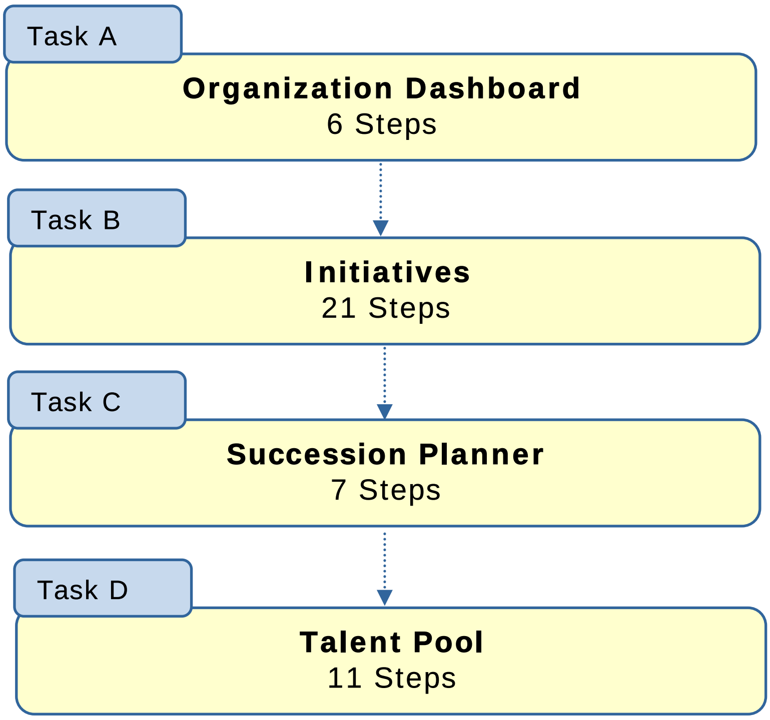
Job Aid: Organization Owner Overview

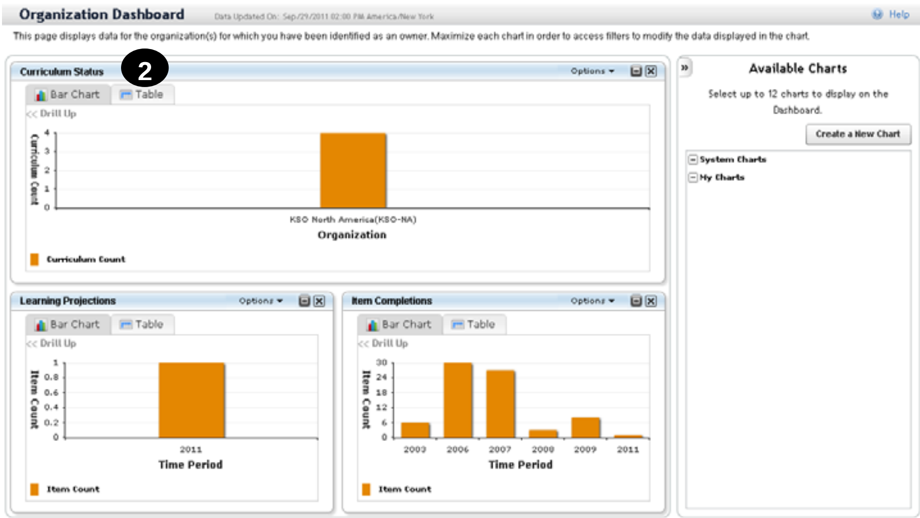
Purpose

The purpose of this job aid is to guide organization owners through the step-by-step process of available features within SuccessFactors Learning. The organization dashboard is a collection of charts and data tables that summarize learning data for your organizations and sub-organizations.



Note: Depending on how permissions were configured in, access to the following features will vary for each organization.

Task A.	**Organization Dashboard**	
1	From the Home page, roll-over the Organization tab and select **Dashboard** from the list.	

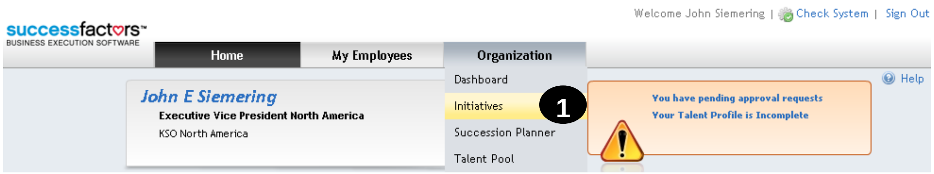
2	You can use the Organization Dashboard to investigate the status or ratings of learning and performance data. An organization dashboard can be configured to provide as many as 12 different charts.	 *Note: The organization dashboard does not show real-time data; it relies on periodic data updates. Therefore, if you make changes that should affect the data but do not see those changes reflected in the dashboard, then the system has not updated the data yet. The system shows when the data was last updated next to the Organization Dashboard title.*
		
3	Toolbar	Each toolbar contains a title, drop-down menu of Options, Maximize/Restore button, and Close button. To modify a chart, you must maximize its window. If you select the **Bar Chart** tab, **Print to PDF** is an option and saves the current chart as a PDF file; if you select the **Table** tab, then **Export Data to Excel** is an option and saves the current table as a CSV file.

4	Control section	Each data section contains a chart or table, depending on what tab you select. Fundamentally, you can change the chart in one of three ways: the view (for example, from Bar Chart to Table) without changing the data; the data (for example, changing the Assignment Type to required in the Items Completion chart); or the organization that you're reporting on. In some situations, you can click the **Drill Up** link to view a different breakdown of the data for the current chart. For example, if you are working with the Item Completions chart, and it shows the breakdown by month, then you can click the quarter of the years. Then, you could click the **Drill Up** link again to view the items completed for each year. *Note: If you change any of the view or filtering options, the chart retains your selections even after you minimize or restore the window.*
5	Data section	Each data section contains a chart or table, depending on what you select from the Display list. While the control section allows you to drill up, the data section allows you to drill down. Click any bar (in a chart) or double-click any row (in a table) to drill down. Drilling down for a table contains no visual indicator on the data that you can drill down. Therefore, we recommend that you explore the chart for opportunities to drill further down.
6	Legend	Each window also contains a legend so that you know exactly what is being measured for each chart. Each filter section contains a set of unique controls that you can use to customize how the data is displayed. As you customize what each chart shows by filtering, you can save that filter by clicking **Save Filters** on the Options menu.

Task B. Initiatives

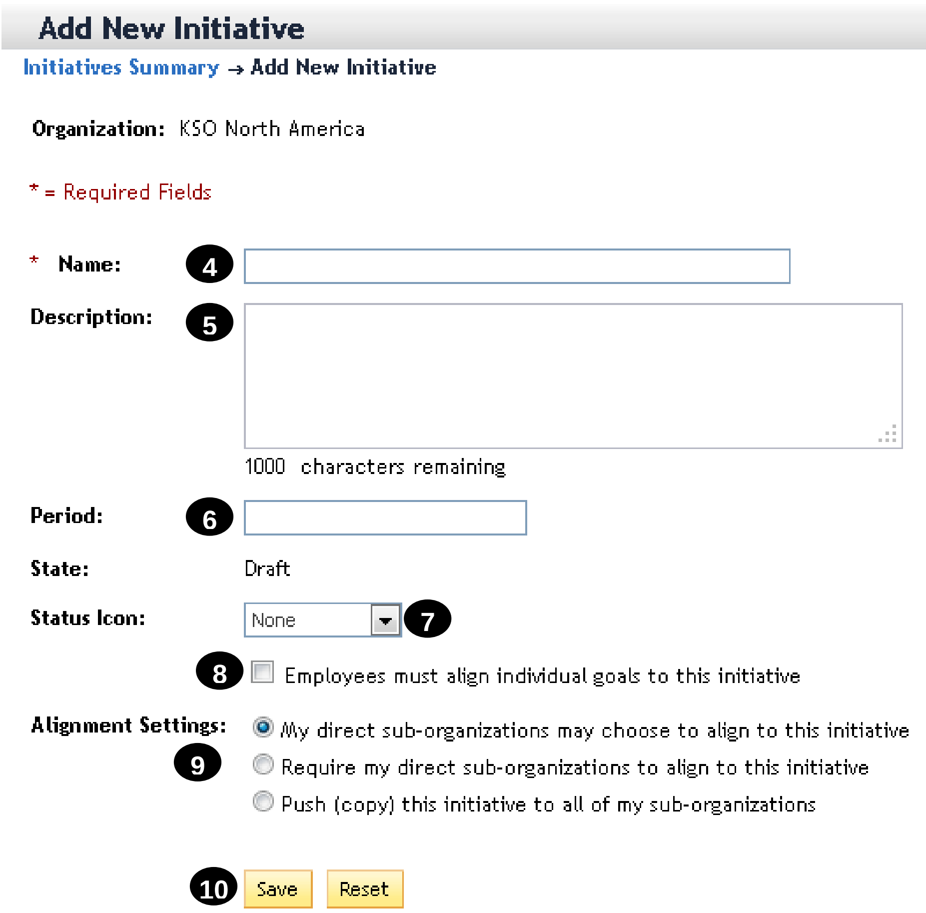
You can use initiatives to communicate organization goals (such as increase sales, cut costs) so that employees of that organization can align their actions to fulfill the organization's initiative. How they align their goals can be formal (using plans and goals) or informal (actively doing what they can to increase sales). As an initiative organization owner, you can start by creating or modifying an initiative.

1. From the Home page, roll-over the Organization tab and select **Initiatives** from the list.

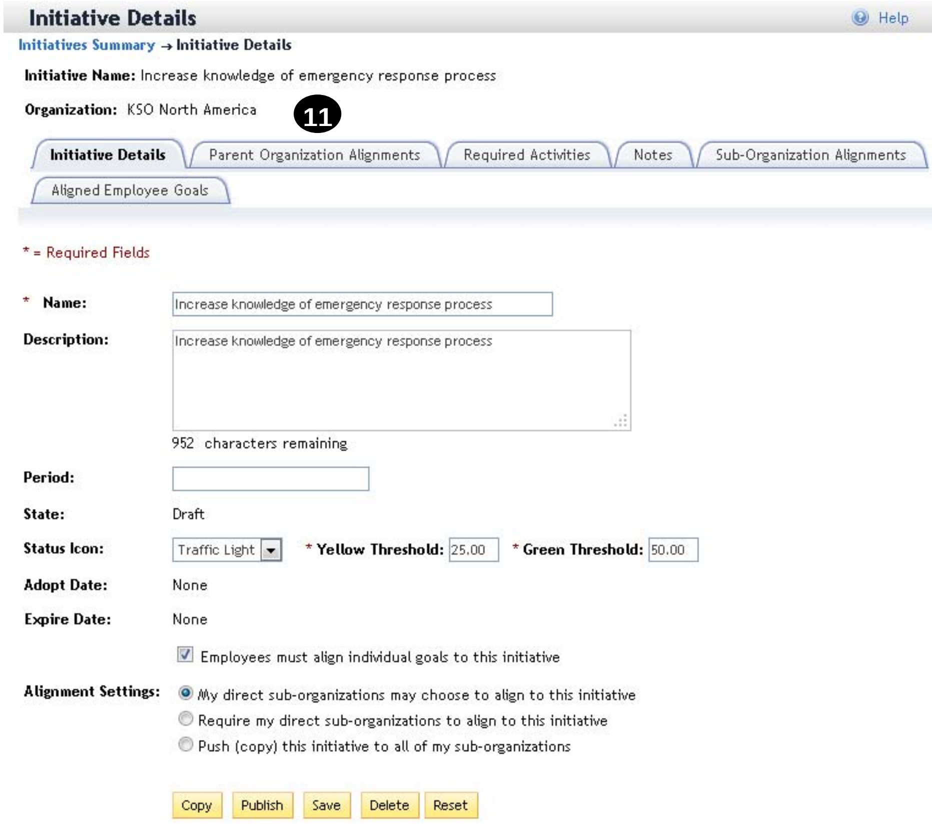


2. Select the **View** drop-down list to change initiative viewing options (draft, expired, published, all).
3. Click the **Create Initiative** button.

4. Enter initiative name.
5. Enter initiative description.
6. Enter a descriptive period.
7. Select Status Icon (none, or Traffic Light).
8. Select **Employees must align individual goals to this initiative** checkbox.
9. Select appropriate alignment setting radio button.
10. Click **Save**.

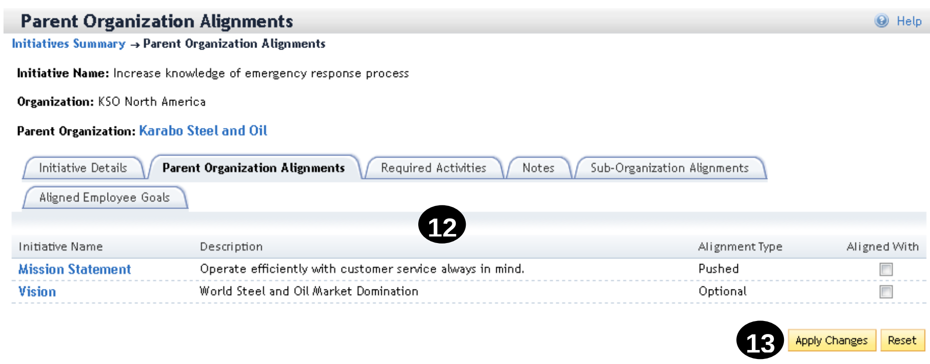


11 Select the **Parent Organization Alignments** tab.



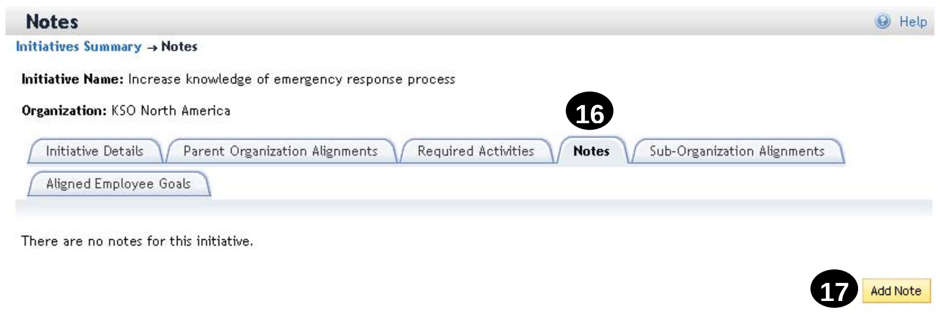
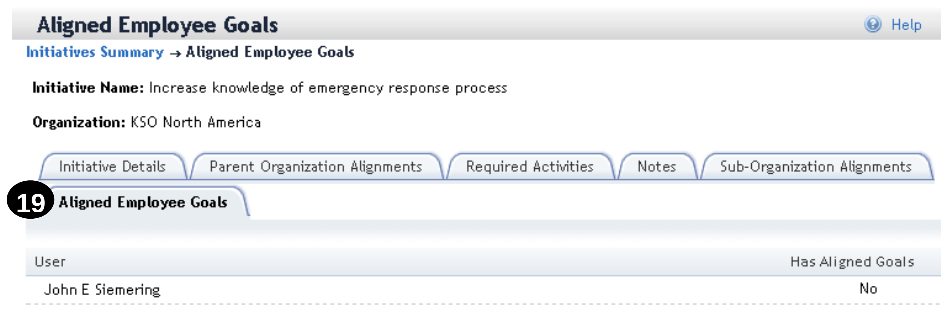
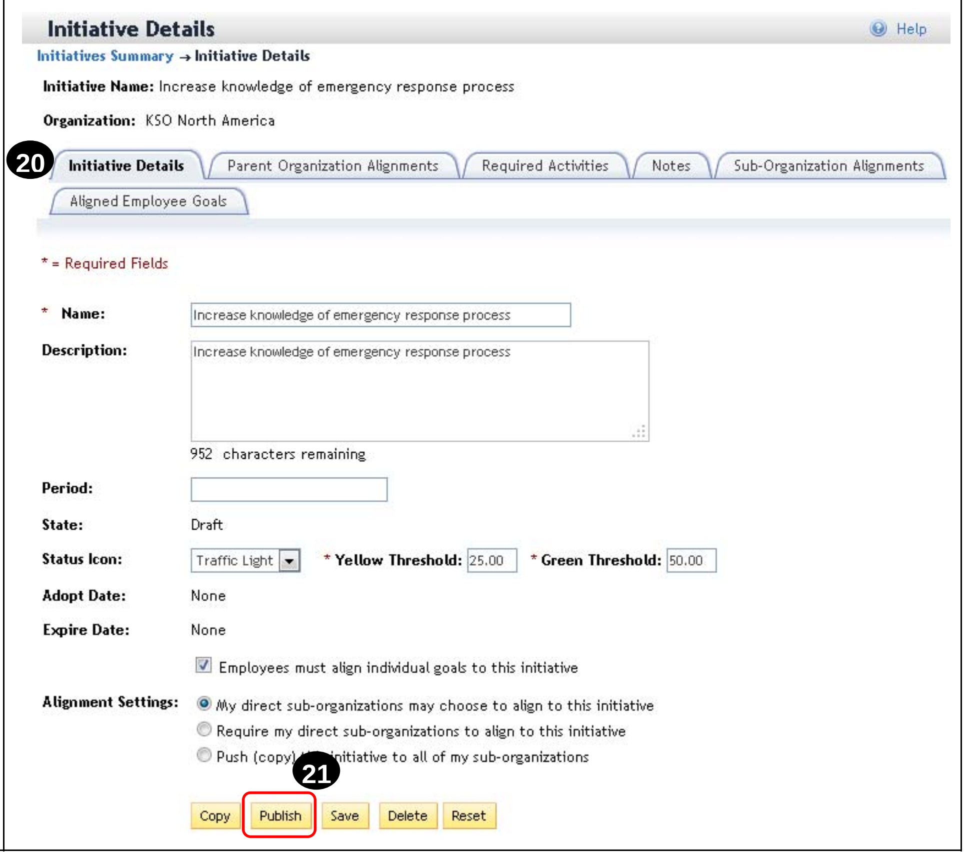
12 View list of parent organization initiatives, and elect to align with one or more initiative.

13 Click **Apply Changes**.



14 Select the **Required Activities** tab.

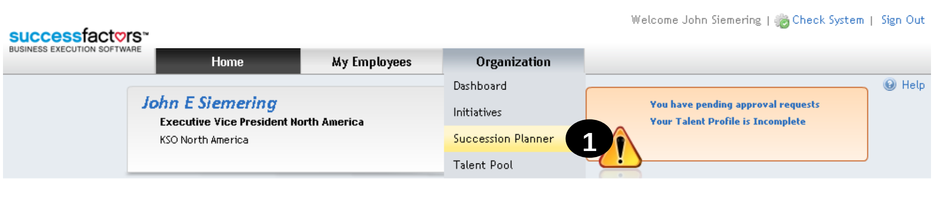
15 Click **Add Activity** button to add an associated activity to this initiative.

16 17	Select the **Notes** tab. Click the **Add Note** button to add a note to this initiative.	
18	Select the **Sub-Organization Alignments** tab to view any aligned published sub-organization initiatives.	
19	Select the **Aligned Employee Goals** tab to view all employees who have aligned one or more goals with the organizational initiative.	
20 21	Return to **Initiative Details** tab. Click **Publish** to make initiative available.	

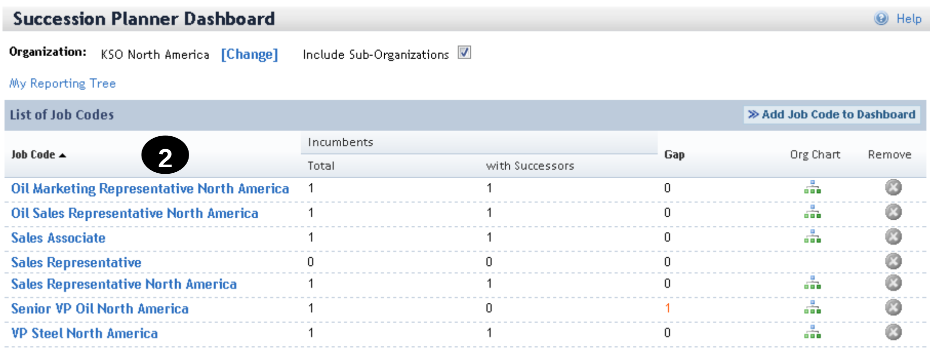
Task C. Succession Planner

You can use the succession planner to 1) view all of the incumbents for a job position 2) view the immediate organizational structure for an incumbent (after you select an incumbent you want to work with), 3) access the list of successors for a job position, or 4) view a user's talent profile.

1 From the Home page, roll-over the Organization tab and select **Succession Planner** from the list.



2 Click the job position title to view a list of incumbents.

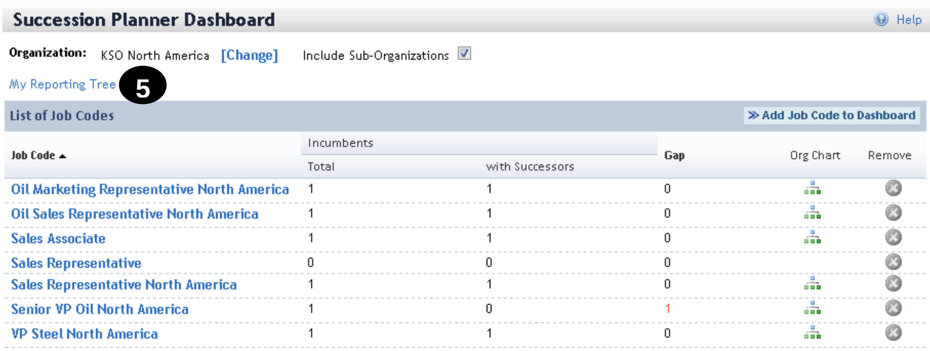


The Job Position Details page displays a list of user names, identified successors, if this requires an emergency replacement, last update date, an organization chart ( ) button, and a successors ( ) button.

3 Click a user name to view their Talent Profile.

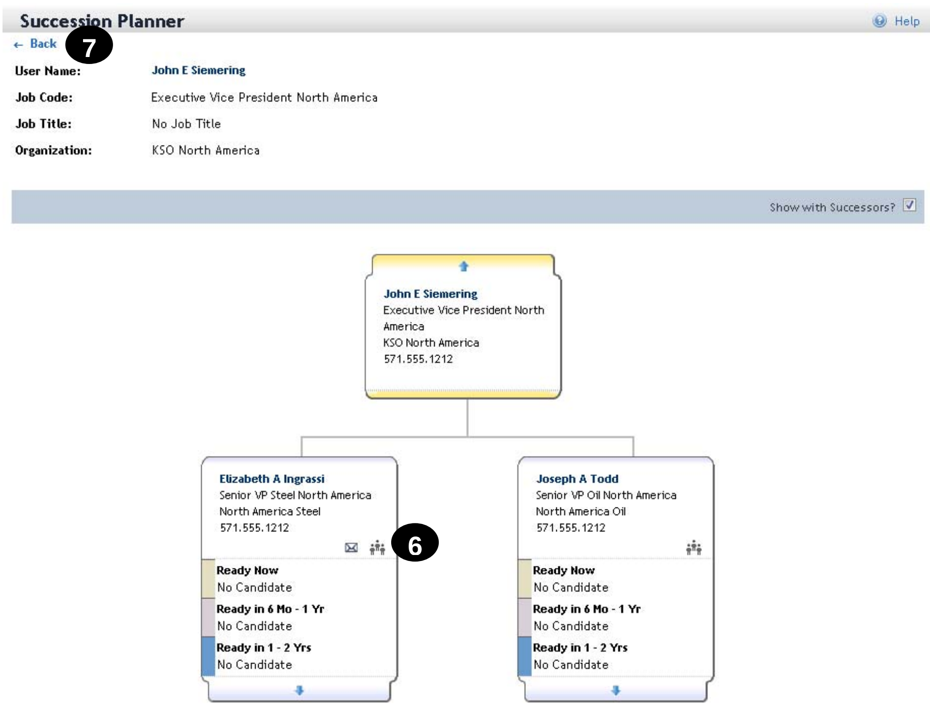
4 Click the **Succession Planner Dashboard** link to return to the dashboard.

5 From the dashboard, click the **My Reporting Tree** link.



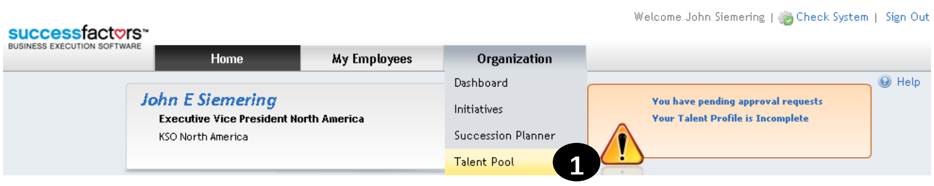
6 For a select employee, click the Successors icon (icon) to view a complete list of successors aligned for the job.

7 Click the **Back** link to return to the dashboard.



Task D. Talent Pool

1 From the Home page, roll-over the Organization tab and select **Talent Pool** from the list.

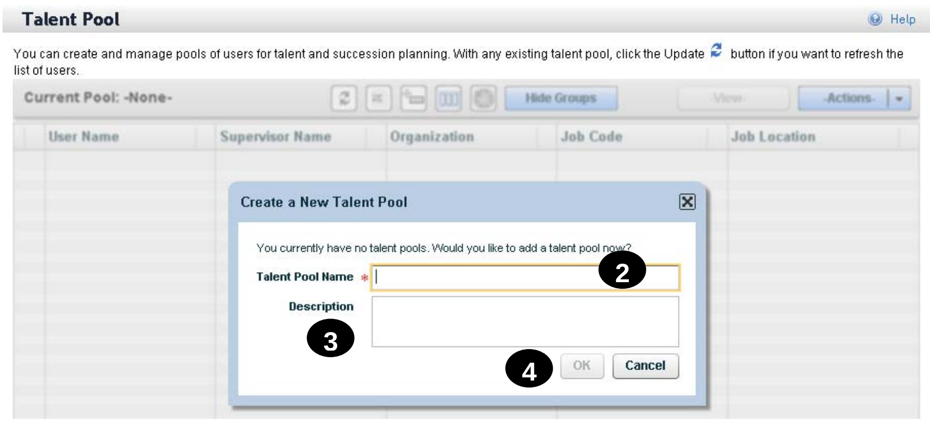


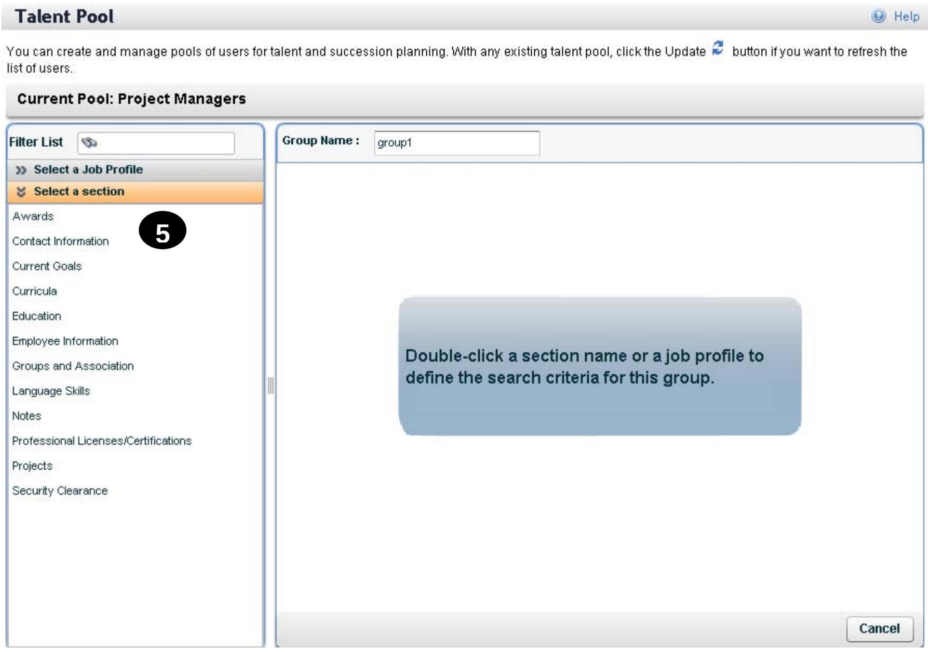
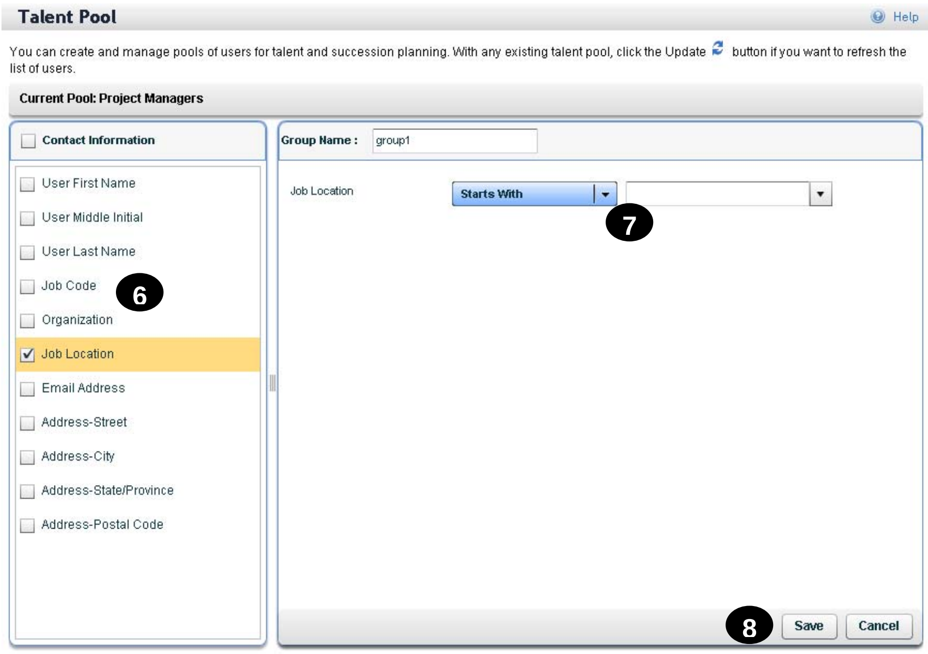
If a Talent Pool has never been created, you will be asked to create a new talent pool.

2 Enter a talent pool name.

3 Enter a description.

4 Click **OK**.

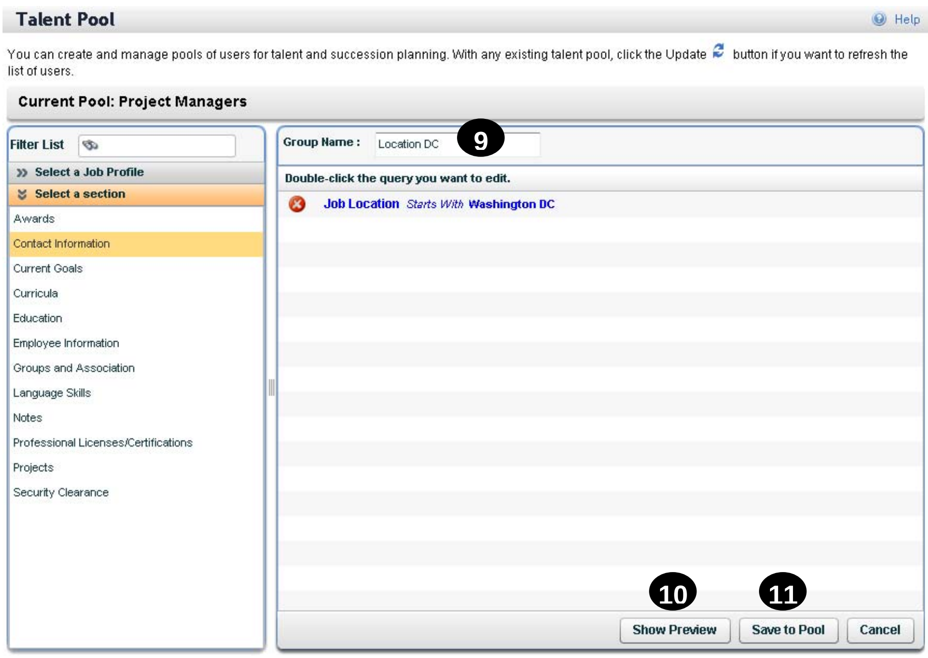


5	Double-click a section name, for example contact information.	
6 7 8	Select criteria under contact information. Enter search criteria and select. Click **Save**. Continue to add criteria to group.	

9 Click in the Group Name textbox and give the group a name.

10 Once you've added all criteria to the group, click **Show Preview** to view a list of users in the pool.

11 Click **Save to Pool**.



The Talent Pool page displays the group added to the current pool.