

# HR841

## SAP SuccessFactors Succession Management Administration

### COURSE OUTLINE

Course Version: 2311

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

*Example text*

Window title

*Example text*

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# Course Overview

## **TARGET AUDIENCE**

This course is intended for the following audiences:





# UNIT 1

# Introducing the Course

## Lesson 1: Introducing the Course

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe the general information about the course



## Lesson 1: Managing Succession

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe the overview of succession management

## Lesson 2: Configuring Succession Nomination Methods

### Lesson Objectives

After completing this lesson, you will be able to:

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

## 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: Applying Succession Permissions

### Lesson Objectives

After completing this lesson, you will be able to:

- Identify the main permissions used in succession management

## Lesson 2: Granting Role-Based Permissions

### Lesson Objectives

After completing this lesson, you will be able to:

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



## Lesson 1: Discovering Additional Permissions and Access

### Lesson Objectives

After completing this lesson, you will be able to:

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

## Lesson 2: Managing Employee or User Data

### Lesson Objectives

After completing this lesson, you will be able to:

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

## Lesson 3: Filling In People Profile Information Blocks

### Lesson Objectives

After completing this lesson, you will be able to:

- Introduce People Profile Blocks and its purpose within Succession

## Lesson 4: 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 5: Reviewing Matrix Grid Placement History

### Lesson Objectives

After completing this lesson, you will be able to:

- Discuss the Matrix Grid Placement History portlets

## Lesson 6: Customizing Picklists

### Lesson Objectives

After completing this lesson, you will be able to:

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



## UNIT 5

# Managing Positions Using Legacy Position Nomination Method

### Lesson 1: Managing Positions via Import or Sync

#### Lesson Objectives

After completing this lesson, you will be able to:

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



## Lesson 1: Applying MDF Permissions and Tools

### Lesson Objectives

After completing this lesson, you will be able to:

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



## Lesson 1: Configuring MDF Position Object

### Lesson Objectives

After completing this lesson, you will be able to:

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

## Lesson 2: Modifying Field Visibility

### Lesson Objectives

After completing this lesson, you will be able to:

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

## Lesson 3: Changing Field Labels and Translations

### Lesson Objectives

After completing this lesson, you will be able to:

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

## 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.

## 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.

## Lesson 6: Applying Miscellaneous Permissions and Position Target Populations

## **Lesson Objectives**

After completing this lesson, you will be able to:

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

## **Lesson 7: Updating the MDF Position Model via Import or Sync**

### **Lesson Objectives**

After completing this lesson, you will be able to:

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

## Lesson 1: Importing Successors

### Lesson Objectives

After completing this lesson, you will be able to:

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

## Lesson 2: Setting Up Nominations

### Lesson Objectives

After completing this lesson, you will be able to:

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

## Lesson 3: Enabling Successor Ranking

### Lesson Objectives

After completing this lesson, you will be able to:

- Enable Successor Ranking

## Lesson 4: 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 1: Viewing Succession Org Chart v12

### Lesson Objectives

After completing this lesson, you will be able to:

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

## Lesson 2: Accessing Lineage Chart

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe the Lineage Chart

## Lesson 3: Assigning MDF Talent Pools and Permissions

### Lesson Objectives

After completing this lesson, you will be able to:

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

## Lesson 4: Searching Talent v12

### Lesson Objectives

After completing this lesson, you will be able to:

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

## Lesson 5: Viewing Matrix Grid Reports v12

### Lesson Objectives

After completing this lesson, you will be able to:

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

## **Lesson 6: Positioning Tile View**

### **Lesson Objectives**

After completing this lesson, you will be able to:

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

## Lesson 1: Discovering Presentations

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe Presentations
- Enable Presentations

## Lesson 2: Applying Key Features

### Lesson Objectives

After completing this lesson, you will be able to:

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

## Lesson 3: Creating Presentations

### Lesson Objectives

After completing this lesson, you will be able to:

- Create and Enable Presentations

## Lesson 4: Managing Presentations

### Lesson Objectives

After completing this lesson, you will be able to:

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