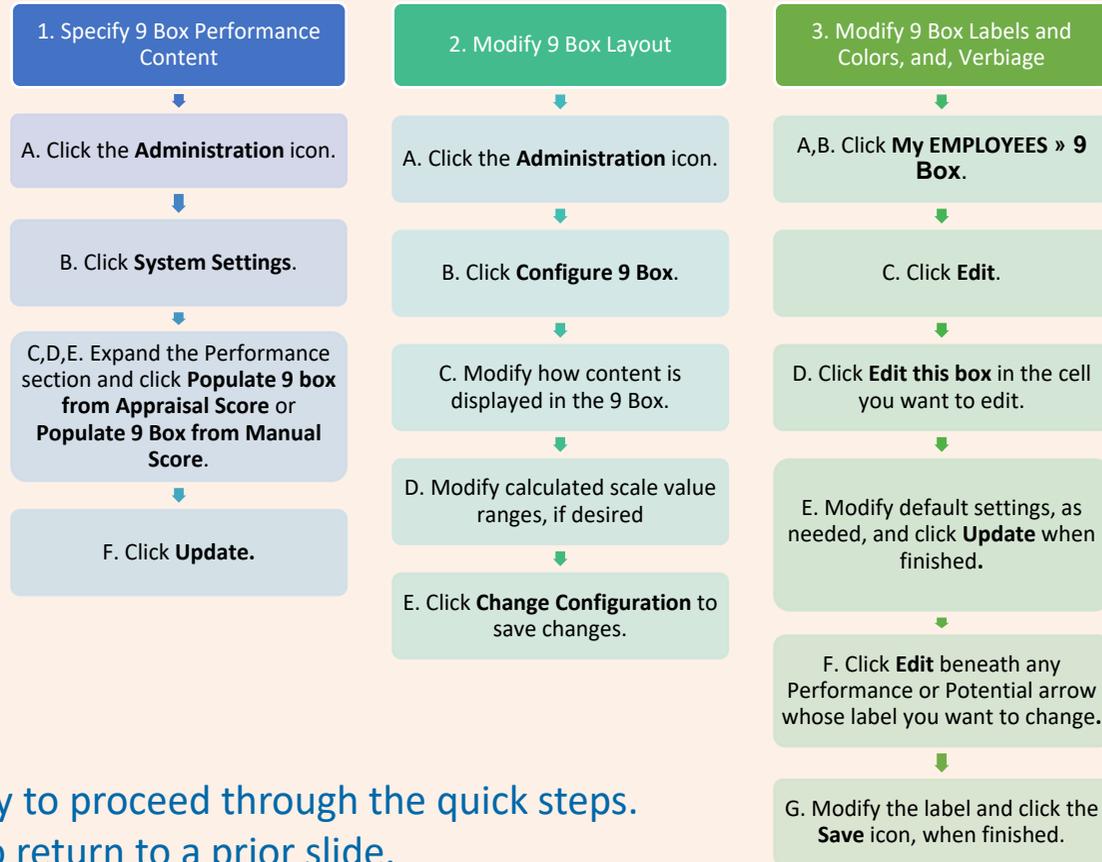


# 9 Box Configuration

The high-level steps required for an administrator to modify default 9 Box settings are shown here. Each step includes sub-steps.



## Navigation:

- Use the **Page Down** key to proceed through the quick steps.
- Use the **Page Up** key to return to a prior slide.

- Dashboard
- MY EMPLOYEES
- RECRUITING
- PERFORMANCE
- LEARNING
- SUCCESSION
- CAREER CENTER
- REPORTS

Employees [Dropdown] Search... [Search Icon]

A

Click the **Administration** icon.

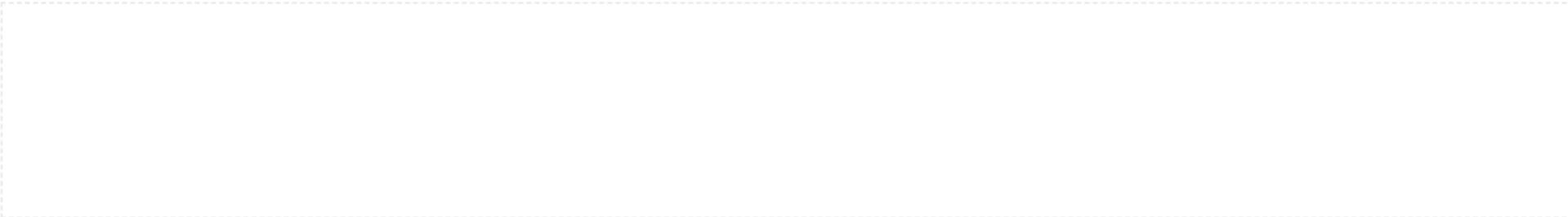
### Main Dashboard

Get More Widgets Tasks

**Alerts** [Close Icon]

- New Tuition Assistance Requests (10)
- Appraisal (Mars wf full really) for your employee Mars Mgr is awaiting your signature

Show All



1. Specify 9 Box Performance Content > Step A

# Administration

### Recruiting

- Configuration**
  - Application Restriction Rules
  - Diversity Data Collection
  - Dynamic Forms
  - External Front Ends
  - Kiosks
  - Teams
  - Terms of Use
  - Workflows
- Onboarding**
  - Welcome Page
  - Task Management
  - Document Library
  - Bundles
  - Recipients
- Cross-Posting**
  - Accounts
  - Authorization Requests
  - Site Selection
- Vendors**
  - Accounts
  - Charge Codes
  - Distribution Lists
  - Locations
- Employee Referral Program**
  - Approve Earned Awards
  - Pay Installments
  - Manage Referral Awards
  - Approve Award Plans
  - Manage Award Plans by Requisition
- Résumés**
  - Résumé Deletions
- Benefits**
  - Benefit Packages
  - Benefits

### Development

- Career Path Templates
- Potential Rating Tips

### Succession Planning

- Manage Succession Plans
- Configure 9 Box

### Global Settings

<b>System Administration</b> <ul style="list-style-type: none"><li>Custom Menus</li><li>Drop-down and Multi-Select Lists</li><li>FAQs</li><li>Features</li><li>Groups</li><li>Languages</li><li>Notification Events</li><li>Page Options</li><li><b>System Settings</b></li></ul>	<b>Your Organization</b> <ul style="list-style-type: none"><li>Approval Chains</li><li>Competencies</li><li>Documents</li><li>Job Families</li><li>Job Profiles</li><li>Groups</li><li>Structure</li><li>Red Users</li></ul>
---	--

**B** Scroll to the Global Settings » System Administration section and click **System Settings**.



Employees

Search...



Administration / Global Settings / System Administration / System Settings

## System Settings

**WARNING:** System Settings are restricted to authorized users. Changing system settings may impact site functionality. Proceed with caution. For questions about a system setting and its impact, please reach out to Deltek Customer Care Support at [support.deltek.com](mailto:support.deltek.com).

- Appraisal
- Candidates
- Certifications
- Classes
- Data Privacy Settings
- Development Plan
- Employee Referral System

C

Scroll to the Performance section.

1. Specify 9 Box Performance Content > Step C

› Offers

› Onboarding

› Outlook Sync Utility

› Performance

D

Click **Performance** to expand the section.

› Requisitions

› Résumés

› Tasks

› Tuition Assistance Administration

› Union

› Vendors

✓ Update

v16.1.0

Last sync: 2019-10-28 09:12:48

▼ Performance

IMPLEMENTATION ONLY	SETTING NAME	DESCRIPTION & OPTIONS	SETTING VALUE OPTIONS
N/A	9 Box Performance Content Choice	This setting will provide two options to choose from. Users will need to either choose "Populate 9 box from Appraisal Score" or "Populate 9 box from Manual Score". If the Appraisal option is chosen, the 9 box will behave as it currently does. If the Manual Score option is chosen, it will pull the "Performance" score for the 9 box from the Manual rating defined in Performance / Development -> Set Performance / Potential score	<input type="radio"/> Populate 9 box from Appraisal Score <input checked="" type="radio"/> Populate 9 box from Manual Score

➤ Requisitions

➤ Résumés

➤ Tasks

➤ Tuition Assistance Administration

➤ Union

➤ Vendors

✓ Update

**E**

Check the option you want to use to populate the content of the 9 Box:

- **Populate 9 box from Appraisal Score:** Select this option if your firm uses appraisal scoring. Content is pulled from scores assigned during the appraisal process.
- **Populate 9 box from Manual Score:** Select this option if your firm does not use appraisal scoring. Before content displays on the 9 box, a manager must first specify a manual score for an employee on the Set Performance/Potential Rating dialog, accessed on the My Employees screen Development or Performance tab (**My Employees » My Employees » Development or Performance Tab » Actions menu » Set Performance/Potential Rating**).

▼ Performance

IMPLEMENTATION ONLY

SETTING NAME

DESCRIPTION & OPTIONS

SETTING VALUE OPTIONS

N/A

9 Box  
Performance  
Content  
Choice

This setting will provide two options to choose from. Users will need to either choose "Populate 9 box from Appraisal Score" or "Populate 9 box from Manual Score". If the Appraisal option is chosen, the 9 box will behave as it currently does. If the Manual Score option is chosen, it will pull the "Performance" score for the 9 box from the Manual rating defined in Performance / Development -> Set Performance / Potential score

- Populate 9 box from Appraisal Score
- Populate 9 box from Manual Score

➤ Requisitions

➤ Résumés

➤ Tasks

➤ Tuition Assistance Administration

➤ Union

➤ Vendors

✓ Update

E

Click **Update**.

1. Specify 9 Box Performance Content > Step E

The 9 Box allows managers to view their employees in a box grid that offers a quick display of where each employee fits within the organization. By default, the 9 Box layout is configured and ready to use as is; however, administrators can modify it to meet business needs.

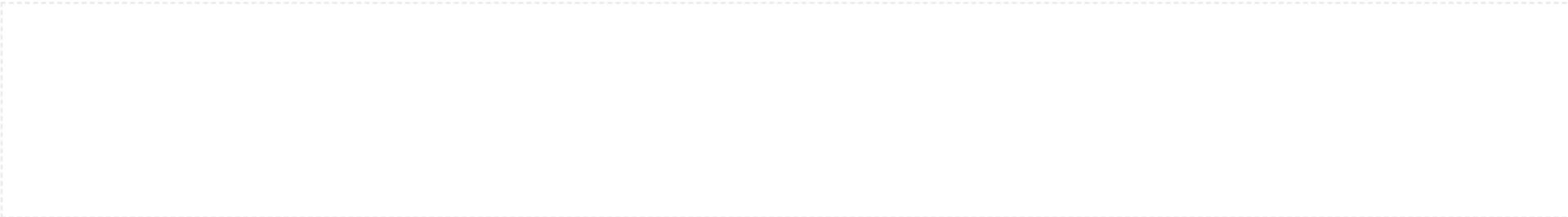
A Click the **Administration** icon.

- RECRUITING
- PERFORMANCE
- LEARNING
- SUCCESSION
- CAREER CENTER
- REPORTS

**Alerts** ✕

- New Tuition Assistance Requests (10)
- Appraisal (Mars wf full really) for your employee Mars Mgr is awaiting your signature

[Show All](#)





## Administration

### Recruiting

#### Configuration

- Application Restriction Rules
- Diversity Data Collection
- Dynamic Forms
- External Front Ends
- Kiosks
- Teams
- Terms of Use
- Workflows

#### Onboarding

- Welcome Page
- Task Management
- Document Library
- Bundles
- Recipients

#### Vendors

- Accounts
- Charge Codes
- Distribution Lists
- Locations

#### Employee Referral Program

- Approve Earned Awards
- Pay Installments
- Manage Referral Awards
- Approve Award Plans
- Manage Award Plans by Requisition

#### Résumés

- Résumé Deletions

#### Benefits

### Development

- Career Path Templates
- Potential Rating Tips

### Core HR

- Self-Service

### Succession Planning

- Manage Succession Planning
- Configure 9 Box**

**B**

Scroll to the Succession Planning section and click **Configure 9 Box**.

### Global Settings

### Configure 9 Box

**X-AXIS ORIENTATION**  
 Potential

**MEASUREMENT PRIORITY**  
 Performance

**PRIORITY WEIGHT**  
 Average Weight of both Metrics

**C** Enter information in the following fields to determine where content displays in the 9 Box:

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

5	2	1
7	4	3
9	8	6

Potential

### Configure 9 Box Ranges

Your placements in the 9 Box are always based on a three point scale. The system default scale values are converted into a three point scale to represent the **Performance Placement** scale and the CDSP

# Configure 9 Box Ranges

Talent Management's default scale values are converted into a three-point scale to represent the **Performance Placement scale** in the left column below. The Career Development Succession Planning scale values are converted into a three-point scale to represent the **Potential Placement scale** on the right. If you have multiple scales in your performance appraisals they are all converted to the default scale prior to conversion.

Performance Placement		Potential Placement	
9 BOX PLACEMENT	UPPER RANGE*	9 BOX PLACEMENT	UPPER RANGE*
First Increment	<input type="text" value="2.33"/>	First Increment	<input type="text" value="2.33"/>
Second Increment	<input type="text" value="3.67"/>	Second Increment	<input type="text" value="3.67"/>
Third Increment	<input type="text" value="5"/>	Third Increment	<input type="text" value="5"/>

**D** If needed, enter information in the following fields to revise the calculated scale value ranges to best fit your organization's needs:

- **Performance Placement:** In the text box for **First Increment**, **Second Increment** and/or **Third Increment**, modify the Upper Range value.
- **Potential Placement:** In the text box for **First Increment**, **Second Increment** and/or **Third Increment**, modify the Upper Range value.

Your placements in the 9 Box are always based on a three point scale. The system default scale values are converted into a three point scale to represent the **Performance Placement** scale and the CDSP scale values are converted into a three point scale to represent the **Potential Placement** scale. The two tables below allow you to revise the scale value range conversions to best fit with your organization's needs.

*NOTE: If you have multiple scales in your performance appraisals, they are all converted to the default scale prior to conversion.*

Performance Placement

9 BOX PLACEMENT **UPPER RANGE\***

First Increment

Second Increment

Third Increment

Potential Placement

9 BOX PLACEMENT **UPPER RANGE\***

First Increment

Second Increment

Third Increment

**E**

- **Change Configuration:** Click to save changes. The 9 Box immediately reflects changes.
- **Equalize Placements:** Click to reset the values to their original, system-calculated settings.
- **Reset:** Click if you have made changes and you have not yet clicked **Change Configuration**, but you would like to reset all Increments to the value prior to making changes.

- Dashboard
- MY EMPLOYEES**
- My Employees
- My Matrix Employees
- 9 Box**
- Project Teams
- Certifications
- Approvals
- RECRUITING
- PERFORMANCE
- LEARNING
- SUCCESSION
- CAREER CENTER
- REPORTS

Click **MY EMPLOYEES**.

A

Click **9 Box**.

B

Search...

Administration / Succession Planning / Configure 9 Box

### Configure 9 Box

Y AXIS

ON

MEASUREMENT PRIORITY

Performance

PRIORITY WEIGHT

Average Weight of both M

Performance

5	2	1
7	4	3
9	8	6

Potential

### Configure 9 Box Ranges

Your placements in the 9 Box are always based on a three point scale. The

point scale to represent values are converted into a

3. Modify 9 Box Labels, Colors, and Verbiage > Step A and B

My Employees / 9 Box

### 9 Box

### Viewing Reports For: Sean Cassidy

Filter

As with the layout options demonstrated in step 2, the 9 Box labels, colors, and verbiage come configured and ready to use. Administrators see an Edit button when viewing the 9 Box, which allows these options to be customized, if desired.



Viewing 2 Employees

Expert-in-Place - 5 i

---

0 Employees (50.00 %)

Future Contributor - 2 i

---

0 Employees (50.00 %)

Ready / Move - 1 i

McKenzie, Namor

---

1 Employee (50.00 %) +



C Click Edit.

3. Modify 9 Box Labels, Colors, and Verbiage > Step C

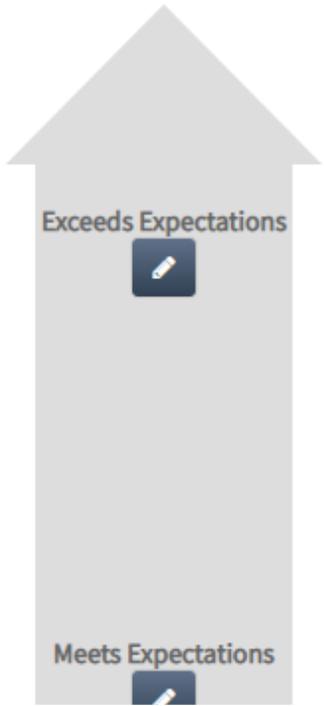
Performer - 4 i

Ready / Watch - 3 i

My Employees / 9 Box

# 9 Box

Standard Mode



Expert-in-Place - 5 <a href="#">Edit this box</a>	Future Contributor - 2 <a href="#">Edit this box</a>	Ready / Move - 1 <a href="#">Edit this box</a>
Average Performer - 7 <a href="#">Edit this box</a>	Growing Performer - 4 <a href="#">Edit this box</a>	Ready / Watch - 3 <a href="#">Edit this box</a>

D To change information in a cell, click **Edit this box**, in that cell.

3. Modify 9 Box Labels, Colors, and Verbiage > Step D



Employees ▾

Search...



My Employees / 9 Box

## 9 Box

← Standard Mode

Exceeds Expectations



Meets Expectations



Expert-in-Place

Employee is superb in their current position, but performance would not



Box Color: Click to Select

FFF894

Copy Color from Cell ▾

Update

Cancel

E

Modify details as needed:

- **Label:** Enter a new label for the box.
- **Description:** Modify the box description.
- **Box Color:** Click the icon and select a new color, if desired.
- **Copy Color from Cell:** Alternatively, you can copy a color from another cell by selecting an option from this drop-down list.
- **Update:** Click **Update** to make the changes.

Move - 1



Edit this box

Average Performer - 7



Growing Performer - 4



Ready / Watch - 3



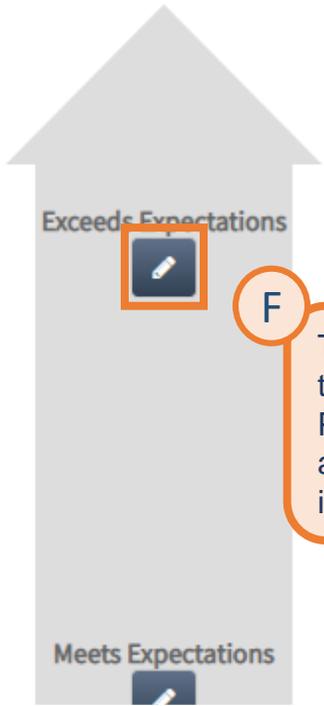
Edit this box

Edit this box

My Employees / 9 Box

# 9 Box

Standard Mode



F  
To edit the label in any of the areas of the Performance or Potential arrows, click the **Edit** icon beneath the label.

Expert-in-Place - 5

Edit this box

Future Contributor - 2

Edit this box

Ready / Move - 1

Edit this box

7

Edit this box

Growing Performer - 4

Edit this box

Ready / Watch - 3

Edit this box

3. Modify 9 Box Labels, Colors, and Verbiage > Step F



Employees ▾

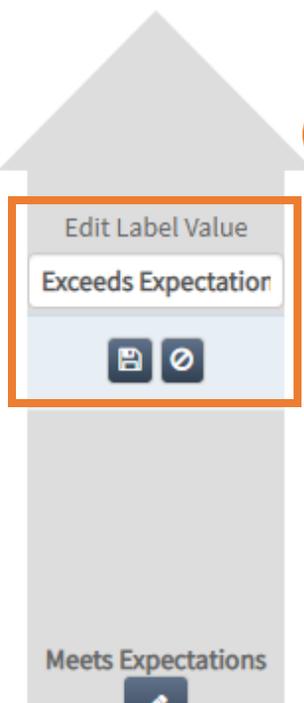
Search...



My Employees / 9 Box

## 9 Box

← Standard Mode



G

Modify the label and click the **Save** icon when finished.

Expert - 5



Edit this box

Future Contributor - 2



Edit this box

Ready / Move - 1



Edit this box

Average Performer - 7



Edit this box

Growing Performer - 4



Edit this box

Ready / Watch - 3



Edit this box

3. Modify 9 Box Labels, Colors, and Verbiage > Step G



# 9 Box

Standard Mode

This concludes the 9 Box Configuration quick steps.



Expert - 5 Edit this box		- 1 Edit this box
Average Performer - 7 Edit this box	Growing Performer - 4 Edit this box	Ready / Watch - 3 Edit this box