

# HR841

## SAP SuccessFactors Succession Management Administration

### COURSE OUTLINE

Course Version: 2511

Course Duration:



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# Typographic Conventions

American English is the standard used in this handbook.

The following typographic conventions are also used.

This information is displayed in the instructor's presentation	
Demonstration	
Procedure	
Warning or Caution	
Hint	
Related or Additional Information	
Facilitated Discussion	
User interface control	<i>Example text</i>
Window title	<i>Example text</i>

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# Course Overview

**TARGET AUDIENCE**

This course is intended for the following audiences:



## Lesson 1: Exploring the Administration Course

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe general information about the course.



## Lesson 1: Managing Succession

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe Succession Management.

## Lesson 2: Configuring Succession Nomination Methods

### Lesson Objectives

After completing this lesson, you will be able to:

- Configure the Succession module and understand the three succession nomination methods.

## Lesson 3: Discovering Succession Management Tools

### Lesson Objectives

After completing this lesson, you will be able to:

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



## Lesson 1: Exploring Succession Management Permissions

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe the Succession Management permissions.



## Lesson 1: Using People Profile Information Blocks

### Lesson Objectives

After completing this lesson, you will be able to:

- Understand People Profile blocks and their purpose within succession.

## Lesson 2: Reviewing Extended Data for People Profile Blocks

### Lesson Objectives

After completing this lesson, you will be able to:

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

## Lesson 3: Customizing Picklists

### Lesson Objectives

After completing this lesson, you will be able to:

- Create and manage picklists used with succession.



## Lesson 1: Describing the Position Model

### Lesson Objectives

After completing this lesson, you will be able to:

- Define the position model and position nomination methods.

## Lesson 2: Configuring the MDF Position Object

### Lesson Objectives

After completing this lesson, you will be able to:

- Understand and configure the MDF position object.

## Lesson 3: Maintaining MDF Position Data

### Lesson Objectives

After completing this lesson, you will be able to:

- Maintain MDF position data using position sync or position import.

## Lesson 4: Customizing Fields and Picklists

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe the necessary actions to modify or add custom fields and picklists with the MDF position object.

## Lesson 5: Creating Associations and Searchable Fields

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe the action steps to change an association or searchable field with the MDF position object.

## Lesson 6: Managing Legacy Positions via Import or Sync

## Lesson Objectives

After completing this lesson, you will be able to:

- Provide information to maintain the Legacy Position model by using the position import or position sync.

## Lesson 1: Discovering the Succession Org Chart

### Lesson Objectives

After completing this lesson, you will be able to:

- Navigate the Succession Org Chart and Succession Talent Card.

## Lesson 2: Configuring the Succession Org Chart

### Lesson Objectives

After completing this lesson, you will be able to:

- Permission and configure the Succession Org Chart.

## Lesson 3: Using the Succession Org Chart

### Lesson Objectives

After completing this lesson, you will be able to:

- Add successor nominees to the SOC and configure recommended successors.

## Lesson 4: Configuring Position Criticality

### Lesson Objectives

After completing this lesson, you will be able to:

- Define and set up Position Criticality.

## Lesson 5: Understanding Bench Strength

### Lesson Objectives

After completing this lesson, you will be able to:

- Define bench strength.

## Lesson 6: Using Nomination History

### Lesson Objectives

After completing this lesson, you will be able to:

- Define the SOC Nomination History.

## **Lesson 7: Applying Formless Nominations and Approvals**

### **Lesson Objectives**

After completing this lesson, you will be able to:

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

## **Lesson 8: Integrating the SOC with other SAP SuccessFactors Modules**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Explore how the SOC integrates with other SAP SuccessFactors modules.

## Lesson 1: Exploring Pool-based Planning

### Lesson Objectives

After completing this lesson, you will be able to:

- Understand Pool-Based Planning and Succession Talent Pools.

## Lesson 2: Permissioning Talent Pools

### Lesson Objectives

After completing this lesson, you will be able to:

- Configure object and role-based permissions for Talent Pools.

## Lesson 3: Managing Talent Pools

### Lesson Objectives

After completing this lesson, you will be able to:

- Manage Talent Pools and Talent Pool nominations.

## Lesson 4: Configuring Talent Pool Columns and Filters

### Lesson Objectives

After completing this lesson, you will be able to:

- Configure Talent Pool columns and filters.

## Lesson 5: Associating Talent Pools with Roles

### Lesson Objectives

After completing this lesson, you will be able to:

- Associate Talent Pools with roles.



## Lesson 1: Exploring the Position Tile View

### Lesson Objectives

After completing this lesson, you will be able to:

- Configure and use the Position Tile View.

## Lesson 2: Using the Lineage Chart

### Lesson Objectives

After completing this lesson, you will be able to:

- Understand the Lineage Chart and its components.



## Lesson 1: Discovering the Talent Search

### Lesson Objectives

After completing this lesson, you will be able to:

- Identify key features and benefits of the Talent Search.

## Lesson 2: Permissioning Talent Search

### Lesson Objectives

After completing this lesson, you will be able to:

- Configure the Role-Based Permissions for Talent Search.

## Lesson 3: Configuring Talent Search Settings

### Lesson Objectives

After completing this lesson, you will be able to:

- Enable the settings available for Talent Search.

## Lesson 4: Using Talent Search

### Lesson Objectives

After completing this lesson, you will be able to:

- Define and save the search criteria in Talent Search.

## Lesson 5: Utilizing the Talent Search Results and Toolbar

### Lesson Objectives

After completing this lesson, you will be able to:

- Refine the search criteria and utilize the Talent Search Toolbar.

## Lesson 6: Using Background and Competency Criteria for Ranking

### Lesson Objectives

After completing this lesson, you will be able to:

- Search for talent using ratings and competencies/attributes.

## Lesson 1: Introducing the Matrix Grid Reports

### Lesson Objectives

After completing this lesson, you will be able to:

- Identify the Matrix Grid Reports and their key features.

## Lesson 2: Permissioning the Matrix Grid Reports

### Lesson Objectives

After completing this lesson, you will be able to:

- Configure permissions for the Matrix Grid Reports.

## Lesson 3: Configuring the Matrix Rating Scale

### Lesson Objectives

After completing this lesson, you will be able to:

- Configure the Matrix Grid Rating Scale.

## Lesson 4: Configuring the Admin Center Matrix Grid Report Settings

### Lesson Objectives

After completing this lesson, you will be able to:

- Configure the Matrix Grid Report settings in Admin Center.

## Lesson 5: Using the Matrix Grid Reports

### Lesson Objectives

After completing this lesson, you will be able to:

- Use the Matrix Grid Report filters and describe the full functionality of the reports.

## Lesson 6: Configuring Icons in the Admin Center

### Lesson Objectives

After completing this lesson, you will be able to:

- Configure Matrix Grid Report Icons.

## **Lesson 7: Determining Retirement Eligibility**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Configure the Retirement Eligibility feature.

## **Lesson 8: Using the Matrix Grid Placement History Portlets**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Understand the Matrix Grid Placement history portlets.

## Lesson 1: Configuring Talent Cards

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe and configure Talent Cards.

## Lesson 2: Creating Presentations

### Lesson Objectives

After completing this lesson, you will be able to:

- Configure and create Presentations.



## Lesson 1: Importing Successors

### Lesson Objectives

After completing this lesson, you will be able to:

- Recognize the components of the Successor Import Template and identify the actions available to import successors.

## Lesson 2: Utilizing Calibration with Succession Planning

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe the Calibration elements used in Succession.



## **Lesson 1: Earning SAP SuccessFactors Expert (SFX) Accreditation**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Describe the SFX Accreditation program.

## **Lesson 2: Reviewing Additional Resources**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Review additional resources after completing this course.