

THR85

SAP SuccessFactors Succession Management Academy

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

Contents

vii Course Overview

1 Unit 1: Introduction to Succession Management

- | | |
|---|---|
| 1 | Lesson: Succession Management Overview, Important Information and Key Resources |
| 1 | Lesson: Modifying Configurations for Succession Management |

3 Unit 2: Succession Permissions Overview

- | | |
|---|--|
| 3 | Lesson: Setting Succession Permissions |
|---|--|

5 Unit 3: Succession Data Model and People Profile

- | | |
|---|---|
| 5 | Lesson: Describing the Data Model and Using the Picklist Center |
| 5 | Lesson: Describing People Profile |
| 5 | Lesson: Managing Data |

7 Unit 4: Succession Nomination Methods, Nomination Options and Position Model

- | | |
|---|--|
| 7 | Lesson: Describing Nominations |
| 7 | Lesson: Enabling Successor Ranking |
| 7 | Lesson: Nomination Setup |
| 7 | Lesson: Describing Formless Approvals |
| 7 | Lesson: Describing the Position Model Creation and the Legacy Position-Based Nomination Method Specificities |
| 8 | Lesson: Configuring Position Criticality |
| 8 | Lesson: Configuring Bench Strength |

9 Unit 5: Succession Functionality and Tools

- | | |
|---|---|
| 9 | Lesson: Describing the Succession Org Chart (SOC) v12 and Lineage Chart |
| 9 | Lesson: Setting up Succession Talent Search |
| 9 | Lesson: Describing Matrix Grid Reports and Calibration |

11 Unit 6: MDF-Related Functionality

- | | |
|----|--|
| 11 | Lesson: Describing MDF Position Nomination |
| 11 | Lesson: Describing an MDF Nomination Tool |
| 11 | Lesson: Describing MDF Talent Pools |

13	Unit 7:	Successor Import, Nomination History, Processes and Presentations
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13	Lesson: Importing Successors
13	Lesson: Nomination History
13	Lesson: Describing Processes and Forms
13	Lesson: Creating Presentations

Course Overview

TARGET AUDIENCE

This course is intended for the following audiences:

- Application Consultant

UNIT 1

Introduction to Succession Management

Lesson 1: Succession Management Overview, Important Information and Key Resources

Lesson Objectives

After completing this lesson, you will be able to:

- Describe SAP SuccessFactors Succession Management
- Data Protection and Privacy
- List Key Resources
- Utilize Action Search

Lesson 2: Modifying Configurations for Succession Management

Lesson Objectives

After completing this lesson, you will be able to:

- Modify configurations for Succession Management

UNIT 2

Succession Permissions Overview

Lesson 1: Setting Succession Permissions

Lesson Objectives

After completing this lesson, you will be able to:

- Describe Succession permissions
- Use Succession permissions

Lesson 1: Describing the Data Model and Using the Picklist Center

Lesson Objectives

After completing this lesson, you will be able to:

- Describing the Data Model
- Troubleshoot common XML issues
- Using the Picklist Center

Lesson 2: Describing People Profile

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the People Profile
- People Profile Elements (PP3)
- Describe the Scorecard
- Troubleshoot Scorecard issues

Lesson 3: Managing Data

Lesson Objectives

After completing this lesson, you will be able to:

- Describe data management
- Describe personal, trend, and background data
- Export extended data
- Import extended data
- Troubleshoot data management issues

UNIT 4

Succession Nomination Methods, Nomination Options and Position Model

Lesson 1: Describing Nominations

Lesson Objectives

After completing this lesson, you will be able to:

- Describe Nominations

Lesson 2: Enabling Successor Ranking

Lesson Objectives

After completing this lesson, you will be able to:

- Enable Successor Ranking
- Sort successors

Lesson 3: Nomination Setup

Lesson Objectives

After completing this lesson, you will be able to:

- Describe Commonly Utilized Options for Succession Nominations

Lesson 4: Describing Formless Approvals

Lesson Objectives

After completing this lesson, you will be able to:

- Describe Formless Approvals
- Auto-Remove Successors

Lesson 5: Describing the Position Model Creation and the Legacy Position-Based Nomination Method Specificities

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the Position Model creation options

- Describe the Legacy Position-Based Nomination Method specificities
- Display the position title instead of the user title

Lesson 6: Configuring Position Criticality

Lesson Objectives

After completing this lesson, you will be able to:

- Display Position Criticality
- Configuring Position Criticality
- Identify common issues with the criticality scale

Lesson 7: Configuring Bench Strength

Lesson Objectives

After completing this lesson, you will be able to:

- Configure Bench Strength

Lesson 1: Describing the Succession Org Chart (SOC) v12 and Lineage Chart

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the SOC v12
- Describe how to hide the matrix team size for faster loading
- Set up External Successors
- Troubleshoot SOC v12 issues
- List SOC integration points with Career Development Planning
- Configure the Succession Org Chart (SOC) XML
- Utilize the v12 Succession Org Chart
- List the benefits of the Lineage Chart v12
- Access the Lineage Chart
- Define the Lineage Chart components

Lesson 2: Setting up Succession Talent Search

Lesson Objectives

After completing this lesson, you will be able to:

- Describe Talent Search
- Set permissions for the Talent Search
- Enable settings for Talent Search
- Add filters to Talent Search
- Save a search in Talent Search
- View the toolbar in Talent Search
- Use background and competency criteria to get a best fit ranking

Lesson 3: Describing Matrix Grid Reports and Calibration

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the Matrix Grid reports
- Enable the Matrix Grid reports in Provisioning
- Set permissions for the Matrix Grid reports
- Describe Matrix Grid formatting in the Admin Center
- Define custom weighting for a Matrix Grid report
- Define the normalized ratings for a Matrix Grid report
- Describe the matrix rating scale
- Define the matrix grid rating scales
- Describe Matrix Grid XML
- Modify Matrix Grid XML
- Configure icons in the Admin Center
- Determine retirement eligibility
- Identify supported and unsupported fields for matrix filters
- Describe How vs. What Matrix Grid reports
- Troubleshoot Performance Potential Matrix Grid reports
- Describe the Matrix Placement History Portlets
- Describe Calibration Elements used in Succession

Lesson 1: Describing MDF Position Nomination

Lesson Objectives

After completing this lesson, you will be able to:

- Change the nomination method to MDF

Lesson 2: Describing an MDF Nomination Tool

Lesson Objectives

After completing this lesson, you will be able to:

- Activate the Position Tile View
- Configure Filters for the Position Tile View

Lesson 3: Describing MDF Talent Pools

Lesson Objectives

After completing this lesson, you will be able to:

- Describe pool-based nominations
- Set permissions for the MDF Talent Pool
- Create and use MDF Talent Pools

Lesson 1: Importing Successors

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the Successor Import Template
- Identify the different options for the different succession nomination method
- Handle errors described in the email
- Describe the specific case for role-person nomination transfer

Lesson 2: Nomination History

Lesson Objectives

After completing this lesson, you will be able to:

- Enable the Nomination History
- Analyze the Nomination History for a User
- Hide the Nomination History prior to a certain date

Lesson 3: Describing Processes and Forms

Lesson Objectives

After completing this lesson, you will be able to:

- Describe various sources of ratings

Lesson 4: Creating Presentations

Lesson Objectives

After completing this lesson, you will be able to:

- Describe Presentations
- Enable Presentations
- Set permissions for Presentations
- Describe the Talent Card

- Set permissions for a Talent Card
- Design the content of a Talent Card
- Assemble a Presentation
- Add a Custom Profile Slide
- Share Presentations
- Print Presentations