My Focus

Talent Planning User Manual

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Table of Contents

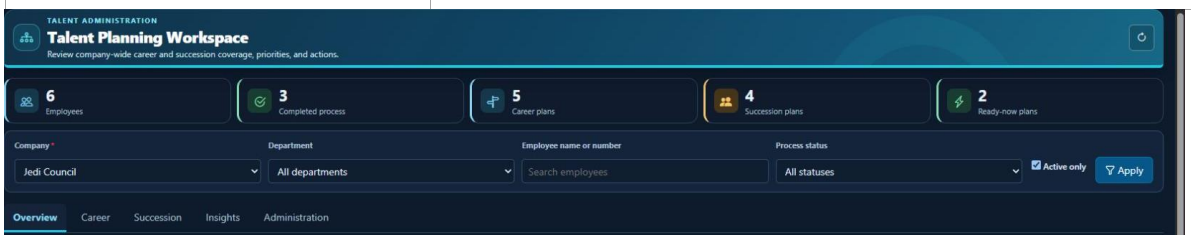
1. Planning conversations and access 1
2. Filters and coverage measures 2
3. Recording a career plan 3
4. Selecting potential successors 5
5. Insights reports and exports 6
6. Review checks and assistance 7

1. Planning conversations and access

Talent Planning brings career direction, development actions and potential successor coverage into connected workspaces. Use this guide to prepare and record a planning conversation, review the selected employee and financial year, and follow the actions permitted for your audience. Coming Soon material for release 2026.10.1.0 does not announce a release date.

In the examples, Leia Organa reviews the Jedi Council team, Luke Skywalker discusses a future Jedi Academy role, and Ahsoka Tano appears as a potential successor. A recorded aspiration or successor nomination remains planning information. It does not appoint, promote or move an employee.

Audience	Where to begin
Employee	Open the Career Path or Succession Plan action offered in your own employee context. Your signed-in identity determines the employee.
Manager	Open the Manager Talent workspace from the enabled manager menu. Its portfolio follows your reporting scope.
HR	Open Talent Planning Workspace from the authorised HR menu. Use company and department filters within your permitted scope.



The workspace groups coverage measures, filters and role-appropriate planning views.

Viewing and editing are separate. A plan can open as read only when your audience may view it but its edit setting is disabled. Confirm the employee displayed before discussing confidential Talent information.

2. Filters and coverage measures

1. Confirm the configured current financial year with your administrator. Portfolio results use the current financial year and the latest applicable record for each employee.
2. Select the company and, where available, the department. Managers work within the reporting population supplied by the system.
3. Use employee search, Search all, process status and Active only where shown. Select Apply after changing filters.
4. Choose a summary tile or a Career or Succession view to review a particular coverage question. Use Grid or Cards to suit the discussion.
5. Use grid column filters and sorting when you need a narrower list. Clear filters deliberately when returning to the wider population.

Measure	How to read it
Employees	Employees in the permitted filtered population.
Completed process	Recorded process status. This is not proof that every development action or appointment is complete.
Career plans	Employees with recorded career planning information in the selected scope.
Succession plans	Employees with recorded succession planning information in the selected scope.
Ready now plans	Plans with ready-now successor coverage. This is a planning assessment.

These measures overlap. One employee can contribute to career coverage, succession coverage and a completed process. Career choices count populated period choices. Successor assignments count entries across periods, so one candidate shown in two periods can contribute twice. Do not treat the assignment count as the number of distinct people.

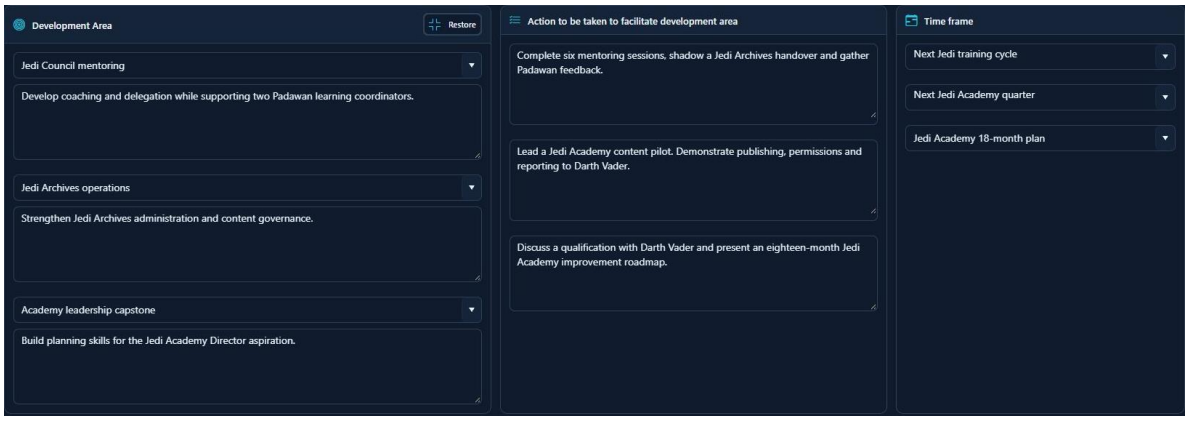
3. Recording a career plan

Open Career for the selected employee. Use employee details, qualifications, career movements and rating history to ground the conversation. Summary tiles jump to their matching sections; a total of career choices can include edits that have not yet been saved.

1. Read the employee and audience label before editing. Use the information icon for the page guide.
2. Review the loaded history and recorded ratings. Open an available history report when the underlying record supports it.
3. For each development row, select the development area and write its supporting description. Keep the matching action and time frame on that same row.
4. Record potential roles against the configured readiness periods. Use the plus button to open Position Search, then choose the appropriate company, structure and position.
5. Review role importance, person importance, leaving risk, impact, Talent rating and comments as applicable. Use evidence from the planning conversation.
6. Check the Unsaved changes message. Select Save to persist the record and wait for the actual response.
7. Close and reopen the same employee and financial year to confirm the saved values before relying on them in a later discussion.



Configured periods hold possible future roles, such as Jedi Academy Mentoring Lead.



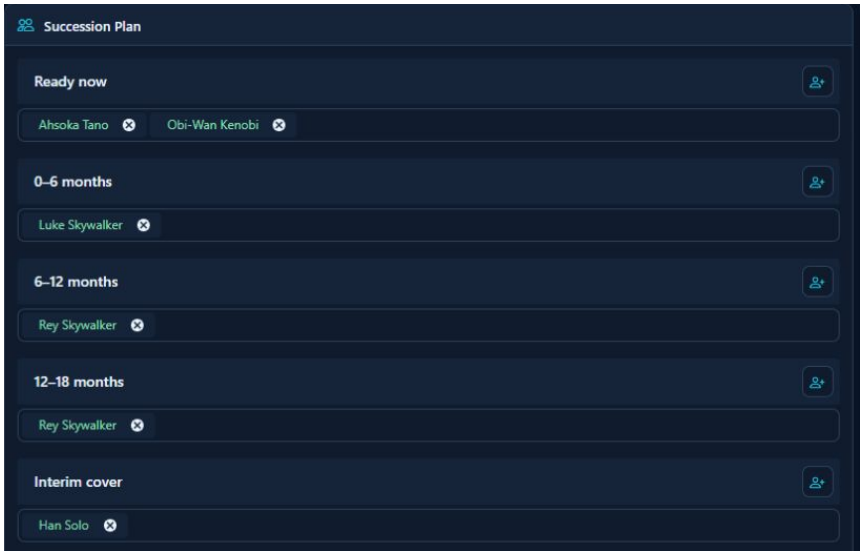
Each development area has its own description, supporting action and time frame.

For example, Luke may discuss Jedi Council mentoring, agree to six mentoring sessions, and use the next Jedi training cycle as the time frame. That plan describes the intended action; it does not create a completed learning record or a qualification award.

4. Selecting potential successors

Open Succession for the employee whose role you are planning to cover. Candidate chips represent selections on the plan. The configured periods and optional interim cover help distinguish readiness and continuity needs.

1. Review the selected employee, financial year and whether the plan is editable.
2. Choose the plus button for the appropriate readiness period or interim cover.
3. Use Employee Search to find candidates within the available search scope. Select the required grid rows.
4. Choose Submit selected to add those candidates to the plan on screen. This selection step does not save the plan.
5. Review candidate chips and remove unintended selections. Consider how repeated candidates across periods affect assignment counts.
6. Review the potential matrix, direct-report measures, candidate measures and configured targets where available. Record the relevant risk action.
7. Select Save and wait for its result. Reopen the same plan to confirm persistence before handing the record to another reviewer.



Potential successors can appear in readiness periods and interim cover.

Ahsoka Tano can be considered ready now while Luke Skywalker is considered for a later period. Readiness assessments support a conversation. The matrix does not make an appointment, and saving candidates does not automatically change their jobs.

5. Insights reports and exports

Use Insights to understand coverage and recorded categories across the filtered population. Read each chart with its scope and definition. A percentage of coverage, a plan count and a count of candidate assignments answer different questions.

- Use available chart controls only where implemented. A visual example does not establish that every chart type or binary export has been exercised.
- Open Career and Succession from the row actions to examine the underlying planning record.
- HR Administration links open established secured Talent tools. Additional administrator-only links depend on the signed-in role.
- Excel exports the permitted filtered results across pages up to the supported limit of 10,000 employees. Reduce the company, department or search scope if that limit is exceeded.
- Review the workbook title, financial year and applied criteria before using it. Exported employee data remains confidential and follows your organisation policy.

A workbook is a point-in-time view. Refresh the workspace after a verified save, and reopen the authoritative plan if a result appears inconsistent. Do not assume another window has already refreshed.

6. Review checks and assistance

What you see	What to check
Read only plan	Confirm the audience edit setting and your viewing scope with the authorised administrator.
Employee missing	Check company, department, active filter, status, search and reporting relationship.
Different totals	Check overlapping measures, repeated candidate entries, scope and financial year.
Selection missing after reopen	Confirm that Save completed after Submit selected or other edits.
Save or history error	Keep the employee and year context, avoid repeated blind submissions and ask support to review the failed action.

Practice with an authorised fictional Jedi Council record: find Luke, review one career period, explain one development action, select a potential successor without submitting a business decision, and identify the explicit save point. A facilitator should arrange a separate approved save-and-reopen exercise when persistence needs acceptance testing.

Before ending a session, confirm the intended employee and year, the audience, the meaning of the measures, any unsaved edits, and the next responsible person. Treat record visibility, a screenshot and a successful save as separate pieces of evidence.