SAP SuccessFactors

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Using Presentations

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Content

1 Presentations

Presentations is a simple and intuitive way for you to create and present interactive presentations that include dynamic SAP SuccessFactors content.

Why Should I Use It?

Presentations is a solution to challenges faced by CHROs and senior HR leaders who deliver talent review presentations to CEOs, executives, and board members multiple times each year. Preparing, delivering, and managing these presentations offline is effort-intensive and provides poor user experience. Typical challenges include:

- HR leaders and staff spend weeks or even months copying & pasting content to assemble these presentations.
- Custom reports, manual effort, and reams of paper are used to produce binders of printed talent cards that are unwieldy and not portable
- Presentations and binders often have outdated static data, raising questions about accuracy
- Static data and a linear presentation format lead to a poor audience experience

Presentations was built to address these challenges. It is a tool for preparing and delivering talent review presentations, or any other presentation that includes dynamic data from SAP SuccessFactors. Key benefits include:

- *Easy assembly.* You can quickly assemble talent review presentations by merging static PowerPoint and dynamic SAP SuccessFactors content
- *Outstanding user experience.* SAP SuccessFactors data is presented in a visually compelling way and centered on presentation focus areas
- *Dynamic content.* Live content from the SAP SuccessFactors HCM Suite eliminates the need for screenshots and talent cards, enabling dynamic talent conversations.

How Does It Work?

Step 1: Upload

- Upload PowerPoint a file to SAP SuccessFactors application from your desktop
- Wait for your Presentation to be ready, during asynchronous processing of your imported file

Step 2: Assemble

Add dynamic SAP SuccessFactors "live slides", such as Succession Org Chart or 9-box, and interactive "hotspots".

Drag and drop slides to rearrange your presentation.

Step 3: Present

- Present directly from the SAP SuccessFactors application, with live data

- Use full-screen presentation mode
- Use your keyboard to navigate slides

Additional Information

Prerequisites	Presentations is available to all SAP SuccessFactors customers. No license or feature prerequisites are required. **Note** Some "live slide" content depends on which SAP SuccessFactors modules are included in your subscription and on how your instance is configured.
Product Versions	Available in both Enterprise and Professional Edition
Permission Model	Compatible with both role-based permissions and legacy permissions.
Configuration Type	Provisioning Opt-In **Note** You can also enable Presentations in *Admin Center* > *Upgrade Center*.

2 Getting Started with Presentations

Enable and configure the Presentations feature in your instance so that people can start using it.

There are three steps to enabling Presentations so that people can use it:

1. Turn on the feature.
2. Accept a user agreement that recognizes the processing of media content through a service that may be outside your geographic region.
3. Grant users permission to access the feature.

The first two steps can be completed together in the Upgrade Center. If you don't use the Upgrade Center, contact SAP SuccessFactors to have the feature turned on and then accept the user agreement separately for your company.

Access permissions are granted in the usual way, using either role-based or user-based permissions.

Enabling Presentations [page 6]
Enable the Presentations feature in the Upgrade Center.

Important Notes About Using Presentations [page 7]
Before you start using Presentations, be aware of the following notes:

Permission to View Presentations [page 8]
Role-based permission control who can use the Presentations feature and the live content that can be shown in a presentation.

2.1 Enabling Presentations

Enable the Presentations feature in the Upgrade Center.

Prerequisites

To complete this task, you need to have permission to access the *Upgrade Center*.

Context

If you do not have permission to access the *Upgrade Center*, please contact Support to have Presentations enabled.

Procedure

1. Go to *Admin Center* > *Upgrade Center* > *Optional Upgrades* and find the *Presentations* upgrade.
2. Click *Learn More & Upgrade Now* and read more about the feature.
3. Click *Upgrade Now* to proceed with the upgrade.
4. Read the End User License Agreement and check the box to confirm that you agree to the terms and conditions described.

   > Note
   >
   > Acceptance of the agreement is a one-time, company-wide decision by an administrator. It is not required by end-users of the Presentations feature.

5. Click *Yes* to perform the upgrade and then *OK* to finish.

Results

The Presentations feature is enabled but is not yet visible to end-users until access permissions have been granted.

Next Steps

Grant the *Manage Presentations* permission to roles or people who you want to give access to Presentations.

Task overview: Getting Started with Presentations [page 6]

Related Information

Important Notes About Using Presentations [page 7]
Permission to View Presentations [page 8]
Important Notes About Using Presentations [page 7]
Permission to View Presentations [page 8]

2.2 Important Notes About Using Presentations

Before you start using Presentations, be aware of the following notes:

- The Presentations feature uses a technology called the SAP SuccessFactors Media Service, where static slides are uploaded for processing. The Media Service is located within customers' existing production data center

locations, except for customers with production data centers in the Kingdom of Saudi Arabia and Greater China, in which case the Media Service located in the Netherlands data center shall be utilized.
- The uploaded files and converted images in Media Service will be purged immediately after the images are downloaded in Presentations.

Parent topic: Getting Started with Presentations [page 6]

Related Information

Enabling Presentations [page 6]
Permission to View Presentations [page 8]

2.3 Permission to View Presentations

Role-based permission control who can use the Presentations feature and the live content that can be shown in a presentation.

To access and use the Presentations feature, you need to have the *Manage Presentations* permission. People with this permission can create, manage, and present presentations. Please note that if you are shared with a presentation, you can see the Presentations from the Home menu even if you do not have the *Manage Presentations* permission.

The visibility of dynamic content in a presentation, such as live slides and talent cards, is further controlled by additional permissions. First, to use some live slides you need to have permission to access a particular SAP SuccessFactors solution or feature. For example, only users who have Org Chart Access permission can add or view the Succession Org Chart live slide. Second, to view dynamic content within a live slide, about a given person or business process, you need to have the appropriate permission. For example, to view incumbents and successors on a live slide, you need to also have permission to do so in SAP SuccessFactors Succession & Development.

Parent topic: Getting Started with Presentations [page 6]

Related Information

Enabling Presentations [page 6]
Important Notes About Using Presentations [page 7]

3 Key Features of Presentations

These are the key features of Presentations.

Talent Cards [page 9]
A talent card is a concise profile of an employee and their talent related attributes.

Live Slides [page 18]
"Live slides" are slides in your presentation that display dynamic content using live data from the SAP SuccessFactors application. Live slides can be inserted among slides you've created from uploaded offline content or they can be used independently to create an entire presentation of dynamic content.

Hotspots [page 20]
A hotspot is a specified area on one of your uploaded static slides that you can interact with during your presentation. Use hotspots to make your static content more dynamic and engaging.

Custom Profile Slides [page 21]
Custom profile slides are slides based on an existing uploaded static slide, with added information from the People Profile.

3.1 Talent Cards

A talent card is a concise profile of an employee and their talent related attributes.

Talent cards display a subset of People Profile information and are designed to display strategic talent information about a person.

There are three different talent cards available, each associated with a specific SAP SuccessFactors module.

- Succession Talent Card
  The talent card you configure for Succession Planning is used in the Succession Org Chart (v12 and higher), the Lineage Chart, the Position Tile View, the Matrix Grid reports (v12 and higher), and MDF Talent Pools.
- Presentation Talent Card
  The talent card you configure for Presentations is used on some live slides and can be linked to hotspots on static slides.
- Calibration Talent Card

While all three have the same set of features, you can configure each differently based on your requirements. For example, there may be certain background elements you want to use for succession planning or calibration sessions that you don't need for your executive reviews.

Based on your permissions and target population, you can add or edit succession nominations and talent pool nominations in all the three types of talent cards. In Presentations, users including recipients of a shared presentation can add and edit nominations in the Nominations section on talent cards with permissions *Succession Planning Permission* and *View Talent Pool nominations* > *Add/edit/delete Talent Pool nominations*.

Some of the benefits of using talent cards include:

- A layout designed for stacking and side by side comparison
- Streamlined information
- Flexibility to configure a layout that works best for you
- Synchronized scrolling when multiple cards are open
- Support for existing user information and many background blocks

> **Note**
>
> Employee data shown on the talent card is subject to system permissions. The talent card only displays employee data that the logged-in user has permission to view. When used in a presentation, presenters should ensure that members of the audience are also allowed to view this information

3.1.1 Designing the Talent Card

Users with the appropriate permissions can design the talent card layout and content.

Prerequisites

You have the *Administrator Permissions* > *Manage Talent Card* > *Manage Talent Card Configuration* permission.

Context

While the vertical layout of the card can't be altered, you can choose content from a wide range of sources to configure the talent card.

> **Note**
>
> *Talent Card* doesn't support HTML tags.

> **→ Remember**
>
> For any instance, there's only one configuration and layout for each of the three types of talent card.
>
> For example, when you design the *Presentations Talent Card*, all presentations created in that instance use the same talent card design.

Procedure

1. Navigate to ▶ *Admin Center* ▶ *Manage Talent Cards* ▶.
2. Select the type of talent card you want to edit.

   You only need to configure the talent cards for the modules you use.

   You're presented with an example talent card reflecting the current layout. By default, the overview, and extended information sections are populated with basic information and the background section is blank.
3. Hover on any section to see the options available for editing.

   > ⓘ Note
   >
   > The example talent card does **not** reflect changes to the overview or extended information sections. These sections are static images and don't change.
4. To add background sections, choose *Add a Section*.

   > ⓘ Note
   >
   > The example talent card **does** display the background sections you add, but it doesn't reflect any field-level configurations. Each section shows a static image and doesn't change.
5. Select the fields you want to display on the talent card.
   In the overview section and the extended information section, you can select fields that are drawn from the standard elements and userinfo elements defined in People Profile.
6. Save your changes.

   > ⓘ Note
   >
   > To view your changes, open the talent card in one of the areas it's used, like in the Succession Org Chart for succession talent cards.

Results

Your new content and layout is reflected wherever that type of talent card is used in your solution.

3.1.1.1 Configuring the Talent Card Overview Section

The overview section appears at the top of the talent card, showing the employee's name and basic information.

Procedure

1. Hover on the overview section and choose *Edit*.
2. Select the fields you want to display in the talent card.

   By default, the overview section displays the employee's *Department*. To override that, select from the list any other basic user information field defined for your company.

   > Note
   >
   > The available fields are drawn from the standard elements defined in People Profile.
3. Select *Show Label* to display the field name label for a field.
4. Select *In Position* if you want to display the number of years the employee has been in their current position.
5. Save your changes.

3.1.1.2 Configuring the Talent Card Extended Information Section

The extended information section contains additional user information, such as the length of time an employee has been in the company, their role or job code, or their manager.

Procedure

1. The extended information section is collapsed by default on the talent card. Click to expand and then edit the section.
2. Select the fields you want to display on the talent card.

   By default, the extended information section displays the employee's *Job Level*, *Function*, and *Country/Region*. To override those fields, select from the lists any other user information field defined for your company.

   > Note
   >
   > The available fields are drawn from the standard elements and userinfo elements defined in People Profile.
3. Select *Show Label* to display the field name label for a field.
4. Save your changes.

3.1.1.3 Configuring the Talent Card Background Sections

Background sections on the talent card are used to display background user information from People Profile.

Context

By default, the talent card does not include any background sections but you can configure it based on the background elements defined for your company in People Profile.

If you've selected the option *Enable Person-Based Background Information Blocks* under *Admin Center* > *Company System and Logo Settings*, the talent card displays the background information based on persons rather than users for employees with concurrent employments and global assignments, which means all the background information records related to an employee are displayed consistently across employments. This data is the same as what appears on People Profile.

Procedure

1. To add a new section to the talent card, click *Add a Section* and choose a predefined section or create a custom section.

   The predefined background sections represent the most commonly used background information. When you create a custom section, you can select from any of the background elements defined for your company.

   > ⓘ Note
   >
   > The *Nominations* predefined section is editable for users who have the *User Permissions* > *Succession Planners* > *Succession Planning Permission* and *User Permissions* > *Succession Planners* > *View Talent Pool Nominations* > *Add/Edit/Delete Talent Pool Nominations* permissions. For the *Performance & Potential* and *Competency & Objective* predefined sections, the mini matrix grid is generated based on the dates and rating scales defined in People Profile. If your matrix grid settings are not in line with People Profile settings, the results may look different in the talent card than in the full matrix grid report.

2. For existing configurable sections, hover over the section and click *Edit*.

   You can configure up to five fields per section. The fields you have to choose from are based on the fields defined for your company.

   > ⓘ Note
   >
   > The available fields are drawn from the background elements defined in People Profile.

3. Select *Show Label* to display the field name label for a field.
4. Adjust the order of the sections by clicking *Move Up* or *Move Down* or remove a section by clicking *Delete*.
5. Save your changes.

3.1.2 Prerequisites for Enabling Navigation Links on Talent Cards

Permitted users can navigate to a specific page by clicking the relevant link available on talent cards.

With proper permissions and settings, you can find the links by clicking *(View Available Actions)* on talent cards.

Links	Prerequisites
Achievements	• You have the *User Permissions* > *Continuous Performance Management User Permission* > *Access Continuous Performance Data* permission. • You have the *User Permissions* > *Continuous Performance Management User Permission* > *Access Continuous Performance Page* permission. • You have the *View* permission for *User Permissions* > *Continuous Performance Management* > *Achievement*. Note This link is only available to managers who have direct reports.
Activities	• You have the *User Permissions* > *Continuous Performance Management User Permission* > *Access Continuous Performance Data* permission. • You have the *User Permissions* > *Continuous Performance Management User Permission* > *Access Continuous Performance Page* permission. • You have the *View* permission for *User Permissions* > *Continuous Performance Management* > *Activity*. Note This link is only available to managers who have direct reports.
Development Plan	• You have the *User Permissions* > *Career Development Planning* > *Career Development Plan (CDP) Access Permission* permission. • You have the *User Permissions* > *Goals* > *Goal Plan Permissions* permission.

Links	Prerequisites
	Note The development plan templates are selected under this permission. • *My Goals Tab - For V10 and Ultra — requires "Total Goal Management"* in provisioning is enabled. • → Remember As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.
Goal Plan	• You have the *User Permissions* > *Goals* > *Goal Management Access* permission. • You have the *User Permissions* > *Goals* > *Goal Plan Permissions* permission. Note The goal plan templates are selected under this permission. • *My Goals Tab - For V10 and Ultra — requires "Total Goal Management"* in provisioning is enabled. • → Remember As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.
Growth Portfolio	• You've migrated to Talent Intelligence Hub. • You've enabled Growth Portfolio. • You have the *View* permission for *User Permissions* > *Growth Portfolio* > *Growth Portfolio* for the target population.
Performance Review	You have Performance Management forms in the *Inbox*, *En Route*, and *Completed* folders.
People Profile	You have the *User Permissions* > *General User Permission* > *Live Profile Access* permission.
Succession Org Chart	• You've enabled Succession Org Chart.

Links	Prerequisites
	• You have the *User Permissions* › *Succession Planners* › *Succession Org Chart Permission* permission.

3.1.3 Editing Information on Talent Cards

For the fields in Talent Information and custom background element sections, HR and managers can edit them directly on talent cards.

Prerequisites

You have the *View* and *Edit* permissions for the respective Employee Data sections under *User Permissions* › *Employee Data*.

Procedure

1. Open an employee's talent card.
2. Choose the View icon in the upper right corner of a section.

   The edit dialog window pops up .
3. Choose the Edit icon and update the information.

   The updates apply to the original data source immediately. For example, if you change an employee's Risk of Loss from High to Low, it’s updated to Low on the employee's People Profile.
4. Save your changes.

Results

The information on talent card and the original data source is updated at the same time.

3.1.4 Viewing Nomination History for a Nominee on Succession Talent Card

You can view any nomination information changes, including note changes, for a nominee in the *Nominations* section of their Succession talent card.

Prerequisites

- *Allow succession planners to view successors on org chart nodes/position tile view* is enabled in *Admin Center* > *Succession* > *Org Chart Configuration* > *Succession org chart*.
- You have the *User Permissions* > *Succession Planners* > *Succession Planning Permission* permission.
  With this permission, you can view nomination entities in any status, including the *Removed* status.

Context

The following statuses are supported in the nomination history:

Status	Description
Succeed	(For MDF position-based nomination only) Indicates that a nominee has become the incumbent for a position. (For role-person nomination only) Indicates that a nominee has become the incumbent for an employee.
Approved	(For MDF position-based nomination only) Indicates that a nominee has been added to positions. (For role-person nomination only) Indicates that a nominee has been added to employees.
Removed	(For MDF position-based nomination only) Indicates that a nominee has been removed from positions. (For role-person nomination only) Indicates that a nominee has been removed from employees.
Pending	(For MDF position-based nomination only) Indicates that adding a nominee to positions hasn't been approved. (For role-person nomination only) Indicates that adding a nominee to employees hasn't been approved.
Change Pending	Indicates that changing readiness or notes for existing nominations hasn't been approved.

Status	Description
Deletion Pending	(For MDF position-based nomination only) Indicates that re-moving a nominee from positions hasn't been approved. (For role-person nomination only) Indicates that removing a nominee from employees hasn't been approved.

Procedure

1. In *Succession*, select a nominee to open their Succession talent card.
2. In the *Nominations* section, choose *(View Nomination History)*.
3. **Optional:** To view the nomination history in a specified date range, choose *(Date Range)* in the upper right corner, select a start date and end date, and then choose *OK*.

   By default, the nomination history in the past 12 months is displayed. To show all nomination history, clear the date range value.

3.2 Live Slides

"Live slides" are slides in your presentation that display dynamic content using live data from the SAP SuccessFactors application. Live slides can be inserted among slides you've created from uploaded offline content or they can be used independently to create an entire presentation of dynamic content.

Although live slides are not technically required, they are the primary benefit of the Presentations feature, so using them is highly recommended.

You can add a variety of different types of live slides to your presentation and each live slide is configured differently, depending on the data it displays. Live slide configuration settings determine what SAP SuccessFactors data is displayed on the slide by default. Because live slides are dynamic and interactive, in many cases, you can also navigate away from the default view and display other SAP SuccessFactors data during the course of your presentation.

Related Information

Adding a Live Slide [page 25]
Types of Live Slides [page 19]

3.2.1 Types of Live Slides

The following table describes the types of live slides that are available in the Presentations feature. Some live sides have their own unique prerequisites, in addition to those of the Presentations feature as a whole.

Live Slide	Description	Prerequisites
Matrix Grid Report (9-box)	This slide shows the matrix grid reports. You can choose between two types of matrix grid live slides: the *Performance-Potential Matrix* and the *How vs What Matrix*.	This slide requires: • SAP SuccessFactors Succession & Development • Matrix grid reports configured
Succession Org Chart	This slide shows a specified manager and team (both direct and matrix reports), along with their successors.	This slide requires: • SAP SuccessFactors Succession & Development • Succession nomination based on MDF position or legacy position
Team View	This slide shows a specified manager and his or her team, both direct and matrix reports. It is similar to the "basic" org chart.	No prerequisites are required for this live slide to be available in Presentations. User must have Org Chart Navigation permission.
Talent Pools	This slide shows MDF Talent Pools. You can click to view their members.	This slide requires: • SAP SuccessFactors Succession & Development • MDF Talent Pools configured
People Grid	This slide shows groups of people in various layouts.	No prerequisites are required for this live slide to be available in Presentations.
Compensation Review	This slide shows compensation data based on executive review compensation templates.	This slide requires: • SAP SuccessFactors Compensation • Executive review template configured User must have permission to view executive review templates for the selected population.
Position Tile	This slide shows MDF Position and related Succession plans in a tile-like format. You can filter positions and display them based on their business need. Position filters are configured as part of the “Position Tile” tab in Succession.	This slide requires: • MDF Position • Position Tile tab User must have permission to view the positions being displayed on the slide.

People Profile	This slide shows a specified employee's entire one-page profile. You can navigate the profile within the slide just as you would on the People Profile page.	This slide requires: • People Profile
Performance History	This slide shows the history of performance ratings for a chosen population over a period of time. The performance rating is derived from the selected process. The rating scale associated with the process is used for the Y-axis and ratings are normalized to that rating scale. Hovering over a “dot”, displays a line chart tracking the performance rating throughout the period.	This slide requires: • SAP SuccessFactors Performance and Goals • Performance History block configured on People Profile Users must have permission to access the performance history block for the selected population.
Analytics	This slide shows charts and metrics from Analytics dashboards. You can display up to four charts on a slide, in various layouts.	This slide requires: • Dashboards 2.0 • Tile-based dashboards (standard dashboards are not supported) Users must have Dashboard 2.0 access permission for the selected tiles.

3.3 Hotspots

A hotspot is a specified area on one of your uploaded static slides that you can interact with during your presentation. Use hotspots to make your static content more dynamic and engaging.

You can link a hotspot to any specified URL or you can use it to open up the talent card for a specified employee.You can only add hotspots to static slides created from uploaded PowerPoint or PDF content.

Related Information

Adding a Hotspot to Your Static Slides [page 36]
Editing or Deleting Hotspots [page 36]

3.4 Custom Profile Slides

Custom profile slides are slides based on an existing uploaded static slide, with added information from the People Profile.

Custom profile slides give you greater control over slide content than the People Profile live slide. Previously, you had to use a People Profile live slide that displayed the person's entire profile. Now, you can create slides with just the content you need for the purpose of your talent review meeting.

Custom profile slides are a good alternative to the Pixel-Perfect Talent Card (PPTC). Although they are not as flexible as the PPTC, you can create these slides by yourself, with a simple drag-and-drop interface.

Related Information

Adding a Custom Profile Slide [page 23]

4 Creating Your Presentation

Use SAP SuccessFactors Presentations to enhance your presentations with dynamic content and live employee data from the SAP SuccessFactors application.

Here are the basic steps:

1. Upload static content to SAP SuccessFactors (in slide or PDF format).
2. Add dynamic content, such as live slides, hotspots, talent cards, profile slides, and analytics.
3. Arrange the slides and finalize your presention.
4. Present!

Creating a Presentation [page 22]
Create a presentation so that you can add dynamic content.

Adding a Custom Profile Slide [page 23]
Add a custom profile slide to your presentation.

Adding a Live Slide [page 25]
Add a live slide with dynamic content to your presentation so that you can make your presentation more interactive.

Adding Static Content to Your Presentation [page 32]
Add uploaded static content in the holding area to your presentation.

4.1 Creating a Presentation

Create a presentation so that you can add dynamic content.

Prerequisites

- You have the *Manage Presentations* permission.
- Optional. To make dynamic content more consistent with the branding applied to the rest of SAP SuccessFactors application, you can also configure themes in *Admin Center* > *Manage Themes*.

Procedure

1. Select *Presentations* from the main navigation menu.
2. On the *My Presentations* tab, click the "plus" icon to add a presentation.
3. Give your presentation a name.

Results

Your presentation is opened in slide sorter mode, ready for editing.

Next Steps

You can now add dynamic live slides or upload static content to your presentation.

4.2 Adding a Custom Profile Slide

Add a custom profile slide to your presentation.

Prerequisites

You have *Manage Presentations* permission.

Context

> ⓘ Note
>
> In the custom slide editing mode, you can design a template for a selected population. You can also preview the template with real employee data and adjust template layout as you want before applying the template to the selected population automatically.

Procedure

1. Upload PowerPoint or PDF content that you want to use as the basis for your custom profile slides. This static content provides the background on top of which you insert dynamic profile data.
2. Find your uploaded content in the *Slide Holding Area* and add it to your presentation.
3. In either the View Slide Timeline mode or the View Slide Sorter mode, select your uploaded content.
4. Open the action menu dropdown and select *Create Customized Slides*.
5. In the *Add Populations* dialog, select the population for whom you wish to create a custom profile slide. Then click *Add to Selected* to add them to your presentation. To ensure optimal performance, do not add more than 200 people.

You can create slides for:

- An individual user
- A team, starting from a given manager and including a specified number of levels
- A dynamic group that you define

6. After clicking *Continue*, you are presented with a wizard that displays your static background and lists the available profile data in a side panel.

   You are in the template design mode. You can drag and drop widgets from the right panel to the slide as placeholders and adjust the layout as you want. You can add:

   - Profile photo
   - Labels: You can add customized texts with Labels.
   - Basic user info fields
   - Background info fields
7. During and after the design, you can check the slide layout with real data under the *Preview* tab and make necessary adjustments back in the *Template* design mode.
8. Click *Finalize* to close the wizard and add custom profile slides for each person to your presentation.

> ⓘ Note
>
> You cannot go back and edit custom profile slides once they are created. To change the data or layout of your custom profile slides, you have to create and add them again.

Related Information

Custom Profile Slides [page 21]

4.3 Adding a Live Slide

Add a live slide with dynamic content to your presentation so that you can make your presentation more interactive.

Context

To add a live slide to your presentation, complete the following steps:

Procedure

1. In View Slide Sorter or View Slide Timeline mode, open the action menu dropdown, and select *Add A Live Slide*.
2. Select the type of live slide you want to add.
3. Configure the live slide using the configuration wizard.
4. Click *Add Live Slide* to add the slide to your presentation.

Results

The selected live slide is added to the end of your presentation.

Matrix Grid Report Live Slide Configuration [page 26]

Team View Live Slide Configuration [page 26]

Succession Org Chart Live Slide Configuration [page 27]

Talent Pools Live Slide Configuration [page 28]

People Grid Live Slide Configuration [page 28]

Compensation Review Live Slide Configuration [page 29]

Position Tile Live Slide Configuration [page 30]

People Profile Live Slide Configuration [page 30]

Performance History Live Slide Configuration [page 31]

Analytics Live Slide Configuration [page 31]

Related Information

Live Slides [page 18]

4.3.1 Matrix Grid Report Live Slide Configuration

When adding a matrix grid report live slide, you can do the following:

- Define the group of people whose ratings you want to display in the grid
- To display members of a team, choose a manager and the number of organizational levels.
- To display members of group, choose an existing dynamic group or create a new group especially for your presentation.

> **Note**
>
> The option to display groups is only available if "dynamic groups" functionality is enabled in your instance.

- Specify a date range to limit the scope of ratings included in the grid. Like matrix grids elsewhere in your instance, the latest ratings are used to plot each employee by default.

> **Note**
>
> You can also use average of all found ratings instead of the latest ratings. To change the rating basis, go to *Admin Center* > *Matrix Grid Reports: Performance-Potential* > *Use average of all found ratings, instead of latest*.

Parent topic: Adding a Live Slide [page 25]

Related Information

Team View Live Slide Configuration [page 26]
Succession Org Chart Live Slide Configuration [page 27]
Talent Pools Live Slide Configuration [page 28]
People Grid Live Slide Configuration [page 28]
Compensation Review Live Slide Configuration [page 29]
Position Tile Live Slide Configuration [page 30]
People Profile Live Slide Configuration [page 30]
Performance History Live Slide Configuration [page 31]
Analytics Live Slide Configuration [page 31]

4.3.2 Team View Live Slide Configuration

When adding a Team View live slide, you can do the following:

- Select the manager of the team you want to display by default.
- Optionally, you can choose to *Include Matrix Reports* on the slide.

Parent topic: Adding a Live Slide [page 25]

Related Information

Matrix Grid Report Live Slide Configuration [page 26]
Succession Org Chart Live Slide Configuration [page 27]
Talent Pools Live Slide Configuration [page 28]
People Grid Live Slide Configuration [page 28]
Compensation Review Live Slide Configuration [page 29]
Position Tile Live Slide Configuration [page 30]
People Profile Live Slide Configuration [page 30]
Performance History Live Slide Configuration [page 31]
Analytics Live Slide Configuration [page 31]

4.3.3 Succession Org Chart Live Slide Configuration

When adding a Succession Org Chart live slide, you can do the following:

- Select *Find a position* to search by position title, or select *Find a user* to search by incumbent name.
- For a position-based view, choose the position you want to display on the slide by default.
- For a user-based view, choose the manager you want to display on the slide by default.
- Optionally, you can select the option to *Include Matrix Reports* on the slide.
- Optionally, you can select the option to *Show Only Critical Positions* on the slide.
- Optionally, after you've added a Succession Org Chart live slide, you can selectively hide certain positions in your presentation. To hide positions, see *Hiding Positions on the Succession Org Chart*.

Parent topic: Adding a Live Slide [page 25]

Related Information

Matrix Grid Report Live Slide Configuration [page 26]
Team View Live Slide Configuration [page 26]
Talent Pools Live Slide Configuration [page 28]
People Grid Live Slide Configuration [page 28]
Compensation Review Live Slide Configuration [page 29]
Position Tile Live Slide Configuration [page 30]
People Profile Live Slide Configuration [page 30]
Performance History Live Slide Configuration [page 31]
Analytics Live Slide Configuration [page 31]

4.3.4 Talent Pools Live Slide Configuration

When adding a Talent Pools live slide you can do the following:

- Select the talent pool(s) you want to display.

Parent topic: Adding a Live Slide [page 25]

Related Information

Matrix Grid Report Live Slide Configuration [page 26]
Team View Live Slide Configuration [page 26]
Succession Org Chart Live Slide Configuration [page 27]
People Grid Live Slide Configuration [page 28]
Compensation Review Live Slide Configuration [page 29]
Position Tile Live Slide Configuration [page 30]
People Profile Live Slide Configuration [page 30]
Performance History Live Slide Configuration [page 31]
Analytics Live Slide Configuration [page 31]

4.3.5 People Grid Live Slide Configuration

When adding a People Grid live slide, you can do the following:

- Choose how many grids to display on your slide
- Add people to each grid on your slide. You can add people one-by-one or use dynamic groups. To change the sequence of the people within a grid, you can simply drag and drop their names.

  > **Note**
  >
  > The option to add people using dynamic groups is only available if "dynamic groups" functionality is enabled in your instance.

- Add a name label for each grid on your slide.
- Add a title to your slide.
- Add or remove extra grids through *Edit Slide Settings* > *Change Grids*.

  > **Note**
  >
  > The users in the removed grids are also removed.

Parent topic: Adding a Live Slide [page 25]

Related Information

[Matrix Grid Report Live Slide Configuration [page 26]]
Team View Live Slide Configuration [page 26]
Succession Org Chart Live Slide Configuration [page 27]
Talent Pools Live Slide Configuration [page 28]
Compensation Review Live Slide Configuration [page 29]
Position Tile Live Slide Configuration [page 30]
People Profile Live Slide Configuration [page 30]
Performance History Live Slide Configuration [page 31]
Analytics Live Slide Configuration [page 31]

4.3.6 Compensation Review Live Slide Configuration

When adding a Compensation Review live slide, you can do the following:

- Select a compensation plan from the dropdown menu.
- Add a slide title.
- Select the person or people to display on the slide.
- To display an individual, choose the employee from a dropdown.
- To display a team, choose a manager and the number of organizational levels to display.
- Select pay components to be displayed on the slide.

Parent topic: Adding a Live Slide [page 25]

Related Information

Matrix Grid Report Live Slide Configuration [page 26]
Team View Live Slide Configuration [page 26]
Succession Org Chart Live Slide Configuration [page 27]
Talent Pools Live Slide Configuration [page 28]
People Grid Live Slide Configuration [page 28]
Position Tile Live Slide Configuration [page 30]
People Profile Live Slide Configuration [page 30]
Performance History Live Slide Configuration [page 31]
Analytics Live Slide Configuration [page 31]

4.3.7 Position Tile Live Slide Configuration

When adding a Position Tile live slide, you can do the following:

- Add a slide title
- Select the position filters configured for the Position Tile (via MDF Position configuration)

Parent topic: Adding a Live Slide [page 25]

Related Information

Matrix Grid Report Live Slide Configuration [page 26]
Team View Live Slide Configuration [page 26]
Succession Org Chart Live Slide Configuration [page 27]
Talent Pools Live Slide Configuration [page 28]
People Grid Live Slide Configuration [page 28]
Compensation Review Live Slide Configuration [page 29]
People Profile Live Slide Configuration [page 30]
Performance History Live Slide Configuration [page 31]
Analytics Live Slide Configuration [page 31]

4.3.8 People Profile Live Slide Configuration

When adding a People Profile live slide, you can do the following:

- Select the population for People Profile
- To display an individual, choose the employee from a dropdown.
- To display a team, choose a manager and the number of organizational levels to display.
- To display a group of people, choose a dynamic group

Parent topic: Adding a Live Slide [page 25]

Related Information

Matrix Grid Report Live Slide Configuration [page 26]
Team View Live Slide Configuration [page 26]
Succession Org Chart Live Slide Configuration [page 27]
Talent Pools Live Slide Configuration [page 28]
People Grid Live Slide Configuration [page 28]

[Compensation Review Live Slide Configuration [page 29]](#)
[Position Tile Live Slide Configuration [page 30]](#)
[Performance History Live Slide Configuration [page 31]](#)
[Analytics Live Slide Configuration [page 31]](#)

4.3.9 Performance History Live Slide Configuration

When adding a Performance History live slide, you can do the following:

- Select the population to display
- To display a team, choose a manager and the number of organizational levels to display.
- To display a group of people, choose a dynamic group
- Select the date range for review period and
- Select the process to determine the source and rating scale for the performance rating

Parent topic: Adding a Live Slide [page 25]

Related Information

Matrix Grid Report Live Slide Configuration [page 26]
Team View Live Slide Configuration [page 26]
Succession Org Chart Live Slide Configuration [page 27]
Talent Pools Live Slide Configuration [page 28]
People Grid Live Slide Configuration [page 28]
Compensation Review Live Slide Configuration [page 29]
Position Tile Live Slide Configuration [page 30]
People Profile Live Slide Configuration [page 30]
Analytics Live Slide Configuration [page 31]

4.3.10 Analytics Live Slide Configuration

When adding an Analytics live slide, you can do the following:

- Select the number of dashboards to display (1 to 4).
- Enter a slide title.
- Select one or more dashboards to display (from list of dashboards already configured in Dashboards 2.0).
- Add a title for each dashboard displayed.

ⓘ Note

When you apply a filter to a dashboard, you're changing the filter of the dashboard overall, which means the change also applies to other slides.

Parent topic: Adding a Live Slide [page 25]

Related Information

Matrix Grid Report Live Slide Configuration [page 26]
Team View Live Slide Configuration [page 26]
Succession Org Chart Live Slide Configuration [page 27]
Talent Pools Live Slide Configuration [page 28]
People Grid Live Slide Configuration [page 28]
Compensation Review Live Slide Configuration [page 29]
Position Tile Live Slide Configuration [page 30]
People Profile Live Slide Configuration [page 30]
Performance History Live Slide Configuration [page 31]

4.4 Adding Static Content to Your Presentation

Add uploaded static content in the holding area to your presentation.

Prerequisites

You have *Manage Presentations* permission.

Context

Uploaded static content is visible in the *Slide Holding Area*. It is not automatically added to your presentation. You can add some or all of the slides in the holding area to your presentation.

Uploaded content is saved and stored in the holding area for future use and you can have more than one uploaded file in holding area.

Procedure

1. To add all of the uploaded slides, click the "plus" icon.
2. To select one or more of the uploaded slides manually, click the "slides" icon and then select the slides you want to add.

   To multi-select, hold down the CTRL button as you select the slides.
3. To replace one ore more slides already in your presentation with newly uploaded content, first select the slides you want to replace. Then select the slides in the *Slide Holding Area* that you want to replace them with and click *Replace*.

   To multi-select, hold down the CTRL button as you select the slides.

Results

Static slides are added to your presentation.

Next Steps

You can now add hotspots to your static slides.

Related Information

Adding a Hotspot to Your Static Slides [page 36]

4.4.1 Uploading Static Content to Presentations

Upload static content, such as slides or a PDF, so that you can add them to your presentation.

Prerequisites

You have *Manage Presentations* permission.

Context

Static slide content is optional. You can also create an entire presentation out of dynamic live slides only.

Procedure

1. Open your presentation.
2. In either Slide Sorter or Slide Timeline mode, open the action menu dropdown and select *Upload PowerPoint or PDF Slides*.
3. Select the file you want to upload.
4. Click *Upload*.

Results

Your slides are uploaded and processed in the background. If you don't want to wait, you can navigate away from your presentation and return later for further editing, when your slides are ready.

After processing, your uploaded content appears in the *Slide Holding Area*. Each slide or page in your uploaded content is converted into a slide in the holding area.

Next Steps

You can now add any or all of the uploaded static slides to your presentation.

5 Editing Your Existing Slides

Edit the content or behavior of slides that you've already created and added to a presentation.

Edit Live Slide Configuration Settings

> ⓘ Note
>
> To do this, open your presentation in Slide Sorter mode.

In Slide Sorter mode, hover your cursor on the slide and open the options menu. For uploaded content, you can choose one of the following options: *Edit Slide Content*,*View Slide*, *Remove Slide*, and *Clone Slide*. For live slides, you can choose one of the following options: *Edit Slide Settings*,*View Slide*, and *Remove Slide*.

To edit the configuration settings of a live slide, select *Edit Slide Settings* to open the same dialog window you used to create the slide.

Edit Hotspots

> ⓘ Note
>
> To do this, open your presentation in Slide Timeline mode.

In Slide Timeline mode, open the action menu dropdown and select *Edit Slide Content* to enter edit mode. While in edit mode, you can add hotspots to uploaded content.

Navigate Dynamic Content

> ⓘ Note
>
> To do this, open your presentation in Slide Timeline mode.

In Slide Timeline mode, open the action menu dropdown and select *Edit Slide Content* to enter edit mode. While in edit mode, you can interact with dynamic content on live slides, in order to set the default starting point for that slide during your presentation. For example, you can navigate the org chart or open a particular talent card.

5.1 Adding a Hotspot to Your Static Slides

You can add a hotspot to static slides. Within the hotspot area, you can add a talent card or a link.

Procedure

1. In the Slide Sorter mode, hover over the slide, open the options menu, and click *Edit Slide Content*.
2. In the Slide Timeline mode, open the action menu dropdown and select *Edit Slide Content*.
3. Click the *Add hotspot* icon in the upper-right corner, and drag your cursor around the area that you want to define as a hotspot.
4. In the pop-up window, link the hotspot to one of the two available options:

Option	Description
Link	To point the hotspot to an external URL, select this option and enter a URL.
Talent Card	To make the hotspot open a talent card, select this option and choose an employee in the search box.

5. Click *Done* to save your hotspot and return to timeline mode.

Results

- In Presentation Mode, the hotspots aren't visible but the defined area is clickable and interactive. "Link" hotspots open the URL in a new window. "Talent Card" hotspots open the talent card on top of the live slide.
- In Slide Timeline mode, the hotspot appears as a shaded rectangle on the slide. Slides with a hotspot are also indicated in the timeline with a "link" icon in the corner of the thumbnail.

Related Information

Hotspots [page 20]
Editing or Deleting Hotspots [page 36]

5.1.1 Editing or Deleting Hotspots

Edit or delete hotspots that you have added to a presentation.

To edit an existing hotspot, find the slide in Slide Timeline mode, open the action menu dropdown, and select *Edit Slide Content* to enter edit mode. Then, hover over the hotspot to reveal the edit and delete icons.

Related Information

Hotspots [page 20]
Adding a Hotspot to Your Static Slides [page 36]

5.2 Hiding Persons on the Succession Org Chart and the Team View Live Slides

You can hide persons on the Succession Org Chart and the Team View live slides.

Context

You can hide specified persons on the Succession Org Chart and the Team View live slides so that they don't appear in your presentation. To do so, complete the following steps.

Procedure

1. In the View Slide Sorter or View Slide Timeline mode, open the actions menu dropdown, and select *Edit Slide Content* to enter edit mode.
2. Click the *Show/Hide person* icon in the upper-right corner.
3. Click *Hide this person* icon.

   When you've hidden the person, the *Show this person* icon shows, and you can click it to unhide this person. If you want to unhide all hidden persons, you can click the *Show All* button.

Results

Hidden persons are grayed-out in edit mode and aren't displayed in Slide Timeline or Presentation modes.

5.3 Rearranging Your Presentation

Use the slide sorter view to rearrange your presentation.

Prerequisites

You have *Manage Presentations* permission.

Procedure

1. Open your presentation in Slide Sorter mode
2. Drag-and-drop slides into the desired order.

   > ⓘ Note
   >
   > Live slides are represented in the sorter by special icons.
3. Save your changes.

6 Viewing Your Presentation

You view your presentation in one of three view modes: slide sorter, slide timeline, and presentation. Use the icons in the top corner to switch between view modes.

Slide Sorter View Mode [page 39]
Use the slide sorter view mode to add new slides, rearrange slide order, and edit existing slides.

Slide Timeline View Mode [page 40]
Use the slide timeline view mode to preview or edit each slide in your presentation.

Presentation View Mode [page 40]
Use presentation mode to give your presentation to an audience.

6.1 Slide Sorter View Mode

Use the slide sorter view mode to add new slides, rearrange slide order, and edit existing slides.

Use the option menu to:

- Edit the slide
- Add a hotspot to static slides
- Open the full-size slide in slide timeline mode
- Remove the slide
- Copy the slide
- Insert a new live slide after the selected slide

Options	Static Slides	Customized Slides	Live Slides
View Slide	Y	Y	Y
Edit Slide Settings	N	N	Y
Remove Slide	Y	Y	Y
Clone Slide	Y	N	N
Add Slide Content	Y	N	N
Add A Live Slide	Y	Y	Y
Upload PowerPoint or PDF Slides	Y	Y	Y

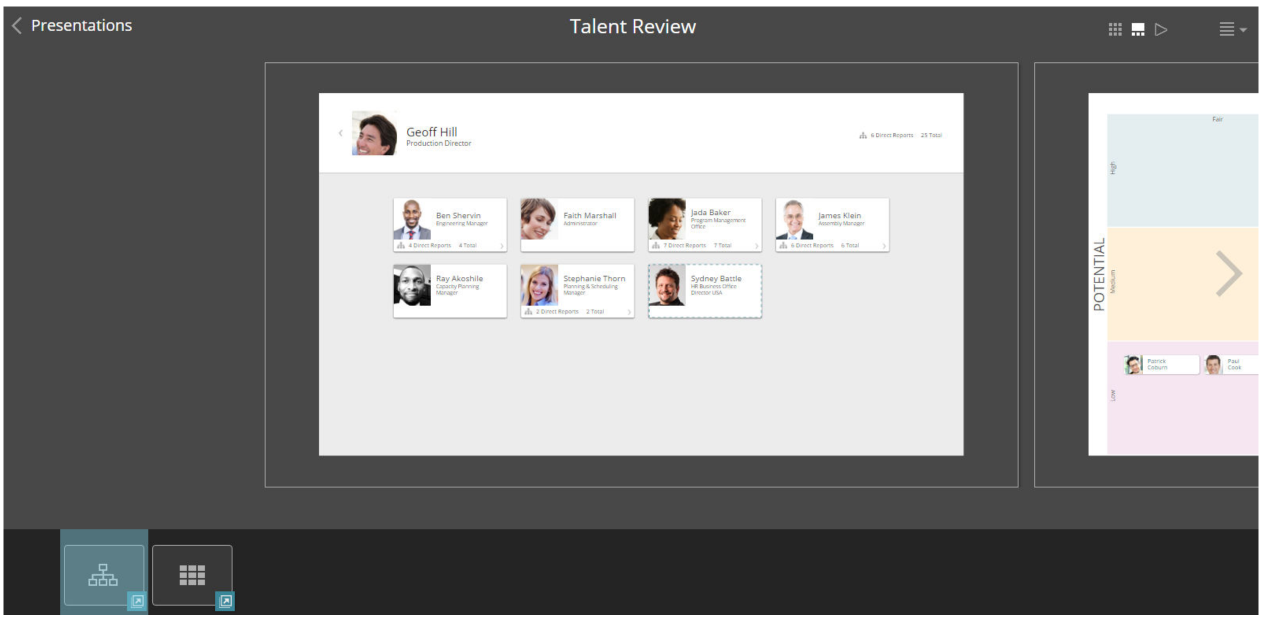
6.2 Slide Timeline View Mode

Use the slide timeline view mode to preview or edit each slide in your presentation.

Slide thumbnails are shown in the timeline at the bottom of the screen and you can view full-size slides one at a time. Live slides are represented by special icons and slides with hotspots have a hotspot icon in the corner of the thumbnail.

In the timeline view, you can:

- Use arrow keys to step through your slides
- Add hotspots to static slides
- Interact with dynamic content on live slides



6.3 Presentation View Mode

Use presentation mode to give your presentation to an audience.

The current slide fills the entire screen. You can:

- Click through your slides using arrow keys.
- Use the cursor to interact with dynamic content.
- Press `Esc` to exist your presentation.

7 Managing Your Presentations

You can organize your saved presentations in folders and share them with other people in your organization..

7.1 Organizing Your Presentations

Organize and archive your presentations in folders.

Prerequisites

You have *Manage Presentations* permission.

Context

Over time, you might create many different presentations, each year for different business processes. To avoid clutter on the screen and save past presentations for future reference, you can organize them in folders.

Procedure

1. Go to *Presentations* > *My Presentations* .
2. By default, you have three folders available on the side of the screen:

- The *Presentations* folder contains active presentations and is displayed by default when you arrive on the page.
- The *Archived* folder contains presentations that you want to save but don't need to keep in view.
- The *Trash* folder contains presentations that you have deleted.

3. To view the contents of a folder, just click it.
4. To move a presentation to a new folder, click the "more" icon (three stacked dots) and select *Move To*. Then select the folder where you want to move the presentation.
5. To create a new folder, click *Create New Folder* and give the folder a name.
6. To edit or delete a folder after you create it, hover over the folder and click the "edit" or "trash" icons.
7. To delete a presentation, find it in a folder and click the "more" icon (three stacked dots). Then click *Delete*.

   The deleted presentation is moved to the *Trash* folder.
8. To empty the *Trash* and permanently delete presentations, hover of the folder and click *Empty Trash*.
9. To restore a presentation, find it in the *Trash* folder and click the "more" icon (three stacked dots). Then select *Restore*.

7.2 Copying a Presentation

You can copy a Presentation of your own or shared with you by other people.

Prerequisites

You have the *Manage Presentation* permission.

Procedure

1. Go to *Home* > *Presentations*.
2. Choose a Presentation and click *Copy* from the three-dot action menu.

   You can copy any Presentation under the *MY PRESENTATIONS* and the *SHARED WITH ME* tabs.
3. Give the copy a name and select a folder to save the copy to.

   You can save the copy to any folder, except the trash folder, under the *MY PRESENTATIONS* tab.
4. Click *OK*.

   A popup window displays, asking whether you want to open the copy now.
5. To open the Presentation, click *OK*. You can also click *Cancel* to stay on the current page.

Results

You have successfully copied the Presentation and saved it to a folder.

7.3 Sharing a Presentation

Share a presentation with other people in your organization, within Presentations or by email.

Prerequisites

You have *Manage Presentations* permission.

Procedure

1. Go to *Presentations* > *My Presentations*.
2. Click the "share" icon.
3. Use search boxes to add individuals or groups to whom you want to send the presentation. You can also grant editing permissions to the people you are sharing with.
4. The *Send email notification to new viewers* option is selected by default. If you do **not** want to send an email notification to the people you are sharing with, unselect the checkbox.
5. To view the exact URL of the presentation to be shared, click *View URL of this presentation*.
6. Click *Customize Email* to customize the text of the email notification.

> Note
>
> Email tokens dynamically insert information about the presentation and the recipient into the email. You do not need to use them, but if you delete them accidentally and want to add them again, you can click *View Email Tokens* to see a list of available tokens and add them again.

7. Click *Done* to finish.

Results

The specified people can now view the shared presentations on the *Shared With Me* tab.

7.4 Giving Edit Permission When Sharing a Presentation

When sharing a Presentation, you can also grant editing permissions to others so that they can edit this Presentation .

Prerequisites

- You have the *Manage Presentation* permission.
- Although you can grant editing permission to others who do not have the *Manage Presentation* permission, they must have the *Manage Presentation* permission to edit the Presentation shared by you.

Procedure

1. Go to *Presentations* > *MY PRESENTATIONS* .
2. Click the sharing icon on the Presentation that you want to share.

   The *Share Presentation* popup displays.
3. Search for individual or group users to share the Presentation with.
4. Select *Edit*.
5. Optionally, you can customize email notifications to new viewers.
6. Click *Done*.

Results

You have successfully granted editing permissions to others.

Next Steps

To ensure that there is only one person editing the Presentation at a time, lock the Presentation before editing, and unlock the Presentation when finish editing.

7.5 Printing a Presentation

Print a Presentation or save it as a PDF file.

Prerequisites

You have the *Manage Presentations* permission.

Context

You can print presentation slides in either View Slide Sorter mode or View Slide Timeline mode.

Procedure

1. Go to *Presentations* > *My Presentations* and open a Presentation.
2. Choose *Print Presentation* from the Presentation menu.

   A *Print Presentation Options* popup shows.
3. Select from the options.

   For 9-box and people grid slides, you can preview the layout with demo images on the right.
4. Click *Print*.

   A print preview window shows.
5. Further customize your printing preferences in the *Print Preview* window.

   You can also save the presentation slides as a PDF file.
6. Click *Print*.

Results

You've successfully printed the presentation slides.

8 Giving Your Presentation

Launching Your Presentation

To launch your presentation, launch the triangular "play" icon to enter Presentation Mode.

Presenting to an Audience

- Use the left and right arrows to step through the presentation.

> **Note**
>
> You can use F11 in most browsers to enter full-screen mode on your computer monitor.

Using the Talent Card

To interact with the talent card during your presentation, you can:

- Click an employee on the Org Chart to open the talent card
- Click an employee on a Matrix Grid to open the talent card
- Click on a hotspot to open the talent card.
- Open multiple talent cards for side-by-side comparison
- Expand talent cards to show more information

Using the Succession Org Chart Live Slide

To interact with the Succession Org Chart during your presentation, you can:

- Click the incumbent or successors to view successor details
- Click the direct report count to navigate down the hierarchy

Using an Analytics Live Slide

You can interact with the data on an Analytics live slide during your presentation. You can:

- Hover your cursor over one metric in a chart to reveal a numerical display of the data.
- Focus your presentation on one particular chart by clicking the chart and opening the data in a dialog box.
- Make the dialog box larger by clicking the "expand" icon.
- Filter the data in the selected chart. You can use the same filter options that are available for that chart in Dashboards 2.0. To do this:

Click the edit icon (pencil) or *Filter*.

Select your filters.

Click *Apply Filters*.

Click

- Click the "X" icon to close the dialog and continue with your presentation.

Using Hotspots

To interact with hotspots during your presentation, you can:

- Click a hotspot to open a talent card:

Find and Display Any Talent Card

You can search for and display any talent card at any point during your presentation, using the built-in People Search.

Exiting Your Presentation

To exit presentation mode, press ESC or hover the cursor in the top corner to reveal the "exit" icon.

Updating Matrix Grid Report Live Slide [page 47]
Matrix Grid Report live slide is different from other live slides. It does not automatically reflect updates in the employee records. You must refresh the Matrix Grid Report live slide to see the latest changes.

8.1 Updating Matrix Grid Report Live Slide

Matrix Grid Report live slide is different from other live slides. It does not automatically reflect updates in the employee records. You must refresh the Matrix Grid Report live slide to see the latest changes.

Prerequisites

You have *Manage Presentations* permission.

Context

Do this shortly before presenting your slides, to ensure that you are displaying the latest information.

Procedure

1. In the Matrix Grid Report live slide, click the menu icon in the upper-right corner.
2. Choose *Edit Slide Content*.
3. Click the refresh icon in the upper-right corner of the Matrix Grid Report live slide.

Results

You can see the Matrix Grid Report live slide is now updated.

9 Change History

Learn about changes to the documentation for Presentations in recent releases.

1H 2025

Type of Change	Description	More Info
Changed	We updated the permission prerequisites for enabling navigation links on talent cards.	Prerequisites for Enabling Navigation Links on Talent Cards [page 14]

2H 2024

Type of Change	Description	More Info
Changed	We removed the topic about end user agreement for Presentations and updated information about Media Service.	Important Notes About Using Presentations [page 7]
Added	We added information that the talent card displays background information based on persons rather than users for employees with multiple employments.	Configuring the Talent Card Background Sections [page 13]

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