My Focus

Talent Planning Configuration Guide

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1. Configuration scope and entry routes

This guide explains the implemented controls that govern Talent Planning access, sheet labels, readiness and existing administration routes. Coming Soon material for release 2026.10.1.0 is configuration guidance, not an instruction to change a live environment. Review and rehearse changes in an authorised environment before applying them to users.

Native route	Purpose
Modules/TalentScores/HRF_TALENT_HR_WORKSPACE.aspx	HR portfolio and administration entry.
Modules/TalentScores/HRF_TALENT_MANAGER_WORKSPACE.aspx	Reporting-scope manager portfolio.
Modules/TalentScores/Setup/HRF_TALENT_SHEET_SETTINGS.aspx	Sheet options, labels and audience editing controls.
Modules/TalentScores/HRF_TalentCareerPath.aspx	Existing Career Path editor.
Modules/TalentScores/HRF_TalentSuccessionPlan.aspx	Existing Succession Plan editor.

HR viewing depends on membership of the configured Performance management group. The Sheet settings page additionally checks the exact ADMINISTRATOR group. Manager workspace access requires an authenticated employee, a valid Talent module licence, an enabled manager workspace flag and exact Manager group membership. A navigation link alone does not grant permission.

Use the existing secured menu entries. Do not construct longer employee URLs or share session-bound plan context with another user. A manager view uses the existing reporting hierarchy; changing a hierarchy is a separate authorised HR process.

2. Audience editing controls

The Career and succession editing section in Sheet settings maintains separate self, manager and HR flags for each plan. Viewing remains governed by the audience policy. These flags determine editing only after the viewer is authorised for the employee.

Setting under TALENT Plan audiences	Meaning
CAREER_EDIT_EMP	Employee editing of the signed-in employee Career Path.
CAREER_EDIT_MNG	Manager editing of an authorised reporting employee Career Path.
CAREER_EDIT_HR	HR editing of an authorised Career Path.
SUCCESSION_EDIT_EMP	Employee editing of the signed-in employee Succession Plan.
SUCCESSION_EDIT_MNG	Manager editing of an authorised reporting employee Succession Plan.
SUCCESSION_EDIT_HR	HR editing of an authorised Succession Plan.

A manager opening their own plan follows the employee self-edit flag even when they entered from manager mode. Enabling manager editing does not enable self editing. The server rechecks the authenticated audience and record context; hiding or showing a button is not the security boundary.

1. Open Sheet settings as an authorised administrator.
2. Review both plan rows and the self, manager and HR choices. Record the approved intended policy before changing it.
3. Change only the required audience controls and use Save. Wait for the actual confirmation.
4. Open fresh employee, reporting-manager and HR sessions to verify the approved combinations. Include a denied out-of-scope employee and a manager opening their own plan.

3. Sheet labels periods and planning options

The General settings are maintained through the existing Sheet settings page. Labels and required markers come from configured JSON definitions. Preserve the label identifiers and valid Boolean values when maintaining definitions through approved support tooling; a caption change is not a data migration.

Setting under TALENT General	Purpose
TALENT_SC_IDEAL_SUCCESSORS	Configured ideal successor count used by the Talent sheet.
TALENT_SHEET_SC_ENABLE_INTERIM	Whether interim cover is enabled.
TALENT_CP_ALLOW_MULTI_READINESS	Whether the configured career flow permits multiple readiness choices.
TALENT_SHEET_ENABLE_KEY_PERSON	Whether key-person information is enabled.
TALENT_SHEET_CP_CONTROLS	Career Path labels and required markers.
TALENT_SHEET_SC_CONTROLS	Succession labels and required markers.
TALENT_SHEET_SC_TARGETS	Labels and required markers for succession target controls.

Readiness captions can differ between environments. Extra periods appear when the existing configuration enables them. Keep the training guide and narration aligned with the actual configured periods rather than assuming that every possible period is visible.

The manager workspace feature flag is TALENT / Workspaces / MANAGER_WORKSPACE_ENABLED. The access check accepts enabled values represented as 1, Y or True. Confirm the registered value in the target environment through the established setting administration process; this guide does not assert its current value or provision a new setting.

Saving Sheet settings reloads application settings through the existing page flow. Reopen the plan after a change and confirm the intended controls. A required marker is not, by itself, proof that every relevant save path has the same validation. Verify the server response as part of acceptance.

4. Administration financial year and source data

The HR Administration tab opens existing secured tools, including Talent management, Sheet settings, Talent setup, Talent matrix, Succession view and Finalise reviews. Administrator-only cards remain restricted to their intended audience. The manager workspace does not offer the HR Administration tab.

Area	Preparation responsibility
Financial year	Confirm the current financial year and the record population before comparing summaries. Portfolio results use the latest applicable employee record for that year.
Ratings and matrix	Review the configured rating categories and underlying recorded data before interpreting matrix placement.
Positions and structures	Keep the authoritative organisation and position records correct for future-role selection.
Reporting hierarchy	Verify the manager reporting scope using the established HR process.
Successor targets	Confirm target meanings with the organisation policy and check their configured labels.

Do not describe a configuration screen as a finished workflow implementation wizard. Candidate selection, a completed process status and a recorded development action remain different states. Reporting and planning do not automatically create learning completion, qualifications or appointments.

5. Acceptance and troubleshooting

- Verify HR group membership, administrator-only settings access and the manager licence, flag and group checks separately.
- Check an employee can view only their own plan, a manager can view permitted reporting employees, and an unrelated employee is denied.
- Exercise each approved audience edit setting for both Career and Succession. Include manager-self behaviour.
- Confirm a period selection is unsaved until Save, then verify the same employee and year in a fresh read.
- Check counts with repeated candidates and employees that appear in multiple coverage categories.
- Check filtered grid and card results and an Excel export, including the supported scope limit.
- Verify failed or unavailable data does not appear as a successful zero or completed process.
- Record actual test outcomes in the environment under review; the marketing screenshots and this guide do not certify production acceptance.

When troubleshooting, collect the native entry route, audience, employee context, financial year, filters and the action that failed. Keep credentials, access tokens and private employee data in approved support channels, outside training exports. Save errors must be diagnosed before repeating changes.