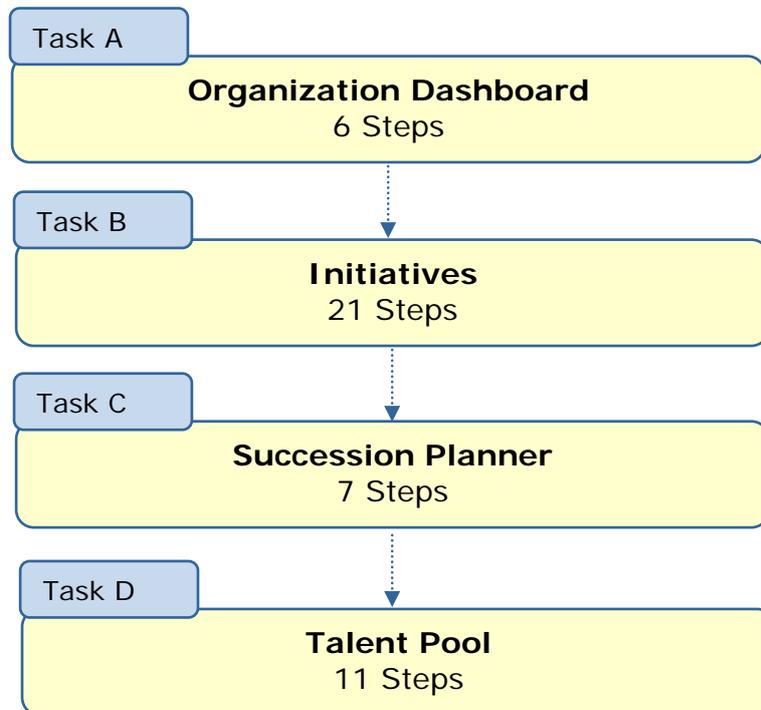


Job Aid: Organization Owner Overview

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.

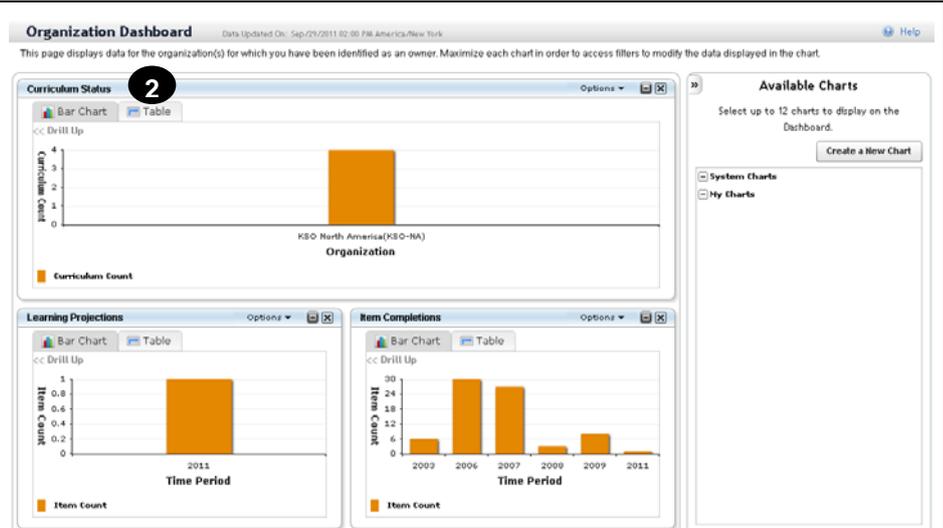
Task A. Organization Dashboard

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

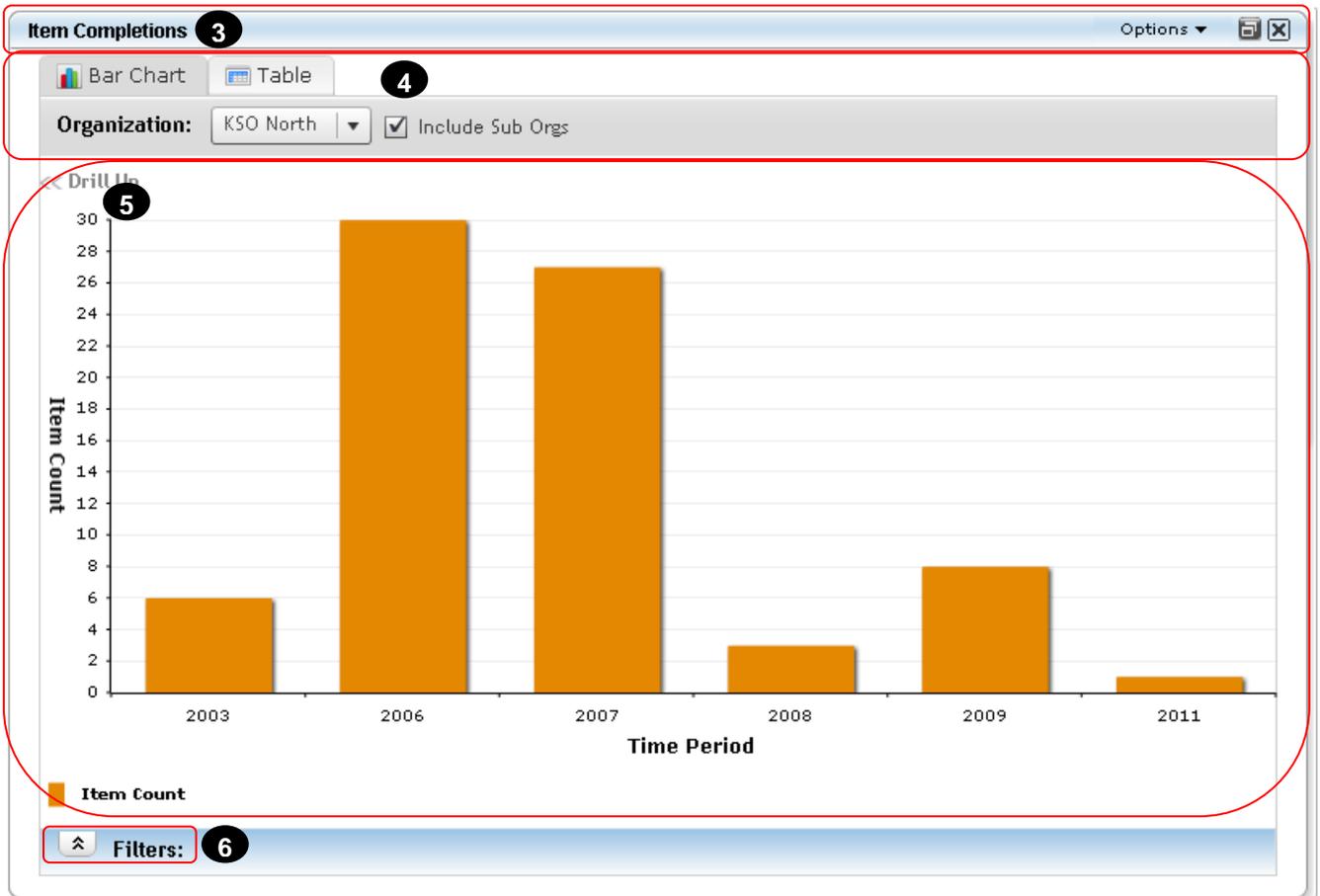


You can use the Organization Dashboard to investigate the status or ratings of learning and performance data.

2 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.

<p>4</p>	<p>Control section</p>	<p>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.</p> <p>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.</p> <p><i>Note: If you change any of the view or filtering options, the chart retains your selections even after you minimize or restore the window.</i></p>
<p>5</p>	<p>Data section</p>	<p>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.</p>
<p>6</p>	<p>Legend</p>	<p>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.</p>

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.

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



- Select the View drop-down list to change initiative viewing options (draft, expired, published, all).



- Click the Create Initiative button.

- Enter initiative name.
- Enter initiative description.
- Enter a descriptive period.
- Select Status Icon (none, or Traffic Light).
- Select Employees must align individual goals to this initiative checkbox.
- Select appropriate alignment setting radio button.
- Click Save.

Add New Initiative

[Initiatives Summary](#) → Add New Initiative

Organization: KSO North America

* = Required Fields

* **Name:**

Description:

1000 characters remaining

Period:

State: Draft

Status Icon:

Employees must align individual goals to this initiative

Alignment Settings:

My direct sub-organizations may choose to align to this initiative

Require my direct sub-organizations to align to this initiative

Push (copy) this initiative to all of my sub-organizations

<p>11 Select the Parent Organization Alignments tab.</p>	
<p>12 View list of parent organization initiatives, and elect to align with one or more initiative.</p> <p>13 Click Apply Changes.</p>	
<p>14 Select the Required Activities tab.</p> <p>15 Click Add Activity button to add an associated activity to this initiative.</p>	

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

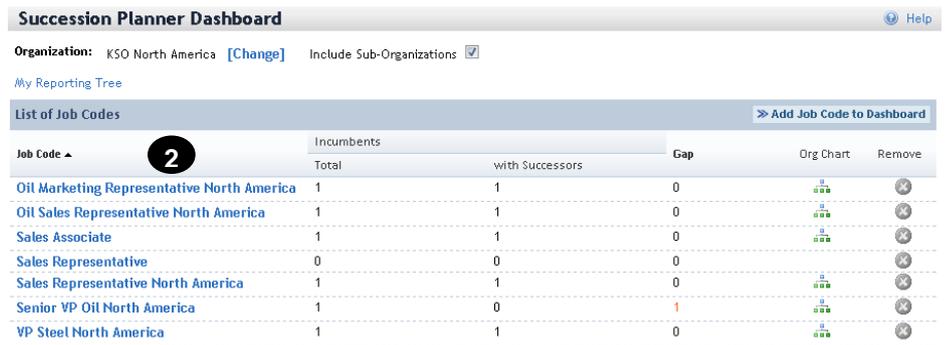
Task C. Succession Planner

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.



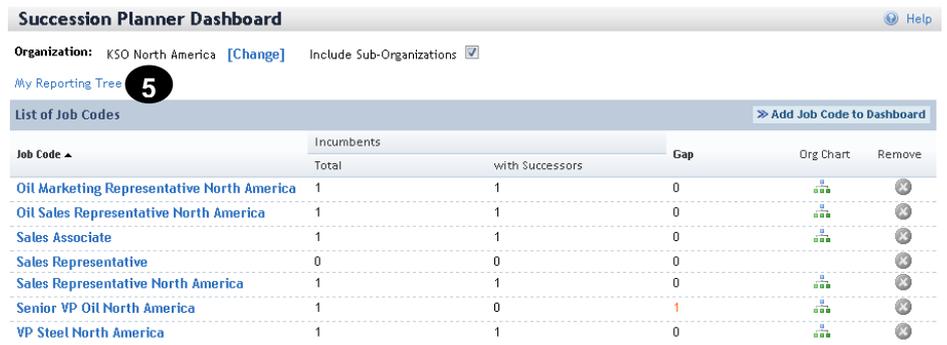
The Job Position Details page displays a list of user names, identified successors, if this requires an emergency replacement, last update date, an organization chart () button, and a successors () button.



3 Click a user name to view their Talent Profile.

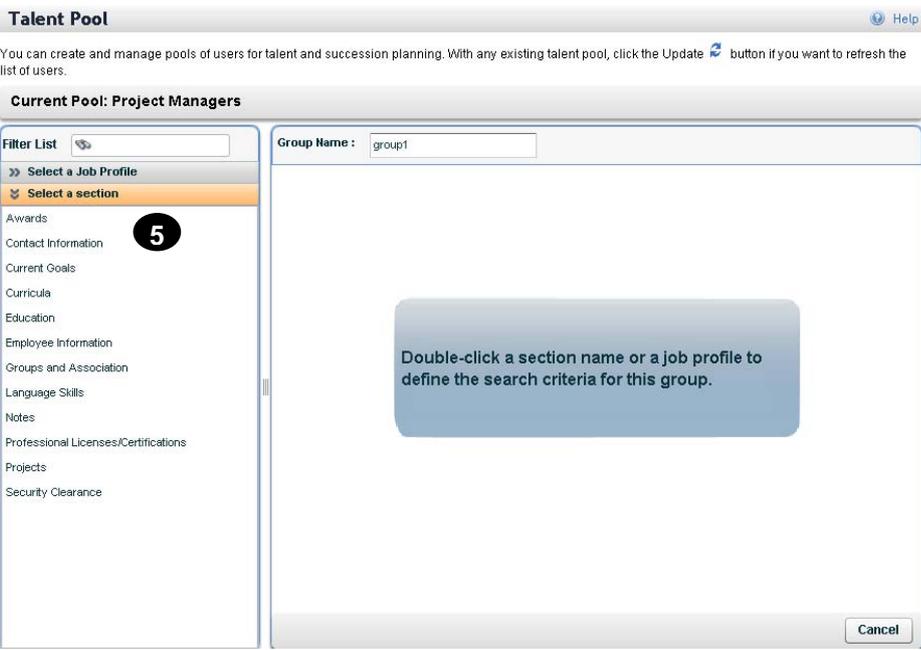
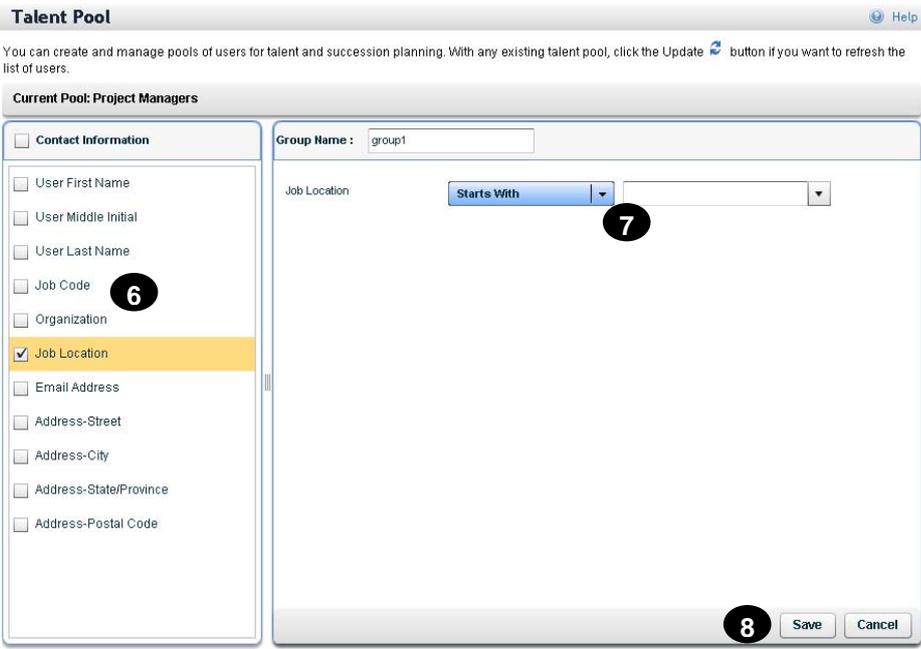
4 Click the Succession Planner Dashboard link to return to the dashboard.

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



<p>6 For a select employee, click the Successors icon (👤) to view a complete list of successors aligned for the job.</p> <p>7 Click the Back link to return to the dashboard.</p>	
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<p>Task D. Talent Pool</p>	
<p>1 From the Home page, roll-over the Organization tab and select Talent Pool from the list.</p>	
<p>If a Talent Pool has never been created, you will be asked to create a new talent pool.</p> <p>2 Enter a talent pool name.</p> <p>3 Enter a description.</p> <p>4 Click OK.</p>	

<p>5 Double-click a section name, for example contact information.</p>	 <p>Talent Pool Help</p> <p>You can create and manage pools of users for talent and succession planning. With any existing talent pool, click the Update button if you want to refresh the list of users.</p> <p>Current Pool: Project Managers</p> <p>Filter List </p> <p>Group Name : group1</p> <p> <input type="button" value="Select a Job Profile"/> <input checked="" type="button" value="Select a section"/> </p> <ul style="list-style-type: none"> Awards Contact Information 5 Current Goals Curricula Education Employee Information Groups and Association Language Skills Notes Professional Licenses/Certifications Projects Security Clearance <p style="text-align: center; border: 1px solid gray; padding: 10px; background-color: #e0e0e0;">Double-click a section name or a job profile to define the search criteria for this group.</p> <p style="text-align: right;"><input type="button" value="Cancel"/></p>
<p>6 Select criteria under contact information.</p> <p>7 Enter search criteria and select.</p> <p>8 Click Save.</p> <p>Continue to add criteria to group.</p>	 <p>Talent Pool Help</p> <p>You can create and manage pools of users for talent and succession planning. With any existing talent pool, click the Update button if you want to refresh the list of users.</p> <p>Current Pool: Project Managers</p> <p> <input type="checkbox"/> Contact Information </p> <ul style="list-style-type: none"> <input type="checkbox"/> User First Name <input type="checkbox"/> User Middle Initial <input type="checkbox"/> User Last Name <input type="checkbox"/> Job Code 6 <input type="checkbox"/> Organization <input checked="" type="checkbox"/> Job Location <input type="checkbox"/> Email Address <input type="checkbox"/> Address-Street <input type="checkbox"/> Address-City <input type="checkbox"/> Address-State/Province <input type="checkbox"/> Address-Postal Code <p>Group Name : group1</p> <p>Job Location Starts With 7</p> <p style="text-align: right;">8 <input type="button" value="Save"/> <input type="button" value="Cancel"/></p>

- 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**.

Talent Pool Help

You can create and manage pools of users for talent and succession planning. With any existing talent pool, click the Update button if you want to refresh the list of users.

Current Pool: Project Managers

Filter List

Select a Job Profile
 Select a section

- Awards
- Contact Information
- Current Goals
- Curricula
- Education
- Employee Information
- Groups and Association
- Language Skills
- Notes
- Professional Licenses/Certifications
- Projects
- Security Clearance

Group Name: Location DC **9**

Double-click the query you want to edit.

- Job Location Starts With Washington DC

10 **11**

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

Talent Pool Help

You can create and manage pools of users for talent and succession planning. With any existing talent pool, click the Update button if you want to refresh the list of users.

Current Pool: Project Managers

	User Name	Supervisor Name	Organization	Job Code	Job Location
Location DC (8) <input type="button" value="Show Excluded"/> (0)					
	Amy M Cook	Brett Lewis	Karabo Steel and Oil	Chief Executive	Washington DC
	Barbara J Gary	Amanda E Gabriel	North America Oil Marketing	Marketing Associate	Washington DC
	Chase S Winters	Brett Lewis	Karabo Steel and Oil	Software Engineer	Washington DC
	Jennifer K Gaines	Amanda E Gabriel	North America Oil Marketing	Oil Marketing Representative North	Washington DC
	Margaret E Foster	Christopher Trace	North America Oil Sales	Director of Oil Sales North America	Washington DC
	Theresa A D'Amico	Diana M Daly	North America Steel Sales	Sales Associate	Washington DC
	Tracy C Browning	Kevin M Bird	Europe Steel Marketing	Steel Marketing Representative Europe	Washington DC
	Wendy A Brayer	Josh Beckett	Human Resources	Director of Human Resources	Washington DC