

# THR85

## SAP SuccessFactors Succession Management Academy

### COURSE OUTLINE

Course Version: 2411

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 and Configuring Succession Management

## Lesson 1: Introducing Succession Management

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe SAP SuccessFactors Succession Management

## Lesson 2: Modifying Configurations in Provisioning for Succession Management

### Lesson Objectives

After completing this lesson, you will be able to:

- Modify configurations in Provisioning for Succession Management



### Lesson 1: Understanding People Profile's Relationship to Succession Management

#### Lesson Objectives

After completing this lesson, you will be able to:

- Describe People Profile
- Compare Career vs Talent Sections in People Profile
- Identify Succession Management Touchpoints with People Profile

### Lesson 2: Configuring People Profile

#### Lesson Objectives

After completing this lesson, you will be able to:

- Identify Career and Talent Profile Components
- Manage other XML dependencies (translations, picklist) and issues
- Enable People Profile

### Lesson 3: Updating People Profile Data

#### Lesson Objectives

After completing this lesson, you will be able to:

- Describe People Profile Data Management
- Manage personal, trend, and background data



## Lesson 1: Describing the Succession Nomination Methods

### Lesson Objectives

After completing this lesson, you will be able to:

- Understand the different Succession Nomination methods

## Lesson 2: Describing the Position Model Creation

### Lesson Objectives

After completing this lesson, you will be able to:

- Define the Position Model creation options
- Choose a position nomination method
- Understand the Metadata Framework
- Configure the MDF Position object

## Lesson 3: Maintaining Position Data

### Lesson Objectives

After completing this lesson, you will be able to:

- Maintain position data
- Sync MDF Positions
- Update Position Attributes
- Import MDF position data



## Lesson 1: Identifying the Key Features of the Talent Search Tool

### 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 the Search Criteria to search for Talent
- Save search criteria for future searches

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

### Lesson Objectives

After completing this lesson, you will be able to:

- Refine the Search Criteria
- Utilize the Search Toolbar

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

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Search for talents using ratings and competencies

## Lesson 1: Defining Pool-Based Nominations

### Lesson Objectives

After completing this lesson, you will be able to:

- Understand pool-based nominations
- Enable Talent Pools

## Lesson 2: Permissioning Talent Pools

### Lesson Objectives

After completing this lesson, you will be able to:

- Configure object permissions for MDF Talent Pools
- Enable Talent Pool role-based permissions
- Configure RBP Target Populations for Talent Pools

## Lesson 3: Managing Talent Pools

### Lesson Objectives

After completing this lesson, you will be able to:

- Create and delete Talent Pools
- Manage nominations with Talent Pools
- View the nomination history
- Filter Talent Pool data
- Approve Talent Pool nominations

## Lesson 4: Associating Talent Pools with Roles

### Lesson Objectives

After completing this lesson, you will be able to:

- Associate Talent Pools with Roles using JPB
- Associate Talent Pools with Roles using JDM



## Lesson 1: Navigating the Succession Org Chart

### Lesson Objectives

After completing this lesson, you will be able to:

- Navigate the Succession Org Chart
- Explore the Succession Talent Card

## Lesson 2: Configuring the Succession Org Chart

### Lesson Objectives

After completing this lesson, you will be able to:

- Permission the Succession Org Chart
- Configure the Nominations Setup options
- Rank and sort Successors
- Configure Succession Org Chart settings

## Lesson 3: Using the Succession Org Chart

### Lesson Objectives

After completing this lesson, you will be able to:

- Understand the SOC layout
- Add successor nominees
- Configure recommended successors
- Manage external successors

## Lesson 4: Configuring the Succession Org Chart XML

### Lesson Objectives

After completing this lesson, you will be able to:

- Define the Readiness Rating Scale
- Change colors assigned to Readiness Level and Bench Strength

- Configure Talent Icons for the SOC

## **Lesson 5: Configuring Position Criticality**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Define Position Criticality
- Set up the Position Criticality feature
- Configure the SOC display options

## **Lesson 6: Configuring Bench Strength**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Define Bench Strength
- Configure Bench Strength

## **Lesson 7: Integrating the SOC with other SAP SuccessFactors Modules**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Describe the integration between the SOC and Career Development Planning
- Describe the integration between the SOC and Recruiting
- Describe the integration between the SOC and Learning Management Systems
- Describe the integration between the SOC and Performance Forms

## Lesson 1: Using the Position Tile View

### Lesson Objectives

After completing this lesson, you will be able to:

- Recognize the benefits of the Position Tile View
- Activate the Position Tile View
- Configure filters for the Position Tile View

## Lesson 2: Utilizing the Lineage Chart

### Lesson Objectives

After completing this lesson, you will be able to:

- Recognize the benefits of the Lineage Chart
- Access the Lineage Chart
- Define the Lineage Chart components
- Configure the Lineage Chart Icons



## Lesson 1: Describing 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: Provisioning and Permissioning the Matrix Grid Reports

### Lesson Objectives

After completing this lesson, you will be able to:

- Enable the Matrix Grid Reports
- Set 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
- Identify various sources of ratings
- Normalize rates and apply custom weights

## Lesson 5: Using the Matrix Grid Reports

### Lesson Objectives

After completing this lesson, you will be able to:

- Use the Matrix Grid Report filters

- Explore the Matrix Grid Reports functionality

## **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: Maintaining the Matrix Grid XML**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Modify the Matrix Classifier XML
- Configure fields to be included as matrix filters
- Identify supported and unsupported fields for matrix filters

## **Lesson 9: Using the Matrix Grid Placement History Portlets**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Explain the Matrix Grid Placement History Portlets
- Configure the Matrix Grid Placement History Portlets

## Lesson 1: Configuring Talent Cards

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe Talent Cards
- Set permissions for a Talent Card
- Design the content of a Talent Card

## Lesson 2: Creating Presentations

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe Presentations
- Enable Presentation
- Set Presentation permissions
- Assemble a Presentation
- Create dynamic live slides
- Add custom slides
- Manage Presentations including copying, sharing, and printing



## Lesson 1: Importing Successors

### Lesson Objectives

After completing this lesson, you will be able to:

- Recognize the components of the Successor Import Template
- Identify the actions available with the succession import
- Analyze the successor import email notification

## Lesson 2: Using 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 by date

## Lesson 3: 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: Describing Succession Management Permissions

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe Succession Management Permissions

## Lesson 2: Accessing Supplemental Resources

### Lesson Objectives

After completing this lesson, you will be able to:

- Locate and access links to implementation and product documentation resources that will help during implementation