



2024

Succession Planning Admin Guide



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V1

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Guide Usage and Disclosures

Guide Information

This guide is designed based on the Oracle Cloud HCM delivered setups; some fields may differ from your instance configurations. For example, some fields may be required in this guide that are not required in your instance. Additionally, some of the training topics discussed in this guide may not apply to your organization, but we know you'll find it helpful. If you would like a custom guide for your organization, please contact our Training team at learn@camptratech.com.

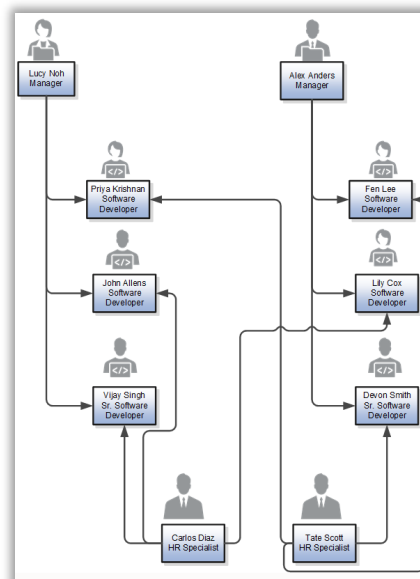
How To Use This Guide

This guide is intended to assist Admin users with their day-to-day tasks in Oracle Cloud. A few notes before you begin:

- Any fields with an asterisk are required fields.
- Based on your configurations, approval workflows may in place for the training topics below; those tasks would need to be approved before the additions or updates are visible in your instance.
- You may have specific flexfields in your instance that require inputs; this guide is a generic tool and will not include those specific flexfields. You will see those fields as a context segment or not visible at all in our Oracle instance.

Overall Process Flow

Before we begin with the training content, It's important to understand the overall process flow of information in Oracle Cloud for the Succession Planning module.



Glossary of Terms

Here we've included common terms associated to the Succession Planning module. Please review the terms below to familiarize yourself with the Oracle Cloud terms used throughout this guide.

Talent Pool

- ✦ We can add candidates in a succession plan to an existing talent pool to manage candidate development. The development goals in a talent pool can prepare candidates for the relevant job or position

Attributes

- ✦ We use attributes to specify which of our candidates on a succession plan are most capable of assuming the plan role. Such as readiness, candidate ranking, and an Interim Successor

Succession Plan

- ✦ We can use succession management to create succession plans for replacing key employees. We can manage succession plans in the Succession Plans work area.

Plan Types

- ✦ There are different plan types for succession planning. You select the plan in order to identify the plan type. Plan types are Incumbent, Job, and Position

Owners

- ✦ By default, the person creating the succession plan is added as an owner of type Administrator. If you don't add additional owners, no one else can access the succession plan as it's a private plan.

Plan Incumbents

- ✦ We can view the incumbents who currently have the same job or position as defined in Job and Position type succession plans. The succession plan attributes such as business unit and department if specified determine the incumbents who have the same position or job.

Plan Candidates

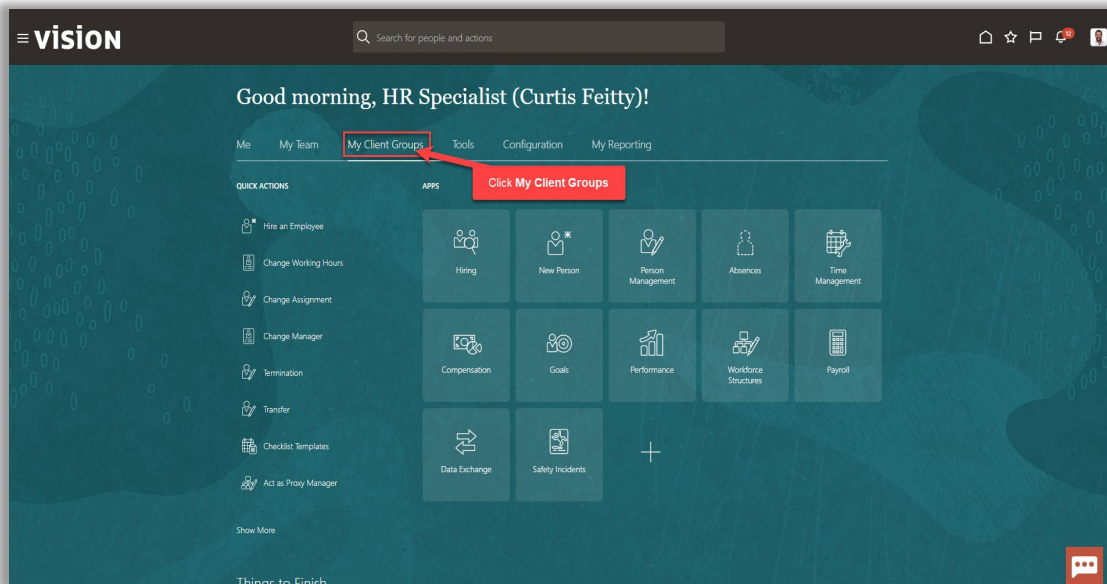
- ✦ Succession plans can have multiple owners from different organizations. We can include candidates from multiple organizations in succession plans.

Day to Day Operations Guide

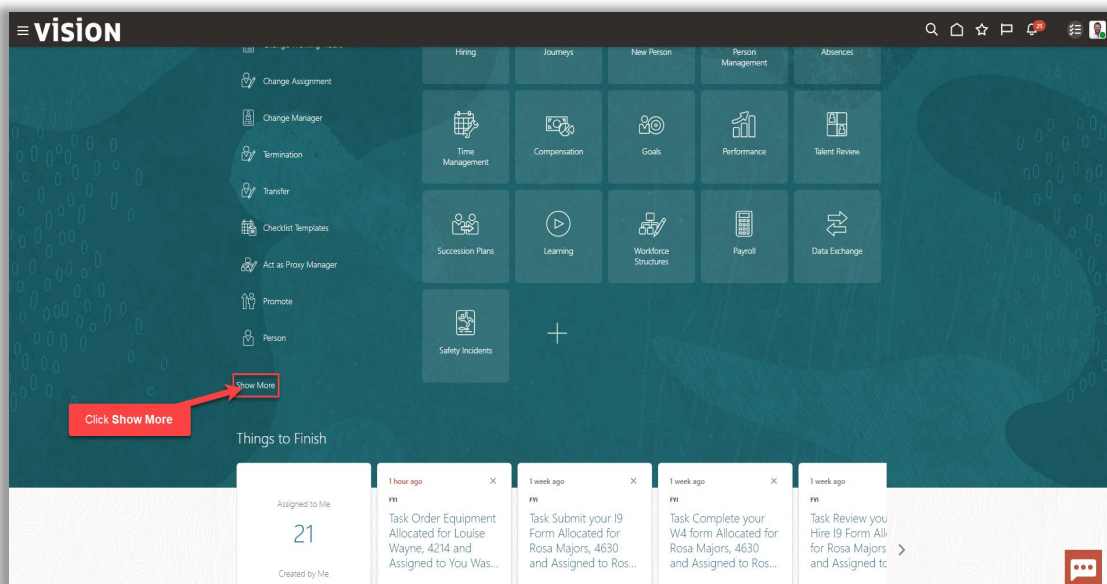
Create Talent Pool

Navigation: Home>My Client Groups>Quick Actions Show More>Talent Pools

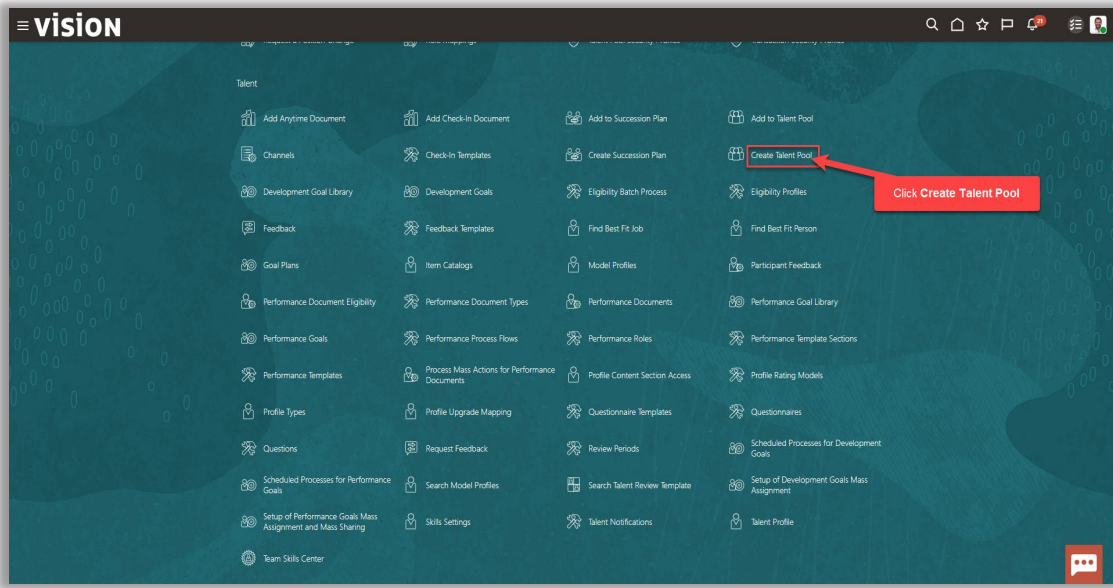
From the home screen, click **My Client Groups**



Next, click **Show More** from the Quick Actions



Next, under Talent, click **Create Talent Pool**



Enter the Pool Info

The screenshot shows the 'Create Talent Pool' form. The 'Pool Info' section is highlighted with a red box. The form includes the following fields:

- Pool Name:** Management Pool
- Status:** Active
- Private:** ☒
- Description:** This pool has been created for Management

Below the 'Pool Info' section, there are sections for 'Members', 'Owners', and 'Development Goals'. The 'Members' section has a search bar and a message: 'Nothing matches your search. Try again.' The 'Owners' and 'Development Goals' sections are currently empty.

Enter the **Members**. Click **Add** then **Member** or **Best Fit Members**. We'll select **Member**

Create Talent Pool

Save and Close Cancel

Pool Info

*Pool Name: Management Pool *Status: Active

☒ Private

Description

This pool has been created for Management

Members

Find member in pool

Nothing matches your search. Try again.

Click Member

Add Member Best-Fit Members

Owners

Development Goals

Next, type the employees **Name** to select the employee and click **OK**

Create Talent Pool

Save and Close Cancel

Pool Info

*Pool Name: Management Pool *Status: Active

☒ Private

Description

This pool has been created for Management

Members

Find member in pool

Type Employees Name

Click OK

Select Employee

Add Member Best-Fit Members

Owners

Development Goals

We can follow this same process to add additional **Members**. Next, expand **Owners**. The Talent Pool Creator will be the designated Owner. To add an additional owner, click **Add**

Create Talent Pool Save and Close Cancel

Management Pool Active


☒ Private

Description
This pool has been created for Management


Members Add

Find member in pool

Sort By Name

 **Rakesh Jhindal**
Manager Active
Member Since 4/24/23

Owners + Add

 Patrick Jones Click Add

Development Goals

Next, type the employees Name to select the employee and click **OK**


Create Talent Pool Save and Close Cancel

Description
This pool has been created for Management

Members Add


Find member in pool

Sort By Name

 **Rakesh Jhindal**
Manager Active
Member Since 4/24/23

Owners Click OK

*Owner Type Employees Name

 Select Employee

	Name	Business Title	Work Email	Person Number
RM	Rishi Mukherjee	Chief Executive Officer (CEO)	rishi.mukherjee@erp.com	1001
RV	Rishi Verma	Director		1005

Development Goals OK Cancel

Next, expand **Development Goals**. To add Development Goals, click **Add**

Create Talent Pool Save and Close Cancel

This pool has been created for management.

Members Add Find member in pool Sort By Name

	Rakesh Jhindal Manager	Active Member Since 4/24/23
--	----------------------------------	--------------------------------

Owners + Add

RV	Rishi Verma	×
PJ	Patrick Jones	×

Development Goals + Add

There's nothing here so far. Click Add

[Campfire Cloud Wiki](#)

Next, enter the **Basic Info**. We can create a new goal or select a **Library Goal**. We will select a goal from the **Goal Library** and click **OK**

vision Search for people and actions Home Star Calendar Profile

Add Goal
Curtis Felty

Basic Info

Library Goal Type Goal Name Library Goal

Goal Name **Category**

Attend **Attend Course on Presentation Skills (Toast Masters)** **Short-term**

Description
Attend Course on Presentation Skills - part of Toast Masters series

Status **Not started** **Category** **Short-term**

Start Date **1/1/51** **Completion Percentage** **0**

Target Completion Date **m/d/yy** **Source** **HR specialist**

Success Criteria

Successful attendance on Course on Presentation Skills - part of Toast Masters series

Click OK OK Cancel

Lastly, to save the **Talent Pool**, click **Save and Close**

vision Search for people and actions

Create Talent Pool

Pool Info

*Pool Name: Management Pool *Status: Active

☒ Private

Description: This pool has been created for Management

Members

Find member in pool

Sort By: Name

Mark Davis, Sales Representative, Active, Member Since: 4/24/23

Owners

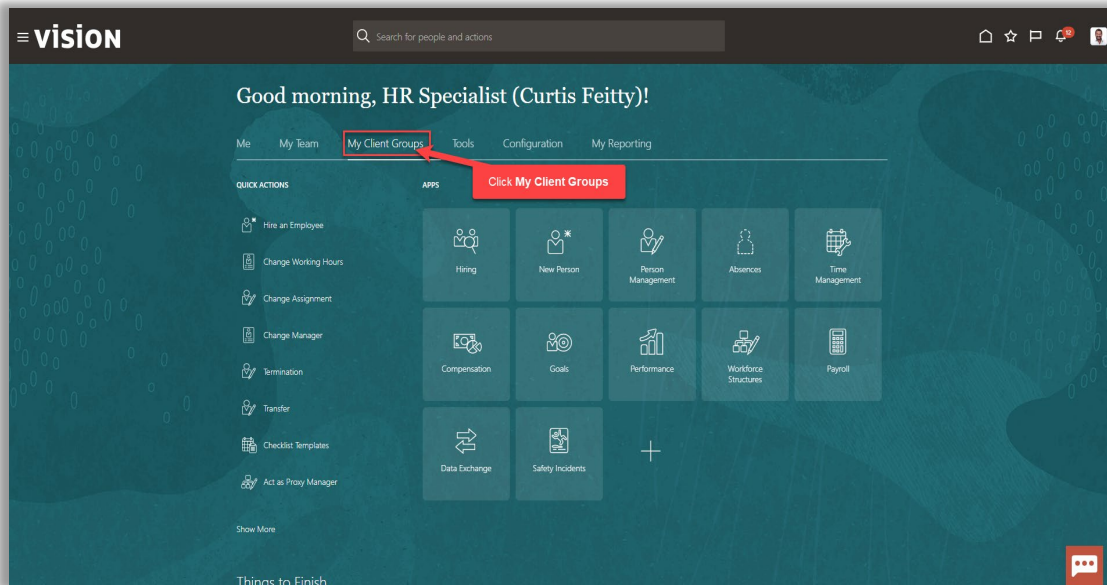
Click Save and Close

Save and Close Cancel

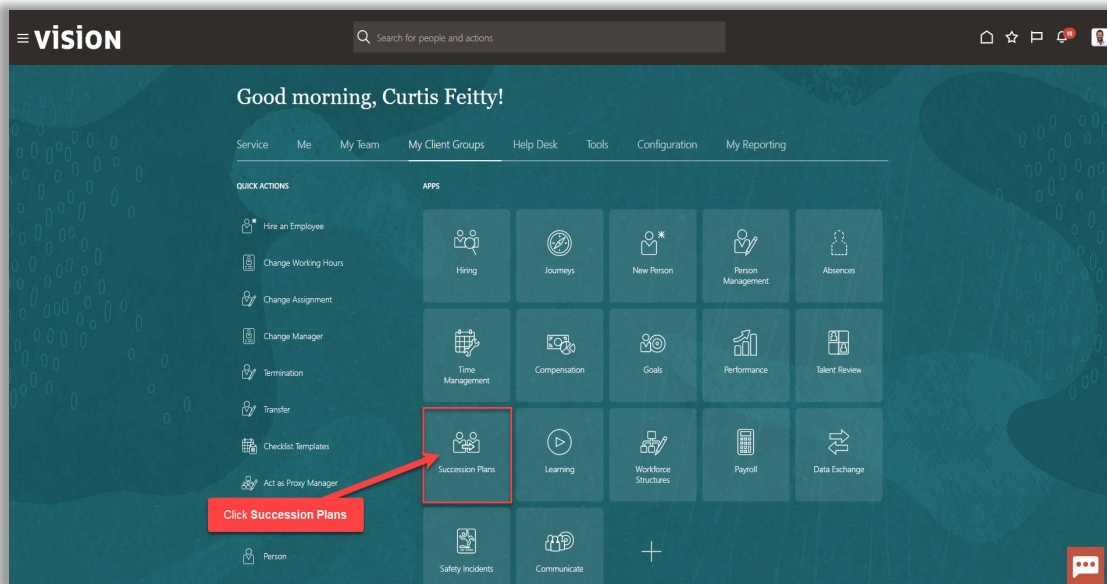
Create Succession Plan

Navigation: Home>My Client Groups>Succession Plans>Add>Enter Details>Save and Close

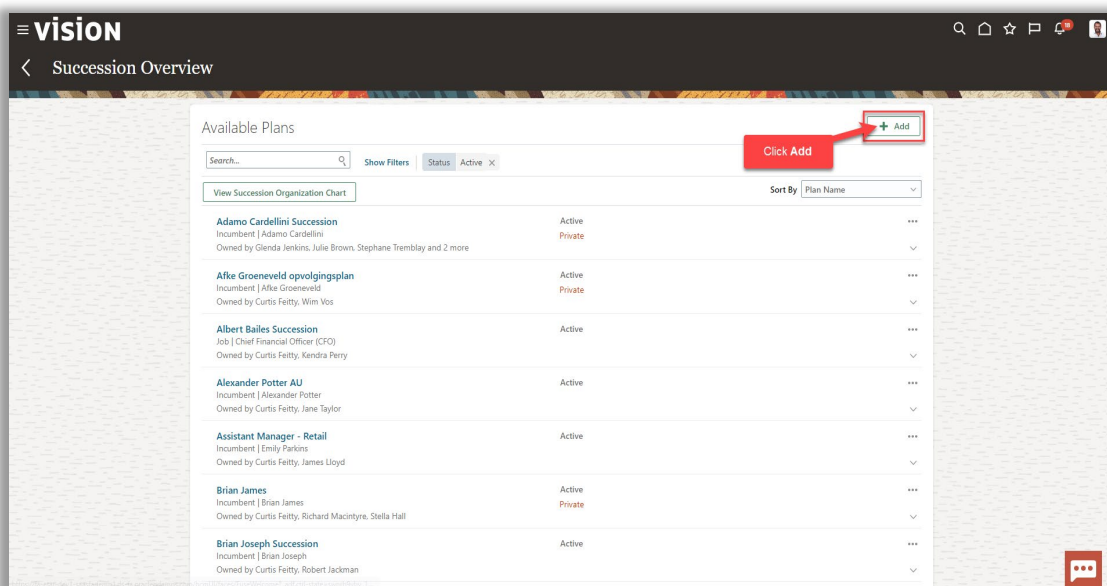
From the home screen, click **My Client Groups**



Next, click **Succession Plans**



Click Add



Enter the **Plan Info**. We can create a Succession Plan for an Employee, Position, or Job. Enter the **Plan Name**, **Description**, **Plan Type** and **Incumbent**

vision

Create Succession Plan

Enter the below information

Save and Close Cancel

Plan Info

*Plan Name: Human Resources Administrator

Status: Active

☒ Private

Description: This plan is for the Human Resources Administrator position

*Plan Type: Incumbent

*Incumbent: Frank Arena

Incumbent Job: Human Resources Administrator

Incumbent Department: Human Resources AU

Candidates

Find candidate in plan

Nothing matches your search. Try again.

Next, expand Candidates. Click **Add** then **Internal Candidate**

Create Succession Plan

Save and Close Cancel

☒ Private

Description: This plan is for the Human Resources Administrator position

*Plan Type: Incumbent

*Incumbent: Frank Arena

Incumbent Job: Human Resources Administrator

Incumbent Department: Human Resources AU

Candidates

Find candidate in plan

Nothing matches your search. Try again.

Owners

Alerts

+ Add

- Internal Candidate
- External Candidate
- Best-Fit Candidates
- Talent Pool Members

Click Internal Candidate

Next, search for the employee and click **OK**

Create Succession Plan Save and Close Cancel

This plan is for the Human Resources Administrator position

*Plan Type: Incumbent *Incumbent: Frank Arena

Incumbent Job: Human Resources Administrator Incumbent Department: Human Resources AU

Candidates

Find candidate in plan

Add to Talent Pool

By: Name

Click OK

Type Employee Name

Name: Robert Bedwell-Curtis *Readiness: No readiness available

OK Cancel

Robert Bedwell-Curtis Human Resources Specialist curtis_eta1-dev1@oraclepdemos.com 2703

Select Employee

Owners

Next, expand **Owners**. To add an additional owner, click **Add**

Create Succession Plan Save and Close Cancel

*Plan Type: Incumbent *Incumbent: Frank Arena

Incumbent Job: Human Resources Administrator Incumbent Department: Human Resources AU

Candidates + Add

Find candidate in plan

Add to Talent Pool

Sort By: Name

Robert Bedwell-Curtis Human Resources Specialist In current job since 3/8/12 Active 1 to 2 years readiness Candidate since 4/24/23

Owners + Add

Curtis Felty Administrator Alerts disabled

Alerts

Click Add

Next, search for the employee and click **OK**

Create Succession Plan Save and Close Cancel

Candidates

Find candidate in plan

Add to Talent Pool

Sort By Name

Robert Bedwell-Curtis
Human Resources Specialist
In current job since 3/8/12
Active
1 to 2 years readiness
Candidate since 4/24/23

Owners

Type Employee Name

Click OK

Send Alerts

No

Robert Jackman
Vice President of HR
robert.jackman_eta-dev1@oraclepdx.com
541

Curtis Felty
Administrator
Alerts disabled

Select Employee

OK

Cancel

Alerts

Lastly, click **Save and Close**

Create Succession Plan Save and Close Cancel

Plan Type

Incumbent

Incumbent Job

Human Resources Administrator

Incumbent

Frank Arena

Incumbent Department

Human Resources AU

Candidates

Find candidate in plan

Add to Talent Pool

Sort By Name

Robert Bedwell-Curtis
Human Resources Specialist
In current job since 3/8/12
Active
1 to 2 years readiness
Candidate since 4/24/23

Owners

Robert Jackman
Administrator
Alerts disabled

Curtis Felty
Administrator
Alerts disabled

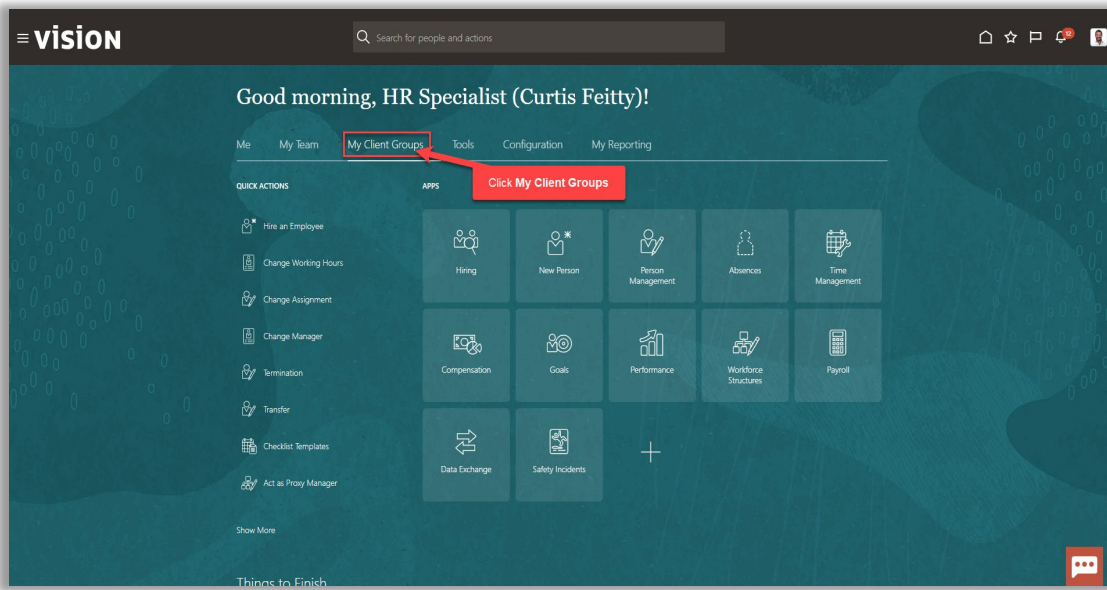
Alerts

Click Save and Close

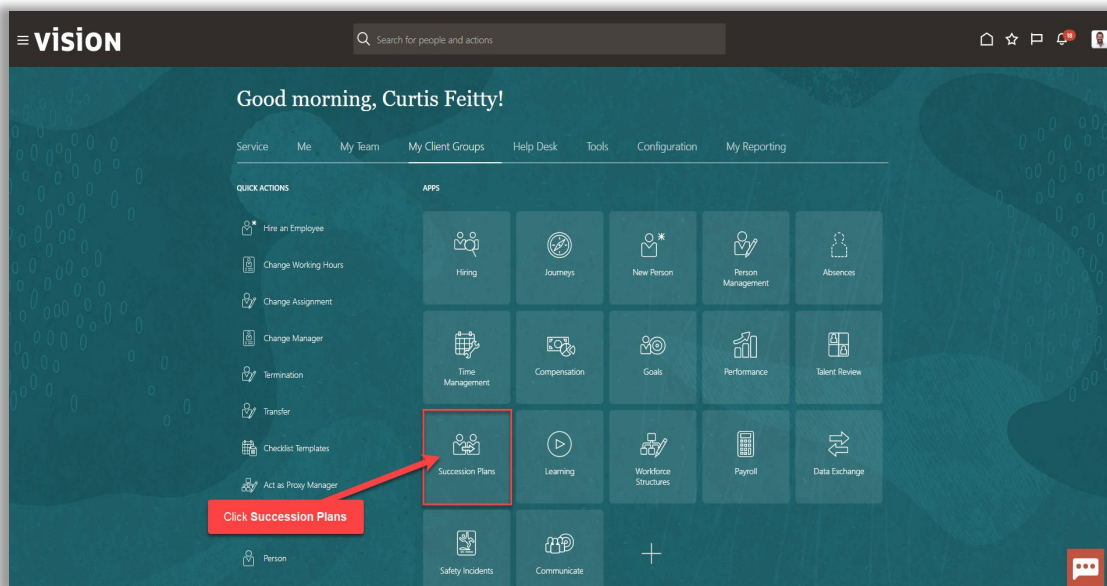
Manage Succession Plans

Navigation: Home>My Client Groups>Succession Plans>Select Plan>Edit>Save and Close

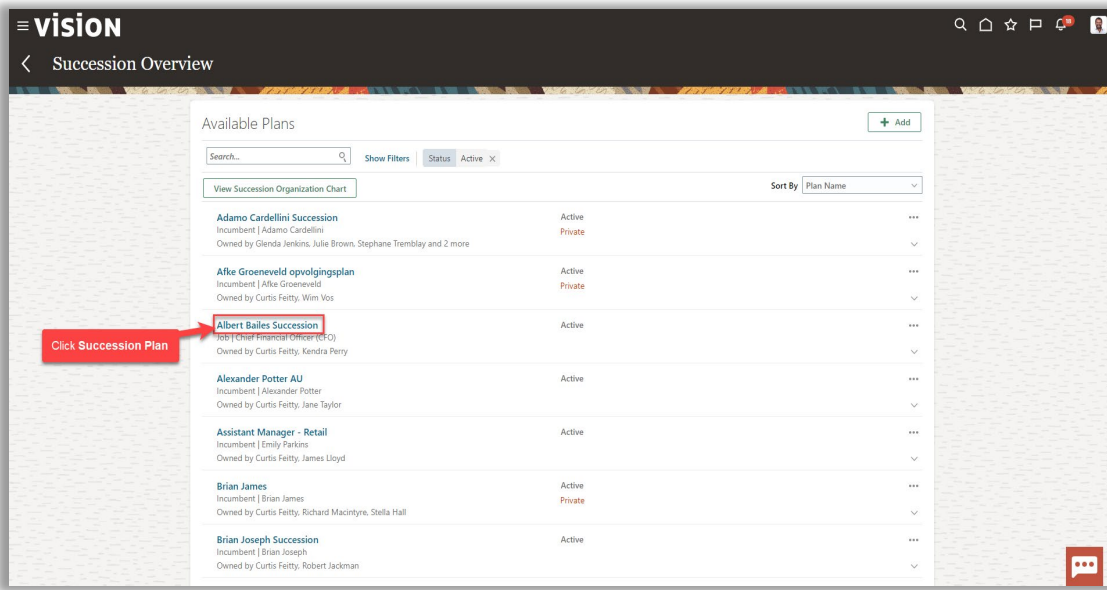
From the home screen, click **My Client Groups**



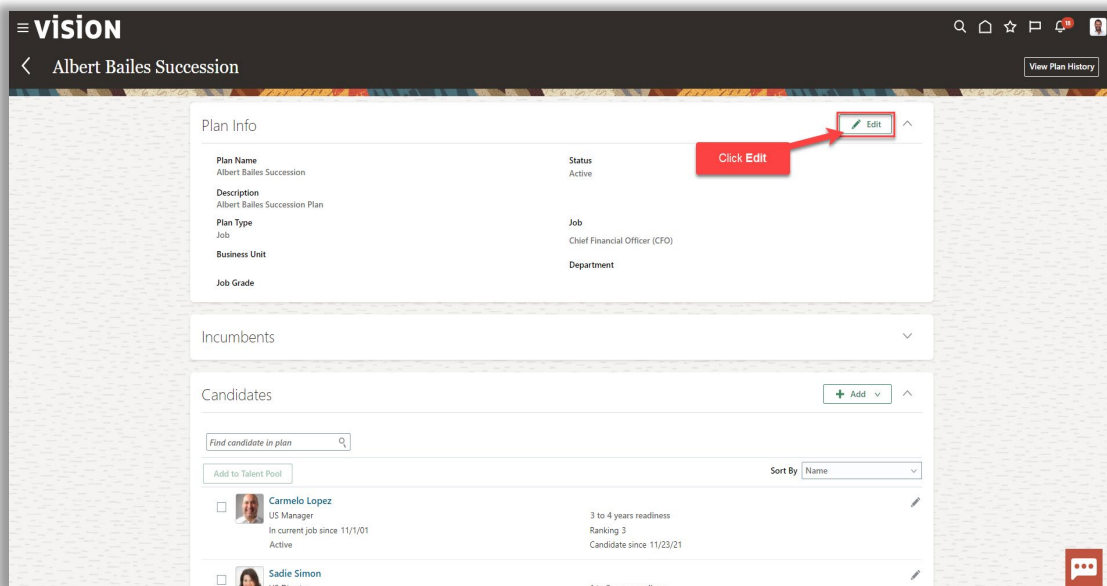
Next, click **Succession Plans**



Click **Succession Plan** we wish to update



Next, we can Edit the **Plan Info** or Update the **Candidates**. Click **Edit** to Edit the Plan info



Update the applicable information and click **Save**

vision

< Albert Bailes Succession

Update the below information

*Plan Name: Albert Bailes Succession

Status: Active

Save Cancel

Click Save

Description: Albert Bailes Succession Plan

Plan Type: Job

*Job: Chief Financial Officer (CFO)

Business Unit:

Department:

Job Grade:

Incumbents

Candidates

Next, to update a **Candidate**, click the **Pencil**

< Albert Bailes Succession

View Plan History

Incumbents

Candidates

+ Add

Find candidate in plan

Add to Talent Pool

Sort By: Name

<input type="checkbox"/>	Carmelo Lopez US Manager In current job since 11/1/01 Active	3 to 4 years readiness Ranking: 3 Candidate since 11/23/21	
<input type="checkbox"/>	Sadie Simon US Director In current job since 2/22/00 Active	1 to 2 years readiness Ranking: 1 Candidate since 11/23/21	
<input type="checkbox"/>	Sean Murphy US Director In current job since 1/4/99 Active	3 to 4 years readiness Ranking: 2 Candidate since 11/23/21	

Click Edit

Owners

Alerts

Update the applicable information and click **Save**

Albert Bailes Succession

Incumbents

Candidates

Find candidate in plan

Add to Talent Pool

Sort By Name

Update the below information

Click Save

Save

Cancel

Name
Carmelo Lopez

Job
US Manager

In current job since
11/1/01

Status
Active

Interim Successor

*Readiness
3 to 4 years readiness

Ranking
3

Candidate since
11/23/21

Sadie Simon
US Director
In current job since 2/22/00
Active
1 to 2 years readiness
Ranking 1
Candidate since 11/23/21

Sean Murphy
US Director
In current job since 1/4/99
Active
3 to 4 years readiness
Ranking 2
Candidate since 11/23/21

Follow this same process to edit the additional sections

Thank you for reviewing and using our guide; we hope you have found it helpful. If you have any questions on the content included in this guide, please contact our Training & Learning team at learn@camptratech.com

Version History	Revision Date	Author	Changes
Version 1.0		Megan Ketter	Initial Version