Add External Certifications as a Manager or Admin Quick Steps

① Admin: Access Any Employee's Learning Profile

↓

② Manager: Access Your Employee's Learning Profile

↓

③ Admin or Manager: Scroll to the External Certifications Section

↓

④ Admin or Manager: Click Add External Certifications

↓

⑤ Admin or Manager: Fill in the Fields on the External Certifications Screen and Click Save

---

Dashboard

MY EMPLOYEES ⌄

RECRUITING ⌄

PERFORMANCE ⌄

LEARNING ⌄

SUCCESSION ⌄

CAREER CENTER ⌄

REPORTS ⌄

Employees ⌄

Main Dashboard

The high-level steps for Administrators and Managers to add an External Certification to an employee's Learning Profile are shown in the menu to the left.

Navigation
- Click the numbered circles on the left to move to the first step in each phase.
- Use the **Page Down** key to proceed through the quick steps. Use the **Page Up** key to return to a prior slide.

Begin

Best viewed in IE or Adobe PDF Reader.

Add External Certifications as a Manager or Admin Quick Steps

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Admin or Manager: Click Add External Certifications

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---

Deltek Talent Management

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Dashboard

| Employees ▾ | Search... 🔍 |

A Enter the employee name, or other search terms, in the Search field and click the magnifying glass icon.
.

MY EMPLOYEES

RECRUITING

Main Dashboard

PERFORMANCE

Widgets

LEARNING

Alerts   ✕

- New Tuition Assistance Requests (12)
- Expired/Expiring Employee Certifications (1)

Managers, skip to Step 2.

SUCCESSION

Show All

CAREER CENTER

REPORTS

⊞ My Curriculum Completion Status   ✏️   ✕

CZ - Basketball Curriculum

AB - Healthcare Curriculum

0% 20% 40% 60% 80% 100%

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Employees ▾ | Search... 🔍

↺ ▾ 📌 ▾

Search for Employees

« ‹ **1** › »

Displaying 1 - 3 of 3   10 25 50 **100** per page

NAME ⌄	MANAGER ⌄	COMPANY/DIVISION ⌄	LOCATION ⌄
Shawn Aaron	Admin HRsmart	Engineering	Boston
Shawna Beaver	McNeal	Engineering	New York
Shawn Slater		Operations	Chicago

B Click the name of the employee whose Learning Profile you want to access.

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v15.2.0

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---

Your Account / Total Talent Profile

Total Talent Profile

ABOUT   PROFILE   PREFERENCES

Shawn K. Aaron — Field Engineer

Dept.: Engineering

Manager: Admin HRsmart

Location: Boston

Status: Exempt

Original Date of Hire: 03/04/2013

Start Date (Current Position): 06/11/2010

Hire Date (Current Position): *Unknown*

View Organization Chart

✉ kenilshah+saaron224@hrsmart.com

📞 +(1)5515570228

🏠 2929 North Central Expressway, Suite 110, Boston, Massachusetts 2128, US

Update Photo

APPRAISALS

CAREER PATH

COMPETENCIES & SKILLS

JOB HISTORY

MENTORING

PROJECT TEAMS

SUCCESSION PLANS

TRAINING & DEVELOPMENT

➕ Expand All Panels

⌄ Current Appraisal

No appraisals for this employee.

C On the Employee's Total Talent Profile, click TRAINING & DEVELOPMENT.

Add External Certifications as a Manager or Admin Quick Steps

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Total Talent Profile

ABOUT   PROFILE   PREFERENCES

Shawn K. Aaron — Field Engineer

Dept.: Engineering

Manager: Admin HRsmart

Location: Boston

Status: Exempt

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Update Photo

APPRAISALS

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JOB HISTORY

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PROJECT TEAMS

SUCCESSION PLANS

TRAINING & DEVELOPMENT

➕ Expand All Panels

› Development Plans

› Past Development Plans

D

› Training

Click Training to expand the section.

①

Admin: Access Any Employee's Learning Profile

②

Manager: Access Your Employee's Learning Profile

③

Admin or Manager: Scroll to the External Certifications Section

④

Admin or Manager: Click Add External Certifications

⑤

Admin or Manager: Fill in the Fields on the External Certifications Screen and Click Save

Manager: Admin HRsmart

Location: Boston

Status: Exempt

Original Date of Hire: 03/04/2013

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Hire Date (Current Position): *Unknown*

Update Photo

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APPRAISALS

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TRAINING & DEVELOPMENT

➕ Expand All Panels

❯ Development Plans

❯ Past Development Plans

Click here to skip to the next step for an Administrator, Step 3.

⌄ Training

No Courses to display

Curriculum

Communication Methods

Progress

%

🌐 View External Training   🎓 View Learning Profile   **E**

Click View Learning Profile.

❯ Education History

Add External Certifications as a Manager or Admin Quick Steps

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Dashboard

Employees ▾   Search... 🔍

MY EMPLOYEES

My Employees

My Matrix Employees

9 Box

Project Teams

Certifications

Profile Edits

RECRUITING

PERFORMANCE

LEARNING

SUCCESSION

CAREER CENTER

REPORTS

A Click MY EMPLOYEES.

B Click My Employees.

Main Dashboard

Alerts

New Tuition Assistance Requests (1)
Expired/Expiring Certifications (1)

Show All

⫶⫶⫶ Offboarded Employees

« ‹ 1 › »

Displaying 1 - 1 of 1   10 25 50 **100** per page

NAME ▾	OFFBOARDED BY ▾	ELIGIBLE FOR RE-HIRE ▾	LAST WORKING DAY ▾	SEPARATION TYPE ▾	SEPAR
Jennifer Alford		Yes	05/30/2017	Voluntary Separation	RL06

①

Admin: Access Any Employee's Learning Profile

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Employees ▾ | Search... 🔍

🕘▾ 📌▾

My Employees / My Employees / Development

📄

My Employees
Development

Performance | **Learning**

C

Click the Learning tab.

« ‹ **1** › »

Displaying 1 - 2 of 2 | 10 | 25 | 50 | **100** | per page

👤

Shawn Aaron
Field Engineer
Potential: Unrated
Time in Position: 8y 4m 11d
Hire Date: 03/04/2013
No career paths to display

DEVELOPMENT PLAN   PROGRESS   ⚙▾

Leadership Development

Add External Certifications as a Manager or Admin Quick Steps

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Learning

« ‹ **1** › »

Displaying 1 - 2 of 2   10   25   50   **100**   per page

Shawn Aaron
Field Engineer
Total Credits: 0
Total CEUs: 0
Time in Position: 8y 4m 13d
No Courses to display

CURRICULUM   PROGRESS

⚙▾

ACTIONS

🎓 Learning Profile

🌐 View External Training

📇 Tuition Assistance

👤 View TTP

Communication Methods   %

D Find the employee whose Learning Profile you want to access, then click the drop-down arrow to expand the Action menu and click Learning Profile.

Add External Certifications as a Manager or Admin Quick Steps

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---

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My Learning

Employees ▾   Search... 🔍

Personal Profile

Learning Profile
Shawn Aaron

➕ Expand All Panels

▾ Curricula

« ‹ **1** › »

Displaying 1 - 1 of 1   10   25   50   **100**   per page

CURRICULUM ⌄	ENROLLMENT STATUS ⌄	CURRICULUM STATUS ⌄	PERCENT COMPLETE	DATE ENROLLED ⌄	DATE COMPLETED ⌄	ACTIONS
Communication Methods	Enrolled	Open	0.00	01/19/2017, 2:01 PM (CDT)	N/A	👤✖ 👤➕

▾ Certifications

Scroll to the External Certifications section.

Add External Certification

External Certifications

Click Add External Certification.

«

Displaying 1 - 1 of 1 10 25 50 100 per page

CERTIFICATION NAME ˅	DESCRIPTION	ISSUED BY ˅	EFFECTIVE ˅	EXPIRATION ˅	REQUIRED ˅	ACKNOWLEDGED ˅	REMINDER ˅	ACTIONS
SZ-Art Certification	SZ-Art Certification		Never	No	No	Yes		🖊 ⏳

> Certification History

> Courses (Totals: Credits:0 CEUs: 0)

> Course History (Totals: Credits:0 CEUs: 0)

˅ External Training Summary (Totals: Credits:0.00 CEUs:0.00)

Manage External Training

« ‹ 1 › »

Displaying 1 - 1 of 1 10 25 50 100 per page

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Employees ▾   Search... 🔍

Learning / My Learning / Learning Profile

External Certifications

At least one of the fields marked with a (*†) is required. Fields marked

ACRONYM (IF APPLICABLE)

CERTIFICATION NAME *

DESCRIPTION

B *I* <u>U</u>   1≣ ≣   ≡| |≡   🔗 🔗

A Enter information in the following fields on the External Certifications Screen:
- **Acronym**: Enter an acronym, if necessary.
- **Certification Name**: Enter the certification name.
- **Description:** Enter a short description.
- **Issued By:** Enter the institution who will grant the certification.
- **Effective:** Enter the date on which the certification becomes effective.
- **Expiration Date:** Enter the expiration date.
- **Upload File:** Upload any files you want to attach to this certification.
- **Required to Perform Job Duties:** Check this option if the certification is required for the employee to perform his or her job.
- **Notify Users Before Expiration:** Select this option to send a notification to the employee before the certification expires.
- **Number of Days to Notify After Expiration:** Specify the number of days after expiration to send a notification to the employee that the certification has expired.
- **Frequency (Days) of Reminders After Expiration:** Specify how often a repeat reminder will be sent to the employee.
- **Reminder Notification Recipient:** Select additional people who should receive reminders of certification expiration. You can click the double arrow to move all people to the recipients list, or click a role in the left column and click the single arrow to specify that this role should receive a notification.

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← ←←

Employee
Manager

B When finished, click Save.

🖫 Save   Cancel

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←

Employee
Manager

This concludes the
Add External Certifications as a Manager or
Administrator quick steps.

Save   Cancel