



Deltek

Deltek Talent Management Development 16.2

Administrator Guide

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Development Administrator Overview

Employees use Deltek Talent Management's Development module to perform tasks related to growing their own or their employees' careers. Career Development administrators use the Development Administration features to manage Career Path Templates, create Rating Tips, manage Succession Plans and configure 9 Boxes.

Note: This guide covers all available modules and features, even those that your firm may not have purchased.

Development and Succession Planning Administration Menus

As a Deltek Talent Management Development module administrator, you use the options in the Development and Succession Planning sections of the Administration screen.

Development Administration Menu Choices

You can manage Career Path templates and Potential Rating tips on the Development section of the Administration screen.


Menu Choices

Menu Choice	Description
Career Path Template	This screen lists and lets you manage existing templates. From here, you can also create new templates for different job profiles, which can be used by managers for recommendations when they create a career path for an employee.
Potential Rating Tips	This screen lists all Potential Scales, and Rating Tips associated with each value in each scale. Rating Tips are used to provide guidance to managers to consistently set proper Potential ratings.

Display the Development Administration Menu Choices

You can access the Development Administration options on the Administration screen.

To display the Development Administration menu choices:

1. Click  in the toolbar at the top of any screen.
2. Go to the Development section and select **Career Path Template** or **Potential Rating Tips**.

Career Path Templates Screen

Career paths help employees develop their skills and talents as they advance in the organization.

The Deltek Talent Management Development module can help managers establish the career paths of the employees who report directly to them. You can create career templates for different job profiles that managers can use when creating a career path for employees.

Display the Career Path Templates Screen

Follow these steps to access the Career Path Templates screen.


To access the Career Path Templates screen:

Click . Under **Administration » Development**, click **Career Path Templates**.

Contents of the Career Path Templates Screen

The Career Path Templates screen contains the **Career Path Template** column that displays the name of the job for which the career path template was created.

Actions

The **Actions**  drop-down field lists the options for each career path template. Select from one of the following actions.

Action	Description
View Job Profile	Click this to view the position profile.
Add Job	Click this to add jobs to the template.
Delete	Click this to delete the career path template.

View Career Path Templates Screen

View the details of career templates that have been created for different job profile.

Display the View Career Path Templates Screen

Follow these steps to display the View Career Path templates screen.



To display the Career Path Templates Screen:

From the **Career Path Template** column on the Career Path Templates screen, click the name of the template to display its details.

Contents of the View Career Path Templates Screen

The View Career Path Templates screen displays the following columns.

Columns

Column	Description
Sequence	This is the sequence or order in which the career path positions are completed.
Position	This is the title of the position. The position indicated in the topmost row (for example, Sequence 1) is the last position held by the employee before they reach their final career path destination, such as Director of Training.
Duration (Months)	This is the recommended duration for the employee to remain in a specific position before moving into the next position.
Actions	This contains the available options for each career path position. Here, you can reorder the sequence of the career path positions by clicking  to move up or  to move down.

Actions

In addition, the **Actions**  drop-down field contains the following actions.

Action	Description
Edit	Edit the career path position.
Delete	Delete the career path position.

Use the Create Career Path Templates screen to configure new templates. After you create the template, you can add jobs to the template.

Create a New Career Path Template

Follow these steps to create a new career path template.


To create a new career path template:

1. Click **Create a New Career Path Template**.
2. From the **Career Path** drop-down list, select the appropriate value, and click **Submit**.
After you create the template, you must add jobs to that template.

Add Jobs to a Career Path Template

You can add jobs to a career path template on the Career Path Template screen.

To add jobs to a career path template:

1. Locate the name of the career path template that you want to edit.
2. In the **Actions** column, click  » **Add Job**.
3. On the Career Path Template Search screen, select the appropriate values for the following search criteria.

Criteria	Description
Job Title	Select the job title from this drop-down list.
Required Job Skills	Select the required skill for this career path, if applicable. You can select more than one value.
Job Skills Gained	Select the gained job skill for this career path, if applicable. You can select more than one value.
Competency Gained	Select the gained competency for this career path, if applicable. You can select more than one value.
Competency Required	Select the required competency for this career path, if applicable. You can select more than one value.

Add more search variables to narrow down your search results. Use fewer criteria options if you want to broaden your search results

Note: If you want to select multiple values in the **Required Job Skills**, **Job Skills Gained**, **Competency Gained**, and **Competency Required** fields, hold down the **Ctrl** key (Windows) or the **⌘** key (Mac), and click the names of the skills or competencies that you want to add to the search criteria.

Click  to move all highlighted selections at once to the search criteria. Click

 to move selections one at a time.

To remove selections, click  to remove all highlighted selections at once.

Click  to remove selections one at a time.

4. Click **Search**.

The search results display in a table that contains the following details.

Search Criteria	Description
Job Title	This column displays the job titles that you selected or that match your search criteria.
CompetenciesRequired	This column displays the required competencies that you selected or that match your search criteria.

Search Criteria	Description
	If you did not populate this field in the previous screen, Deltek Talent Management will display the default values associated with the job title.
Competency Gained	This column displays the gained competencies that you selected or that match your search criteria. If you did not populate this field in the previous screen, Deltek Talent Management will display the default values associated with the job title.
Job Skills Required	This column displays the required job skills that you selected or that match your search criteria. If you did not populate this field in the previous screen, Deltek Talent Management will display the default values associated with the job title.
Actions	This column contains a link to the Gaps Analysis table for the job title. See Gap Analysis .

5. Select the check box next to the **Job Title** that you want to add, and click **Add Job To Template**.


Gap Analysis

For each job title in the search results listing, you have the option to view the gap analysis between that job and the individual viewing the analysis.

Launch the Competencies Gap Analysis Table

Follow these steps to launch the Competencies Gap Analysis Table.

To launch the Competencies Gap Analysis Table:

On the Add Job to Template section of the Career Path Template Search screen, in the Actions menu, click  for the job whose Gap Analysis you want to launch.

Here, you have a view of the following:

- Competencies Gap
- Skills Gap

Gap Analysis Dylan McKenzie - Financial Analyst

Download as CSV

Competencies Gap

COMPETENCIES	REQUIRED BY JOB (P) VS. ATTAINED BY EMPLOYEE (A)	REQUIRED	ATTAINED	GAP
Accountability		4	4	0
Adaptability		3	3	0
Collaboration		3	4	+1
Decision Making		3	4	+1
Ethics/Integrity		4	N/A	-4
Action Orientation		N/A	3	N/A
Adaptability / Flexibility		N/A	4	N/A
Command Skills		N/A	5	N/A
Trust		N/A	4	N/A
Winning Attitude		N/A	5	N/A

Skills Gap

SKILLS	REQUIRED VS. ATTAINED	REQUIRED	ATTAINED	GAP
Compare, estimate, economize and perform math functions		Advanced	N/A	-3
Concentrate and handle detailed work		Intermediate	N/A	-2
Recognize and solve problems		Advanced	N/A	-3
HRIS		N/A	Expert	N/A
Management		N/A	Advanced	N/A
Organizational Development		N/A	N/A	N/A
Staffing/Recruiting		N/A	Advanced	N/A
Training & Development		N/A	Advanced	N/A

Close Window

Contents of the Competencies Gap Section

A competency is a behavior trait or knowledge a person possesses that they can use to make them effective and essential to a specific job or organization.

Competencies help match the appropriate candidates to positions, provide a basis for appraisal ratings, and help employees succeed in their career goals.

Any competencies listed below the blue divider bar are not required by the chosen job. These competencies are those attained by the employee through job experience. The second column is a graphical depiction of competencies required for the job versus the competencies attained by the employee.

Color Codes

The Competencies Gap graph on the Gap Analysis screen is color coded as described in the following table.

Color Code	Meaning
Completely orange bar	This indicates that the employee has achieved the required level.
Completely red bar, with a minus sign	This indicates that the employee is deficient in that competency.
Partially orange and partially red bar	This indicates that the employee has the competency/skill, but not at the required proficiency level.
Completely green bar, with a plus sign	This indicates that the employee has exceeded the required level.
Completely green bar, without a plus sign	This indicates that the employee has the competency, but that competency is not required for the selected job. These are the competencies that are typically listed below the blue divider bar.

Contents of the Skills Gap Section

Skills are proficiencies learned or developed through training or experience.

Skills differ from competencies in that skills do not include behaviors or innate abilities. Skills help match the appropriate candidate to positions within the organization; they provide a basis for appraisal ratings; and they can be earned through classes or project teams.

The **Required**, **Attained**, and **Gap** columns have numeric values that explain the information in the bar graph.

Skills listed below the blue divider bar are not required for the selected job, but they are listed because they have been attained by the employee. The **Required vs. Attained** column is a graphical representation of both the skills required by the job and the skills attained by the employee.

Color Codes

The graph is color coded as described in the following table.

Color Code	Meaning
Completely yellow block	This indicates that the employee exactly meets the requirement for the selected job.
Completely red block, with a minus sign	This indicates that the employee has a skill deficiency.
Completely green block	This indicates that the employee exceeds the requirement for the selected job.

Download Gap Analysis as a Report

Follow these steps to download gap analysis as a report.


To download the gap analysis as a report:

Click **Download as CSV**, which allows you to save the information in CSV format. This format interprets the data in a spreadsheet, but will not display the graphic chart information.



Edit Jobs in the Career Path Template

Follow these steps to edit jobs in the career path template.

To edit jobs:

1. From the **Actions** column of the job that you want to edit, click  » **Edit**.
2. In the **Duration (Months)** column, change the number of months required for an employee to remain in that position before he or she can be promoted to the next position in the career path.
Repeat this for each position, as required.


Note: The value initially displayed for the duration comes from the job profile of the position.

3. Click  to save your changes.
4. Click  to cancel your changes. This resets the value to the last saved state.

Delete Jobs from the Career Path Template

Follow these steps to delete jobs from the Career Path Template.

To delete a position from the career path template:

1. From the **Actions** column of the job that you want to delete, click  » **Delete**.
2. Click **OK** to confirm the deletion.


Note: The application always displays a confirmation message when the action being taken has a permanent outcome and cannot be undone.

Edit Career Path Templates

Career path templates may be edited for the following reasons:



- If the duration for the positions listed under the template needs to be updated.
- If new jobs need to be added to the template.

To edit the duration for positions in a career path template:

1. From the **Administration » Development » Career Path Template** screen, click the **Name** of the template that you want to edit.
2. From the **Actions** column of the job that you want to edit, click  » **Edit**.
3. In the **Duration (Months)** column, change the number of months required for an employee to remain in that position before he or she can be promoted to the next position in the career path.

Repeat this for each position, as required.


Note: The value initially displayed for the duration comes from the job profile of the position.

4. Click  to save your changes.
5. Click  to cancel your changes. This resets the value to the last saved state.

Delete a Career Path Template

Deleting a career path template removes that career path template from any list or select box where career path templates are displayed to managers.

To delete a career path template:

1. From the **Administration » Development » Career Path Template** screen, click  in the **Actions** column of the job that you want to delete, and click **Delete**.
2. Click **OK** to confirm the deletion.

Potentials Rating Tips

View all Potential Scales and the Rating Tips associated with each value on a scale.


Rating tips can be used to provide managers guidance to consistently rate each employee's potential.

The Potentials Rating Tips screen contains a list of all Potentials Scales. When a scale is selected from the list, the **Scale Values** column displays the numeric values available to assign to an employee for this scale. The **Potential Rating Tips** column displays tips a manager can use when assigning a value for a selected employee's Potential rating. Administrators can edit these tips at any time by clicking the Edit icon for a given tip.

Display the Potentials Rating Tips Screen

Display the Potential Ratings tips screen on the Administration screen.



To access the Potentials Rating Tips screen:

1. Click  » **Administration** » **Development** » **Potentials Rating Tips**.
2. Click a link for a Scale from the list of Scales to display the **Scale Values** and **Rating Tips**.

Edit a Potentials Rating Tip

Administrators can edit rating tips to make it clear to managers how to consistently rate each employee's potential.

To edit a Potentials Rating Tip:

1. Click the  Administration icon.
2. Under Development, click **Potential Rating Tips**.
3. On the Potential Ratings Tips screen, click a link for the Scale whose tips you want to edit from the list of Scales.
Scale Values for the selected tip display in the column on the right.
4. In the Scale Value column, click the  edit icon for the Scale Value whose tip you want to edit.
5. In the text box, type a rating tip, such as **Performance falls short of minimum expectations**.
6. Click **Submit**.

Succession Planning Administration Menu Choices

You can manage Succession Plans and configure 9 Boxes on the Succession Planning section of the Administration screen.


Menu Choices

Menu Choice	Description
Manage Succession Plans	This screen lists all succession plans. You can click on a plan name to view plan details, select Change Owner from the Actions menu to assign a new plan owner, or click the Succession Plan Without Successors button to view a list of plans who still need to have successors assigned.
Configure 9 Box	This screen allows managers to view their employees in a nine box grid, which offers a quick display of where each employee fits within the organization.

Display the Succession Planning Administration Menu Choices

You can access the Succession Planning Administration options on the Administration screen.

To display the Succession Planning Administration menu choices:

1. Click  in the toolbar at the top of any screen.
2. Go to the Succession Planning section and select **Manage Succession Plans** or **Configure 9 Box**.

Manage Succession Plans

You create a Succession Plan for every job identified as a key in its job profile.

When you create a new succession plan, Deltek Talent Management automatically sets you as the succession plan **Owner**. You can change the ownership of the succession plan to an individual within the organization.

Display the Manage Succession Plans Screen

You can access the Manage Succession Plans screen on the Administration screen.

To display the Manage Succession Plans screen:

Click **Administration » Succession Planning » Manage Succession Plans**.

Contents of the Manage Succession Plans Screen

You can view the details of a succession plan, and change the plan owner.

Columns

Column	Description
Plan Created	This is the creation date of the succession plan.
Succession Plan	This is the name of the job or position. It displays as a hyperlink only for the owner of the succession plan.
Company/Division	This is the company or division associated with the succession plan.
# of Employees	This indicates the number of employees. It displays as a hyperlink on the Manage Positions screen.
# of Vacant Positions	This indicates the number of vacant positions. It displays as a hyperlink on the Manage Positions screen.
# of Successors	This indicates the number of successors. It displays as a hyperlink on the Potential Successors screen

# in Talent Pool	This indicates the number in talent pool. It displays as a hyperlink on the My Talent Pool screen.
Owner	This is the name of the current owner of the succession plan.
Actions	This contains additional options that are available for each succession plan.

Actions

The **Actions**  drop-down field contains the following action.

Action	Description
Change Owner	Click this to edit the succession plan owner.

Change Succession Plan Owner

You can change the succession plan owner on the Manage Succession Plans screen.

To change the Succession Plan owner:

1. Click the Administration icon the toolbar in the upper left of any screen.
2. Under the Succession Planning section, click **Manage Succession Plans**.
3. Find the succession plan you want to edit in the list, click the three vertical dots icon in the Actions menu and select **Change Owner**.
4. Click **Select Succession Plan Owner**.
5. On the Search for Employees screen, use search options to find those individuals who report directly to a specific manager, or display all internal users who are eligible to be a succession plan owner.

Note: Typically, only those in the Executive group are permitted to be owners of a succession plan.

6. In the search results list, check the box next to the employee you want to select as the new succession plan owner.
7. Click **Confirm Selection**.
8. Click **Update**.

Succession Plans Without Successors

When a succession plan is created for a key job, the owner of that succession plan has the ability to nominate individuals within the organization as a successor if the incumbent leaves the

organization or is promoted to another position. In some cases a plan is created but does not yet have a successor named.

Depending on your access rights, you can access the list of succession plans without successors from the Reports menu, from the Succession menu, or from the Administration menu's Manage Succession Plans screen.

Display the Succession Plans Without Successors Screen

Use this report to view a list of key jobs without a successor. Users can access this report from several different paths (Succession menu, Administration, Reports)

To display the Succession Plans Without Successors screen from Administration:

1. Click **Administration » Succession Planning » Manage Succession Plans**.
2. Click **Succession Plans Without Successors**.

Display the Report From The Succession Menu

Use this report to view a list of key jobs without a successor.

To display the Succession Plans Without Successors screen from the Succession Menu:

1. Click **Succession » Succession Plans**.
2. Click **Succession Plans Without Successors**.

Display the Report From the Reports Screen

Use this report to view a list of key jobs without a successor.

To display the Succession Plans Without Successors screen from Reports:

1. Click **Reports » Succession Planning**.
2. Under Successors, click **Succession Plans Without Successors**.

Contents of the Succession Plans Without Successors Screen

View details of plans without designated successors, such as job title, location and succession plan owner, and download the list.

Columns

Column	Description
Location Name	This indicates the location of the job.
Job Family	This indicates the job classification.
Job Title	This indicates the title of the job.
Job Code	This indicates the unique job identification code.

Key Job	This indicates whether or not the job is identified as a key job. No may display in this column if a job profile was previously considered a key job for the organization and then later revised.
Plan Owner	This displays the name of the owner of the succession plan.
Has Talent Pool	This indicates whether or not the succession plan has a talent pool.

Actions

Column	Description
Download as CSV	Click to download as a comma delimited file.
Download as PDF	Click to download as an Adobe Acrobat PDF file.
More Options	These options are available when you click More Options: <ul style="list-style-type: none"> Download as XLS: Click to download as a Microsoft Excel file. Report: Click to view all Succession Planning related reports.

Configure 9 Box

Managers can view their employees in a nine box grid, which offers a quick display of where each employee fits within the organization.

The placement on the grid is determined by scores that the employee receives from the Performance Appraisal, and a Potential Rating selected by their manager.

The view that your organization may have regarding an employee's capabilities can differ from other organizations. To accommodate differences, administrators can configure this nine box grid to function within the parameters of each organization.

The number **1** box in the upper right corner always represents the employees with the highest capabilities. The number **9** box is always in the lower left corner and represents the employees that need the most improvement. You can change the way boxes **2 – 8** display on the grid by selecting the options for the following.

Display the Configure 9 Box

Display the Configure 9 Box Screen on the Administration screen.

To display the Configure 9 Box screen:

Click **Administration » Succession Planning » Configure 9 Box**.

Contents of the Configure 9 Box Screen

Configure the display of performance vs. potential based on the priorities of your organization to track employee progress, and change default scale values, if desired, to meet your organization's needs.

Configure 9 Box Display Options

Field	Description
X-Axis	This is the range indicator. Select which type of content (Performance or Potential) to display across the bottom row of the matrix. The type of content not selected (Performance or Potential) displays vertically in the first column.
Measurement Priority	The measurement priority is what your organization feels is the priority, Potential or Performance .
Priority Weight	The priority weight determines whether box 4 is the middle box of the grid or in the corner. If you select Extreme Weight for Priority Metric , then box 4 displays in the corner closest to the chosen measurement priority. If you select Average Weight of Both Metrics , then box 4 displays in the middle.

Configure 9 Box Ranges

Talent Management's default scale values are converted into a three-point scale to represent the **Performance Placement** scale. The Career Development Succession Planning scale values are converted into a three-point scale to represent the **Potential Placement** scale. The options in this section allow you to revise the scale value range conversions to best fit with your organization's needs.

- If you have multiple scales in your performance appraisals they are all converted to the default scale prior to conversion.
- Click **Equalize Placements** to reset the values to their original settings.

If desired, revise scale value range conversions.






Field	Description
Performance Placement	Enter the Upper Range for each of the First, Second, and Third Increments of the 3-point Performance scale.
Potential Placement	Enter the Upper Range for each of the First, Second, and Third Increments of the 3-point Potential scale.

Edit the 9 Box

Configure colors and labels that appear on the 9 Box, which enables a quick view of an employee's performance vs. potential. The 9 Box is accessible on the **My Employees** menu.

You can change the colors and verbiage of each box in the grid. Any change that you make in the 9 Box section will be seen by all managers in your organization.

To edit the 9 Box:

1. Click **My Employees » 9 Box**.
2. Click **Edit** on the right side of the screen.
3. Click **Edit this box** to edit any of the boxes within the grid.
 - Box name
 - Box description
 - Box color
4. Click the color palette icon  to change the box color.
5. On the color sector window, click the color selection cross and move it to the desired color.
6. To pick a shade of color, move the shade selector arrow up or down.
7. When you have set your desired color, click  again to close the color selector window.
8. If you want to copy a color used in another box in the grid, click the **Copy Color from Cell** drop-down list, and select the title of box that you want to copy.
9. When all your changes are in place, click **Update**, or click **Cancel** to leave the cell unchanged.
10. Click  to edit the **Potential** and **Performance** indicators to match the verbiage your organization uses.
11. After entering your new indicator term, click  to save.
12. When all edits have been made to the 9 Box grid, click **Standard Mode**  to view your changes to the 9 Box grid.

Development Plans

Development plans are created to help an employee master competencies or skills to progress to the next step on his or her career path.



A Development Plan is a list of training courses and other activities that the employee must accomplish to meet his or her goals. When Development Plan functionality is enabled for a user group, Development plans can be created by a direct manager, an upper level manager or admin, or by an employee.

Enable the Development Plan feature from the Core area of the Features screen.

Enable the Development Plan Features

You enable the Development Plan feature from the Core area of the Features screen.

To enable the Development Plan features:



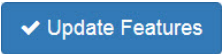
1. Click .
2. On the Administration screen, in the Global Settings >> System Administration section, click **Features**.
3. In the **Select a Group** drop-down list, select the employee group that will use the Development Plan functionality.
4. Click **Core**.
5. Click the down arrow  next to Development Plans and select all the features to enable.
 - **Add Development Plan** — This feature grants access to the Add Development Plan page where administrators and managers can add development plans for their direct and indirect reports.
 - **Add Development Plan for Self** — This feature allows users to add development plans for themselves.
 - **Add Development Plan Item** — This feature grants access to the New Plan Item screen where administrators and managers can add individual training courses and other activities that address the plan objectives.
 - **Add Development Plan Item for Self** — This feature allows users to add development plan items for themselves.
 - **Development Suggestions** — This feature allows the creation and management of development suggestions for competencies.
 - **Edit Development Plan Item** — This feature grants access to Edit Development Plan items.
 - **Past Development Plans** — This feature includes past development plans on the Total Talent Profile.
 - **View Own Inactive Development Plans** — This feature grants access to view Development Plans created by the logged in user but marked inactive.
6. Click **Update Features**.

Enable Launch Appraisals From Project Teams For Specific Employee Groups

The Launch Appraisals functionality is enabled by default for all employee groups.

This includes managers and administrators. However, for companies with different structures, Launch Appraisals can be enabled for specific groups. You can specify which groups have Launch Appraisal functionality in the Features screen in the Administration module.

To Enable Launch Appraisals for Specific Employee Groups:

1. Click  » **Administration** » **Global Settings** » **Features**.
2. From the **Select a Group** drop-down list, select the employee group for which you want to enable Launch Appraisal functionality.
3. Under Development, click the Project Teams  and select the **Launch Performance Appraisals** check box.
4. Click .

Note: The Performance tab in the Projects Team screen will not display unless the Launch Performance Appraisals check box is selected for the employee group.

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