics

- [Potential Assessment: Explained](#)

FAQs for Talent Review Meeting Content Preparation

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

The talent review meeting uses data from the worker's current profile record. If the reviewer doesn't submit ratings prior to the meeting, the most recent ratings are used even if the ratings are outside of the data validity guidelines. If the profile record contains no performance or potential ratings, the worker appears in the holding area of the Talent Review meeting dashboard at the start of the meeting. The worker doesn't appear in the box chart matrix. Meeting participants can rate the worker during the meeting.

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

No. Outside the talent review meeting, when reviewers update ratings on the Prepare Review Content page or the dashboard view available from that page, they can see profile data for their direct and indirect reports only. However, during the meeting, such as in a conference room when the facilitator dashboard is projected on a screen, reviewers who are also participants can see profile data for all persons being reviewed.

5 Talent Review Meetings: Conducting

Actions for Talent Review Meetings: Explained

During a talent review meeting, facilitators can perform several actions for workers in the review population. Participants can also perform the actions on the dashboard view they open from the Prepare Review Content page. The actions depend on whether one marker is selected on the box chart matrix, or multiple markers.

Find Workers

Use the **Find** action to:

- Find and select a worker by name or manager name. If you find workers using a manager name, all direct reports of the manager are selected.
- Select all workers at once to perform actions on all of them.

Actions for an Individual Marker

If you select only one marker, you can perform the following actions for the worker associated with the marker:

- Move the worker to the holding area
- Move the worker to another box within the box chart matrix
- Add the worker to a talent pool or succession plan
- Add goals to the worker
- Add notes regarding the worker
- Print the worker's talent profile

Additional details such as goal and performance information are available when you select an individual worker. When you click on the **Show Details** button, you access the Details page. Depending on which Oracle Fusion products you are using, the Details page can include the following tabs:

- General: kudos and notes associated with the worker
- Succession: succession plans and talent pools to which the worker belongs and candidates for the worker's replacement
- Experience and Qualifications: worker's profile information, such as competencies, degrees, and so on
- Performance: worker's overall rating, overall comments, and rating history
- Goals: career statement, performance goals, and development goals
- Compensation: salary information such as base salary, other compensation, stock, grade, salary range, and an analytic that illustrates annualized salary versus compa-ratio

Actions for Multiple Markers

If you select more than one marker, you can perform the following actions for the workers associated with the markers:

- Move them to the holding area

- Move them to a different box within the box chart matrix
- Add them to a talent pool or succession plan
- Compare profiles of jobs and workers to find suitable workers for a job, or suitable jobs for the workers
- Print their talent profiles

Talent Profile Summary: Explained

The Talent Profile report provides talent-related information for a worker. This topic describes options that you can select when printing the report. To print the report, select the Manage Talent Profile task in the Person Management work area. On the Edit Profile page, select **Actions - Print Profile**. Talent review meeting participants can also print the report for one or more workers from the Talent Review dashboard.

Report Sections

The Talent Profile report can contain a person summary and five configurable sections. This table describes the contents of each section.

Report Section	Contents
Experience	Current and previous assignments.
Talent Overview	Performance evaluation information for up three years. The section includes the evaluation period, overall rating, overall comments, and a bar graph comparing the performance ratings. You can also include talent ratings.
Education and Qualifications	Competency ratings and evaluation types, degrees, licenses and certifications, honors and awards, and memberships.
Career Options and Interests	Career preference and advancement readiness information, including willingness to travel, relocate, consider part-time employment, or adopt flexible work schedules. You can also include preferred career moves and any jobs in a worker's interest list.
Goals	Development and performance goal information, such as goal names, completion dates, statuses, and descriptions. This section includes a graph of goal achievements for the worker.

Print Formats

You can print the Talent Profile Summary in the following formats:

Print Format	Description
PDF	Includes a photograph of the worker and all selected graphs.
RTF	Includes a photograph of the worker and all selected graphs.

Print Format	Description
Microsoft Excel	Includes all selected workers in an Excel workbook, with one profile per worksheet and the worker's name as the tab label. This format doesn't include the photograph, performance history, or goals graphs.
HTML	Includes selected graphs but doesn't include the photograph.

Talent Review Tasks: Explained

Talent review meeting facilitators can create, assign, and manage tasks for action items arising from a talent review. This topic describes administration details for task assignments. It also describes who can edit tasks, and where. Everyone who has access to the Manage Notes and Tasks page can view all tasks for the review population, including those from previous talent reviews.

Manage talent review meetings and the associated tasks from the Talent Review work area. Select **My Workforce - Talent Review**.

Creating and Assigning Tasks

You can create and assign tasks on the Talent Review dashboard and Manage Notes and Tasks page.

When you create tasks, you must select an assignee. You can assign a task to anyone; you aren't restricted to assigning tasks to meeting participants or the review population. You can select any one person in the review population as the associated worker. When you add a task to a selected worker on the Talent Review dashboard, the worker is automatically the Associated Worker, and the worker's manager is the Assignee. You can change those roles when you create the task on the dashboard.

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

Task Detail	Description
Associated Worker	The worker for whom the task assignee must perform some action.
Assignees	One or more workers who perform the task.
Owners	People who manage the task. The meeting facilitator is the task owner by default, but you can add more owners. Owners aren't required to be meeting facilitators, but if the task owners can't access to the Manage Notes and Tasks page, they may not be able to manage the task.
Task Type	Task category, such as Preparation, Presentation, and so on. Task type values exist in the HRT_TASK_TYPE lookup. You can add values to suit business requirements.
Due Date	Date by when assignees must complete the task. The default date is one year from the current date.
Priority	Level of urgency for the task, such as High, Medium, or Low. Priority values exist in the HRT_TASK_PRIORITY lookup. You can add values to suit business requirements.

Task Detail	Description
Percentage Complete	The completion percentage of the task. Owners update the field as the assignee progresses on the task.
Status	Assigned or Completed . Once the status is Completed , all fields except Owners become read-only.
Start Date	Date when work begins for the task.
End Date	Date when the task is completed.

Editing Tasks

You can edit any task fields, and reassign and delete tasks. If a task has multiple owners or assignees, then any changes that one makes are seen by the others.

You can edit tasks on the Talent Review dashboard and on the Manage Notes and Tasks page for the meeting.

Reviewing History

You can view all tasks for all current and past meetings for the members of the review population. Click the **History** button in the table to see all tasks for a worker. The history is available only for tasks with an associated worker.

Exporting Tasks

To review all tasks for the meeting, you can export the tasks to a spreadsheet.

Related Topics

- [Profile Management Lookups: Explained](#)

Talent Review Notes: Explained

You can create notes for workers in the review populations of talent review meetings in multiple talent review processes. Talent review notes appear only in the context of talent reviews, and in no other applications. You can create reports for Notes using OTBI.

Note Management

You can manage notes in multiple locations:

- Facilitators create and manage notes on the Talent Review dashboard and Show Details dialog box, and the Manage Notes and Tasks page. Select **My Workforce - Talent Review**. Facilitators can see all notes created for the meeting.

- Reviewers create and manage notes for their direct and indirect reports on the Prepare Review Content page for a selected meeting before and after the meeting. Select **My Team - Talent Review**. Reviewers can see all notes created for the meeting for their direct and indirect reports.

Note Editing

You can edit all attributes of a note until you save it. After saving it, you can change the note text and type, but you can't select a different worker.

History

On the Manage Notes and Tasks page, facilitators can view all notes for all meetings for the members of the review population, including those created by reviewers on the Prepare Review Content page. Click the **History** button in the table to see all notes for a worker.

Note Types

Values for note types exist in the HRT_NOTES_TYPE lookup type. The predefined values are External, Internal, and General, but you can add others to suit business requirements. Use the Manage Talent Review Lookups or Manage Common Lookups task in the Setup and Maintenance work area to edit the lookups.

Related Topics

- [Profile Management Lookups: Explained](#)

Adding Analyses to the Talent Review Dashboard: Explained

The meeting facilitator can add analyses to the Talent Review dashboard to display data about the review population from the analyses in the meeting. Using Page Composer, the facilitator can use either of these methods to add analyses to the dashboard:

- Create a placeholder analysis, associate it with custom analyses, and add the placeholder analysis to the dashboard.
- Add custom analyses directly to the dashboard and open the analyses.

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

Placeholder Analysis

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

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

Non-Placeholder Analyses

You can add analyses directly to the dashboard. Using this method, you can open only one analysis at a time. When you open the analysis, you can view all data that you have security access to view. When you create the analyses, add either, or both the **PersonID** and **AssignmentID** columns to the analysis to ensure that you can select individual workers and view only their data.

Adding Analyses to the Talent Review Dashboard: Procedure

You can deploy custom Oracle Transactional Business Intelligence (OTBI) analyses directly from the Talent Review dashboard by adding links to the desired analyses to the dashboard. Using the reports, you can keep relevant information about your workers readily available to support the talent review. This topic explains how to add analyses to the Talent Review dashboard for a meeting you select.

To open an analysis for a selected worker on the Talent Review Dashboard, the analysis you add to the dashboard must contain a prompt set to **Is Prompted** on either or both Person ID and Assignment ID.

Opening the Talent Review Meeting

1. On the home page, click **My Workforce - Talent Review** to open the Talent Review Overview page.
2. Click **Go to Task** for the meeting for which you want to enable the analysis.
3. On the Talent Review Meeting page for the selected meeting, expand the Reports and Analytics section on the right side of the page.

Creating a Sandbox

1. At the top of the page, select the down arrow for the login name, and in the Administration section, select **Manage Sandboxes** to open the **Manage Sandboxes** dialog box.
2. Click the **New** icon to open the **Create Sandbox** dialog box.
3. In the **Sandbox Name** field, enter a name. For example, enter `Dashboard_Reports`.

 **Note:** The prefix **AppCoreLongSB_** is automatically added to the sandbox name you entered.

4. Click **Save and Close** to open the **Confirmation** dialog box.
5. Click **OK** to return to the **Manage Sandboxes** dialog box.
6. Select **AppCoreLongSB_ Dashboard_Reports** and click **Set as Active** to return to the Talent Review Meeting dashboard.

Customizing the Talent Review Dashboard

1. On the Settings and Actions menu, click **Customize Talent Review Pages** to open the **Customize Talent Review Pages** dialog box.
2. In the **Edit** column, select **Site**.

3. Click OK to open the panel header.
4. In the upper left corner of the page, select **View - Design** to reopen the Talent Review Meeting dashboard.
5. In the Reports and Analytics section, click **Add to Content** to open the **Add Content** dialog box.
6. In the **Reports and Analytics** row, click **Open** to open the **Add Content** dialog box with the BI Presentation Server.
7. In the **BI Presentation Server** row, click **Open** to open the **Add Content** dialog box with Shared Folders.
8. In the **Shared Folders** row, click **Open** to open the folder path containing the analysis that you want to add.
9. Continue clicking **Open** to follow the file path containing the analysis until you locate it.
10. In the row for the analysis you want to add, click **Add**. The analysis appears in the Reports and Analytics section of the dashboard.
11. Click the **Add Content** dialog box **Close** button to return to the Editing: Talent Review page.

Publishing the Sandbox

1. At the top of the page, click **AppCoreLongSB_ Dashboard_Reports** to open the **AppCoreLongSB_ Dashboard_Reports** dialog box.
2. Click **More** to open the **Sandbox Details** dialog box.
3. Select **/oracle/apps/hcm/talentCalibration/dashboard/publicUi/page/DashboardPageDef.xml** and click **Publish** to return to the Editing: Talent Review page.
4. At the top of the page, click **Close** to return to the Talent Review Meeting dashboard.

FAQs for Talent Review Meetings: Conducting

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

Yes. On the Edit: Talent Review Meeting: Select Review Population page, edit the review population and click **Submit**. When you restart the meeting, your changes appear. If you remove workers from the meeting, no data changes are applied to their worker profiles.

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

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

Yes. On the Edit: Talent Review Meeting pages, you can change attributes including the meeting status, name, participants, and review population. Click **Submit** to save your changes.

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

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

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

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

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

What happens when I submit a talent review meeting?

Rating changes made before and as a result of the talent review meeting appear in the profile records of workers in the review population. The meeting status changes to **Completed** and you can no longer update ratings. However, you can do the following:

- View the dashboard and worker ratings and change views.
- Add tasks on the dashboard, and notes and tasks using the Manage Notes and Tasks task.
- Add workers to existing succession plans and talent pools associated with the meeting.
- Create succession plans and talent pools and add workers to them.

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

How can I export data from the talent review meeting?

Select **View Table** on the Talent Review meeting dashboard to open the table view of the meeting and click **Export to Excel**. You can save all data from the table view to Microsoft Excel.

When do talent review calibrated ratings appear in reports?

After the talent review meeting is submitted from the Talent Review meeting dashboard.

6 Succession Planning

Succession Management: Explained

Using succession management, you can create succession plans for replacing key personnel. Succession plans identify workers who are ready now, or can develop the necessary skills, for jobs and positions that aren't currently vacant. Succession plans can ensure a smooth transition and help you to manage candidate development. You use the Succession Plans work area (**My Workforce - Succession Plans**) to manage succession plans.

Succession Plan Type

You can create five types of succession plans:

- Incumbent
- Job
- Job Family
- Job Profile
- Position

Use the Incumbent plan type to replace a named individual. Use the other plan types to identify candidates for a job or position.

Candidates in Succession Plans

As the succession plan owner, you identify candidates for the relevant job or position. You can:

- Select named candidates directly.
- Use best-fit analysis to identify workers whose person profiles most closely match the job or position requirements.

Succession plans can have multiple owners from different organizations, so the plan can include candidates from multiple organizations.

Candidate Readiness

You can specify a candidate's readiness to assume a job or position. For example, you can specify that a candidate is ready now. You select a readiness level based on your knowledge of the candidate and how well the candidate's current competencies match the skills of the job or position.

You can use the Candidate Ranking and Interim Successor attributes to specify which of your candidates on a succession plan are most capable of filling a vacant job. Using candidate ranking, you can enter the order of preference for succession plan candidates to fill the job associated with the plan when it becomes vacant. You can have multiple candidates with the same rank across readiness categories. For example, you can rank candidates across the entire plan, or you can rank candidates within a readiness category.

The readiness levels of all candidates in a plan determines the bench strength for the job or position and your organization. For example, if no candidate is likely to be ready in the next 2 years, the bench strength is poor. You can add candidates if this is the case.

Talent Pools and Succession Plans

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

Succession Plans Access

You manage succession plans in the Succession Plans work area or in a talent review meeting. To access the Succession Plans work area, owners must inherit the Succession Plan Management duty role. The human resource specialist job role inherits this duty role by default. To manage a plan in the Succession Plans work area, you must be an owner of the plan. Whoever creates or edits the plan selects the plan owners. For more information on roles and security, see the Oracle Human Capital Management Cloud Security Reference.

Managers can create plans from the organization chart in the Succession Plans work area, Person Gallery, Directory, and on Manager Resources. They can also view succession plans on the:

- Succession Planning card of a direct or indirect report who is either an incumbent, or the job, job family, job profile, or position for the plan of that type is the same as that of the report. For example, if the direct report has the job Senior Manager, a job plan defined for the Senior Manager job appears on the Succession Planning card for that direct report.
- Career Planning cards of all reports who are candidates or incumbent on the plans.

In addition, from the organization chart in the Person Gallery, Directory, and on Manager Resources, managers can:

- View the number of candidates who exist on plans to fill the position of their reports on the Succession Candidate card
- View the number of succession plans in which their reports are candidates on the Succession Membership card

Talent review meeting facilitators can make succession plans and talent pools available in the meeting when they create the meeting. During the meeting, facilitators can also create succession plans and edit existing plans to add candidates and specify their readiness. They can also view talent pools and add pool members to the plans.

You can view succession plan and talent pool details information for a worker on the Succession tab of the talent **Details** dialog box. This dialog box is available to succession plan owners from the candidate list on the Succession Plans work area and to talent review meeting facilitators from the Talent Review dashboard. The Succession tab displays information about a worker's potential successors as well as the worker's candidacy in succession plans and membership in talent pools.

Creating a Succession Plan

 **Watch:** This tutorial shows you how to create a succession plan to identify and track the progress of candidates to replace personnel in a key position.

Creating Succession Plans: Examples

These examples show some approaches to the creation of succession plans in the Succession Plans work area (**My Workforce - Succession Plans**).

Creating a Succession Plan for a Job

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

You:

- Set **Plan Type** to **Job**.
- Select the North America business unit.
- Search for sales directors globally and add them as candidates.
- Using the best-fit feature, search for sales directors who match the job profile and add them as candidates.
- Set readiness and risk of loss values.
- For candidates outside North America, assess willingness to relocate.
- Delete any candidate who is either at high risk of loss or unwilling to relocate.

Creating a Plan for Multiple Positions

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

You:

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

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

Manager Self-Service for Succession Planning: Explained

Managers can create succession plans for their workers directly from the organization chart and evaluate the quality of succession planning for the workers, if configured to do so. This topic describes in general terms how to enable managers to create and evaluate succession plan strength, and where managers can access the organization chart.

By enabling manager access to the cards on the organization chart, they can:

- Create succession plans for their direct and indirect reports

- Assess at a glance whether their succession planning is sufficient for their organization
- Determine if they have adequate bench strength to fill crucial vacancies

Organization Chart Access

Using the card views in the organization chart, managers (and HR specialists) can create succession plans and easily track critical information to improve succession planning. The organization chart appears in the Person Gallery, Directory, and on Manager Resources.

These cards include:

- Talent Ratings: View ratings for the worker's job criticality, risk of loss, and impact of loss.
- Succession Candidate: View the number of interim successors, and ready now and total candidates who exist on all plans to fill the worker's position.
- Succession Membership: View the number of succession plans in which the worker is a candidate and talent pools of which the worker is a member.

Managers, however, can't access the Succession Planning work area to manage the plans they create unless granted the privilege to do so. They also can't access the organization chart in the Succession Planning work area.

Succession Plans, Talent Pools, and Talent Reviews: How They Work Together

Succession plans, talent pools, and talent review meetings together support the development of selected workers to meet enterprise goals or fill key roles. You manage succession plans and talent pools in the Succession Plans work area (**My Workforce - Succession Plans**). You select succession plans and talent pools for a talent review meeting when you select the meeting content in the Talent Review work area (**My Workforce - Talent Review**).

Talent Pools and Succession Plans

You can group workers in talent pools to manage their development, training, and other goals. Using succession plans, you can track the readiness of candidates for a specific job or position. You can use talent pools either with or without succession plans.

Talent Pools Without Succession Plans

Typically, you use talent pools without succession plans when worker development isn't tied to a particular role. For example, you may create talent pools to track how high-potential workers are progressing. These workers may move into various roles at different rates.

Talent Pools with Succession Plans

You can use talent pools with succession plans to track the development of candidates for a specific job or position. When you add candidates to a succession plan, you can also add them to a talent pool. For example, you could create a talent pool of sales people who could move into the sales director role. You assign development goals to this talent pool and track progress during annual talent review meetings. When the current sales director sets a retirement date, you use the succession management plan to identify a replacement.

Talent Review Meetings with Succession Plans and Talent Pools

When you set up a talent review meeting, you can associate succession plans and talent pools with the meeting. During the meeting, the selected talent pools and succession plans appear on the meeting dashboard. You can drag and drop workers from the box chart matrix to a talent pool or succession plan. You can also add workers to a succession plan or talent pool that isn't associated with the meeting. The available plans and pools are those that the facilitators own.

You can also create new talent pools and succession plans from the meeting dashboard. However, you must add the newly created pool or plan to the meeting outside the meeting dashboard for it to appear on the meeting dashboard.

Related Topics

- [Talent Review: Explained](#)
- [Talent Pools: Explained](#)

Selecting Owners and Privacy Levels for Succession Plans: Points to Consider

For a succession plan, you select owners, administrator types, and a privacy level. This topic describes the effects of these values. Create succession plans in the Succession Plans work area. Select **My Workforce - Succession Plans**.

Owners and Administrative Types

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


- Administrator
- Candidate Manager
- Viewer

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

Action	Administrator Role	Candidate Manager Role	Viewer Role
View the plan	Yes	Yes	Yes
Add candidates	Yes	Yes	No
Remove candidates	Yes	Yes	No
Update worker readiness	Yes	Yes	No
Update risk of loss	Yes	Yes	No
Update impact of loss	Yes	Yes	No

Action	Administrator Role	Candidate Manager Role	Viewer Role
Add candidates to talent pools	Yes	Yes	No
Change the plan name	Yes	No	No
Change the plan privacy level	Yes	No	No
Add owners	Yes	No	No
Remove owners	Yes	No	No

A succession plan must have at least one administrator.

 **Note:** To access the Succession Plans work area, owners must inherit the Succession Plan Management Duty role. The human resource specialist job role inherits this duty role by default.

Security Access to Candidates

Plan owners can view, add, and remove candidates to whom they have security access. If a plan requires candidates from various parts of the organization, then you may need multiple plan owners.

Public Versus Private Plans

You must specify whether a plan is private or public. The privacy setting determines access to the plan on the Succession Plans Overview work area, the simplified Career Planning card, and talent review meetings.

Succession Plans Overview Work Area

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

For public plans, anyone with access to the Succession Plans Overview work area can view the plan.

Succession Plans on the Simplified Career Planning and Succession Planning Cards

All plan owners can view both private and public plans on the simplified Career Planning card.

Line managers have the Succession Plan View Duty role by default. On the simplified Career Planning card, they can view:

- Public plans in which their reports are candidates or incumbents.
- Private plans only if they're also plan owners.

On the Succession Planning card, managers can view succession plans for their reports that meet these criteria:

- The report is the incumbent of the plan.

- The succession plan type is same as that of the report's job, job family, job profile, or position. For example, if the report has the job Senior Manager, a job plan defined for the Senior Manager job appears on the Succession Planning card for that report.

On both the Career Planning and Succession Planning cards managers can see only plans for which they're owners, or public plans. They can only view candidates to whom they have security access.

Succession Plans in Talent Review Meetings

Talent review meeting facilitators can associate public plans with a meeting. They can also associate private plans for which they're administrators or candidate managers. All meeting facilitators, regardless of their security access to workers elsewhere or whether they're plan owners, can perform actions on the plans on the meeting dashboard. All plans facilitators add to the meeting can be viewed by participants in the meeting, so facilitators should select only plans they want participants to see.

On the view of the dashboard that reviewers can open from the Prepare Review Content page, they can:

- View plans added by facilitators of which they're owners.
- Perform actions on plans if they're administrators or candidate managers.
- Access private plans if they're plan owners.

Succession Plans in the Details Dialog Box

You can open the **Details** dialog box for a worker from either the Succession Plans work area or the Talent Review dashboard. Succession plans appear on the Succession tab of the dialog box.

- In the Succession Plans work area, the tab shows public and private plans for which the viewer is an owner.
- On the Talent Review dashboard, the tab shows public plans only. In both places, the tab show all plans for which the selected worker is an incumbent, depending on privacy and ownership.

In both places, the tab show all plans for which the selected worker is an incumbent, depending on privacy and ownership.

Selecting Succession Candidates from a Talent Pool Using the Talent Review Dashboard: Procedure

You can create a sample talent review meeting to evaluate candidates for succession plans from members of a selected talent pool, or other members of the review population. In the meeting, you can review all available ratings to evaluate potential candidates and add candidates to succession plans directly. When you finish your review, you can cancel, save, or submit the meeting to preserve your succession plans. You can create succession plans and talent pools before creating the meeting to add them to the meeting to evaluate candidates. Or, you can create the plans and pools during the meeting.

This topic describes how to:

- Create a talent review meeting
- Add review content, including existing talent pools and succession plans, to the meeting
- Add talent pool members and a review population to the meeting
- Conduct the meeting, review candidates, and add them to succession plans
- Create succession plans and talent pools in the meeting

Creating the Meeting


1. On the home page, click **My Workforce - Talent Review** to open the Talent Review Overview page.
2. Click **Create** to open the Create Talent Review Meeting: Enter Meeting Details page.
3. In the **Talent Review Meeting** field, enter a name for the meeting.
4. In the **Description** field, enter a description, if desired.
5. In the **Template Name** list, select a template for the meeting. Ensure that the template configuration includes succession plans and talent pools, and all the ratings required by your business process to evaluate workers.

 **Note:** You configure templates using the Configure Talent Review Dashboard Options task in the Setup and Maintenance work area.

6. In the **Business Leader** field, search and select a manager who's senior to all members of the review population.
7. In the **Meeting Date** field, enter the date that you plan to start the meeting.
8. Leave the **Data Submission Deadline** field blank.

Adding Review Content to the Meeting

1. Click **Next** to open the Create Talent Review Meeting: Select Review Content page.
2. In the Include Prior Meetings section, search and select prior meetings to compare the most recent worker ratings to previous meetings. If you need only the most recent ratings, skip to the next step.
3. In the Include Successions Plan section add existing succession plans you own to the meetings. If you don't want to add existing plans to the meeting, skip to step 4.
 - a. Click **Select and Add** to open the **Select and Add: Succession Plans** dialog box.
 - b. Enter search criteria to find plans you own and click **Search**.
 - c. Select the plan and click **OK** to open the **Warning** dialog box.
 - d. Click **Yes** to return to the Create Talent Review Meeting: Select Review Content page.
4. In the Include Talent Pools section, add existing talent pools you own to the meeting. If you don't want to add existing pools to the meeting, skip to step 5.
 - a. Click **Select and Add** to open the **Select and Add: Talent Pools** dialog box.
 - b. Enter search criteria to find pools you own and click **Search**.
 - c. Select the pools to add to the meeting and click **OK** to open the **Warning** dialog box.
 - d. Click **Yes** to return to the Create Talent Review Meeting: Select Review Content page.
5. Click **Next** to open the Create Talent Review Meeting: Select Review Participants page.

 **Note:** Don't add participants to the meeting, as participants receive notification of the meeting. However, the organization owner appears as a default participant and can't be removed.

Adding the Review Population to the Meeting and Submitting

1. Click **Next** to open the Create Talent Review Meeting: Select Review Population page.
2. Click **Select and Add** to open the **Select and Add: Workers** dialog box to add workers you want to review as possible candidates for the succession plans you're editing.
3. Enter search criteria and click **Search**. Select the workers to add to the talent review meeting, and click **OK** to return to the Create Talent Review Meeting: Select Review Population page.

4. To add member of particular talent pools to the review population, click the **Select and Add** down arrow, and then **Select Talent Pool Members** to open the **Select and Add: Talent Pool Members** dialog box.
 - a. Enter search criteria to find pools you own and click **Search**.
 - b. Select a pool and click **Apply**. Select additional pools, if desired, and click **Apply** after selecting each.
 - c. Click **OK** to return to the Create Talent Review Meeting: Select Review Population page.
5. Click **Next** to open the Create Talent Review Meeting: Review page.
6. Review your selections. Click the **Edit** icon for any section to edit it.
7. Click **Submit**. If you selected no reviewers or participants, a **Warning** dialog box appears.
8. Click **OK** to open the **Confirmation** dialog box.
9. Click **OK** to return to the Talent Review Overview page.

Conducting the Meeting, Reviewing Potential Candidates, and Adding Them to Succession Plans

1. For the meeting you created, click the **Conduct Meeting** icon to open the Talent Review Meeting dashboard.
2. Select **Show Names** to see the names for each worker represented by an icon.
3. Review worker ratings and other data. To review:
 - o Scroll over a worker icon to view the ratings for the worker. The ratings that appear are determined by the dashboard view.
 - o Select a worker and click **Show Details** to view worker performance, goals, compensation, and other data.
4. Add workers to the succession plan added to the meeting. To add workers:
 - o Select workers, and drag them to the plan in the Succession Plans and Talent Pools pane.
 - o Select a worker, and in the Actions section, click **Add To**, then **Add to Succession Plan** to open the **Add to Succession Plan** dialog box.
5. Click the **Create** icon, and select **Create Succession Plan** in the Succession Plans and Talent Pools section to create a succession plan. The **Create Succession Plan** dialog box opens.
6. Enter a plan name, select a plan type, and other required attributes, and click **Save and Close** to return to the meeting dashboard.
7. Add candidates to the plan you created, if desired, as described in Step 4.
8. When you're done, you can either:
 - o Click **Save**, or **Save and Close** to keep the meeting open for future edits.
 - o Click **Submit** if you have completed reviewing candidates. If you submit a meeting, any updates you make to ratings are reflected in the worker profiles.

Whether you save or submit, the succession plan edits are available in the Succession Plans work area and the simplified Career Planning and Succession Planning cards.

FAQs for Succession Planning

What's succession plan strength?

A measure of the number of candidates in the plan and their relative readiness. Plan strength appears as a graphical summary on the Succession Plans tab of the Succession Plans work area.

Why can't I perform all the actions on a succession plan?

Access to the actions depends on the security set up for the individual plan. If you're specified as an administrator, you can edit or disable the plan, or add and remove candidates. If you're specified as a candidate manager, you can add and remove candidates. If you're a viewer, you can access the plan, but not perform any actions on it.

How can I find the most qualified candidates for a succession plan?

Click the **Find Best Fit** button on the Create Succession Plan: Select Candidates page to display a list of workers showing how well each worker's profile matches the job or position profile. You can add candidates from the list directly to the succession plan. Find Best Fit is available when a job profile is associated with the succession plan or the incumbent's job.

If you have already identified suitable candidates, use the **Select and Add** action on the Select Candidates page to add them to the succession plan.

As an HR specialist, you can also create a Talent Review meeting solely to find potential candidates for a succession plan, and not update talent ratings. You can add potential candidates to the meeting review population, including those from a selected talent pool, and view all the available talent ratings to review candidates. You can add existing succession plans and talent pools to the meeting and create additional ones, if required. You can add candidates directly to the plans from the meeting. If you don't save or submit the meeting, the succession plans and talent pools you created remain valid.

What happens if I remove a readiness category lookup?

If the level is in use for succession plan candidates or talent pool members, their readiness level changes to **No readiness available**. Plan or pool owners can select a different readiness level for affected workers.

7 Talent Pools

Talent Pools: Explained

A talent pool is an identified group of workers. You use talent pools to manage the development of the pool members for particular purposes. For example, a talent pool can include future leaders of the organization. You can also include one or more talent pools in a succession plan to prepare pool members to fill a vacancy.

Talent Pool Examples

You can use talent pools, for example, to:

- Supply succession plans:
 - Create talent pools of potential candidates for succession plans. The pool members may be suitable for more than one succession plan. For example, you can maintain a talent pool of local managers from which you populate a succession plan for the district general manager position.
 - Create a talent review meeting based on a talent pool specifically for planning successions. Managers nominate workers as succession candidates by adding them to a talent pool while preparing for, or during a typical talent review meeting. Then senior executives can schedule a talent review meeting with a review population created from that talent pool specifically to vet the nominated workers and assign them to succession plans as appropriate.
- Track cohorts: Track various cohorts of workers such as campus hires, leadership trainees, or high potential workers.
- Roll up talent review populations: During a talent review, create a talent pool for high performing or high potential individuals. For the next talent review, add the talent pool members to the review population to evaluate these high performers against each other.

Talent Pool Access

You create and manage talent pools in the Succession Plans work area. Select **My Workforce - Succession Plans**. You can also create talent pools from the Talent Review dashboard.

Talent pool owners can access and manage a talent pool, if they have security privilege to access the Succession Plans work area or the Talent Review dashboard.

Managers can view the talent pools they own in which their direct and indirect reports are members on the simplified Career Planning card.

On the Succession Membership card available from the Organization chart in the Person Gallery, Directory, and on Manager Resources, they can view talent pools of which their reports are a member.

Talent Pool Details

You can enter criteria that define the scope of the talent pool. The available criteria are:

- Job
- Grade

- Job profile
- Job family
- Department
- Business unit
- Position

These values have no effect on pool processing.

You can also specify the talent pool status and identify one or more pool owners. If a talent pool is inactive, you can't select it for use in succession plans and talent reviews.

Talent Pool Members

You can search and select workers to add to the talent pool. You can also use best-fit analysis to identify workers who match the criteria in a selected job profile. For each worker in the pool, you can record your assessment of the risk and impact of the worker leaving the enterprise.

Talent Pool Goals

If you're using Oracle Fusion Career Development, talent pool owners can add development goals to the talent pool. These goals appear in the development plan of each member of the talent pool. The development intent of these goals are tagged as Organization.

Related Topics


- Succession Plans, Talent Pools, and Talent Reviews: How They Work Together
- Best Fit Algorithm Utilization as Provided in Oracle Fusion Profile Management (Doc ID 1600727.1)

Using Development Goals in Talent Pools: Explained

You can add development goals to a talent pool to ensure that all pool members achieve the goals for which the talent pool exists. Add development goals to a talent pool when you manage talent pools in the Succession Plans work area (**My Workforce - Succession Plans**).

Adding Development Goals to a Talent Pool

Only talent pool owners can add development goals to a talent pool. The development goals must be in the goal library. Goals from the talent pool appear automatically in the goals of talent pool members, who can access them from their development plan on the My Career Development page. Managers can access these goals in the Career Development work area. Workers don't inherit goals from the talent pool if they already have them.

 **Note:** When you add a worker to a talent pool, the worker doesn't automatically inherit any goals already associated with the talent pool. The worker inherits development goals that you add to the talent pool after the worker becomes a member.

Removal of Development Goals from a Talent Pool

Only a talent pool's owners can remove development goals from the pool. Removing a development goal from the talent pool doesn't remove it from talent pool members. To remove the goal from a worker's development plan, you must delete it manually from the worker's goals.

Management of Development Goals in the Goal Library

When you edit a development goal in the goal library, the changes don't appear automatically in the talent pool. To include the latest version of a development goal in the talent pool, remove the current version from the pool and add the updated version.

Related Topics

- [Career Development: Explained](#)

Social Networking with Talent Pools: Explained

If the talent pool editing pages have a **Social** link, you can invite others to collaborate about a talent pool using social collaboration. Conversations remain with the talent pool as a historical record.

Examples of collaboration:

- The talent pool owner collaborates with other owners about talent pool definition and membership.
- The talent pool owner initiates a conversation or related conversation to discuss with managers what goals should be assigned to talent pool members.

Collaborating About Talent Pools

Tips for collaborating:

- Click **Social** on the talent pool editing pages to collaborate. Click the **Share** button, or click **Join** if collaboration has already been initiated.
- Click the name of the talent pool to access its wall, where you can start conversations and add others as conversation members.
- After collaboration starts for a meeting:
 - Anyone at your company can be invited to participate in a conversation about it.
 - A manager can only join in conversations or related conversations after being invited as a conversation member.
 - Talent pool owners can initiate conversations and invite others to join the conversation.
- On the wall of the talent pool, everyone invited can view basic attributes of the talent pool and post documents and comments that all conversation members can see.

Related Topics

- [What does social networking have to do with my job?](#)

FAQs for Talent Pools

Can I delete a talent pool?

No, but you can set the status to **Inactive** on the Manage Talent Pools page.

What happens if I set the status of a talent pool to inactive?

You can't associate it with talent review meetings or succession plans. If you own the talent pool, you can set its status back to **Active** at any time on the Manage Talent Pools page.

Glossary

best-fit analysis

A calculation of the best possible matches for a selected person or model profile.

candidate

In a succession plan, a person identified to fill a job or position or replace a named incumbent.

candidate readiness

In a succession plan, an assessment of when a candidate is ready for a specified job or position.

competency

Any measurable behavior required by an organization, job, or position that a person may demonstrate in the work context. A competency can be a piece of knowledge, a skill, an attitude, or an attribute.

content item

An individual quality, skill, or qualification within a content type that you track in profiles.

content type

An attribute such as a skill, quality, or qualification that is added to a profile.

data validity guideline

Specified time frame beyond which ratings are out of date for a talent review.

development goal

A goal that is geared toward facilitating the career growth of individuals so that they can perform better in their current job or prepare themselves for advancement.

goal library

A central repository of reusable goals maintained by the human resource specialist that managers and workers can copy to use for their own goals.

holding area

An area on the Talent Review dashboard to hold workers not rated by their managers, rated using nonstandard rating models, or removed from the box chart during the talent review meeting.

HR

Abbreviation for human resource.

impact of loss

A value assigned to a worker to rate the effect on the enterprise when the worker leaves.

individual score

The number assigned to each matching content item of the content types for which you specify the priority or importance.

instance qualifier set

A set of values that uniquely identifies multiple instances of the same profile item.

job

A generic role that is independent of any single department or location. For example, the jobs Manager and Consultant can occur in many departments.

model profile

A collection of the work requirements and required skills and qualifications of a workforce structure, such as a job or position.

overall score

The total of all individual scores of all matching content items in a best-fit analysis.

performance document

Online document used to evaluate a worker for a specific time period. The document contains the content on which the worker is evaluated, which could include goals, competencies, and questionnaires.

performance goal

A results-oriented goal, often using specific targets, to assess the level of a worker's achievement.

person profile

A collection of skills, experience, qualifications, work preferences, and career planning information for a worker.

position

A specific occurrence of one job that is fixed within one department. It is also often restricted to one location. For example, the position Finance Manager is an instance of the job Manager in the Finance Department.

profile type

A template that defines the content sections of a profile, role access for each section, and whether the profile is for a person, or for a workforce structure such as a job or position.

rating model

A scale used to measure the performance and proficiency of workers.

risk of loss

A value assigned to a worker to rate the likelihood of the worker leaving the enterprise.

sandbox

A testing environment that isolates untested code changes from the mainline environment so that these changes don't affect the mainline metadata or other sandboxes.

source rating

The rating level associated with a content item of the source profile in the best-fit analysis.

succession plan

A plan that identifies candidates for a role or position or to succeed a named incumbent.

succession plan owner

A person who can manage succession plans. Valid actions depend on the owner's administrator type, which can be Administrator, Candidate Manager, or Viewer.

talent pool

A selected group of workers for whom you track training, readiness, or development.

talent pool member

A worker who is added to a talent pool.

talent pool owner

A human resource specialist who can manage a talent pool.

talent review

A series of meetings where organization managers evaluate trends, assess strengths, and address areas of risk for the organization.

talent review facilitator

Human resource specialist who manages talent review meetings. A talent review meeting can have multiple facilitators.

talent review participant

Person who's invited to attend a talent review meeting.

talent review reviewer

Manager who updates profile content for direct and indirect reports before the talent review meeting.

talent score

An assessment of a worker's overall value to the enterprise using a custom rating model.

target rating

The rating level associated with a content item of the target profile in the best-fit analysis.