CHAPTER 6

Core Succession Management

In the last chapter, we focused on the 9-box and Talent Review Form. These functionalities provided us basic information about who in the organization we might want to consider for succession planning. Now we focus on the core functionality of Succession Management: nominating employees to positions. We will start with the basic configuration of talent cards which are found throughout the module. We will then jump into configuring nominations which is important as it will be used throughout the module. After that, we can put the nomination setup to use with nominating employees as covered in the "Succession Org Chart" section.

Talent Cards

Talent cards are configurable popups that provide additional talent details on employees. They are configurable so that information most relevant to your organization is displayed. There are multiple places where talent cards appear: the Succession Org Chart, the Lineage Chart, the Position Tile View, MDF Talent Pools, the matrix grid report, Calibration, and Presentations. This section will teach you how to configure the talent cards and view them as an end user.

Prerequisites for Configuring Talent Cards

In order to configure talent cards, you will first need permission:

1. Type and select "Manage Permission Roles" in the search bar.
2. When the screen loads, click the role you wish to modify. Then click "Permission…:"

S. Traynor et al., *SAP SuccessFactors Talent: Volume 2*, https://doi.org/10.1007/978-1-4842-6995-4_6

3. The “Manage Talent Card Configuration” permission can be found under the Manage Talent Card section of the permission settings as seen in Figure 6-1. Click “Done.”

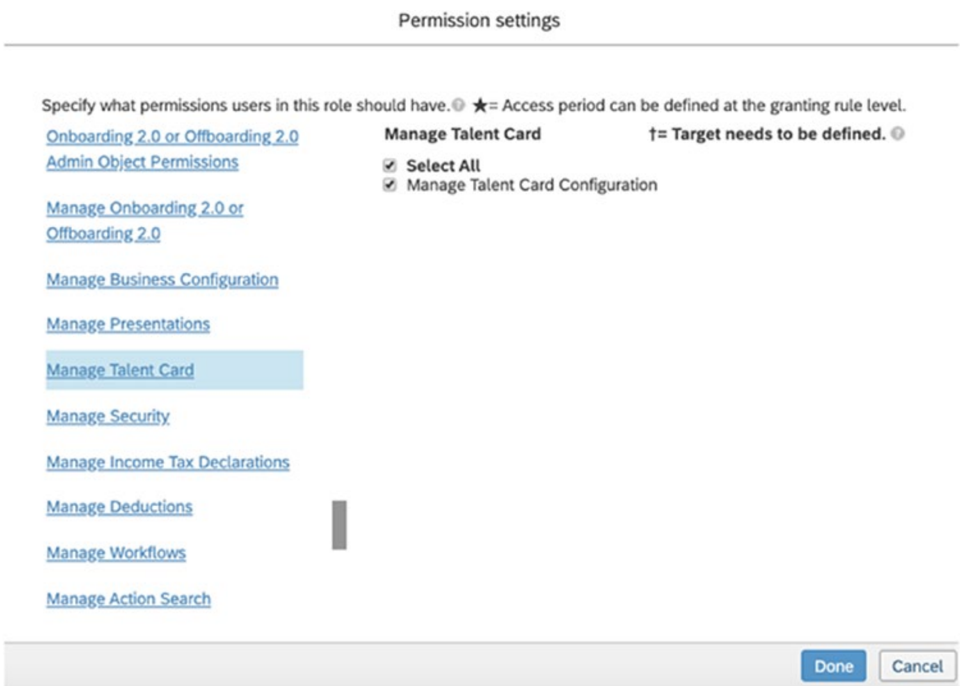

Figure 6-1. Manage Talent Card Configuration Permission

Configuring Talent Cards

To configure the talent cards, follow these configuration steps:

1. Access the Manage Talent Cards configuration screen by typing and selecting “Manage Talent Cards” in the search bar. You will see the screen as shown in Figure 6-2.

Admin Center > Manage Talent Cards

Talent Card	Description	Date Modified
Succession Talent Card	Customize the talent card for position tile view.	04/13/2017
Calibration Talent Card	Customize the talent card in calibration new 9-Box.	09/03/2015
Presentations Talent Card	Customize the talent card for people in org-chart and 9 box matrix.	09/03/2015

Figure 6-2. Manage Talent Cards Configuration Screen

Note You will see that there are in fact three talent cards that can be configured. The configuration options on each of these screens are the same, so we will only cover the Succession Talent Card configuration. The Succession Talent Card configuration will appear for talent cards in the Succession Org Chart, the Lineage Chart, the Position Tile View, MDF Talent Pools, and the matrix grid report. Calibration Talent Card will show in calibration sessions only. Presentations Talent Card will show within presentations only. We recommend configuring all three types consistent with one another unless differences are specifically requested by senior leadership for a presentation or calibration sessions.

2. Click Succession Talent Card to begin configuration of the card. The screen in Figure 6-3 will appear.

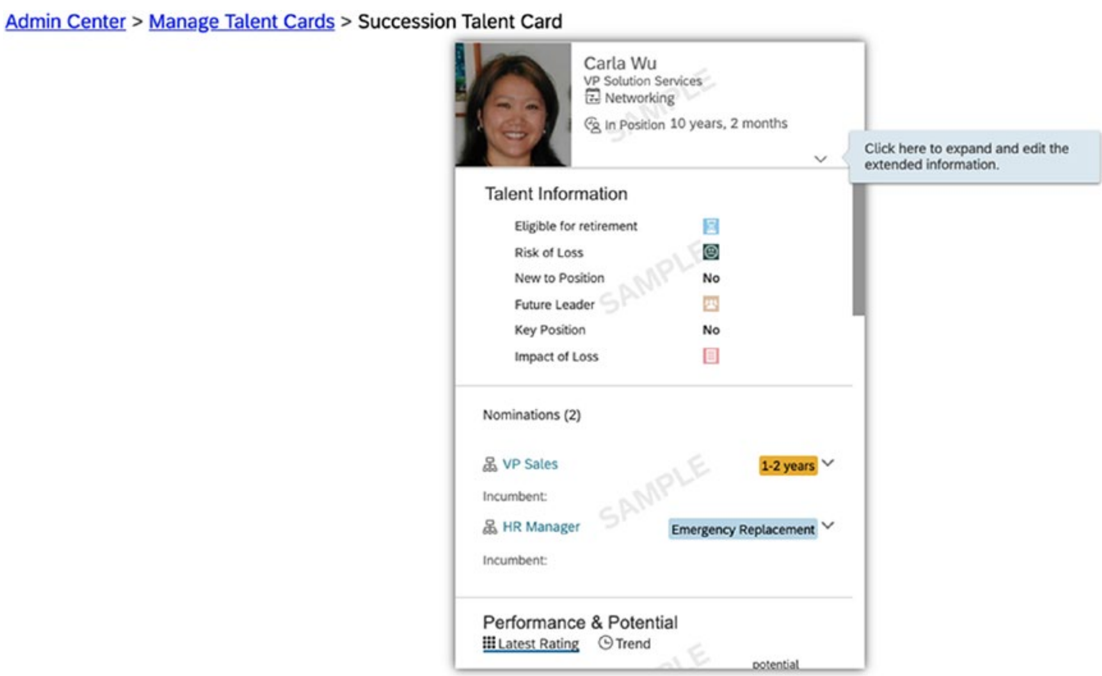

Figure 6-3. *Succession Talent Card Configuration Screen*

3. Click the down arrow to expand and edit the extended information area. Then click "Edit." The area will appear as shown in Figure 6-4.

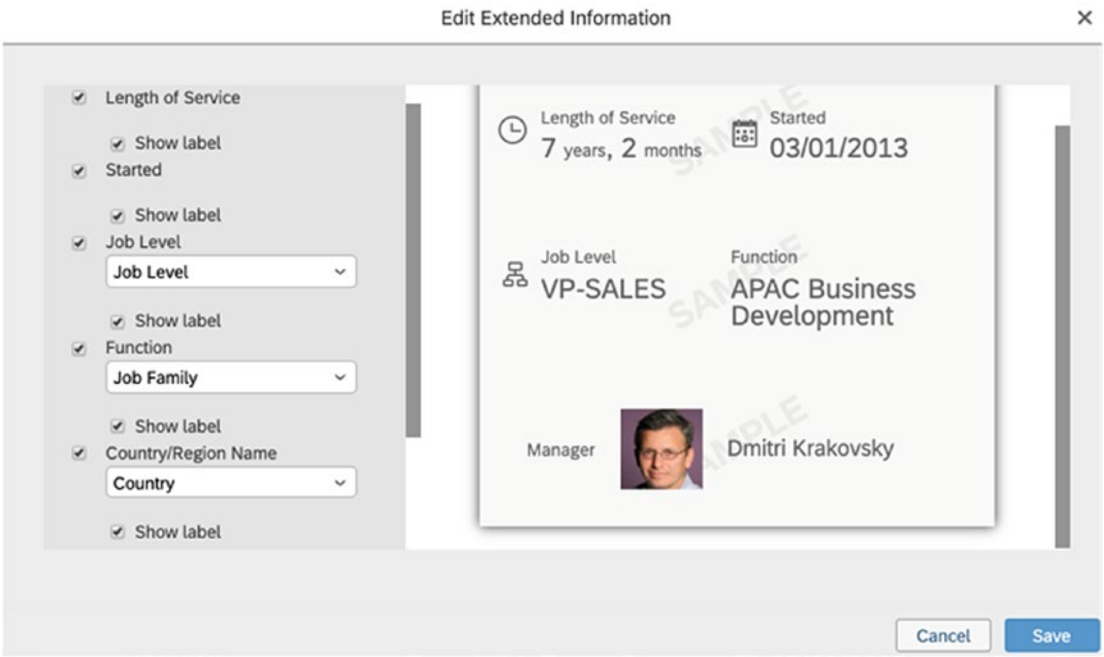

Figure 6-4. *The Edit Extended Information Screen*

4. Check the box next to each area of the section you would like to show and whether or not you would like to show the label of that area. For Job Level, Function, and Country/Region Name, choose the talent field from the data model whose values you would like to associate with the area. When you are finished, click "Save."

5. Click "Edit" on the Talent Information section (or "Add a New Section" and select Talent Information if the section is not already showing on the talent card). The popup will load as shown in Figure 6-5. Click the checkboxes next to the fields you would like to show and choose the talent field from the data model whose values you would like to associate with that field.

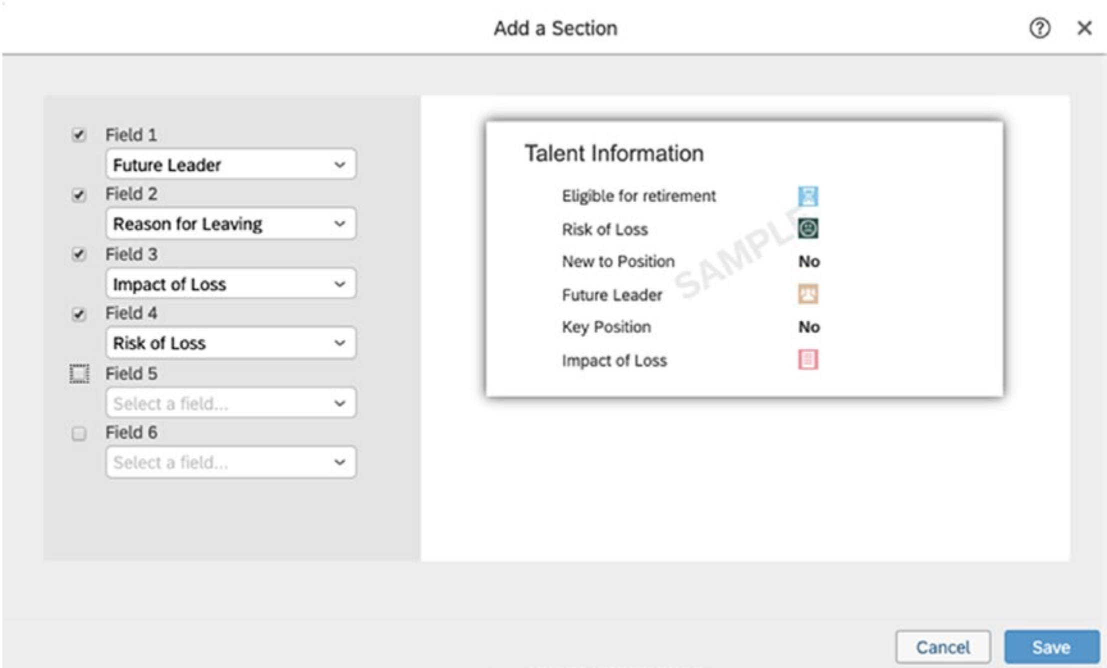

Figure 6-5. *The Talent Information Section Screen*

6. Click "Edit" on the Performance & Potential section (or "Add a New Section" and select "Performance & Potential" if the section is not already showing on the talent card). The popup will load as shown in Figure 6-6. Choose whether you would like to use the employee profile ratings or the matrix grid configuration. Repeat this step for the Competency & Objective section as shown in Figure 6-7.

Note We recommend using the matrix grid admin configuration for consistency if you give managers access to the matrix grid report and have performed these configurations. The Employee Talent Profile should only be used in simple implementations where this is the only available data source. Since it is not recommended, we do not cover it in detail – for more information on the legacy Overview Scorecard Portlet mini 9-box in the Employee Talent Profile, see SAP note 2091458.

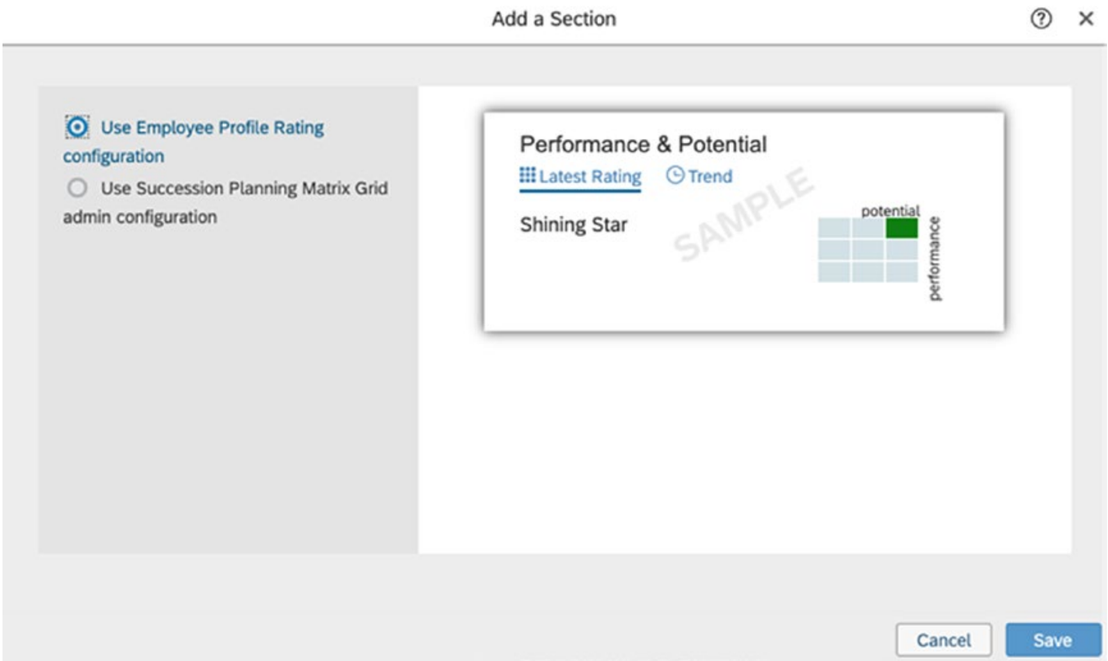

Figure 6-6. The Performance & Potential Section Screen

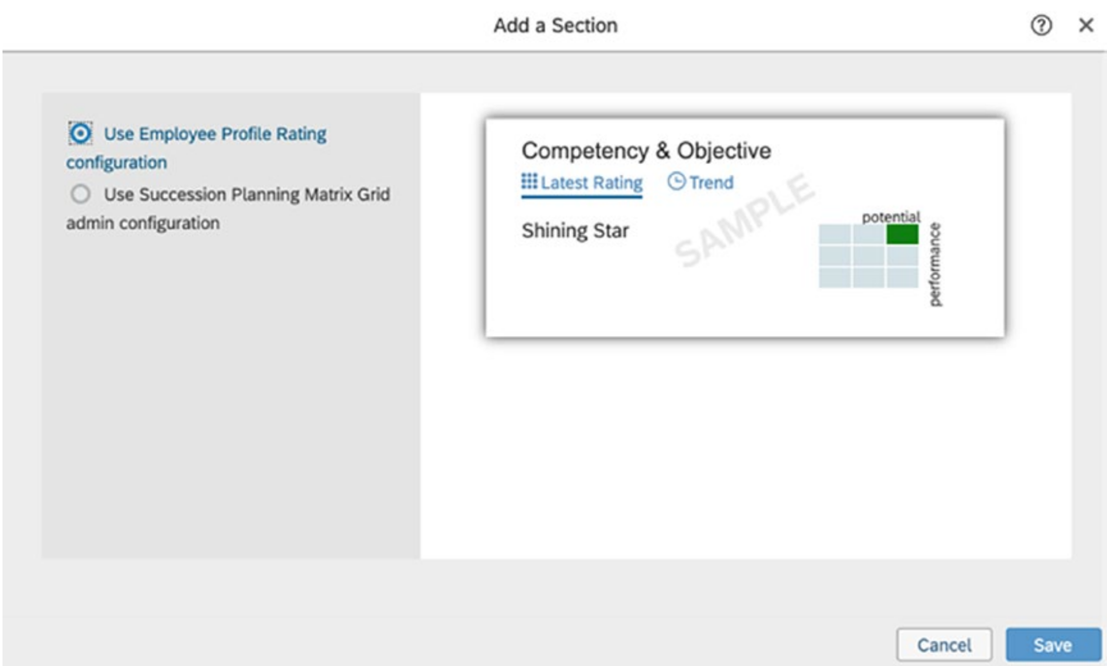

Figure 6-7. The Competency & Objective Section Screen

7. Add/edit any background elements from the data model you would like to include by clicking Edit for the section or clicking "Add a Section," then choosing "Custom Section," and selecting the specific background element as shown Figure 6-8. Choose the fields you would like to display. You are limited to two headers and two subtitles regardless of the structure of the background element defined in the data model.

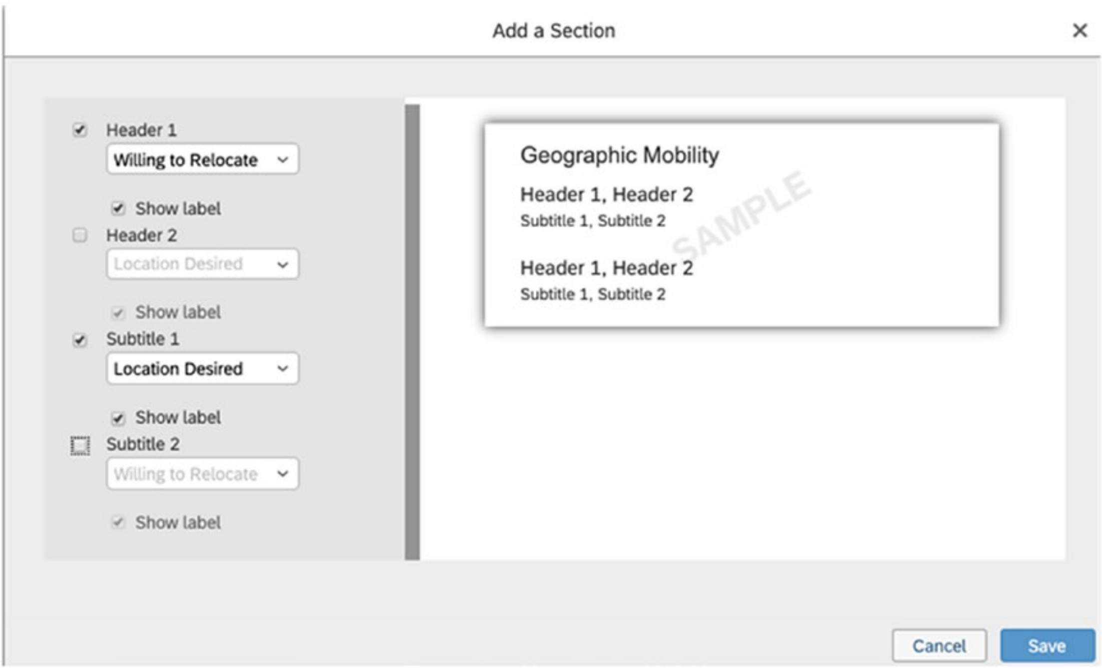

Figure 6-8. *The Add/Edit a Custom Section/Background Element Screen*

8. Add a badges section if desired by clicking "Add a Section" and choosing badges and then clicking "Add." There are no configuration options for badges other than adding them. The section will display any badges awarded to the employee.

Note Badges can be a fun, free way to allow managers and other employees to reward one another for great work or positive attitudes. However, due to the open nature of the functionality, we find most companies to not use them.

9. Click “Move Up” or “Move Down” on any section to change the order as needed.
10. Click “Delete” to remove any section as needed.
11. Repeat the preceding steps for the Calibration and Presentations talent cards.

Viewing Talent Cards as an End User

Once talent cards have been configured, you can view the talent card by clicking the employee name or photo in any of these areas of the system: the Succession Org Chart, the Lineage Chart, the Position Tile View, MDF Talent Pools, the matrix grid report, Calibration, and Presentations. You can scroll through the talent card to view all sections that have been configured. If you have succession nomination and/or Talent Pool nomination permissions assigned (see the “Set Up End User Permissions” section in this chapter), then you can add and edit nominations directly on the talent card. All other fields are read-only. See Figure 6-9 for a finished example.

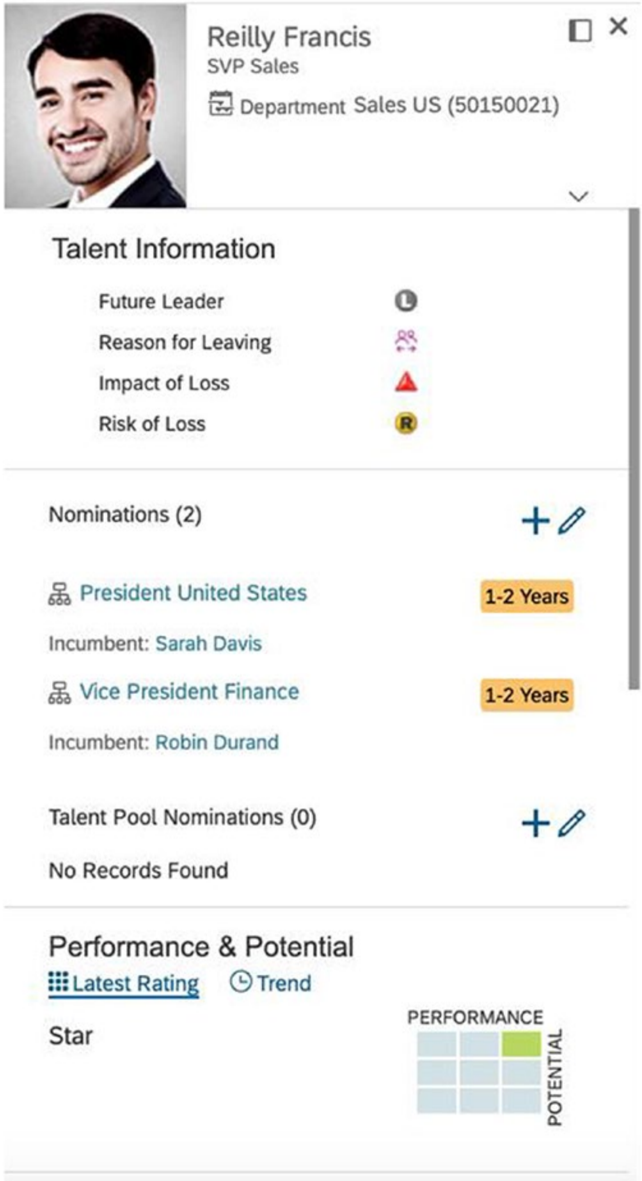

Figure 6-9. *Example Talent Card*

Now that you understand how to configure and view the talent card, we can continue the example of our model company. Once the SVP of Sales and President have identified potential star candidates to succeed the SVP of Sales using the matrix grid reports, they can click the employee's name or picture to open the talent card. Using the talent card, they can view more information on the candidate and nominate the candidate immediately.

Nomination Configuration

The main concept behind succession planning is to nominate specific individuals for specific positions and develop them into successors. This concept is central to the Succession Org Chart which we will cover in the next section. It is also important for Talent Pools. Thus, we now focus on setting up how nominations will work in the system across the features of succession planning.

Understanding Nomination Methods

One of the most important decisions in succession planning configuration is choosing your nomination method. SuccessFactors allows you to choose between position-based and role-person–based nomination methods. We recommend MDF position–based nomination be used for organizations that have position data and practice position management. In brief, position management is the practice of separating individual employee data from their job-related information such as required skills, classifications, and so on down to the individual role level. The two are treated as separate data objects. A common way to think of position management is to treat the position as the “seat” and the employee as the one occupying the seat. The seat can be filled or vacant depending on if someone is in the seat. SAP SuccessFactors Employee Central as well as legacy on-premise SAP is typically implemented using position management.

Note Within the position-based nomination method, there is a legacy position nomination method as well as an MDF position–based method. Since there is not much sense in choosing the legacy position-based method as it does not take advantage of the power of the MDF, it is not covered. We also recommend the MDF position–based nomination method over the role-based method wherever possible. The role-person–based nomination method should really only be chosen when your organization has no position data available at all. Even then, however, SAP offers a special MDF Position Sync feature that attempts to create position hierarchy based on the employee hierarchy. We will not cover this feature in detail as it is rarely used and the requisite lengthy explanation will distract you, the reader, from the more common scenarios.

The role-person–based nomination method (also known as incumbent-based) accommodates organizations that are transitioning to SuccessFactors and have not yet achieved the level of position data needed for position-based nomination. In this method, you are essentially nominating people to replace a specific employee, rather than the position that person occupies. The nominations are really set up against a person–job code relationship, and if the job code is changed, the nomination data is dropped.

Choose a Nomination Method and Activate Reporting

Now that we have a basic understanding of what the different nomination methods mean, let's go ahead and set one up in the system so we can get started!

1. Log into Provisioning for your organization and click "Company Settings."
2. Scroll down to "Succession nomination method" and choose your method as shown in Figure 6-10.
3. Check the box next to "Use formless nomination approval workflow" as seen in Figure 6-10 (note only the role-person nomination method can use the form-based nomination approval workflow). Also check the box next to "Ultra Organization Chart" (not pictured)
4. Click "Save."

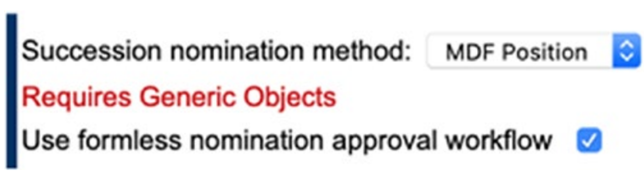

Figure 6-10. *Succession Nomination Method Selection in Provisioning*

Note You should also have the MDF activated as well as role-based permissions prior to choosing MDF positions. You may also want to turn on reporting at this point as well since it is specific to the nomination method. Select the "Succession (MDF Position based nominations)," "Succession History (MDF Position based nominations)," and "Inclusive Succession (MDF Position based nominations)" checkboxes. We do not cover reporting in detail in this chapter since the ad hoc reporting and dashboard concepts are consistent with other modules. We simply need to turn on the access to the data.

Readiness Rating Scale

The readiness rating scale must be configured so that when nominating someone, the user can choose how ready the nominee is for the position. This is done similar to Performance Management. Follow these steps:

1. Type and select "Rating Scales" in the search bar.
2. Click the "Create New Rating Scale" button. The screen will appear as in Figure 6-11.
3. In the Name field, type exactly "Readiness" (the name must always be Readiness for all implementations).
4. Choose the number of levels in your scale. Then enter a score, label, and description for each level of the scale and click "Save."

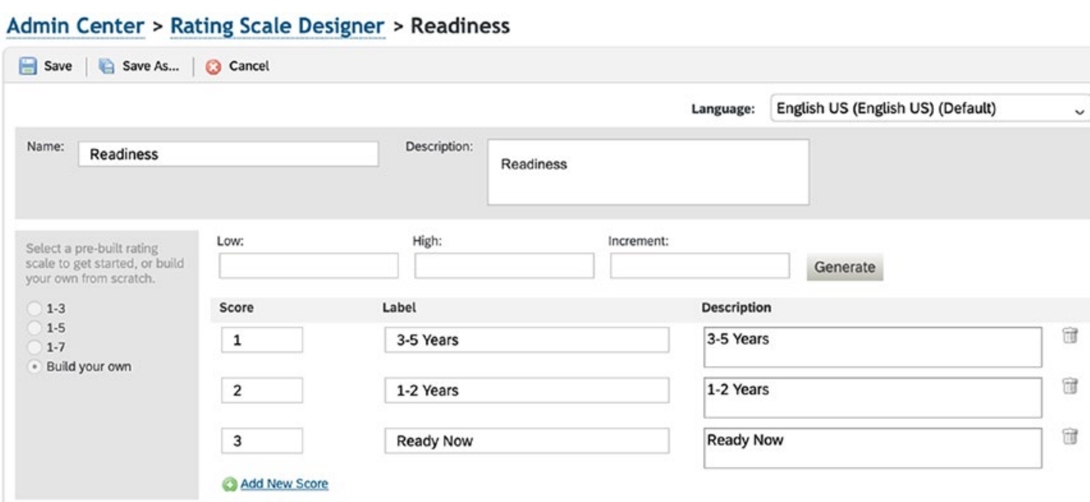

Figure 6-11. Readiness Rating Scale Configuration

Note We recommend the lowest score be the least ready and highest be most ready. You will also need to define this in your Succession Org Chart XML, and the two must match EXACTLY. We will cover the org chart XML in the "Succession Org Chart" section.

Nomination Setup Screen

Prior to using this screen, be sure to follow these steps to configure the nomination setup screen:

1. Type and select "Nomination Setup" in the search bar.
2. Select configuration options per Table 6-1.
3. Click "Save."

Table 6-1. *Nomination Setup Screen Options*

Option	Description
Hide Succession nomination history entries prior to this date (leave blank to show all entries)	We recommend leaving this blank so that all history shows. If you have cutoff periods in your review cycle where data has become stale or have transitioned to a new process, this tool can come in handy to hide old data that is no longer relevant.
Enable ranking of successors	By checking this box, whenever a successor is nominated, the system will allow the user to also enter a ranking number which will serve as a secondary sort for the successors on a position.
Allow ranking across readiness	Checking this box will allow users to sort by ranking first rather than readiness first. This box only appears if the preceding box is checked.

(*continued*)

Table 6-1. (*continued*)

Option	Description
Allow reports to launch future role competency assessments, if they have the appropriate form creation privileges.	If your organization uses competency assessments, you can click this box to allow. Users will see an "Evaluate Readiness" option when choosing a readiness level. If this box is checked, you will need to pick a form template identifying the readiness template for each configured locale.
Filter Current Nominations portlet data by Succession Planning permissions	By default, if you have permission to view a person, you will see all nominations to the position. If this checkbox is checked, the user will only have permission to view nominations for positions to which the user also has succession planning permissions.
Show the # of hidden nominations in Current Nominations portlet	If the preceding checkbox is checked, this checkbox will appear. When checked, it will give users a warning popup telling how many positions were hidden due to security restrictions.
Hide pending nominations on the scorecard portlets from all users	If you have chosen to segregate nominations and approvals, this checkbox would hide the nominations that have not yet been approved when users view the employee scorecard on Talent Profile.
Allow succession planners with recruiting candidate search permissions to nominate external candidates	If you have implemented recruiting and users have permission to perform recruiting candidate searches, checking this box would allow them to perform an external candidate search based on the recruiting external candidate database for nomination.
Automatically remove nominated successor if that user becomes incumbent	If you are using MDF positions, you can check this option to have the nomination hidden when the successor occupies the position. The nomination will still be present but recorded as a "succeed" that is only not shown on the Succession Org Chart so that any history reporting is not removed. When you check the checkbox, the system will not retroactively hide nominees.

(*continued*)

Table 6-1. (*continued*)

Option	Description
Apply target population to Talent Pool Nominations Permissions	If you check this box, you will need to define target permissions for Talent Pool nomination permissions. We go into more details on this setting in the Talent Pools section later in this chapter.
In "Add Nomination" dialog, show separate fields for "Position" search and "Incumbent" search (recommended for better performance with extremely large number of users and positions)	If you check this box, users searching for nominees will get a popup box with a radio that lets them choose between positions or nominees. This is recommended for companies with large numbers of positions who are experiencing slowness in nomination searches without this feature. Note that this can only be used for the MDF position nomination method.

Now that our nominations are set up, we'll be able to look in detail at the features that use nominations, starting with the Succession Org Chart which is the most common way nominations are created.

Succession Org Chart

Now that we've set up the ability to perform nominations, let's dig into how to nominate some of those talented people into specific positions. The Succession Org Chart allows users to view talent and nomination information in the form of a position-based organizational chart. We like to think of the Succession Org Chart as the pinnacle of SuccessFactors Talent. It gives a sort of bird's-eye view of your organization and where each position and person are in terms of succession planning at whatever levels you choose. It is the feature that raises the most eyebrows from executives in sales demonstrations – and for good reason. The visualizations it renders are the culmination of a lot of data and a lot of hard work keeping that data up to date! However, we like to think SAP SuccessFactors makes that work a bit easier and fun. Let's take a more detailed look!

Prerequisites for Configuring and Using the Succession Org Chart

Before we can configure or use the org chart, we need to make sure we have some key system settings in place as well as permissions. Let's take a look at them in the following.

Activate Org Chart

Now that we have a basic understanding of what the different nomination methods mean, let's go ahead and set one up in the system so we can get started!

1. Log into Provisioning for your organization and click "Company Settings."
2. Scroll down to "Succession nomination method" and choose your method.
3. Check the box next to "Ultra Organization Chart."
4. Click "Save."

Note The "Ultra Organization Chart" applies to all org charts in the system, not just Succession. You can choose to turn off the Succession Org Chart feature by checking the box next to "Turn off Succession Organization Chart."

Set Up MDF Position Object and Grant Configuration Permissions

If you are using the MDF position–based nomination method, it is a good idea to set up your position data. The permissions and process for setting up the MDF position in the system are covered in the next chapter in the "Position Tile View" section. We intentionally split the configuration between these two sections to show how the same data can be viewed in different ways and the same config affects the two areas of the system similarly.

Load MDF Position Data

Now that our prerequisites are complete and the MDF object has been defined, we can begin loading any legacy position data you may have. Follow these steps to import this data:

1. Type and select "Import and Export Data" in the search bar.
2. In the "Select action to perform" field, select "Download Template."
3. In the "Select Generic Object" field, choose "Position."
4. Reference Table 6-2 for the other field choices.

Table 6-2. *MDF Import Template Option Descriptions*

Option	Description
Include Dependencies	Choosing "Yes" will download a zip file with .csv templates for the parent object and any child objects per the MDF object definition. The zip file would then have to be uploaded via zip file option on the import screen as well. Choosing "No" will download just one .csv file for the position object.
Include Immutable IDs	Will download the entity id and record id if "Yes" is chosen.
Exclude Reference Objects	Includes or excludes reference object .csv templates in the .zip file if "No" or "Yes" is chosen, respectively.
Key Preference	Selecting "Business Key" will use the set of fields the MDF uses to create a unique identifier. "External Code" can be a manually set key based off of this one entered field.
Hide External Code	Will hide this field from the downloaded .csv file. Note this cannot be selected if your key preference is set to "External Code."
Identity type	Defines whether "User ID" or "Assignment ID" is used to reference employee identity. The assignment ID is a newer concept introduced for Employee Central to simplify global assignments. If you have not implemented Employee Central, then use user ID.

5. Click “Download.”
6. Open the file in an editor and add your legacy data.
7. In the “Select action to perform” field, select “Import Data.”
8. In “Select Generic Object,” choose “Position.”
9. Click “Choose File” and find the file on your local computer.
10. Reference Table 6-3 for all other field options.

Table 6-3. *MDF Import Option Descriptions*

Option	Description
File Encoding	Refers to the character encoding on the file. Note when you save your local .csv file using your editor, but sure to select this here as well. We recommend UTF-8 as it handles international languages the best.
Purge Type	“Incremental Load” will only add new objects or replace old. “Full Purge” will delete any existing objects that do not exist in the upload.
Suppress Redundant Date-Effective Records	Choose “Yes” or “No”; we recommend “Yes” so there is no redundant data in the system.
Key Preference	See the previous table and choose the same option as in the template export.
Use Locale Format	Defines formatting for dates and so on based on locale. If you choose “No,” the sample date format of MM/DD/YYYY is shown at the bottom of the screen. If you choose “Yes,” you will be prompted to choose the locale preference.
Enable Decimal Round Option	If you had a field for which you defined decimal rounding in the MDF, this option would enable the rounding.
Identity Type	See the previous table and enter the same value selected for the template.

11. Click “Import.”

The system will create a job to import the data. You can check the progress of the job and check the error logs by typing and selecting “Monitor Jobs” in the search bar.

Configure the Succession Org Chart

Now that we have our basic system settings and permissions set up and our position data defined and loaded, it is time to define how our Succession data is structured and visualized. This is accomplished with the Succession Org Chart XML.

Understanding Fields Within the Succession Org Chart XML and Ensuring Picklists Are Configured

Before you can understand how to edit the Succession Org Chart XML, there are some key concepts to cover. One of the more confusing concepts in Succession Management is understanding the mapping between Succession Data Model XML keys and the Succession Data Model. While usually these technical field names match in the XML, it is not always the case. For example, addressLine1 in the data model equates to the addr1 key in the Succession Org Chart XML, and lastReviewDate maps to last_review_date. These subtle differences can become very frustrating when creating your XML if you are not familiar with them. In addition, you can only visually display items that are not text in the latest version of Succession Org Chart (v12). To clarify these nuances, please reference Table 6-4.

Table 6-4. *Data Model to Succession Org Chart Field Mapping and Field Types*

Succession Data Model Field	Succession Org Chart Key	Field Type
addressLine1	addr1	text
addressLine2	addr2	text
benchStrength	benchStrength	picklist
businessPhone	biz_phone	text
businessSegment	businessSegment	picklist
Citizenship	citizenship	picklist
City	city	text
competency	competency	Follows matrix grid config using competency scale configured there

(*continued*)

Table 6-4. (*continued*)

Succession Data Model Field	Succession Org Chart Key	Field Type
Country	country	text
custom01–custom15	custom01–custom15	text
sysOverallCustom1	customrating1	Follows matrix grid config using custom1 scale configured there
sysOverallCustom2	customrating2	Follows matrix grid config using custom2 scale configured there
dateOfBirth	dateOfBirth	text (date format)
dateOfPosition	dateOfPosition	text (date format)
Department	department	Automatic list from system departments loaded in user data file
Division	division	Automatic list from system divisions loaded in user data file
Email	email	text
empId	empId	text
Ethnicity	ethnicity	picklist
Fax	fax	text
firstName	firstName	text
Function	function	picklist
futureLeader	futureLeader	Boolean (true/false)
Gender	gender	Hardcoded enumeration as M, F
hireDate	hireDate	text (date format)
impactOfLoss	impactOfLoss	picklist
jobCode	jobCode	text
keyPosition	keyPosition	Boolean (true/false)

(*continued*)

Table 6-4. (*continued*)

Succession Data Model Field	Succession Org Chart Key	Field Type
lastName	lastName	text
lastReviewDate	lastReviewDate	text (date format)
Level	level	picklist
location	location	Automatic list from system locations loaded in user data file
managerId	managerId	text
Married	married	Boolean (true/false)
matrix1label	matrix1label	text (from matrix grid configuration)
matrix2label	matrix2label	text (from matrix grid configuration)
matrixManaged	matrixManaged	Boolean (true/false)
Mi	mi	text
Minority	minority	Boolean (true/false)
Nationality	nationality	picklist
newToPosition	newToPosition	Boolean (true/false)
objective	objective	Follows matrix grid config using objective scale configured there
performance	performance	Follows matrix grid config using performance scale configured there
potential	potential	Follows matrix grid config using potential scale configured there
reasonForLeaving	reasonForLeaving	picklist
reviewFreq	review_freq	text
riskOfLoss	riskOfLoss	picklist
serviceDate	serviceDate	text
Ssn	ssn	text

(*continued*)

Table 6-4. (*continued*)

Succession Data Model Field	Succession Org Chart Key	Field Type
State	state	text
talentPool	talentPool	picklist
Title	title	text
userId	userId	text
Username	username	text
zipCode	zip	text

We recommend configuring picklists for each Succession Data Model field you choose to include in your org chart configuration labeled as such in the preceding table. This will ensure you can make icon associations for them in your XML configuration. You will need to type and select "Picklist Center" in the search bar to maintain these picklists prior to XML configuration. You have likely already done this as part of the Succession Data Model configuration outlined in Volume 1, Chapter 2. Picklists are important because you can associate picklists with color gradients and/or icons in your Succession Org Chart configuration.

Editing the Succession Org Chart XML in Provisioning

Now that our picklists are set up, we can begin XML configuration! Follow these steps to access and edit the XML in Provisioning:

1. Log in to Provisioning and select your company.
2. Click "Edit Org Chart Configuration" under "Succession Management."
3. Make your edits to the XML (we recommend cutting and pasting an offline editor) to display the icons and gradients you would like to make available on your org chart.
4. Click "Save."

Figure 6-12 shows a sample XML file with each element collapsed to show the highest-level structure of the file. You can see each high-level element is either a gradientOption, iconSetOption, textOption, or keyPositionOption. Since we are using the latest Succession Org Chart (v12), the textOptions will be ignored (only in prior versions were these used). The only allowed gradientOptions are "readiness" and "benchStrength." All other non-text fields from the prior table can be configured as iconSetOptions. The keyPositionOption must be last in the order of the XML.

Note We recommend at a minimum configuring the XML to include the gradientOption for readiness and benchStrength as well as the keyPosition. The rest of the configuration is a matter of identifying which picklist and Boolean fields from the preceding table you wish to surface as icons and which icon goes with each field value.

```xml
<?xml version="1.0" encoding="UTF-8"?>
<OrgChartConfig>
  <view>regular</view>
  <maxwidth>1000</maxwidth>
  <gradientOption index="1" key="readiness"> ... </gradientOption>
  <gradientOption index="2" key="benchStrength"> ... </gradientOption>
  <iconSetOption index="3" key="riskOfLoss"> ... </iconSetOption>
  <iconSetOption index="4" key="impactOfLoss"> ... </iconSetOption>
  <iconSetOption index="5" key="reasonForLeaving"> ... </iconSetOption>
  <iconSetOption index="6" key="futureLeader"> ... </iconSetOption>
  <!-- ... -->
  <iconSetOption index="9" key="minority"> ... </iconSetOption>
  <iconSetOption index="10" key="newToPosition"> ... </iconSetOption>
  <textOption index="1" key="performance"> ... </textOption>
  <textOption index="2" key="potential"> ... </textOption>
  <textOption index="3" key="matrix1label"> ... </textOption>
  <textOption index="4" key="jobCode"> ... </textOption>
  <textOption index="5" key="hireDate"> ... </textOption>
  <textOption index="6" key="division"> ... </textOption>
  <textOption index="7" key="department"> ... </textOption>
  <textOption index="4" key="dateOfPosition"> ... </textOption>
  <!-- ... -->
  <keyPositionOption indicator="boolean" key=""> ... </keyPositionOption>
  <SMFormId>4</SMFormId>
</OrgChartConfig>
```

Figure 6-12. Collapsed View of the Succession Org Chart XML

Figure 6-13 shows the end result of having each of these gradientOption and iconSetOption elements configured as well as the keyPositionOption. You can see that each icon is accounted for as an icon in the display options and that each gradient is an associated color. For example, the "SVP Sales" position is shown with a green mark to the left because it has an overall bench strength of "Ready Now" because there is a nominee with a readiness level of "Ready Now" for that position (also shown in green).

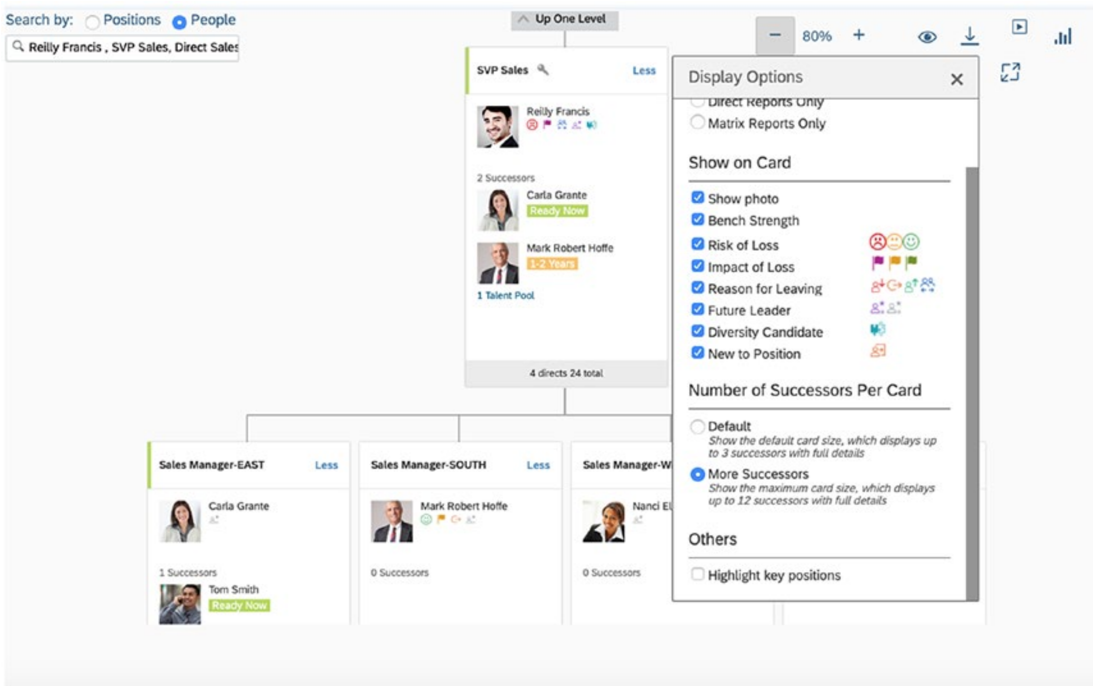

__Figure 6-13.__ Resulting Visualization from the Succession Org Chart XML

The next subsections illustrate examples of how to configure each type of highest-level XML elements shown in the preceding example. Follow Table 6-5 for guidance on how each element in the XML should be treated.

Table 6-5. *Succession Org Chart XML Element/Attribute Descriptions*

Element/ Attribute	Description
index=	Unique incremental number. Use "1" for readiness and "2" for benchStrength. For the remaining icons, use an incremental number in the order in which you would like to see the icons appear.
key=	Fill in the Succession Org Chart field key from the mapping table provided in this chapter.
Type	Always "readiness" for readiness and "titleGradient" for benchStrength. Always "iconset" any iconOption.
Label	The default text label the user will see. See the example gradientOption in the next subsection for how to provide localized labels.
Value	Enter the picklist value. Make sure the corresponding value field has also been filled out in the Picklist Center screen. For readiness levels, the highest value is the most ready. Use "M" or "F" for gender or "true" or "false" for the Boolean fields.
Index	Used only for gradientOption. Single digit number that corresponds to a color table that SAP maintains here: `https://help.sap.com/viewer/55e0a1102eda4d83a5638a3526003bd0/2005/en-US/6dadf9f3ebc34b51a65102c6dba07081.html`.
image	Used only for iconOption. Identifies the icon image that will appear for each value of the field. SAP maintains a table of image values and corresponding images here: `https://help.sap.com/viewer/55e0a1102eda4d83a5638a3526003bd0/2005/en-US/523be343cf874f10a633c5089ac65117.html`.

Example gradientOption Element XML Configuration for readiness

```
<gradientOption index="1" key="readiness">
  <type>readiness</type>
  <label>Readiness</label>
  <gradientset>
    <gradient>
      <label>3-5 Years</label>
      <label lang="en_US">3-5 Years</label>
      <value>1.0</value>
```

```
      <index>3</index>
    </gradient>
    <gradient>
      <label>1-2 Years</label>
      <value>2.0</value>
      <index>2</index>
    </gradient>
    <gradient>
      <label>Ready Now</label>
      <value>3.0</value>
      <index>1</index>
    </gradient>
  </gradientset>
</gradientOption>
```

Note In the preceding example, we include only one localized label for "3–5 Years" for the en_US locale for the sake of brevity. Repeat this pattern for each label and locale you wish to localize. This applies to gradientOption, iconOption, and keyPositionOption.

Example iconOption Element XML Configuration for riskOfLoss

```
<iconSetOption index="3" key="riskOfLoss">
  <type>iconset</type>
  <label>Risk of Loss</label>
  <iconset>
    <icon>
      <image>sap_ui5_icon_RiskOfLoss01_high</image>
      <label>High</label>
      <value>3.0</value>
    </icon>
    <icon>
      <image>sap_ui5_icon_RiskOfLoss01_medium</image>
      <label>Medium</label>
```

```
        <value>2.0</value>
      </icon>
      <icon>
        <image>sap_ui5_icon_RiskOfLoss01_low</image>
        <label>Low</label>
        <value>1.0</value>
      </icon>
    </iconset>
  </iconSetOption>
```

Example keyPosition Element XML Configuration

```
  <keyPositionOption indicator="boolean" key="">
    <label>Highlight key positions</label>
    <keypositionset/>
  </keyPositionOption>
```

Other Optional settings

If you would like to show custom managers in the Succession Org Chart, replace the second line of the XML with the following:

```
<OrgChartConfig configurableDisplay="true">
```

Org Chart Configuration Screen

We wrap up our org chart configuration with the Org Chart Configuration screen. To access the screen, follow these steps:

1. Type and select “Org Chart Configuration” in the search bar.
2. Click the “Succession org chart” tab. The screen will load as shown in Figure 6-14.

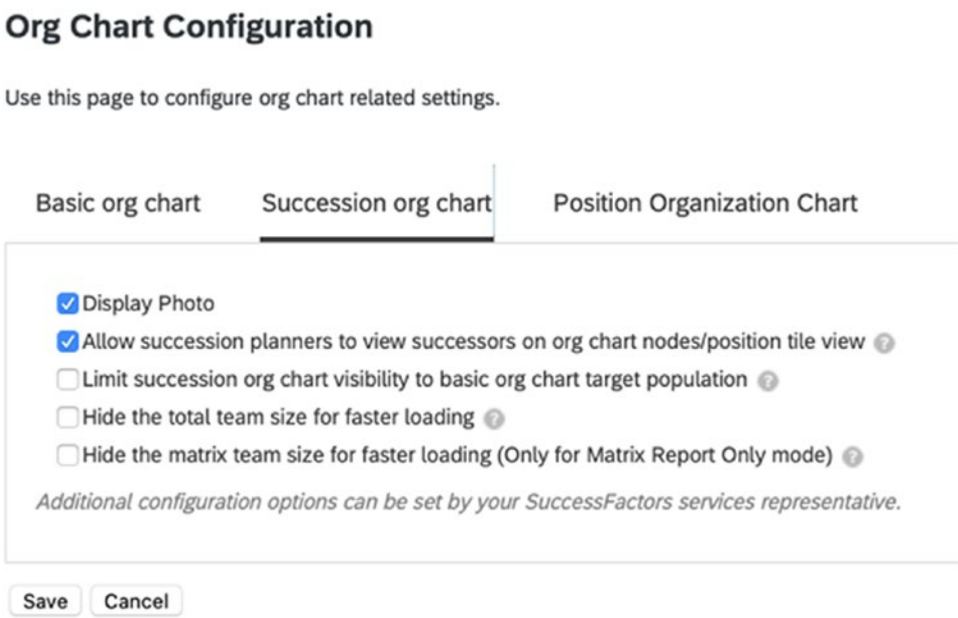

Figure 6-14. *The Org Chart Configuration Screen*

3. Make recommended selections as shown in Table 6-6 and click "Save."

Table 6-6. *Org Chart Configuration Fields*

Field	Description
Display Photo	We recommend checking this box so that the photos show unless your organization has not loaded any photos on the employee profiles or has disabled the ability for employees to load their own photos.
Allow succession planners to view successors on org chart nodes/position tile view	When you check this box, the system will also use the "Succession Planning" permission to determine who can see succession information rather than just the "Succession Management and Matrix Report Permissions" (see the subsection later in this chapter on setting up end user permissions). We recommend checking this box unless you have a scenario where you want to limit visibility for some people who can nominate – for example, if a manager can nominate for their employees but you do not want them seeing other nominations within that same span of control.

(*continued*)

Table 6-6. *(continued)*

Field	Description
Limit succession org chart visibility to basic org chart target population	Checking this box will limit visibility to the permission setting "Organization Chart Navigation Permission" under "General User Permission" within the "Permissions" screen when creating your role-based Permissions. We have not come across a scenario where organizations have needed this since you can already define the population with the "Succession Management and Matrix Report Permissions." It may be useful if you want these permissions to exactly mirror one another.
Hide the total team size for faster loading	If your organization is very large, you may have issues when viewing the top few levels of the organization because the system attempts to count all of the reports underneath each position. For example, the CEO of a 300,000-employee organization would show x number of direct and 299,999 total reports. If you are experiencing long wait times for the org chart to load at these levels, we recommend checking this option so that this calculation is not performed prior to loading the screen.
Hide the matrix team size for faster loading (Only for Matrix Report Only mode)	Similar to the preceding scenario, if you use matrix reporting and choose the "Matrix Report Only" visualization option, you may check this box to improve screen load time.

Load Legacy Successor Data

Once we have finished all of our configurations and have loaded position data, we can load any legacy successor data from a prior system. Follow these steps to access the import screen, download the template, and upload any legacy data:

1. Type and select "Import Successors" in the search bar. The Import Successors screen will load as shown in Figure 6-15.

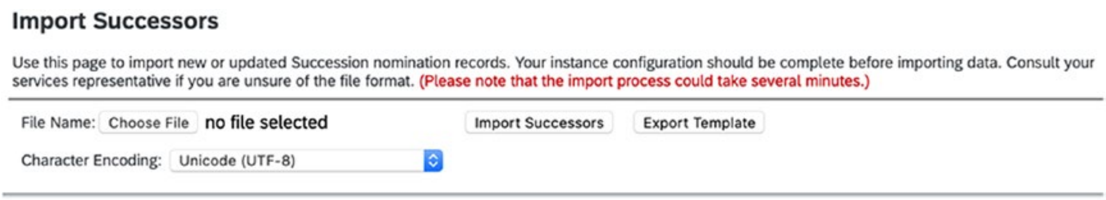

Figure 6-15. *Import Successors Screen*

2. Click "Download Template."

Note The template will change dynamically based on the configurations you have made, so the template isn't necessarily transferable between organizations.

---

3. Fill out the template on your local machine using Table 6-7 as a guide (this assumes you've followed our recommended configurations thus far).

Table 6-7. *Fields Within the Successor Import Template*

Field	Description
GENERIC_POSITION_CODE	Enter the "code" field value for the MDF position object you wish to nominate the successor.
OLD_GENERIC_POSITION_CODE	If using the TRANSFER action, enter the source position code from which the nominee will be transferred.
POOL_CODE	Enter the "code" field value for the MDF Talent Pool object you wish to nominate the successor.
OLD_POOL_CODE	If using the TRANSFER action, enter the source Talent Pool code from which the nominee will be transferred.
READINESS	Enter the value of the readiness level – for example, the "value" field in the picklist and in the Succession Org Chart XML.
SUCCESSOR_USERID	Enter the USERID from the Succession Data Model/Employee Data file for the employee.

(*continued*)

Table 6-7. (*continued*)

Field	Description
NOTE	Enter any comments on the nomination you want to appear in the comments section.
RANK	Assuming you have chosen to include a ranking in your nomination setup, enter the numerical readiness ranking for the candidate.
ACTION	Values can be ADD, UPDATE, TRANSFER, or DELETE. Leaving the field blank or using ADD or UPDATE performs the same function: The system will look for an existing record to update; if none is found, then it adds the record. DELETE will remove the record. For TRANSFER, you need to define the target and source nomination to move the record.

4. Choose your file encoding (we recommend UTF-8 as it handles localized languages the best).
5. Click "Choose File" and select the file you have edited with your successor data.
6. Click "Import Successors." You will receive an email with the details of the import when it is complete. Repeat the preceding steps to resolve any successor data that did not load per the email.

Set Up End User Permissions

We've put in a lot of work setting up our Succession Org Chart. We are almost there! The final step is to set up permissions for our users. In order to properly view the Succession Org Chart, you will need permission to view the MDF positions, the Succession data, and the org chart screen itself. We cover permissions for the MDF position object in the next chapter under the "Position Tile View" section as this pertains to the MDF configurations done there as well. Follow these steps to grant access to the Succession Org Chart screen and the Succession data:

1. Type and select "Manage Permission Roles" in the search bar.
2. When the screen loads, click the role you wish to modify. Then click "Permission...:"
3. Click "Succession Planners" (Figure 6-16) and choose from the following options in Table 6-8 as needed.

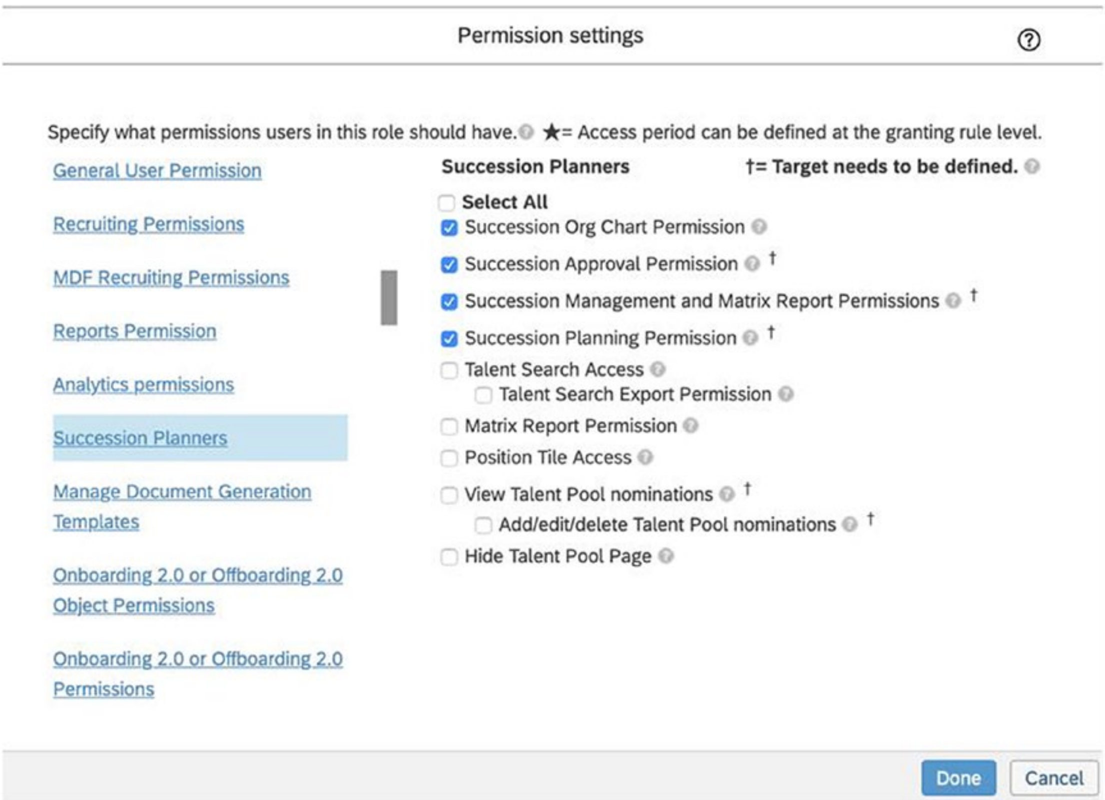

Figure 6-16. *Succession Org Chart Permissions*

Table 6-8. *Succession Org Chart Permission Options*

Option	Description
Succession Org Chart Permission	Gives access to the Succession Org Chart screen.
Succession Approval Permission	Allows users to approve nominations. Nomination approval in the system is simplistic – you can effectively eliminate the approval process by always giving the Succession Planning Permission and Approval Permission together. If approval is not given for the same user and employee population, then the user's nomination will have to be approved by a user that does have approval over that population. Be sure to define your target populations on the role when selecting this in the preceding text. (Note that you can optionally set up pending approval emails in the system. This requires setting up a "Send Pending Nomination Emails" batch job in Provisioning and setting up the "Succession Email Approver" email template on the "E-Mail Notification Templates Settings" screen.)
Succession Management and Matrix Report Permissions	Allows user to see this defined population in the org chart.
Succession Planning Permission	Allows user to nominate successors for this defined population.

4. Optionally, if you would like to see recommended successors in the position card, go to "Career Development Planning" and select "Recommend Successors."
5. Optionally, if you have implemented the SuccessFactors LMS and would like to be able to assign learning from the org chart, go to "Learning" and select "Learning Access Permission." Click "Done." Be sure to save your role on the main screen as well.

Using the Succession Org Chart

The time has arrived to start using our Succession Org Chart! Follow these steps to step through the Succession Org Chart:

1. In the search box, type and select “View Succession Org Chart.” The org chart will appear starting with the position of the logged-in user.

2. To select another user or position, click the radio button indicating you would like to search via position or person. Enter and select the person or position name in the search box. The org chart will appear as shown in Figure 6-17.

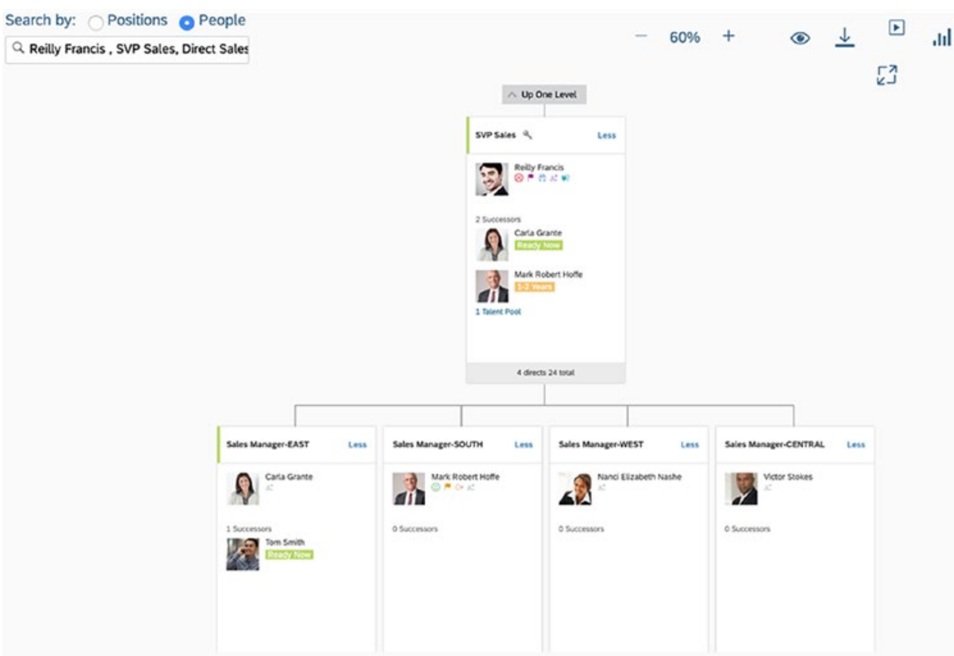

Figure 6-17. *The Succession Org Chart*

3. If you have filled in any of the talent fields for a person and set up the icons in the org chart XML such as riskOfLoss, the icons will appear next to the individual. You can mouse over the icons to see the text descriptions configured as well in a small popup in case you are not familiar with what each icon means.

Note A common frustration/misconception of customers is editability of the talent fields here. Users must navigate to the Talent Profile of the employee to edit the values in these fields. You can navigate to the Talent Profile of the employee by clicking their name or picture to open the position tile and then clicking the name or picture again to open the talent card for the employee. Then click the name or picture again on the talent card to open the Talent Profile in a new window. From there, you can scroll down to the Talent section of the profile and make edits given that you have the proper permissions on Talent Profile.

4. If you are not able to see any of your icons, click the eye icon in the upper right-hand corner to pull up the display options. Here you can choose whether to show all reports, only direct reports, or only matrix reports. You can also check the box next to each configured icon to control whether or not it is displayed on the main screen. You can also select whether to show 3 or 12 successors for each position. In addition, there is an option to highlight only key positions (all other positions will become grayed out).
5. To show or hide the icons and nominees for a single position, toggle the "More" or "Less" link in the upper right-hand corner of the position.
6. You can navigate up or down the org chart by clicking the "Up One Level" at the top of a position or the number of reports at the bottom of the position.
7. If the org chart becomes cluttered, you can close the direct reports for a position that is already displaying direct reports by clicking the number of reports at the bottom of the position again.
8. You can also move around the org chart by clicking and dragging the mouse.
9. To zoom in or out, click the "+" or "-" icon in the upper-right hand corner of the screen.
10. To hide the menu bar at the top and get more room for the org chart, click the box with two arrows icon in the upper right-hand corner of the screen.

11. To download a copy of the chart on-screen, click the down arrow icon in the upper right-hand corner of the screen. You will have the option to download in .pdf or .jpg format.

12. To open the position card, click anywhere on the screen. The position card will pop up as shown in Figure 6-18.

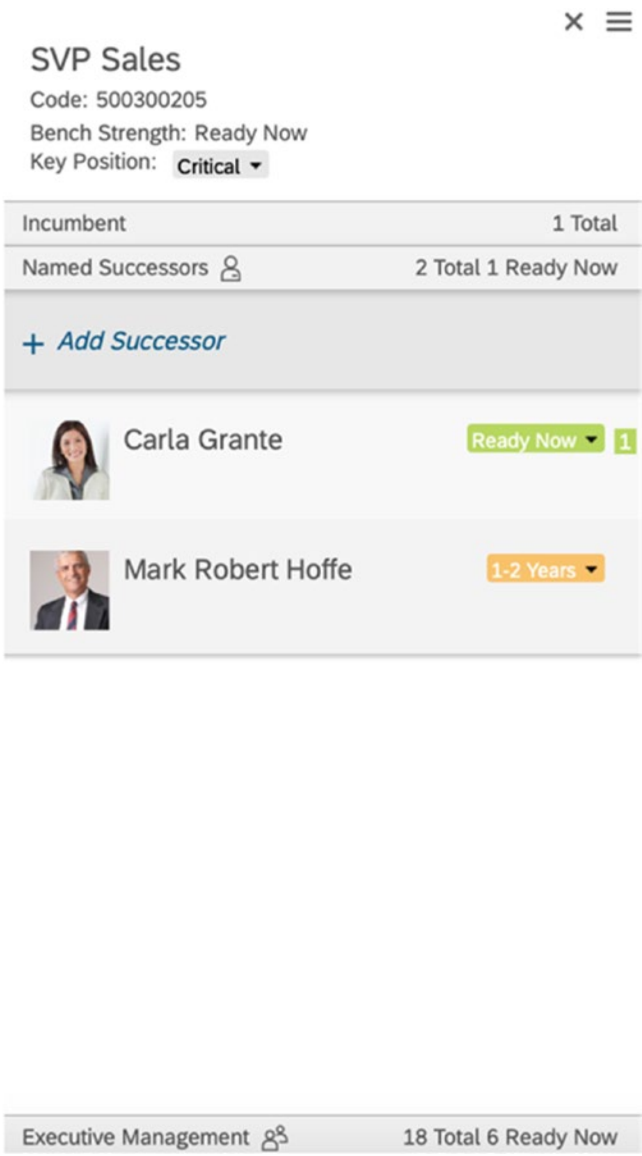

Figure 6-18. *Position Card*

a. Click the menu hamburger icon in the upper right-hand corner to either edit the MDF position object, delete the MDF position object, view the nomination history (which displays nomination actions taken on the nominee), create a job requisition, view the Lineage Chart, view the job role details, or hide the position. If you are using the Recruiting module, you can add a "Create Requisition" menu item here as well. All of these options are dependent on your configurations and permissions. MDF position–related configuration and permissions are covered in the "Position Tile View" section in the next chapter. Nominations are covered earlier in this section and the "Nomination Setup Screen" section of this chapter. The Lineage Chart is covered in the "Lineage Chart" section of the next chapter. Job role permissions are covered in Volume 1, Chapter 3:

   i. If you hide a position, a new icon will appear in the upper right-hand corner of the org chart with a profile and a lock indicating the number of hidden positions. You can click this icon to unhide all hidden positions.

b. To change the key position value, select it from the dropdown.

c. You can toggle between viewing the incumbent, the named successors, or Talent Pools to which the position is associated via job code by clicking the respective bar. Click any of the employee names or photos to open the talent card for any of these people. Talent card configuration is covered earlier in the "Talent Cards" section of this chapter. Note that you can nominate the person to a position from their talent card or nominate someone to that employee's position as well. Additionally, you can nominate a successor by clicking "+ Add Successor" from the Named Successors bar (the popup will display as shown in Figure 6-19). You will notice as you add successors here with various readiness levels, your bench strength on the position card and the corresponding color to the left of the position will adjust to the best readiness level among your nominees. Finally, you can also click "Manage Pool" from the specific Talent Pool bar you have chosen to open the Talent Pool screen for that pool (see the "Talent Pool" section in the next chapter).

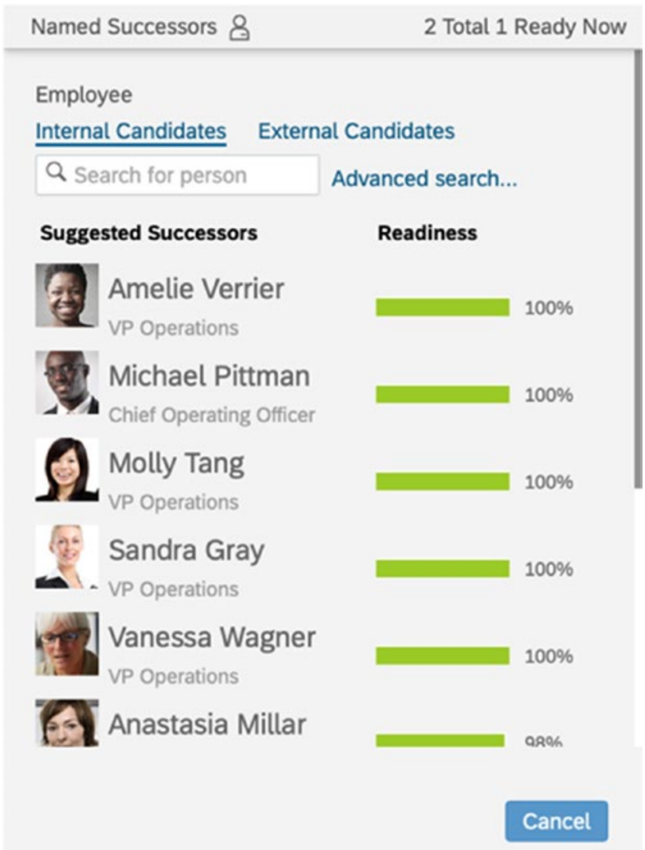

Figure 6-19. Nomination Popup

Note You will notice in the figure that your search options such as whether to search by position or person separately, the ability to search for external candidates, and whether suggested successors will appear on the nomination screen will all display or hide based on your nomination setup configurations covered earlier in this chapter. Clicking the "Advanced search…" in the popup will open Talent Search in a popup – Talent Search is covered in a previous section in this chapter.

It is very gratifying to see from these steps how the Succession Org Chart brings together many of our configurations across this chapter and many others into one centralized location! Circling back to our model company, we can see the powerful visualization and quick access to view and edit data the Succession Org Chart provides to our President as they attempt to evaluate the succession situation at their organization. They can quickly see that the SVP is a high risk of loss and impact of loss by the icons shown on their position. They are able to nominate the SVP to their own position as well and assign a readiness level. They can also see which regional sales managers are being considered for the SVP position and what their readiness level is! Based on this quick information, the manager can have informed conversations with the SVP about their development and how to best fill their position given that they have successfully succeeded her.

Conclusion

At this point in our Succession Management journey, we've seen how to identify our top talent using the 9-box and Talent Review Form in Chapter 5. Now we've also seen how to nominate those employees to specific positions using an org chart–style visualization. In the next chapter, we will wrap up by covering a multitude of other features that allow us to organize and nominate our employees and also other ways to visualize this and other talent data.