Deltek

Deltek Talent Management 16.2

Getting Started User Guide

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Contents

Getting Started User Overview

When you are new to Deltek, it is a good idea to become familiar with the terminology, icons, and toolbar options that you see throughout the application.

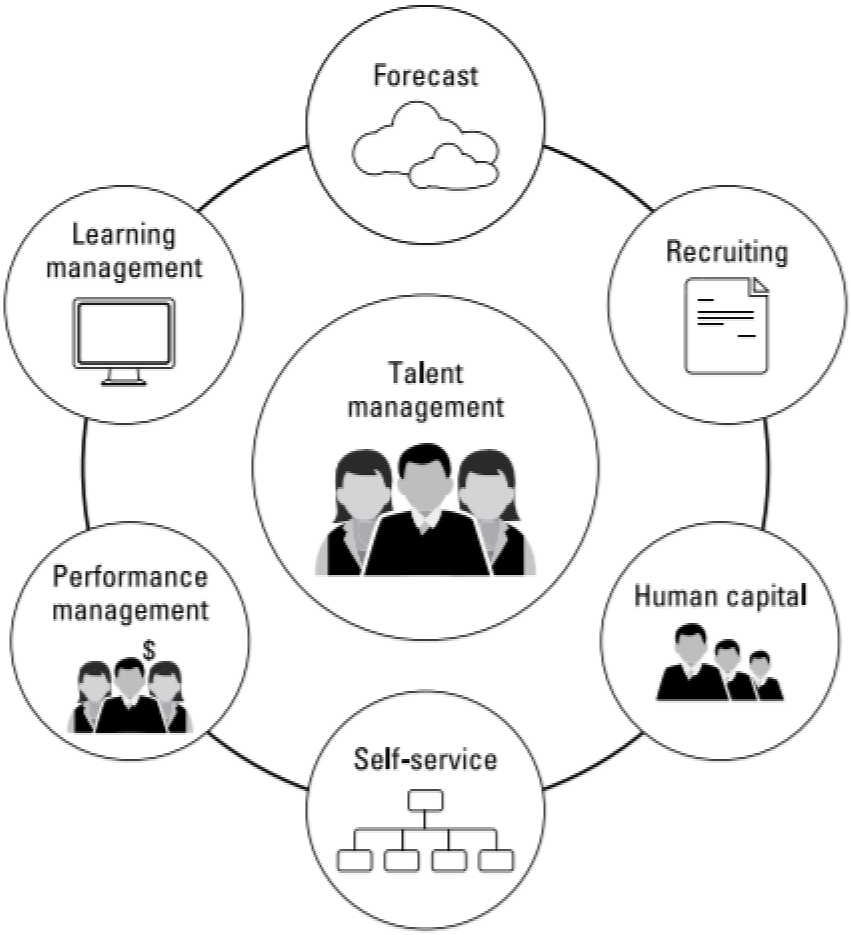
> **Note:** This guide covers all available modules and features, even those that your firm may not have purchased.

Welcome to Deltek Talent Management

Welcome to Deltek Talent Management! This online help assists you as you have questions.

Deltek Talent Management

Deltek Talent Management helps you improve the quality of new hires, increase employee engagement, and maintain compliance, all while giving you complete visibility into the state of your workforce. Deltek Talent Management allows you to recruit and onboard at top speed and provides project focused performance management to supply your teams with feedback that leads to increased success at the project level. Leverage Talent Management to prepare your workforce for the future by creating development plans and providing learning opportunities that engage and inspire. Imagine a streamlined approach to compensation management that allows you to make high impact decisions in real time. With a single integrated solution to acquire, manage, and optimize your workforce, you will gain valuable insights into the people side of your business that can help you support firm wide growth and strategy.



Using the Deltek Talent Management Online Help

The help system provides the following types of topics:

Topic Type	Purpose
Procedures	Procedure topics provide step-by-step instructions for completing tasks.
Field Descriptions	Reference topics contain tables of field descriptions. These topics describe data entry requirements for each field and the effects of each option.
Concepts	Concept topics explain the underlying concepts that drive various business processes.
Overviews	Overview topics introduce an application, feature, or process.

Other Documentation

To access printed guides of the online help, by area, select **Guides** from the help menu, or see the What's New help topic. Additionally, see the Learning Aids help topic to access available videos and click-thrus.

Help Feedback

With the release of 16.0, we moved our online help to a new format. We will continue to add and improve our content on a regular basis. We have also continued to make PDFs of the help available for download. Please use the feedback button located on the help screen to report documentation errors or suggestions. Thank you!

Access to Deltek Based on Role

A security role that your system administrator sets up controls your access to Deltek forms, tabs, and fields.

It also defines the individual records that you can display, and it specifies whether or not you can add and change those records or only view them.

The Deltek help system describes all available forms, tabs, and fields, and provides instructions for performing all tasks. However, because of restrictions defined for your security role, some components of the user interface described here may not be available to you, and you may not be able to perform some of the procedures included in the help.

If you have questions about your Deltek access rights, contact your system administrator.

Terminology

If you are new to Deltek, you may find it helpful to become familiar with the terms that are used throughout the application and documentation.

Terms	Description
Badge	A box of information about a user, including the user's name, job title, hire date, work location, and profile photo. The dimensions and content of the badge vary based on where it is shown in the application.
Breadcrumbs	A navigational aid used to keep track of your current location in Deltek Talent Management.
Competency	Demonstrable skills that one possesses inherently, including abilities and behaviors, as well as knowledge of the fundamental use of a skill.
Dynamic Forms	Forms created for an organization's recruiting process, such as a requisition, résumé profile, secondary application, interview, offer, and onboarding form.
Employee Referral	An applicant who was referred by an employee.

Terms	Description
External Front End	The external job seeker's career portal. An organization can have more than one external front end if it is necessary to show different branding for different divisions or company entities.
Features	An aspect or attribute that can be configured for a Group to allow access to different Deltek Talent Management functions.
Fields	Fields display on tabs and dialog boxes. Use fields to enter and maintain data for a record or transaction. Some fields are display-only; you cannot enter or edit data in these fields. These fields are grayed out on your screen.
Hiring Order	A request submitted to a recruiting agency for help finding candidates for a position, either permanent or contract.
Job Family	A term used to categorize Job Profiles. For example, the “I.T.” job family could be used to identify Job Profiles that are technical in nature and require similar job competencies and skills.
Navigation Pane	The Navigation pane is located on the left side of the screen. It provides access to the modules and sub-screens that you use on a daily basis. When you click an option in the Navigation pane, it opens on the right side of the screen. To hide or display the Navigation Pane, click in the Deltek Talent Management toolbar.
Onboarding	The process for bringing in a new hire, including sending documentation to the new hire for review and/or completion, alerting certain individuals of the arrival of the new hire, and preparing the employee for what to expect when beginning the new job.
Passive Job Seeker	A job seeker who has submitted a résumé but has not applied to a specific requisition.
Pool	A user-defined collection of résumés with similar traits (for example, skill sets, job preferences, or education levels). Pools can also be created to house résumés for future consideration.
Post Hire Modules	The post-hire modules of the Talent Management Suite are those that address an employee’s performance, career development, and learning. These modules are EPM (Employee Performance Management), CDSP (Career Development and Succession Planning), and LMS (Learning Management Solution).
Recruiting Team	A group of individuals who share information about requisitions, job seekers, and candidates. Membership in a recruiting team is limited to those internal users in the Recruiter or Hiring Manager group.
Recruiting Workflow	A means for the administrator to automate many functions of the recruiting process. A recruiting workflow includes form selections,

Terms	Description
	user task suggestions, offer management, onboarding procedures, and more.
Screened-In	The term used for an applicant who has met or exceeded the minimum point value set in the Screening Questionnaire associated with the requisition to which they applied.
Screened-Out	The term used for an applicant who has not met the minimum point value set in the Screening Questionnaire associated with the requisition to which they applied.
Tabs	Deltek screens are organized in a tabular format. The tabs in an screen may contain fields and/or grids on which you enter or modify information.
Tool Bar	The Tool Bar is located at the top right corner of the screen. It provides access to options and actions that are essential, but not typically performed on a daily basis.
Total Talent Profile	An area of the application that provides an employee with a single location to view all of his or her pertinent information. It gives a user access to view and update appraisals, career paths, job history, mentoring relationships, project teams, succession plans, and training/development activities.
Widgets	A means to display information and actions that you use frequently. They are displayed on the Main Dashboard.

Main Areas of Deltek Talent Management

Get acquainted with the basic areas of Deltek Talent Management:

- Navigation Pane
- Main Dashboard
- Tool Bar
- Sub-Menu
- Breadcrumbs
- Instructional Videos

Navigation Pane

The Navigation Pane appears on the left side of the screen and is how you switch between the different areas or modules of Deltek Talent Management.

The modules or areas listed below are the main menus for the Navigation Pane

Menu	Description
Dashboard	This displays alerts and widgets. See Navigation Pane The Navigation Pane gives you access to the actions and options that you use on a daily basis. It is organized according to the modules of Deltek Talent Management, such as Recruiting, Performance, Learning, etc. When you select an option from the Navigation Pane, it expands to display the nested sub-menus that are available for that option. Click to hide or display the Navigation Pane. As you click through the sub-menus, the navigation tree remains open so that you can easily trace the root menus. Click **Main Menu** to collapse all open sub-menus in the navigation tree. Main Dashboard.
My Employees	Managers use this menu to access options for appraising and managing their direct and matrix reports. See DeltekTalentPerformance15.0UserGuide.
Recruiting	This menu includes actions and options for recruiters, hiring managers, HR and administrators. See DeltekTalentRecruiting15.0UserGuide. Access screening questionnaires and letter templates from the toolbar.
Performance	Both managers and employees can use the options in this menu. It provides access to appraisal approvals, if applicable, as well as to the employee's own appraisal or 360. DeltekTalentPerformance15.0UserGuide.
Learning	Options in this menu make it possible for employees to perform learning related functions such as viewing their learning profiles, seeing classes they're enrolled in, and searching for courses. Instructors can also view classes they are teaching. DeltekTalentLearning15.0UserGuide.
Succession	This menu provides access to succession plans and the domino list. See DeltekTalentDevelopment15.0UserGuide.
Career Center	This menu allows employees to access all career related options, such as their resume, job searches, referrals, and development plans. Any items that require the user's attention, such as the completion of an application, are marked with the icon.
Reports	This menu lists available modules. From there, click an option to view all available reports for that module.

Menu	Description
Custom Menu	The options on this menu are determined by your Administrator. These menu options can be frequently visited Web sites for employees (internal or external), or frequently visited Web site pages.

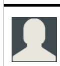
Main Dashboard

This is the Home screen, or the first screen that you see as you log in to Deltek Talent Management.

Tool Bar

Use the main Deltek Tool Bar to perform actions that apply globally.

For example, you can view online help, view action items, specify your personal settings, or log off.

Icon	Action	Description
	**Language**	Select the language you would like to use.
	**Calendar**	Click this icon to access your calendar or scheduled events. The number on the calendar icon indicates how many events you have scheduled for the current day, as well as for future dates.
	**Libraries**	Click this icon to access the Screening Questionnaires, Documents, Letter Templates, and Learning Library (if you are using the Learning Management System).
	**Help Resources**	Click this icon to view the quick help for the current page. You can also link to the Video Library, FAQs, and Guides.
	**Administration**	Click this icon to access the Administration screen, listing all Administration options. This icon only displays if you have Administration privileges.
	**Your Account**	Click this icon for access to your Total Talent Profile, Notifications, Account Information, Personalization, and the Org Chart. You can also log out of Deltek Talent Management from here.

Sub-Menu

This area holds the following shortcuts.

Item	Description
Search	Use the search function to do a quick search of employees, jobs, requisitions, resumes, candidates, mentors, or courses. Enter a name or keyword for which to search. Then press **Enter** or click .
Recently Viewed	Click to see a listing of your recent history in Deltek Talent Management. Click an item to return to that location.
Pins	Click to view, add, or manage your pins. Pins are shortcuts to your favorite or most-often used screens/functions. Click any displayed pin to quickly go to that screen.

Breadcrumbs

Breadcrumbs display below the Tool Bar and the Sub-Menu, showing where you are in Deltek Talent Management (in other words, the menu options you selected to get to the current screen).

Instructional Videos

This icon displays on the upper-right corner of the screen if an instructional video is available for the current page.

Click it to watch the video. You must have a recent version of Adobe Flash Player to view the video.

Navigation Pane

The Navigation Pane gives you access to the actions and options that you use on a daily basis.

It is organized according to the modules of Deltek Talent Management, such as Recruiting, Performance, Learning, etc.

When you select an option from the Navigation Pane, it expands to display the nested sub-menus that are available for that option.

Display the Navigation Pane

You can hide or display the navigation pane.

To display the navigation pane:

1. Click to hide or display the Navigation Pane.

   As you click through the sub-menus, the navigation tree remains open so that you can easily trace the root menus.

2. Click **Main Menu** to collapse all open sub-menus in the navigation tree.

Main Dashboard

The Main Dashboard is the first screen you see when you log on, and it contains three sections: Alerts, Widgets, and Tasks.

Alerts

The highlighted section displays any important actions or notifications sent to you. The alerts box displays only if you have any pending alerts. You will see a **Show More** link if you have three or more entries in your alerts box.

Click the alert link to display the screen on which you need to complete a task.

Click ✖ to dismiss the alerts box and add more screen space to view dashboard widgets. To toggle back and view your alerts once more, click the **Alerts** button.

Widgets

Widgets are the tables and graphs of summary data displayed on the Dashboard. You can add widgets to the Dashboard and order them as you wish. The widgets available to you are based on your role in the organization and the features that your firm uses.

Tasks

Tasks are action items that require completion on or before a specified date. In Talent Management, users who are associated with a Task are referred to as "Stakeholders". As a stakeholder, you will either be:

- An **Assignee**, or the individual responsible for completing the task;
- A **Principal**, or the individual who needs to ensure that the task is done; or
- A **Follower**, someone who has an interest in seeing the task finished, but is not responsible for completing it.

Widgets

Widgets are tables and graphs of summary data displayed on the Dashboard. You can add widgets to the Dashboard and order them as desired.

The following lists all of the widgets that are available in Deltek Talent Management. The widget selection on your screen may vary based on both your role within the organization and on the features and modules that have been enabled for your company.

Core

Field	Description
Mini-Calendar	This displays the current month and highlights any days for which you have scheduled events. Clicking on a hyperlinked day will take you to that date in the main Calendar. See My Calendar .

Recruiting

Field	Description
Activity Since Last Login	This lists a variety of activities that have taken place since the last time you logged in. Clicking the hyperlinked number takes you to the management page for that section. ▪ **# of New Résumés Submissions to My Requisitions**: This number indicates how many résumés have been submitted to your requisitions ▪ **# of New Passive Résumés Created**: This number indicates how many résumés were entered into the system that were not submitted to any requisitions. ▪ **# of Interview Invitation Responses**: This indicates the number of responses you have received from candidates to whom you have sent an interview request. ▪ **Offers Accepted/Rejected by Candidates**: This indicates the number of your offers that have received candidate responses. ▪ **Requisitions Approved/Rejected**: This indicates the number of requisitions that have been approved or rejected.
Candidates by Source	This displays the number of candidates in real time and is grouped according to their Referral Source. By default, this widget displays the last 30-day information, but you can click **Change Settings** to edit the date range. Click on a pie section to view the candidates from that source.
Candidates by Status	This displays the number of candidates in real time and is grouped according to their current Status (**Phone Screen**, **1st Interview**, **Offers Extended**, etc.). By default, this widget displays the last 30-day information, but you can click **Change Settings** to edit the date range. Click on a pie section to view the candidates in that status.
E-Verify Case Alerts	This widget is designed to bring your attention to cases that need your action. This is available only if the E-Verify Integration feature is enabled. ▪ **Open Cases to be Closed**: This indicates the number of cases that are ready to be closed but are still pending. ▪ **Cases with New Updates**: This indicates the number of cases that had a change in case result. These updates come directly from E-Verify and are sent back to the system.
My Activity	This displays the count in real time for each action in the selected date range. By default, this widget displays all the data in that activity type. Clicking the hyperlinked number takes you to the management page for that section.
My ATS Averages (last 30 days)	This displays the average count in number of days for the following Recruiting activities.

Field	Description
	▪ **Days to Fill a Requisition** ▪ **Days to Hire** ▪ **Screened In Rate** ▪ **Screened Out Rate**
My Candidates	This displays the most recent candidates for your requisitions. The information is shown in chronological order based on the last status change date.
My New Résumé Submissions	This displays the most recent résumés for your requisitions. The information is shown in chronological order based on the the résumé's application date.
My New Résumés/CVs and Candidate Pipeline	This provides a cumulative view of all submitted résumés and the candidates associated with requisitions that have been created from a particular Job Profile. Click the hyperlinked number to view the listing. This is available only if the Hourly Module is enabled.
Offboarded Employees	This displays any offboarded employees with pending tasks that need to be reassigned. Clicking an employee name redirects you to the Reassign Pending Items screen. See Reassign Pending Items Screen.
Onboarding Status	This provides a quick overview of the Onboarding status of new hires. It can also display new hires that have not yet had Onboarding initiated for them.
Onboarding Tasks	This displays the onboarding tasks that require your action.
Quick Job Posting Widget	This give you a quick way to post jobs. If information, such as **Job Type** for example, has been specified in the Job Profile, then that selection displays as a read-only field and cannot be changed. If there are additional required fields on the requisition form, then a modal window displays after you click **Post a Job Opening**, allowing you to complete the required fields. This is available only if the Hourly Module is enabled.
Recent Requisitions	This displays the requisitions assigned to you and indicates the number of newly-submitted résumés as well as the candidates currently attached to the requisitions.
Résumé E-mail Reader Instructions	This displays instructions about how to upload résumés by e-mail.
Requisitions by Status	This displays the number of requisitions in real time and is grouped according to their current Status, such as **Pending Approval**, **Open**, **Filled**, etc. By default, this widget displays the last 30-day information, but you can click **Change Settings** to edit the date range. Click on a chart section to view the requisitions in that status.

Field	Description
Search Requisitions	This allows you to use keywords to search for requisitions according to **Requisition Number**, **Job Title**, and/or **Description**.
Search Candidates	This allows you to search for a candidate by **Candidate Name** or **E-mail**.
Search Résumés	This allows you to perform a quick search for résumés using **Keywords**, **First Name**, **Last Name** and/or **E-mail**. If your company has the OFCCP compliance feature enabled, then you will be asked to first select a requisition before performing a quick search.

Performance

Field	Description
Active Appraisals	This gives managers quick access to any active appraisals or 360 reviews in progress for their direct reports. If the appraisal is on a schedule, the **Phase End Date** will display in the widget. Clicking on the appraisal name redirects you to the selected appraisal.
Continuous Feedback	This displays the sessions you have created for your direct reports as well as the sessions created for you by your manager.
Goal Completion for Team	This allows managers to track the progress of their employee's performance goals. You can expand each employee's section to view their goal details. From there, you can see whether goals have not been set, as well as progress status information such as **Start Date**, **Target Date** and **Current Status**. Clicking the appraisal name redirects you to the employee's Goals page within the appraisal.
Goal Completion Status	The shows the progress of each goal and can be expanded to display additional details such as **Start Date**, **Target Date**, **Progress**, and **Current Status**.
New Pending Appraisals	This lists the manager's direct reports and other employees with appraisals ready to be scored. Click the name to view the appraisal.
Phase Overview	This displays the percentage of a manager's direct employees in each phase of their primary appraisal. Click the pie chart to access the My Employees to manage the employees' appraisals. See My Employees Screen for more information about this screen.
Search Employees	This widget makes the **Employees** option available in the Quick Search sub-menu. See Sub-Menu for more information about the Quick Search functionality.

Learning

Field	Description
Classes Just Added	displays shows the 10 most recently-added classes, and displays their **Start Date** and **End Date**.
Completed Class Assignments and Tests	This displays the number of Assignments and Tests in a class. Click the number to access the details.
Employee Monthly Class Participation Statistics	This displays your direct reports who have completed or are enrolled into a class during the current month. The default view is five direct reports, but you can click **Change Settings** to increase the view.
Enrollment Statistics	This is available to class instructors if the class **Status** is **Open** or **Registering**. Each class displays the number of enrolled students, the maximum and minimum number of students for the class, and the remaining open slots for the class.
My Curriculum Completion Status	This graph shows the percentage of curriculum completion per employee enrolled and approved in each curriculum.
New Skills Added	This lists the new skills your employees have added and are awaiting your approval.
Pending Certificates	This lists the certificates that are ready to be granted to employees. Click the number to take that action.
Search Classes	This allows you to search for classes. Enter all or part of a class name to find a match.
Top Courses by Enrollment	This graph shows the courses with the highest number of currently enrolled students. The default view lists five courses, but you can click **Change Settings** to increase the view.

Development

Field	Description
9 Box	This allows you to quickly assess your team's performance and potential via the dashboard. Click through to view the details of the employees in each segment.
Career Path Progress	This bar chart shows where you are in your Career Path. For example, if you have 4 jobs listed to get to your ultimate job, and you are in the third job, your path progress is at 75%.
Competency Fit	This compares the required competencies for the job against those held by the employee. Clicking the icon launches a polar graph allowing you to easily identify how closely the employee fits the requirements.

Field	Description
Development Plan Completion Status	This bar chart shows the completion percentage of your Personal Development Plan. Click the bar to access the profile of your development plan. There are no filter options for this widget, but it is available to any employee.
Development Progress	This allows managers to track the Development Plan progress of their direct reports.
Employees with Active Career Paths	This chart shows the percentage of a manager's direct reports with an active career path. Clicking the chart launches the My Employees screen. See My Employees Screen for more information about this screen.
My Plans with Successors	This percentage chart shows your Succession Plans that have a list of potential replacements versus those without potential replacements. Click the chart to view the My Succession Plans screen. See My Succession Plans Screen for more information about this screen.
New Skills and Competencies	This allows managers to view the names of their direct reports who have added skills or competencies to their profile. The skills and competencies listed here require manager endorsement or approval before they can be added to the employee's Total Talent Profile.
Top Career Paths	This table lists the most popular active career paths and shows the number of employees on the path displayed.

Add New Widgets

Follow these steps to add widgets to your Dashboard.

To add new widgets:

1. From the right side of the Main Dashboard line, click **Get More Widgets**.
2. On the Dashboard Widget Administration screen, select a widget from the **Select Widget from List** drop-down list.
3. Click **Preview Widget** to see what the widget looks like.
   It displays on the lower half of the screen.
4. Click either **Add to Left Side** or **Add to Right Side** to determine where on the screen to add the widget.
5. If the widget has multiple columns and spans the width of the screen, **Add to Left Side** is the only option.
6. Repeat steps 2 through 4 to add additional widgets as needed.
7. Return to the Main Dashboard to arrange widgets in the order you want:
   - To move a widget to another place on the Dashboard, place your cursor in the title area of the widget box. The cursor turns into a four-sided arrow icon. Using your mouse, hold the left click down and drag the box to the desired location.

- If a widget can be edited, click to edit it.
- To remove a widget, click .

My Tasks

This screen displays all the tasks associated with your user record, whether your role is as Assignee, Principal, or Follower.

Display the Tasks Screen

This screen captures all the information about the items that require action, when they need to be done, and by whom.

To display the Tasks screen:

Click **Dashboard** » **Tasks**.

Contents of the Tasks Screen

This screen allows you to view, assign, and resolve tasks or action items that require completion on or before a specified date. Use the Actions to manage and update tasks.

Users associated with a Task are referred to as "Stakeholders". As a stakeholder, you will either be:

- An **Assignee**, or the individual responsible for completing the task;
- A **Principal**, or the individual who needs to ensure that the task is done; or
- A **Follower**, someone who has an interest in seeing the task finished, but is not responsible for completing it.

Columns

The My Tasks screen displays the following columns.

Column	Description
Description	This column provides a description of the task.
Required	This indicates whether or not task Assignees are required to complete the task.
Category	This identifies whether a task is **Personal** or a **Learning Requirement**. - **Personal**: This is a task that has no Assignee and only one Principal stakeholder. - **Learning Requirement**: This is a task that is generated via the **Learning** » **Learning Requirements**screen. This displays if you are assigned a Learning Requirement task.
Due Date	This displays the date when the task needs to be completed.

Column	Description
Date Created	This is the date when the task was created.
Role	This displays your role in the task, whether you are the **Assignee**, **Principal**, or **Follower**.
Principals	This lists the individuals who need to ensure that the task is completed.
Assignees	This lists the individuals responsible for completing the task.
Status	This indicates whether the task is **Complete** or **Incomplete**.
Actions	This displays the actions that can be taken for each task in the table.

Actions

The optoins on the My Tasks screen perform the following actions.

Column	Description
View	Click this to view the task details.
History	Click this to view the changes made to the task.
Edit	Click this to change the task details. This displays only if you are the Principal stakeholder.
Mute Reminders	Click this if you do not want to receive reminder notifications for the task. This displays only if you are the Principal or the Follower stakeholder. Assignees cannot mute task reminders.
Follow	Click this to add your name as a Follower stakeholder.
Un-Follow	Click this to remove your name as a Follower stakeholder. This displays only if you are a Follower stakeholder.
Complete	Click this to set the **Status** to **Complete** . This displays only if the current status is **Incomplete** or **Canceled**.
Un-Complete	Click this to set the **Status** to **Incomplete**. This displays only if the current status is **Complete**.
Cancel	Click this to set the **Status** to **Canceled** . This displays only if the current status is **Incomplete** or **Complete** .
Un-Cancel	Click this to set the **Status** to **Incomplete** . This displays only if the current status is **Canceled**.

Procedures for the Tasks Screen

Procedures for the Tasks Screen

Add New Tasks

Use this screen to create and assign tasks to other users.

To add tasks:

1. On the My Tasks screen, click **Add Task**.
2. Complete the following fields.
   - **Description:** Enter the purpose of this task.
   - **Due Date:** Click and select the date when the task needs to be completed.
   - **Is Required:** Select this if the task is not optional and must be completed by the Assignees.
   - **Is Private:** Select this if the task should be visible to stakeholders only.
   - **Is Group:** Select to set this as a group task.
3. Review the Stakeholders table. Your name is automatically added as a **Principal** stakeholder. Your Direct Reports are automatically added as **Assignees**.
   - From the **Actions** column, click to remove a stakeholder, if necessary.
   - Click **Add More Stakeholders**to search for and select users, if necessary.
4. Click **Save**.

View Tasks

This screen displays the details of a specific task, including history tracking information if and when changes are made to the task.

To view tasks:

1. On the My Tasks screen, locate the task that you want to view.
2. In the **Actions** column, click **View**.

Edit Tasks

Use this screen to edit tasks.

To edit tasks:

1. On the My Tasks screen, locate the task that you want to edit.
2. In the**Actions** column, click **Edit**.
3. Edit the following fields, as needed.
   - **Description:** Update the purpose of this task.
   - **Due Date:** Click and select the date when the task needs to be completed.

   - **Is Required:** Select this if the task is not optional and must be completed by the Assignees.
   - **Is Private:** Select this if the task should be visible to stakeholders only.
   - **Is Group:** Select to set this as a group task.
4. Edit the Stakeholders table, as needed.
   - From the **Actions** column, click to remove a stakeholder.
   - Click **Add More Stakeholders**to search for and select users.
5. Click **Save**.

Tool Bar

The Tool Bar provides easy access to essential options and actions:

Calendar

Use My Calendar to display your calendar.

You see detailed information for the current week. You can change the display to view by Year, Month, or Day. Access My Calendar from the Calendar drop-down on the toolbar. Also displayed on this drop-down are your upcoming calendar events.

Note: You can also add a Mini-Calendar widget to your dashboard.

Share Calendars

You may have the option to share calendars with other employees.

- To share your calendar with other employees, go to » **Personalization** and click **Yes** for the **Share Calendar** option.
- To add other employees' calendars to your own, click **Select Employees** in the **Add Calendar For** section on the My Calendar screen. Events for the selected employees will appear in your calendar, color-coded to indicate the person to which they belong. Click to change the color associated with an employee.
- If you cannot find the person you are looking for, that person hasn't shared his or her calendar.

Add a New Calendar Event

You may add an event to your calendar to keep track of it.

To add a new event:

1. Click **Add Event**.

2. Complete the following fields.
   - **Event Name**: Enter a name for this event.
   - **Completed**: Select this option if this event has already taken place, or the task has been performed.
   - **Type**: Select the event classification:
     - **Event**
     - **Task**
     - **Reminder**
     - **Interview**
   - **Interview Type**: This field displays if you select **Interview** for the classification **Type**.

     Select one of the following interview types:
     - **Single Event:** Select this option if you are scheduling a traditional interview for a single candidate. This option lets you designate a span of time for the interview, with the assumption that the candidate will come for the full length of time specified.
     - **Scheduled Slots**: Select this option if you are scheduling multiple interviews within a span of time, using designated time slots. Each candidate will be asked to select a specific time slot. Once a candidate chooses a time slot, the slot no longer appears for other candidates to select. For example, if the event's hours are from 03:00pm to 05:00pm and the slot intervals are 30 minutes, the interview recipients will be able to select any available 30 minute slot in that two hour period.

       If you selected this interview type, additional fields display:
       - **Slot Length**: Select the duration of time for each slot.
       - The total number of slots is determined based on the **Slot Length**, **From**, and **To** values entered.
       - **Claimed Slots**: Displays the number of interview slots claimed so far.
       - **Available Slots**: Displays the number of interview slots still remaining.
     - **Group Event**: Select this option if you are allowing multiple candidates to interview anytime during a designated window of time. For example, if the event's hours are from 03:00pm to 05:00pm, the interview recipients will be able to come anytime during those two hours.
   - **Date**: Select the date of this event.
   - From: Select the starting time for the event.
   - **To**: Select the ending time for this event.
   - ➕ **Add Another Date**: Click this button to add another date for this event.

     Once you add an additional date, a **Remove Date** button displays.
   - **Event Color Code**: Click on the color desired for this event in the color window, or enter the desired HTML color code in the field.

- **Location**: Enter the location of the event.
- **Notification**: Notifications occur for the event creators, and those others to whom they shared the event. Select one of the following:
  - **None**: No reminder occurs for the event.
  - **Email**: An email reminder is sent.
  - **Pop Up Window (if on site)**: A reminder displays when you log on.
- **Keep Event Private**: Select this option to keep this event private, even if your calendar is shared. It will not be visible to others.
- **Event Description**: Enter a description for the event.
- **Current Attachments to this Event**: Documents currently attached to the event display.
- **File**: Click **Browse** to locate and select a document to attach to this event.
- **Attachment Name**
- **Attachment Description**: Enter a description for this attachment.
- **Share attachments**: Select to share this attachment with **Teams** and/or **Users**.

3. Click **Save** to save this event.

Export Calendar Events

You can export events to Google, Outlook, Yahoo, or any calendar application that makes use of the .ics format

To export calendar events:

1. Click Export Calendar.
2. From the drop-down list, select **My Event(s)** to include only the events that you own or select **All Events** to include all events in your calendar regardless of owner.
3. In the Event Export window, copy the provided link.
   You will need to paste this URL into the external calendars, as described in the instructions below.
4. Click **Close Window**.

> **Note:** Yahoo and Google do not automatically synchronize with Deltek Talent Management if you modify or unshare a Calendar event after you have already exported it. To reflect the changes in Yahoo and Google, you must repeat the calendar event export steps. Microsoft Outlook supports automatic update of changed or unshared Calendar events.

Export Calendar Events to Google Calendar

You may export your events to your Google calendar as applicable to your requirements.

To export events to your Google calendar:

1. On your Google calendar page in your browser, locate the navigation pane on the left and click the **+** icon beside **Add a Friend's Calendar**.
2. Click **From URL**.
3. In **URL of calendar** field, paste the URL you copied from the Event Export window.
4. Click **Add Calendar**.
5. Change the calendar settings as necessary by clicking the newly-imported calendar on the **Settings for Calendar** section of the navigation pane.

Export Calendar Events to Yahoo Calendar

You may export your events to your Yahoo calendar as applicable to your requirements.

To export events to your Yahoo calendar:

1. On your Yahoo calendar in your browser, locate the navigation pane on the left, and click the **Gear** icon next to **Others**
2. Click **Follow Other Calendars**.
3. In the New Calendar pop-up window, type a name for the calendar event.
4. In **iCal Address** field, paste the URL you copied from the Event Export window.
5. Click **Continue**.

Export Calendar Events to Outlook

You can export your events to Outlook to display them alongside your other Outlook schedules or events.

To export events to Outlook:

1. On Outlook, in the Home tab, click **Open Calendar**.
2. Click **From Internet...**.
3. On the New Internet Calendar Subscription window, paste the URL you copied from the Event Export window in the **Enter the location of the internet calendar you want to add to Outlook** field.
4. Click **OK**.
5. When asked whether or not you want to add the Internet Calendar to Outlook, click **Yes**.

Unshare Calendar Events

You can unshare your Calendar events when you no longer have to share them to others.

To unshare your Calendar events:

1. On the toolbar, click » **Personalization**.
2. Under the **Calendar** section » **Unshare / Stop Exported** » **Calendar** setting, click the **Stop My Calendar Events** link.

Pending Interviews

Use this Calendar tab to view pending interviews.

Select an event from the drop-down. The name, requisition, and date invited display for those candidates who accepted the invite for this event. Click a name to view additional details on that candidate.

Your Account

Use Your Account to access your Total Talent Profile, notifications, account information, and your company's organizational chart, as well as to personalize your account settings.

Total Talent Profile

The Total Talent Profile provides you with a single place to view details about your growth and development within the company. The options and tabs you can view and/or edit depend on whether your company has licensed the Core HR module, and also depend on your permissions.

You access your own profile on the Your Account menu, located in the upper right of the screen.

Managers and administrators with the proper permissions can view other users' profiles, and edit certain fields. Managers access a direct report's Total Talent Profile on the My Employees screen.

Administrators configure which sections of the Total Talent Profile each user group can view, based on the group the logged in user belongs to, and the relationship to the user whose profile is being viewed. If a user belongs to multiple groups, there is a hierarchy, from Employee at the bottom of the permission pyramid to the Administrator at the top. If a user belongs to the Administrator group, for example, the view and access rights of this group override the view and access rights for all other groups this user belongs to. The one exception is when a user views their own profile. When viewing your own profile, your access rights are limited to those defined for the Employee group.

Display the Total Talent Profile

How you display the Total Talent Profile depends on whether you are opening your profile, another user's profile, or a direct report's profile.

1. **To display Your Total Talent Profile:**

a) Click Your Account » Total Talent Profile.

2. **To display a direct report's Total Talent Profile:**
   a) Click **My Employees** » **My Employees**.
   b) Click **Actions** » **view TTP** for the employee whose profile you want to display.
3. **To display another user's Total Talent Profile:**
   a) On any screen with a clickable user name link, for example the Team Owner column on the My Project Teams screen, click the link.

Edit the Total Talent Profile

You may have access to edit details on your profile's Preferences tab, and if your organization uses Core HR, Core HR administrators can configure additional sections of the Total Talent Profile that managers can edit for their direct reports, and that employees can edit for their own profiles.

There are several ways a user can edit details on the Total Talent Profile:

- **Preferences Tab**: If given access to the Preferences tab, you can edit details on this tab including details about location preferences, relocation options and job details such as travel availability. Managers cannot edit your preferences.
- **As an Employee:** If your organization uses Core HR, Core HR administrators can grant access to edit certain sections of the Employee Summary Pane, Employment Details tab, and Personal & Contact Information tab, such as Contact Information. An edit icon displays next to all editable fields. Click the edit icon and make changes. Changes are saved automatically. Depending on how Employee editing has been configured, certain parties may receive notifications when changes are made and approvals may be required before changes are final.
- **As a Manager**: If your organization uses Core HR, Core HR administrators can grant access to edit certain sections of the Employee Summary Pane, Employment Details tab, and Personal & Contact Information tab of your direct reports' Total Talent Profiles. You access your reports' profiles on the My Employees tab. An edit icon displays next to all editable fields on the Total Talent Profile. Click the edit icon and make changes. Changes are saved automatically. Depending on how Manager editing has been configured, certain parties may receive notifications when changes are made and approvals may be required before changes are final.

Edit The Preferences Tab

You may have access to edit details on your profile's Preferences tab.

To edit details on the Preferences tab of your profile:

1. Click **Your Account** » **Total Talent Profile**
2. Click the **Preferences Tab**.

3. Click **Actions** » Edit .
4. Make changes in the editable fields.
5. Click **Save** when finished.

Edit Total Talent Profile Details as an Employee

If a Core HR administrator has granted edit access to the Total Talent Profile (**Administration** » **Core HR** » **Self-Service**), Employees can edit the sections to which they've been granted access.

A Core Hr Administrator must first configure which sections of the Total Talent Profile are editable by Employees before an employee can edit profile information following these steps. Also, the Employee must belong to a group with View access to the appropriate sections (such as View Contact Information) on the Total Talent Profile (**Administration** » **Features** » **Select a Group field** » **Core HR** » **Total Talent Profile**).

To edit your own Total Talent Profile:

1. Click Your Account name in the upper right of the Tool Bar.
2. Click **Total Talent Profile**.
3. Editable fields display an edit icon . Click the icon to change the value for that field.

   Editable fields depend on configuration options selected by a Core HR Administrator, and may include fields on the Employee Summary Pane, the Personal & Contact Details tab or the Employment Details tab. Depending on how editing rights are configured, certain parties may receive notifications when changes are made and approvals may be required before changes are final.

Edit Total Talent Profile Details as a Manager

If a Core HR administrator has granted edit access to the Total Talent Profile (**Administration** » **Core HR** » **Self-Service**), Managers can edit the sections to which they've been granted access.

A Core Hr Administrator must first configure which sections of the Total Talent Profile are editable by Managers before a manager can edit profile information following these steps. Also, the Manager must belong to a group with View access to the appropriate sections (such as View Contact Information, View Personal Information, or View Vet, Citizenship and Passport Information) on the Total Talent Profile (**Administration** » **Features** » **Select a Group field** » **Core HR** » **Total Talent Profile**).

Features to Enable:

To edit the Total Talent Profile as a manager for a direct report:

1. Click **My Employees** » **My Employees**.
2. Click the **Development tab**, if necessary.
3. Click **Actions** » **View TTP** for the employee whose profile you want to edit.

4. Editable fields display an edit icon. Click the icon to change the value for that field. Editable fields depend on configuration options selected by a Core HR Administrator, and may include fields on the Employee Summary Pane, the Personal & Contact Details tab or the Employment Details tab. Depending on how Edit access is configured, certain parties may receive notifications when changes are made and approvals may be required before changes are final.

Edit the Employee Name

Users with proper permission can edit an employee's first, middle and last name.

An administrator must first grant the right to Edit Personal Information before a user can edit their own employee name, or the employee name of other employees, such as direct reports. To grant members of the Employees or Managers groups access to edit this field, additional steps must be taken on the Self-Service Administration screen. An Edit icon displays next to the employee's name if the field is editable by the logged in user.

To edit the employee name:

1. On the Total Talent Profile, click the Edit icon.
2. Edit the first, middle, and last name, as needed.
3. Click **Save**.

Employee Summary Pane

View overall information for the selected employee, such as employment status and user login name. Options you see depend on permissions and whether or not your company has licensed the Core HR module.

Contents

The Employee Summary Pane is the area to the left of the profile with the photo at the top. If the Core HR module is in use, some fields have effective dating functionality that allows you to view history. Click the History icon to view history data such as the effective date for the change, the old and new values and the reason for the change.

Field	Description
Name	The employee name displays across the top of the page, with a date that indicates when the profile was last modified. An Edit icon displays if the logged in user has permission to edit the employee name.
Photo	An employee or his or her manager can add or change the profile photo by hovering over the photo or placeholder and clicking **Upload Image**.
Employee Number	A unique numeric identifier.

Field	Description
User Login	The username used to log in to Deltek Talent Management.
Status	An indication of the employment status. This value is based on the Original Hire Date or Rehire Date and Termination Date. This value displays Active if the current date is between an employee's original Hire Date/Rehire Date and Termination date.
Job Title	The employee's title. Click the job title to view details on the Job Profile page.
Home Company	The employee's Home Company.
Your Organization	The employee's Organization.
Location	The office location to which you are assigned.
Manager	The manager to whom you report.
Exemption Type	Your tax exempt status, such as Exempt or Non-Exempt.
Original Date of Hire	This is the date on which you were hired at the company. This displays only if you have not licensed the Core HR Module.
Start Date (Current Position)	This the date on which you started at your current position (title). This displays only if you have not licensed the Core HR Module.
Hire Date (Current Position)	This is the date on which you were hired at your current position. This displays only if you have not licensed the Core HR Module.

Update Your Profile Photo

You may update your Total Talent Profile photo, as necessary.

To update your photo:

1. On your Total Talent Profile, below the photo, click **Upload Image**.
2. In the User Photo dialog, click Browse, select the new photo, and click **Submit**.
3. Crop the photo as necessary.
4. Click **Save** to upload the photo.

Edit the Employee Name

Users with proper permission can edit an employee's first, middle and last name.

An administrator must first grant the right to Edit Personal Information before a user can edit their own employee name, or the employee name of other employees, such as direct reports. To grant members of the Employees or Managers groups access to edit this field, additional steps must be taken on the Self-Service Administration screen. An Edit icon displays next to the employee's name if the field is editable by the logged in user.

To edit the employee name:

1. On the Total Talent Profile, click the Edit icon .
2. Edit the first, middle, and last name, as needed.
3. Click **Save**.

Overview Tab

If the Overview tab is enabled for you, view a comprehensive summary of an employee from appraisal details to training and development information.

Contents

Sections on the Overview Tab

- Appraisals
- Career Path
- Competencies and Skills
- Job History
- Mentoring
- Project Teams
- Succession Plans
- Training and Development

Manage Appraisals

The Appraisals section of the Overview tab lists and provides links to your current, pending, and past appraisals.

To view appraisals:

1. To view the complete text of the appraisal, click the appraisal name.
2. To print the appraisal, click » **Print Appraisal**.

Manage Career Path Details

The Career Path section of the Total Talent Profile Overview tab displays any Career Paths that your manager created for you. You can have more than one career path, but only one career path is active at a time.

To view a career path on the Total Talent Profile Overview tab:

1. Click the job title to see the details of that career path.
2. Click **View Details** to view details for each position in the career path.
3. Click ⚙▾ to access the following additional options.

Icon	Action	Description
✚	**Add to Career Path**	Select this option to add a new career path.
✚	**Add to Development Plan**	Select this option to add a new development plan.
	View Gap Analysis for Ultimate Job	Select this option to view the gap between your current position and the ultimate goal in the career path. The gap analysis is a comparison of your skills and competencies with those required by the ultimate job. The analysis is incomplete if either you or the job does not have associated skills or competencies.
	View Pending Career Path Jobs	Select this option to view all the jobs that exist for this career path.

Competencies & Skills Panel

The Competencies and Skills section of the Total Talent Profile Overview tab lists your competencies and skills.

Information comes from several sources:

- If you were hired via Deltek Talent Management and entered any skills or competencies as part of the application process
- If you entered skills or competencies into Deltek Talent Management after you were hired and your manager approved them

Competencies

This section displays the competencies you've achieved to date. The following information displays.

Field	Description
MANAGE COMPETENCIES	Click to display the Competency Profile screen. From there you can remove a competency.
COMPETENCY NAME	This is the name of the competency.
CATEGORY	This is the type of the competency: Core or Job.
SOURCE	This is the way in which the competency was added to Deltek Talent Management. (For example Self displays if the employee added the competency.)
SCORE	This is the rating for the competency: ■ 1: Seldom Meets Expectations ■ 2: Meets Most Expectations ■ 3: Meets All Expectations ■ 4: Exceeds Expectations ■ 5: Greatly Exceeds Expectations The number of the score displays as a fraction over the total score possible. (For example, a score of 3 is displayed as 3/5.)
APPROVED DATE	This is the date on which the competency was approved. If your manager has not yet approved it, “Awaiting Approval” displays.
DETAILS	These are the details surrounding this competency.
ACTIONS	Click ✎ to edit the selected competency. The Competency Profile displays.

Skills

This section displays the skills you’ve achieved to date. The following information displays.

Field	Description
MANAGE SKILLS	Click to view the Skills Profile screen. From there you can edit or delete any of your skills.
SKILL NAME	This is the title of the skill.
SKILL CATEGORY	This is the group to which this category belongs: ■ Accounting ■ Administrative / Clerical

Field	Description
	▪ Brand Management ▪ Business Development ▪ Communication ▪ Customer Service ▪ Education ▪ Engineering ▪ Finance ▪ Human Resources ▪ Information Technology ▪ Management ▪ Marketing ▪ Medical ▪ Organizational Skills ▪ Training ▪ Transportation
SKILL LEVEL	This is the proficiency of the skill: ▪ Beginner ▪ Intermediate ▪ Advanced ▪ Expert
SKILL USAGE	This is the number of years you have had this skill: ▪ 0-1 Years ▪ 2-3 Years ▪ 3-4 Year ▪ 4-5 Years ▪ 5-6 Years
SKILL LAST USED	This is the number of years since you have used this skill: ▪ 0-1 years ago ▪ 1-2 years ago ▪ 2-3 years ago ▪ 3-4 years ago

Field	Description
	▪ 4-5 years ago ▪ 5-7 years ago ▪ 7-10 years ago
DATE ADDED	This is the date on which you added this skill to your profile.
DATE UPDATED	This the date on which you last made any changes to this skill
IS ENDORSED	**Yes** or **No** displays to indicate whether or not your manager has approved your skills in the Total Talent Profile.
ACTIONS	Click to update the SKILL LEVEL, SKILL USAGE, or SKILL LAST USED.

Job History

The Job History section on the Total Talent Profile Overview tab lists positions that you have held.

What you see in this section depends on the modules your company has licensed. If your company has licensed the Core HR module, the Internal Job History information does not display.

To view details of a previous internal job and/or external job:

1. In the Internal Job History or External Job History section, click **View Details** in the job position row to see additional information about that position (to hide details click**Hide Details**. For an external position this may be an indication of whether the employee has granted permission to contact the previous employer. For an internal position, this may be information such as Hire Date, Start Date and manager. For an internal position, click **Add Feedback** to add a note regarding this position.
2. To view more details about an internal position, click the name of the position to view the Job Profile.
3. To edit details of an external position, click the edit icon . To delete the job, click the delete icon .

Add Positions to the External Job History List

To add positions to the External Job History list:

Click **Add Position** to add a new position to your External Job History.

Manage Project Teams

The Project Teams section on the Total Talent Profile Overview tab shows the project teams associated with the employee, including milestones, team members and project duration. Project Teams are created and maintained by managers in **My Employees** » **Project Teams**.

Only users with proper access rights can manage and edit Project Team details. Other employees can view details.

To view and manage project team details on the Total Talent Profile Overview tab:

1. Click the **View Details** link to see the team members and any milestones that the team has achieved.
2. To manage or edit details about the team, click the team name to open the Project Teams screen.

Send Message to Project Team Members

The Project Team section on the Total Talent Profile Overview tab, allows Project Team creators to send an email containing project details to Project Team members.

To send project team details:

If you created the project team, click to send an email to all members of the team.

The email is sent using your default email application.

View Succession Plans

The Succession Plans section of the Total Talent Profile Overview tab is divided into four sub sections, which display information about positions for which the employee is a potential successor, potential successors for the employee's position, succession plans in which the employee is a participant, and for managers, the risk of loss for their direct report.

Section	Description
Succession Plans on Which the Employee Sits	These are the succession plans in which you are a potential successor for another position in the company.
Potential Successors	This section lists those employees who would be a good fit for your position if you were to be promoted or leave the company. Each employee name links to the employee's Total Talent Profile.
Succession Plans on Which the Employee Participates	These are the succession plans that you own or in which you participate.
Risk of Loss	This section displays only when a manager views the Total Talent Profile of an employee. The Risk of Loss section looks at various factors (active career paths, class attendance, performance, tenure, and so on), and calculates the chance (as a percentage) that the employee will leave the company.

Manage Training & Development

The Training & Development section on the Total Talent Profile Overview tab contains four parts: Development Plans, Past Development Plans, Training, and Education History.

Section	Description
Development Plans	Development plans are created by a manager for you. ▪ Click **Manage Development Plans** to view the details of development plans. ▪ Click to send notifications to your manager when you development plans change. ▪ Click **Show Details** to view plan items and their percentage completed. ▪ Click to update the percentage completed.
Past Development Plans	This section lists any development plans that you completed, including when the development plan started, the target completion date, and the percentage completed. Once a development plan is completed, it cannot be edited. ▪ Click **Manage Development Plans** to view the details of development plans. ▪ Click **Show Details** to view plan items and their percentage completed. ▪ Click to update the percentage completed.
Training	This section lists any classes that you are currently taking, any curriculum in which you are enrolled, and your percentage completion for that curriculum. Click the name of the class or curriculum to view details about it.
Education History	This section lists the degrees you have earned. Information comes from two sources: ▪ If you were hired via Deltek Talent Management and entered education information as part of the application process. ▪ If you entered education history into Deltek Talent Management after you were hired.

Personal and Contact Details Tab

Depending on permissions, view and/or edit personal information, such as birth date, ethnicity, citizenship information and contact details for an employee.

Contents

Whether you see this tab, and the fields you see, depends on permissions granted by an administrator, and whether your organization uses the Core HR module. Core HR Administrators and those granted access via Self-Service Administration have access to Edit fields on this tab.

Personal Information:

Field	Description
Birth Date	Your date of birth.
Ethnicity	Your designated ethnicity.
Social Security Number	Your social security number.
Gender	The gender with which you identify.
Disabled	An indicator of disabled status. For example, **Yes**.
National ID Country	The name of the country where your national ID is tracked for purposes such as work, taxation and benefits.
Marital Status	Your marital status.
Subject to ADA	An indicator of ADA protection status. For example, **Yes**.
National Identifier	A unique identifier used by your National ID country for purposes of work, taxation and benefits.

Contact Information:

Field	Description
Home Address	The employee's home address. Core HR Administrators with access to edit this field can click the **Mailing Address** option to mark the home address and mailing address as the same.
Mailing Address	Your mailing address, if different from Home Address
Personal Email	The personal contact email address of the employee

Field	Description
Primary Emergency Contact	Name, relationship and phone number for the primary emergency contact.
Secondary Emergency Contact	Name, relationship and phone number for the secondary emergency contact.

Veteran Information:

Field	Description
Veteran Type	The type of veteran, such as Armed Forces Service Medal Veteran, or Disabled Veteran.
Veteran Status	This indicates whether or not the employee is a Veteran, Yes or No.
Separation Date	The date service ended.

Citizenship Information:

Field	Description
Citizenship Status	The status of citizenship, such as Citizen or Non-Citizen.
I-9 Verification	An indication of the status of I-9 information.
Citizenship Identification Number	This is an identification number used to track any additional citizenship identification/registration number that must be tracked.

Passport Information:

Field	Description
Passport Issuing Country	The country who issued the employee's passport.
Passport Number	The passport number.
Passport Expiration Date	The passport expiration date.

Employment Details Tab

Depending on permissions, and If the Core HR module is in use, view employee details related to the job, including Organization name, compensation information, and hiring and termination information.

Contents

Whether you see this tab depends on permissions granted by an administrator, and whether your organization uses the Core HR module. Core HR Administrators and those granted access via Self-Service administration have access to Edit fields on this tab.

Some fields have effective dating functionality that allows you to view history. Depending on your permissions, you may see an edit icon next to this field. Click the Edit icon. Click the History icon to view history data such as the old and new values and the reason for the change.

Professional Information

Field	Description
Your Organization	The organization to which the selected employee is assigned
Job Type	The job type. For example, Full-time or Contract.
Hours/Day	Hours of work per day
Projected Time to Retire	The number of years remaining until retirement

Job Information

Field	Description
Career Level	An indicator of job level, such as Manager or Experienced (Non-Manager). If the employee has direct reports a direct report icon displays. Click to view a list of direct reports. When a job seeker is hired through the Talent Management Recruiting module, Talent Management pulls the Career Level value from the requisition to the Total Talent Profile.
Exemption Type	The employee's tax exempt status. For example Exempt or Non-Exempt. When a requisition is created, Talent Management pulls the Exemption Type value from the Job Profile.
SOC Code	The employee's Standard Occupational Classification code
Employee Class	This designates the group the employee belongs to, based on classifications defined by an administrator to coincide with an organization's benefit packages.

Compensation

Field	Description
Annual Pay Rate	The employee's salary.
Pay Frequency	The employee's payment schedule
Work Schedule	The employee's work schedule
Payroll ID	A unique identifier for the employee for the purposes of payroll

Hire Information

Field	Description
Original Date of Hire	The date the employee was first hired to work for your organization
Rehire Date	The date the employee was last hired to work for your organization, if the employee left or was terminated after original hire date
Seniority Date	Refers to the employee's tenure with the company

Termination Information

Field	Description
Termination Date	The date termination has occurred or has been scheduled to occur
Last Day Worked	The last day the employee worked
Separation Reason	The reason for termination. For example, Attendance or Poor Performance.
Last Day Paid	The last date payment was sent to the employee
Separation Type	The category of termination. For example, Voluntary, Involuntary or Retirement.
Exit Interviewer	The name of the employee who performed the exit interview
Re-Hire Eligibility	This indicates whether the individual is eligible for rehire if they apply for a job in the future. The default selections are Yes, No, and Conditional, but other options may display, depending on configuration.
Comments	This field displays comments entered in the Termination Date Dialog field, if the Termination date field has been edited.

Field	Description
Send Notification of Career Center Login	This option is set in the Termination Date Dialog field, if the Termination date has been edited. It indicates that a notification will be sent to the employee who has been terminated, on the date of termination.

Benefits Tab

Depending on permissions and how the job offer for this employee was issued, the Benefits tab displays the benefits for the selected employee (as defined in the **Offer issued for his/her current position)**.

If Benefits is enabled for your organization during implementation (**Administration** » **Global Settings** » **System Administration** » **Features** » **Core** » **Total Talent Profile** » **Benefits tab**) and if the selected employee's job offer was issued via Deltek Talent Management, then the benefit tab displays.

The ability for each individual benefit to be added to the Benefits tab must also be configured for benefits to display (**Administration** » **Global Settings** » **System Administration** » **Features** » **Core** » **Benefits** » **Show in Total Talent Profile**). Once this feature is enabled, a Benefits administrator can access Benefits Administration (**Administration** » **Recruiting** » **Benefits**) and check the **Show in Total Talent Profile** option for each of the benefits he or she wants to display.

Note: Due to the size of the tab, only 12 benefits display at one time. Click **View All Benefits** to see the complete list.

Preferences Tab

If the Preferences tab is enabled for you, you can edit your own relocation preferences and view other employees' preferences.

Relocation

Field	Description
Willing to relocate	**Yes** or **No** displays to indicate whether or not the selected employee is willing to relocate.
Date Available	The date the employee is willing to relocate. If he or she is not willing to relocate, **N/A** appears.
Availability Comments	Additional notes about relocating.
Location Preference	The office location to which you would relocate. **None** displays if the employee is not willing to relocate.

Relocation Options

Field	Description
International	If the employee has indicated they are willing to relocate internationally, the countries selected display. **None** indicates the employee is not willing to relocate internationally.
Domestic	If the employee has indicated they are willing to relocate domestic, the countries selected display. **None** indicates the employee is not willing to relocate internationally.
Additional Relocation Comments	Comments regarding relocation.

Position

Field	Description
Job Function	The type of position (for example, Customer Service or Engineering).
Type	The schedule you want (Full-time, Part-time, Contract, Internship).
Travel	The percentage the employee is willing to travel.
Additional Considerations	Comments regarding any special arrangements that may be needed.
Edit	You can edit your own preferences by selecting **Edit** from the Actions menu to edit all relocation preferences.

History Tab

If the Core HR module is licensed, Core HR Administrators can view history of changes made on the Employee Summary pane, Employment details tab, and Personal & Contact Details tabs.

Contents

Data on this tab is not editable, but can be exported by clicking the Download as XLS button.

Field	Description
Attribute Drop-Down	Select an attribute to limit history results to only information related to the selected attribute.
Attribute	The name of the field or attribute whose history you want to display in the table. Select the **Employee Information** option to view changes made to all Effective Dated fields.
Previous Value	The value assigned to this field prior to the change. For example, Engineer.

Field	Description
New Value	The value selected for the field when the change was made. For example, Senior Engineer.
Effective Date	The date the change goes into effect. This field will be blank for fields that are not Effective Dated.
Reason	The reason for the change. For example, Promotion. This field will be blank for fields that are not Effective Dated.
Date of Change	The date the change was made. This may not be the same as the effective date. Effective dates can be entered as past or future dates.
User	The employee who made the change.
Download as XLS	Click to download the history data as an XLS file.

Self-Service Tab

If the Core HR module is licensed and the Core HR administrator has granted Profile edit access to members of the Employee or Manager groups via Self-Service Administration, the Self-Service tab shows changes rejected or those pending approval.

Contents

Data on this tab is not editable. Information that displays depends on the role of the logged in user. For an Employee, this tab displays changes the employee has submitted for approval. For Managers, when they visit a direct report's profile, this tab displays changes the manager submitted on behalf of the employee that are awaiting approval or that have been rejected. The manager will not see changes the employee made to his or her own profile. For Core HR Administrators, this tab should display all changes that employees and managers have submitted for approval.

Field	Description
Employee	The name of the employee who submitted the change. This field displays for Managers when viewing an employee's profile.
Previous Value	The value assigned to this field prior to the change. For example, Engineer.
New Value	The value selected for the field when the change was made. For example, Senior Engineer.
Effective	The date the change goes into effect. This field will be blank for fields that are not Effective Dated.
Reason	The reason for the change. For example, Promotion. This field will be blank for fields that are not Effective Dated.
Date of Change	The date the change was made. This may not be the same as the effective date. Effective dates can be entered as past or future dates.

Field	Description
Employee	The name of the employee who submitted the change. This field displays for Managers when viewing an employee's profile.
Status	The status of the change.

Notifications

This screen lists the notifications sent to you.

Display the Notifications Screen

You can toggle between viewing all the notifications and viewing only those notifications you have specified as acknowledged.

To display the Notification screen:

Click **View Acknowledged Notifications / View All Notifications** to toggle between the two views.

> **Note:** The method of notification is determined through the **Communication Delivery** option of the Your Account, Personalization menu. Valid options are email, RSS feed, or text message.

Contents of the Notification Screen

Contents

Field	Description
Check box	Click one or more check boxes to select the accompanying notification lines to resend, acknowledge, or delete. Then click the **Resend Notification**, **Acknowledge**, or **Delete** buttons at the bottom of the current screen.
Sent	This is the date the notification was sent.
Subject	This is the subject line from the notification email. Click it to see the entire email. You can also Resend Notification, Acknowledge, or Delete from this detailed email page.
Event	This is the event for the notification.
Actions	Click one of the following for the selected notification line: ▪ Click to resend the notification to your email. ▪ Click to signify that you got it.

Field	Description
	▪ Click ✖ to delete the notification completely.

Correspondence Screen

This screen lists all of the letters that you have sent to and received from the Applicant Tracking module.

Upon entry, letters you have received display on this screen.

Display the Correspondence Screen

To display the Correspondence screen:

1. Click **Correspondence**.
2. Click **View Sent Letters** to see letters that you have sent or click **View Received Letters** to see received letters.
   You can toggle back and forth between these two options.
3. Click **Show/Hide Filters** to display search criteria fields that you can use to filter the list of letters displayed.
4. Click **More Options** » **View Archived Letters** to see letters that you have archived.
5. Select one or more letters to archive, and click **Archive** on the bottom of the screen.

Personalization Screen

Use this screen to configure settings that suit the way that you work in Deltek Talent Management.

Update Personalization Settings

Update personalization settings.

To update your personalization settings:

1. Click **Personalization** to display the Personalize System Settings screen.
2. Update your settings, and click **Submit**.
   Your changes are effective immediately.

Settings on the Personalization Screen

Set and manage personalization settings, such as calendar sharing and preferred language.

Calendar

<table>
<tr><th>Setting</th><th>Purpose</th></tr>
<tr><td>Share Calendar</td><td>Select Yes or No to denote whether or not users can view your calendar when they want to share an event with you or add you to an event.
For this setting to work, the administrator must enable the Shared Calendar option.
Administration » Features (Global Settings, System Administration)
Employee
Core
Main Calendar
Shared Calendar
If not enabled, the Share Calendar option does not appear in Personalization (Personalize System Settings).</td></tr>
<tr><td>Calendar Reminders</td><td>Select the default delivery method for your calendar reminders: no reminder, an email reminder, or a pop-up message that displays when you log in. You can choose to change this setting when you create a calendar reminder.</td></tr>
<tr><td>Date Format</td><td>Select the format of dates in the Talent Management Suite: day first (31/12/2015) or month first (12/31/2015).</td></tr>
<tr><td>Name of Time Zone</td><td>Select your preferred time zone. If you live in one time zone but work in another, you can choose which time zone is used for all time sensitive information.</td></tr>
<tr><td>Time Format Setting Name</td><td>Select whether times display in 12-hour format (1:30 PM) or 24-hour format (13:30).</td></tr>
</table>

General

Setting	Purpose
Default Pagination Range	Select the number of results displayed in a table whenever a table is used to show details 10, 25, 50, or 100.

Distance Unit	Select whether distances are shown in miles or kilometers.
Preferred Language	Select the language in which Deltek Talent Management is displayed. Only those languages that have been installed by the Site Administrator will show as options.
Résumé Agents: Email Format	Select the format in which you receive e-mail notifications with results from the résumé search agent: in HTML or plain text. This setting displays only if your company uses the Applicant Tracking System.
Résumé Agents: Expiration	Select the number of calendar days after which a résumé search agent will no longer send results: 7, 14, 21, or 28 days. This setting displays only if your company uses the Applicant Tracking System.

Communication Delivery

This screen allows you to configure the manner in which you want notifications delivered.

It lists the different types of notification formats which may be used. Select the one you'd like to use for each category or area of Deltek Talent Management (for example, Calendar, Jobs).

Delivery Method	Definition
E-MAIL	Select to receive notifications as emails. This is the default method.
RSS	Select to receive notifications as RSS feeds. With this method, users receive notifications via a regular feed that they can access using news aggregator software, as opposed to signing up for a mailing list or visiting the web site daily. Once an RSS feed has been selected for a notification, the icon to view the RSS feed ( ) is enabled.
TXT/SMS DELIVERY	Select to receive notifications as text messages. This option is available only if your company uses the SMS (TXT) notification feature. If you select this option, make sure you're your mobile phone number is entered in your profile.

Account Information

Select this option to view or edit your personal information or information about your account.

Employee Information

Upon selection of the **Account Information** option, Employee information displays. Scroll to view all employee, position, and professional information, or click at the Employee Information and Professional Information section headings to edit that corresponding data.

Note: Position information cannot be edited; it is display-only.

Diversity Information

This screen allows you to enter or update your diversity information. Diversity information can be entered in many ways: when the job seeker applies to a job, when the administrator creates him/her as a user, when the new hire is onboarded, or just from this screen.

Completing this screen is optional.

Change Username/Password

Use this screen to change the username or password you currently have set up to log in to Deltek Talent.

More Options

Use this screen to set up two-factor authentication and add an extra layer of security to your account.

Edit Account Information

Edit your account information to keep your personal account information updated.

To edit employee information:

1. Click on the Employee Information heading of the Account Information screen.
2. Enter or edit any of the displayed fields, detailed as follows.

   Employee Information

   - **First Name**: Enter your first name.
   - **Middle Name**: Enter your middle name or initial.
   - **Last Name**: Enter your last name.
   - **Employee ID**: Enter your company identification number.
   - **Address One**: Enter the first line of your home address.
   - **Address Two**: Enter the second line of your home address, if any.
   - **Address Three**: Enter the third line of your home address, if any.
   - **Country**: Select the country in which you live from the drop-down provided.

- **ST/PR**: Enter the state or province in which you live.
- **Zip/Postal Code**: Enter your zip code or Click Select Zip/Postal Code to select available zip codes for the city/state entered.
- **Date of Birth**: Select or enter (in MM/DD/YYYY format) your date of birth.
- **SSN**: Enter your social security number, with or without dashes.
- **Phone Numbers**: Enter any pertinent phone numbers. Enter the number and then in the next field select the type of number (such as Home, Pager, and Fax).

  Click **+** to add another number. Numbers previously added are displayed.
- **Preferred Method of Communication**: Select your preferred method of communication: **E-mail** or **TXT Message**.
- **Mobile Phone Number**: Select the country code for this cell phone, then enter the phone number including the area code.
- **E-mail**: Enter your email address. Then enter it again in the **Confirm E-mail** field.
- **About Me**: Enter any brief information you'd like attached to your employee record.
- **Projected Time to Retire**: This is the number of years until your retirement, based upon your date of birth.
- **Mentor**: **Yes** or **No** displays to denote whether or not you have agreed to mentor another employee.

  Click **Change** to change your response. The prompt "Do you wish to be a mentor?" displays. Select **Yes** or **No,** then click **Submit**.
- **Change Password**: Click **Change Username/Password** to update either your user name or password. See the next section for details.

Position Information (Display-only)

- **Organizational Unit**: This is the company and department in which you work.
- **Location**: This is the office location where you work.
- **Hire Date**: This is the date on which you were hired.
- **Status**: This is your tax exempt status.
- **Manager**: This is the name of your current manager.
- **HR Business Partner**: This is the name of your Human Resources contact.
- **Current Position**: This is your current title at this company.
- **Job Start Date**: This is the date on which you started your job.
- **Salary Grade**: This is the grade level for this job that is used in determining salary ranges.

3. Click **Save** to save all changes you've made.

Edit Professional Information

To edit professional information:

1. Click on the Professional Information heading of the Account Information screen.
2. Enter or edit any of the displayed fields, detailed as follows.
   - **Certifications**: Click **+** to add a new certification or you may edit/delete existing certifications.
   - **Professional Associations**: Click **+** to add a new professional association, or you may edit/delete existing associations.
   - **Extracurricular Activities**: Enter any outside of work activities, as desired.
   - **Language(s) Spoken**: Enter any additional languages spoken.

Enter Diversity Information

Completing this screen is optional.

To enter or edit your diversity information:

1. Click **Account Information** » **Diversity Information**.
2. Enter or edit any of the displayed fields, detailed as follows.
   - **Gender**: Select your gender from the drop-down.
   - **Race**: Select the race from the drop-down.
   - **Voluntary Self-Identification of Veteran Status: Protected Veteran Status**: Specify whether or not you are a protected veteran. You can also decline to specify yes or no.
   - **Voluntary Self-Identification of Disability: Please select one of the options:** Specify whether or not you have a disability. You can also decline to specify yes or no.
3. Click **Submit** to save this information.

Change Your Username

You will be identified in the system through your username.

To change your username:

1. Click **Account Information** » **Change Username/Password**.
2. Enter a new username in the **Enter New Username** field.
3. Enter your current password.
4. Click **Submit**.

Change Your Password

You will use your password to access your account regularly, so it is important to use a secure password that you won't easily forget.

To change your password:

1. Click **Account Information** » **Change Username/Password**.
2. Enter a new password in the **Enter New Password** field.
   Passwords must be:
   - At least eight characters long
   - Be a mix of upper and lowercase letters
3. Enter the password again in the **Verify New Password** field.
4. Click **Submit**.

Enable Two-Factor Authentication

Use the More Options screen to set up two-factor authentication and add an extra layer of security to your account.

Warning: The succeeding steps assume that you have already downloaded Google Authenticator or Duo Mobile on your mobile device.

To enable two-factor authentication:

1. Click **More Options** » **Setup 2FA**.
2. Scan the barcode using your mobile phone's authenticator app.
3. In the **Code** field, enter the 6-digit code generated from your authenticator app, and click **Submit**.

Disable Two-Factor Authentication

Use the More Options screen to disable two-factor authentication.

To disable two-factor authentication:

1. Click **More Options** » **Disable** » **2FA**.
2. Enter your username and password, then click **Submit**.

Org Chart

The **Org Chart** provides a graphical view of your position in the organizational structure.

If you have no direct reports, you see only your badge.

By default, the badge shows your name, job title, hire date, the location where you work, and the profile photo that you uploaded via your Total Talent Profile. The Site Administrator can configure the badge to show more or different information. The contents of the badge are also dependent on the Deltek Talent Management modules that your company uses.

If you have direct reports, your badge appears at the top of a chart with your direct reports below.

If a direct report has employees who report to him or her, you click to drill down to view those employees' information. Click to drill up.

Displaying Successors

Display successors selected for a key position.

> **Note: The icon and Domino List display only if your company has implemented the Career Development and Succession Planning module.**

To display successors:

Click to display the Domino List of potential successors and information about each one.

The information includes: name, job title, current salary, date the employee started in the current position, potential ranking, and risk of loss.

My Employees

Managers use options on the My Employees menu to manage actions pertaining to appraisals, career paths, development plans, training, and pending approvals.

My Employees Screen

Manage and assign information for direct reports to ensure they have what they need to meet personal goals and organization goals. Options available may include appraisals, career path information, development plans, training courses, continuous feedback sessions, and employee goals.

The options available on this page depend on the modules used by your Organization. If your firm uses the Performance module, the Performance Page displays by default and allows access to manage appraisals, continuous feedback sessions and employee goals. The Development page, if enabled, allows you to manage career paths, development plans, and succession plans. The Learning page, if enabled, allow you to manage employee training courses.

My Employees Performance Screen

Use as a jumping point from which to manage appraisals, continuous feedback sessions and employee goals for direct reports.

Display the My Employees Performance Screen

Open the screen by clicking the Performance link on the My Employees screen.

To display the My Employees Performance Screen:

1. Click **My Employees** » **My Employees** on the main menu.
   The Performance Screen displays by default. If your organization uses the Learning or Development module, you will see options to to access these screens in the upper right.
2. To return to the Performance screen after clicking to another My Employee screen, click Performance at the top right of the My Employees screen.

Contents of the My Employees Performance Screen

Use fields and options to view an overview of information related to appraisals, and to manage appraisals, continuous feedback sessions, employee goals for direct reports, Total Talent Profile options, and performance/potential ratings.

Contents

Field	Description
Employee Badge and Ribbon	The Employee Badge contains a photo and beneath that, key performance information, such as employee name, job title, and performance score. An up arrow, down arrow, or equal sign icon indicates whether the performance score has improved, declined, or stayed the same from the prior year's appraisal. The Ribbon area is to the right of the photo and contains a snapshot of and links to active appraisals. Click on an appraisal name to manage details. Click the Expand link to view the Current Appraisal, Pending Appraisals, and Past Appraisals sections.
Current Appraisal	This section lists a clickable link to the current appraisal as well as the appraisal score. In some cases you can click the next step in the appraisal process to move the appraisal to the next step. Options available from the Actions menu are **Print Appraisal** and **Reassign**.
Pending Appraisal	This section lists appraisals waiting on an action, such as scoring or signing.
Past Appraisal	This section lists appraisals that have been completed in the past. View Scoring details, such as Overall Scale Score, Raw Scale Score, and Raw Percentage Score. Actions available in this section are View Appraisal and Print (closed) appraisal.
Actions	The following actions can be performed from the Actions menu. The actions you see depend on configuration, user permissions, and placement of employees on the org chart. ▪ **Continuous Feedback:** Click to open the Continuous Feedback screen, where you can view and create continuous feedback sessions for direct reports. ▪ **Goals:** Click to manage employee goals created outside the appraisal process,such as editing, changing status, retiring and deleting. ▪ **Create New Appraisal:** Click to select options to launch an appraisal for the employee. ▪ **Create New 360 Assessment:** Click to select options to launch a 360 Assessment. ▪ **Drill down:**Click to view employee profiles for the direct reports of the current employee. Click the Up arrow to return to the original employee.

Field	Description
	▪ **View TTP** (Total Talent Profile): ▪ **Set Performance/Potential Rating**. Click to open the Set Performance/ Potential Rating dialog, where you can edit the Potential scale, set a manual Performance score, select the next step for the employee on their path, such as a lateral move or a promotion, and specify the risk of loss as low, medium, or high. **Note:** The rating options available in the Performance Score column of the Set Performance/Potential Rating dialog are determined by the scale selected by an Administrator as the System Overall Scale. An Administrator sets this option on the Scales screen (**Administration icon » Global Settings » Your Organization » Scales).**

My Employees Development Screen

Use as a jumping point from which to manage career paths, development plans, 9 box job performance details, and succession plan nominations.

Display the My Employees Development Screen

Open the screen by clicking the Development link on the My Employees screen.

Your organization must license and enable the Development module to use this screen.

To display the My Employees Development Screen:

1. Click **My Employees** » **My Employees** on the main menu.
2. Click **Development** in the upper right.

Contents of the My Employees Development Screen

Use these fields and options to view an overview of development plans, and to access screens where you can manage career paths, development plants, 9 box job performance details, succession plan nominations, Total Talent Profile options, and performance/potential ratings.

Contents

Field	Description
Employee Badge and Ribbon	The Employee Badge contains a photo and beneath that, key career development information, such as employee name, job title, time in position and hire date. The Ribbon area is to the right of the photo and contains a snapshot of and links to active career path and development plans. A gold star marks the active career path. Click on a plan or path name to manage details. Click the

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td></td><td>Expand link to view and manage current Career Paths and Development Plans.</td></tr>
<tr><td>Career Path</td><td>This section lists a clickable link to the current appraisal as well as the appraisal score. In some cases you can click the next step in the appraisal process to move the appraisal to the next step. Options available from the Actions menu are Print Appraisal and Reassign.</td></tr>
<tr><td>Development Plans</td><td>This section lists appraisals waiting on an action, such as scoring or signing.</td></tr>
<tr><td>Actions</td><td>The following actions can be performed from the Actions menu. The actions you see depend on configuration, user permissions, and placement of employees on the org chart.
Add Career Path. Click to open the Create Career Path screen.
Add Development Plan. Click to open the Add Development Plan screen.
Drill Down Click to view employee profiles for the direct reports of the current employee. Click the Up arrow to return to the original employee.
Nominate for Succession Plan. Click to open the Manager Nominated Successor screen, where a manager can specify the employee's readiness for a position and add comments.
View 9 Box. Click to view a graphical representation of a direct report's progress and growth using the metrics of potential ratings and performance score.
View TTP (Total Talent Profile).
Set Performance/Potential Rating. Click to open the Set Performance/Potential Rating dialog, where you can edit the Potential scale, set a manual Performance score, select the next step for the employee on their path, such as a lateral move or a promotion, and specify the risk of loss as low, medium, or high.
Note: The rating options available in the Performance Score column of the Set Performance/Potential Rating dialog are determined by the scale selected by an Administrator as the System Overall Scale. An Administrator sets this option on the Scales screen (Administration icon » Global Settings » Your Organization » Scales).</td></tr>
</table>

My Employees Learning Screen

Manage all employee training, including classes in which employees are enrolled, and progress through a curriculum. Managers can also approve or reject enrollment requests from this screen.

Display the My Employees Learning Screen

Open the screen by clicking the Learning link on the My Employees screen.

Your organization must license and enable the Learning module to use this screen.

To display the My Employees Learning Screen:

1. Click **My Employees** » **My Employees** on the main menu.
2. Click **Learning** in the upper right.

Contents of the My Employees Learning Screen

Use the fields and options to manage all employee training, including classes in which employees are enrolled, and progress through a curriculum.

Contents

Field	Description
Employee Badge and Ribbon	The Employee Badge on the Learning screen contains a photo and beneath that data related to the employee's learning profile, such as an employee name, job title, and training credits earned. Click on the name to open the Total Talent Profile, and the job to view the Position Profile Screen. The Ribbon area is to the right of the photo and contains a snapshot of and links to currently enrolled courses and curriculums. Click on a course or curriculum name to view details. Click the Expand link to view Approvals, Current Courses, Recommended Courses, Courses to watch for the future, and a list of courses for which an employee has been wait-listed..
Approvals	This section lists enrollment requests pending approval. A color-coded number displays to alert managers to the existence of a request. Managers can approve or reject a learning request. The Manager and employee receive notification requests when approvals are pending. Managers can click the course name to view details.
Current Courses	This section lists courses in which the direct report is currently enrolled. Click the class name to view details. Click the Attendance link to view attendance details.
Recommended Courses	This section listscourses recommended to this direct report. Review courses and/or remove by clicking the delete icon in the row for that

Field	Description
	course. A manager can remove a course from a direct report even if the course is marked required.
Course Watch List	This section lists courses that may benefit the employee at a later date.
Class Waiting List	This section lists the courses in which the employee has been placed on a waiting list. The number indicates the employee's place in the wait list. Click on a link to view course details.
Actions	The following actions can be performed from the Actions menu. The actions you see depend on configuration, user permissions, and placement of employees on the org chart. ▪ Drill down ▪ Learning Profile ▪ View External Training ▪ Tuition Assistance ▪ View TTP (Total Talent Profile)

Employee Job Profile Screen

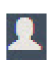
View details of an employee's position, such as salary information, status and competencies.

Display the Employee Job Profile Screen

Access the employee Job Profile Screen by clicking a Job Title anywhere in Deltek Talent Management. For example, from the Total Talent Profile.

These instructions provide access via the Total Talent Profile, where all employees can access their own Job Profile details. However, depending on permissions, you can access other employee job profile details by clicking a job title on any screen where one displays.

To display your employee job profile on the Total Talent Profile:

1. Click the Your Account  icon.
2. Click Total Talent Profile.
3. In the Employee Summary pane under the photo, click your Job Title.

Contents of the Employee Job Profile Screen

View details about your position, or depending on permissions, another employee's position, such as the Job ID, the salary grade and range, and whether the job is full or part time.

Contents

When finished reviewing job details, click **Return** to return to the screen where you clicked the Job Title.

My Matrix Employees Screen

Matrix mnagers perform management functions such as launching appraisals for Matrix employees.

A Manager's Matrix employees are not direct reports, but are still accountable to the Matrix manager, for example, in a dotted-line relationship. Matrix Managers perform management functions such as launching appraisals for Matrix employees.

Display the My Matrix Employees Screen

Access the screen on the My Employees menu.

To display the My Matrix Employees Screen:

Click **My Employees** » **My Matrix Employees** on the main menu.

Contents of the My Matrix Employees Screen

Use fields and options to manage appraisals and to launch screens to manage other actions, such as 360 assessments, goal creation, and appraisal creation for matrix employees.

Contents

Field	Description
Employee Badge and Ribbon	The Employee Badge contains a photo and beneath that, key employee information, such as employee name, for each Matrix employee. The Ribbon area is to the right of the photo and contains a snapshot of and links to active appraisals. Click on an appraisal name to manage details. Click the Expand link to view the Current Appraisal, Pending Appraisals, and Past Appraisals sections.
Current Appraisal	This section lists a clickable link to the current appraisal as well as the appraisal score. In some cases you can click the next step in the appraisal process to move the appraisal to the next step. Options available from the Actions menu are **Print Appraisal** and **Reassign**.
Pending Appraisal	This section lists appraisals waiting on an action, such as scoring or signing.

Field	Description
Past Appraisal	This section lists appraisals that have been completed in the past. View Scoring details, such as Overall Scale Score, Raw Scale Score, and Raw Percentage Score. Actions available in this section are View Appraisal and Print (closed) appraisal.
Actions	The following actions can be performed from the Actions menu. The actions you see depend on configuration, user permissions, and placement of employees on the org chart. ▪ Goals ▪ Create New Appraisal ▪ Create New 360 Assessment ▪ Drill down ▪ View TTP (Total Talent Profile)

9 Box Screen

View and manage a graphical representation of a direct report's progress and growth using the metrics of potential ratings and performance score. The 9 box can be configured by an administrator using System Settings to track progress and growth using appraisal score data or manual score data.

Display the 9 Box Screen

Access the 9 Box Screen on the My Employees menu.

To display the 9 Box screen:

Click **My Employees** » **My Employees** » **9 Box**.

Contents of the 9 Box Screen

View and manage a graphical representation of a direct report's progress and growth using the metrics of potential ratings and performance score.

Contents

The 9 Box offers you a quick view of where each of your employees falls in regards to **Potential** and **Performance**. The default view will show your direct reports. The 9 box can be configured by an administrator using System Settings to track progress and growth using appraisal score data or manual score data. Use the **Filter** to select the sort order and modify the grid view. To print this screen, click the **Print** icon located above the grid.

Field	Description
Filter	Options in the Filter area include **Search Date**, **Sort**, **Filter By**, which allows you to view not only **Direct Reports**, but also **2nd Level Reports**

Field	Description
	(the direct reports of your employees), **3rd Level Reports** (the direct reports of the employees of your direct reports), and a **Cumulative**view, (shows employees at all levels if 2nd or 3rd level is selected). You can also filter by **Attrition**, which allows you to determine whether employees lost to attrition for various reasons (voluntary, involuntary or both) were high performers.
New Box	Employee is new and still developing basic skills in their responsibilities but demonstrates significant aptitude.
Ready/Watch Box	Employee is performing well and demonstrates the ability to advance in the foreseeable future.
Ready/Move Box	Employee performs at highest levels and possesses the abilities to step into a more advanced role.
Questionable Box	Employee should be performing at a higher level but shows signs of improvement.
Growing Performer Box	Employee is a contributor in place and shows potential for more responsibility.
Future Contributor Box	Employee performs at a high level and is developing the abilities required for advancement.
Transition Out Box	Employee is consistently not meeting targets and expectations. Recent development actions have not improved performance.
Standard Performer Box	Employee is performing adequately but shows little promise to warrant advancement.
Expert-in-Place Box	Employee is superb in their current position, but performance would not translate to a position with more responsibility.
Unrated Box	Employee is unrated on either performance or potential. This box allows managers to easily identify employees that may require action, such as rating the potential or completing an assessment.
Actions	▪ **View 9 Box employee details:** Click the Display Employees from this Box in Detail View icon to view details on the View 9 Box Employee Details screen. This icon displays at the bottom of a box that contains employees. ▪ **View Performance and Potential Scores:** If an administrator has enabled Aggregate view, when you hover over an employee name in the grid, the scores shown for the employees may reflect an average score from up to 3 dates entered by the Site Administrator.

Field	Description
	■ **Edit (Administrators Only):** Administrators with proper permissions will have access to an **Edit** button on the top right of the screen. To change labels and colors, click **Edit** , then click the **Edit this box** button for the box you want to change, then click **Update**.

My Project Teams Screen

Managers can create and manage project teams.

Use the My Project Teams screen to view the teams that you have created or to which you belong as a member.

Employees gain skills and competencies by serving on these teams as either team leads or team members.

Display the My Project Teams Screen

Access the My Project Teams screen on the Career Center menu or on the My Employees menu.

Display the My Project Teams Screen on the Career Center Menu

One way to access the My Project Teams Screen is on the Career Center Menu.

To display the My Project Teams Screen on the Career Center menu:

Click **Career Center** » **Career Development** » **Project Teams**.

Display the My Project Teams Screen on the My Employees Menu

One way to access the My Project Teams Screen is on the My Employees menu.

To display the My Project Teams Screen on the My Employees menu:

Click **My Employees** » **My Employees** » **Project Teams**.

Contents of the My Project Teams Screen

Use the fields to review and manage details of your projects, and to perform actions such as starting and stopping a project and adding new team members.

Filter For Non-Administrators

You can filter the display of teams in the My Project Teams table. Click the Filter icon at the top of the screen to display a list of available filter parameters. Click the check box for each filter you want to use. Results display in the projects table. To remove the filter, click the link beneath **Clear Filter**.

For team leads, team owners, and regular users, fields can include:

Field	Description
Keywords	Enter a term to use to narrow projects that are displayed in the list.
Include Closed Projects	Select to include closed projects in search results.

Filter for Administrators

For administrators, these search fields are available in addition to Keywords and Include Closed Projects.

Field	Description
Show only Projects that I'm a Member of	Select to narrow search results to only projects to which you are a member.
Team Lead	Click **Select Employees** to search for employees for the project in your capacity as team lead. You can search by first name, last name, or the employee's email address. In the search results table, click the Plus icon to select the employee. Click **Confirm Selection** to add the selected employees to the project team. The selected employee names display under the Team Lead title.
Team Owner	Click **Select Employees** to search for employees for the project in your capacity as team owner. You can search by first name, last name, or the employee's email address. In the search results table, click the Plus icon to select the employee. Click **Confirm Selection** to add the selected employees to the project team. The selected employee names display under the Team Owner title.

Columns

The My Project Teams screen displays the following columns:

Field	Description
Project Name	This is the name of the project on which the team is working (for example, Employee Appreciation Event). Click the project name to display information about the project and its team members.
Project Code	This is a read-only, sortable, column that transfers from Costpoint to DTM. This provides users with this additional information about a project when selecting projects before launching appraisals.
Description	This is a description of the purpose of the project.

Field	Description
Team Owner	This is the person with ultimate responsibility for the team.
Team Lead	This is the employee who has been chosen to lead the team.
Duration	This is the planned start date and end date of the project.
Members	This is the number of members belonging to the team. Click the total to view a list of team members. Click on an employee's name to view their Total Talent Profile, which lists the employee's skills and competencies.
Status	A project's status can be **Active** (in progress), **Pending** or **Closed** (not yet started or already finished).

Start/Stop Project Action

The Start and Stop icons display in the second to last column on the My Project Teams screen. You can control the project's duration using the Start and Stop icons.

Field	Description
Start Project	Click to start the project. This changes the project's **Status** to **Active**.
End Project	Click to end the project. When you end the project, if Skills and Competencies are defined for the project, the user ending the project can assign these metrics to team members. See "Ending a Project and Assigning Skills and Competencies" below for more information. When you finish this evaluation, the project's **Status** changes to **Closed**.

Actions

The following actions are available in the last column from the vertical dot menu.

> **Note:** The Edit, Add Project Team Members, and Delete actions display only for users with administrative privileges.

Field	Description
Edit	Click this icon to change the general information about the project team, including the name, description, team lead, and the skills and competencies that the team is expected to gain from participating in the project.
Add Project Team Members	Click this icon to search for and add team members.

Field	Description
Email All Team Members	Click this icon to open an email in your default email program, addressed to all team members.
Delete	Click this icon to delete the entire project and team.

Certifications Screen

If your Organization uses the Learning module, you may have access to the Certifications screen on the My Employees menu, where you can view and manage Internal and External employee-earned certifications for your direct reports.

Display the Certifications Screen

If your organization uses the Learning module, you may have access to the Certifications screen on the My Employees menu.

To access the Certifications Screen:

Click **My Employees** » **My Employees** » **Certifications**.

Contents of the Certifications Screen

View internal and external certifications earned by your employees.

Contents

Field	Description
Employee Name	Below each employee name is a list of Internal and External certifications earned by that employee. Click an employee name to open that employee's full Learning Profile.
Internal Certifications	View a list of completed curriculums or courses within the Learning module, which issued a certificate upon completion.
External Certifications	View a list of external certifications, including details like the organization who issued the certification, and when the certification expires. Click the View icon to view attached files. Click the checkmark to mark this certification acknowledged. Click the circle with a diagonal line to mark the certification no acknowledged. Acknowledgment is simply a way to note this certification has been noted and recognized by the manager.

Profile Edits Screen

Approve or reject edits to an employee's profile.

Contents

Each time one of your employee's edits his/her profile, you will be asked to approve those edits before they appear in the system.

- To **Approve** or **Reject** an edit, check the check boxes in the appropriate column.
- Click **Save** when complete.

My Pending Approvals Screen

View and manage approvals that are awaiting your attention, including those associated with appraisals, offers, requisitions, and changes made by your direct reports to their Total Talent Profile.

From this screen, view approvals that are awaiting your attention, including those associated with appraisals, offers, requisitions, and changes that an employee has made to the Total Talent Profile, which require approval. On this screen you can perform actions, such as approving and rejecting these items.

Note: You can approve or reject an appraisal on this screen. If you reject it, the appraisal automatically moves back to the Assessment phase, meaning that all appraisers must re-enter their appraisals and all signers must re-enter their signatures.

Display the My Pending Approvals Screen

You can display the My Pending Approvals screen on the Performance menu and My Employees menu.

To display the My Pending Approvals screen:

Click **Performance** » **Approvals**, or click the **Pending Approvals** button from the Approval History or All Pending Approvals screen. You may also have the option to access Approvals from the My Employees menu (**My Employees** » **Approvals**).

Contents of the My Pending Approvals Screen

Depending on the modules you are using, view and approve requisitions, offers, appraisals, and self-service items that direct reports have updated on their Total Talent Profiles.

Requisitions

Requisitions display to those using the Recruiting module.

Column	Description
Division	The business unit to which the requisition belongs

Column	Description
Job Code	The job code associated with the requisition
Req #	Requisition number
Requisition	Click the link to view details about the requisition.
Date Created	The date the requisition was created
Recruiter	The name of the recruiter managing the requisition
HM	The hiring manager
Attachments	The number of documents attached to the requisition
Members	This field displays the number of members of the requisition approval process, and lists each member's name.
Actions	Use this field to approve or reject the requisition and, depending on your privileges, to do the following: ▪ Click **Add/view Attachments** to view any attachments to the requisition. ▪ Click **Edit Requisition** to modify the requisition. ▪ Click **Add/View Notes & Transactions**.

Offers

Offers display to those using the Recruiting module.

Column	Description
Candidate	Click on the name of the individual being offered a position to view the résumé.
Offer Date	The date the offer was made official
Division	The business unit offering employment
Job Code	The job code signifying the job being offered
Req #	Requisition number
Requisition	Click the link to view details of the requisition tied to this job
On behalf of	This field displays the name of the employee’s manager.
Initiated by	The name of the individual who began the offer process
Members	This field displays the number of members of the approval process, and lists each member's name.
Actions	Use this field to approve, reject, or view the offer.

Appraisals

Appraisals display to those using the Performance module.

Column	Description
Division	This field displays the business unit to which the employee belongs.
Employee	This field displays the employee’s name. Click the name to display the employee’s Total Talent Profile.
Job Title	This field displays the name of the employee’s job.
Appraisal	This field displays the name of the appraisal (for example, Copywriter or Project Manager) that is being used to evaluate this employee.
System Calculated Rating	This field displays the Overall Rating, which is calculated based on the scores entered by the raters for all competencies, skills and goals in the appraisal.
Manager Override Rating	Depending on your organization’s settings, a manager may be able to override the automatically calculated Overall Rating. The manager enters a different value on the Summary tab of the appraisal during the Review phase.
Manager	This field displays the name of the employee’s manager.
Members	This field displays the number of members of the approval process, and lists each member's name.
Actions	Use this field to approve or reject the appraisal.

Self-Service

The Self-Service section displays items that a direct report has edited in the Total Talent Profile, for Core HR Administrators using the Core HR module.

Column	Description
Employee	The name of the employee who made the change. Click the name to display the employee’s Total Talent Profile.
Attribute	The name of the field or attribute that was changed.
Previous Value	The value that was entered for the attribute prior to the change.
New Value	The change the employee made to this attribute that requires your approval.
Effective	The date the change will become effective.
Reason for change	The reason the employee gave for the change.
User	This field displays the name of the employee’s manager.
Members	This field displays the number of members of the approval process, and lists each member's name.

Column	Description
Actions	Use this field to approve or reject the changes to the Total Talent Profile fields.

Bulk Actions and Buttons

The following bulk actions and button actions are available on this screen.

Action	Description
Bulk Actions	Check each requisition, offer and appraisal you want to approve or reject and select the appropriate radio button: ▪ **Approve all selected:**Check each requisition, offer, appraisal, and self-service item you want to approve and click this button to approve all at once. ▪ **Reject all selected:**Check each requisition, offer, appraisal, and self-service item you want to reject and click this button to reject all at once.
View All Pending Approvals	Click this button to see a list of any approvals that are awaiting your attention, including those associated with appraisals. The screen also displays approvals associated with requisitions and offers..
Approval History	Click this button to display a listing of all of the approvals in which you have participated.

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