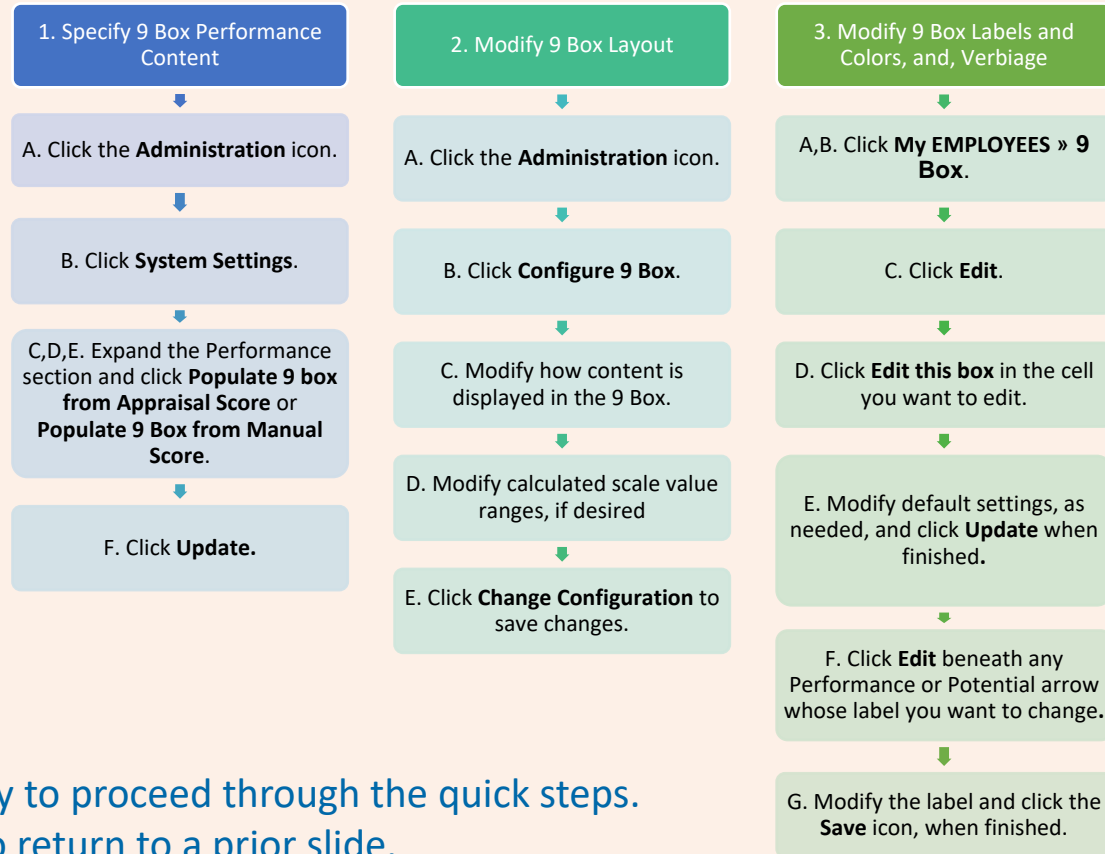


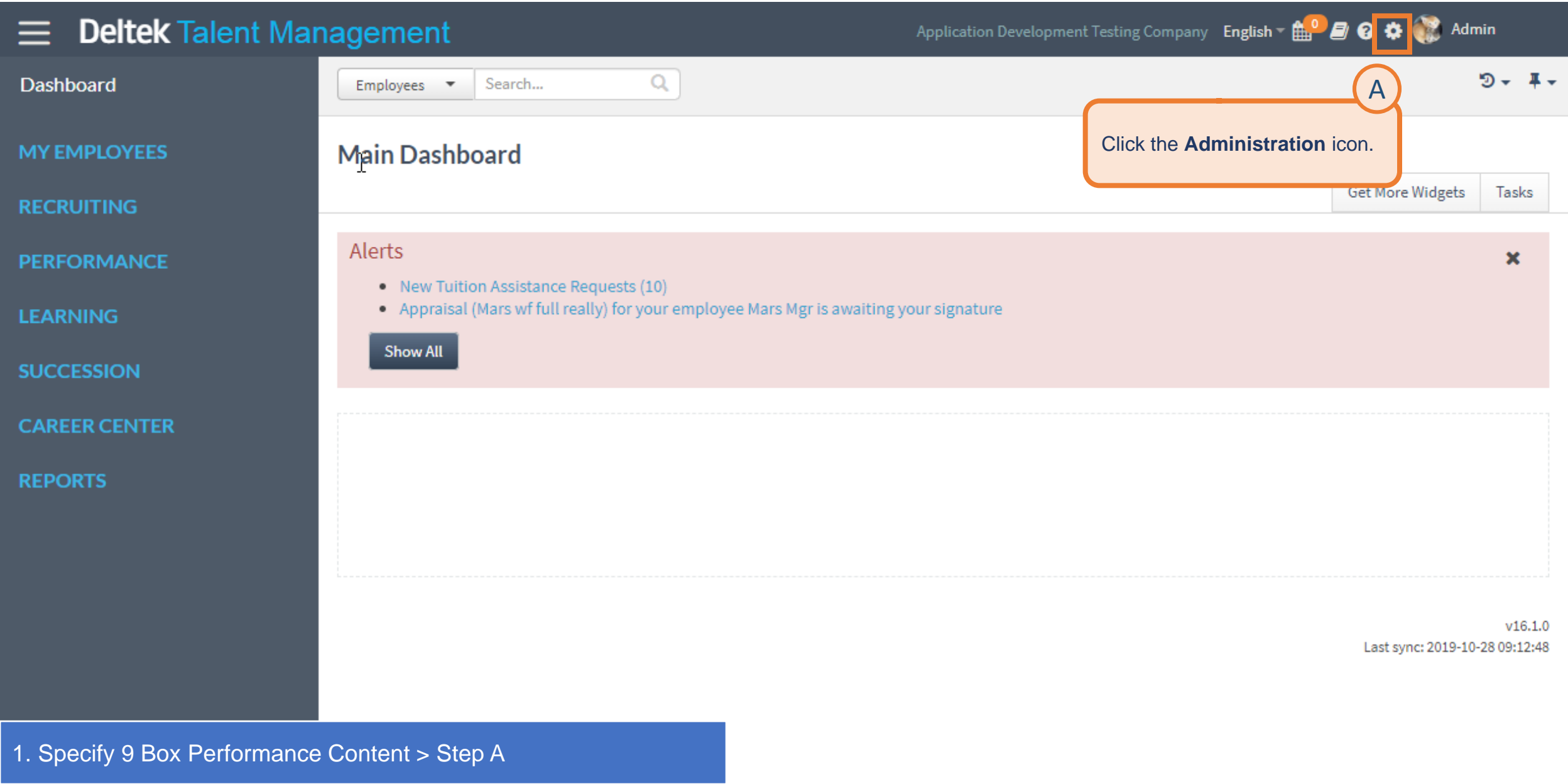
9 Box Configuration

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 Search...

Main Dashboard

Click the **Administration** icon.

Alerts

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

Show All



Employees ▾

Search...



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

System Administration

[Custom Menus](#)
[Drop-down and Multi-Select Lists](#)
[FAQs](#)
[Features](#)
[Groups](#)
[Languages](#)
[Notification Events](#)
[Page Options](#)
[System Settings](#)

Your Organization

[Approval Chains](#)
[Competencies](#)
[Documents](#)
[Job Families](#)
[Job Profiles](#)
[Groups](#)
[Structure](#)
[Unassigned Users](#)

B

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

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

C

Scroll to the Performance section.

› 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

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

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**).

✓ Update

▼ 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**.




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

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.

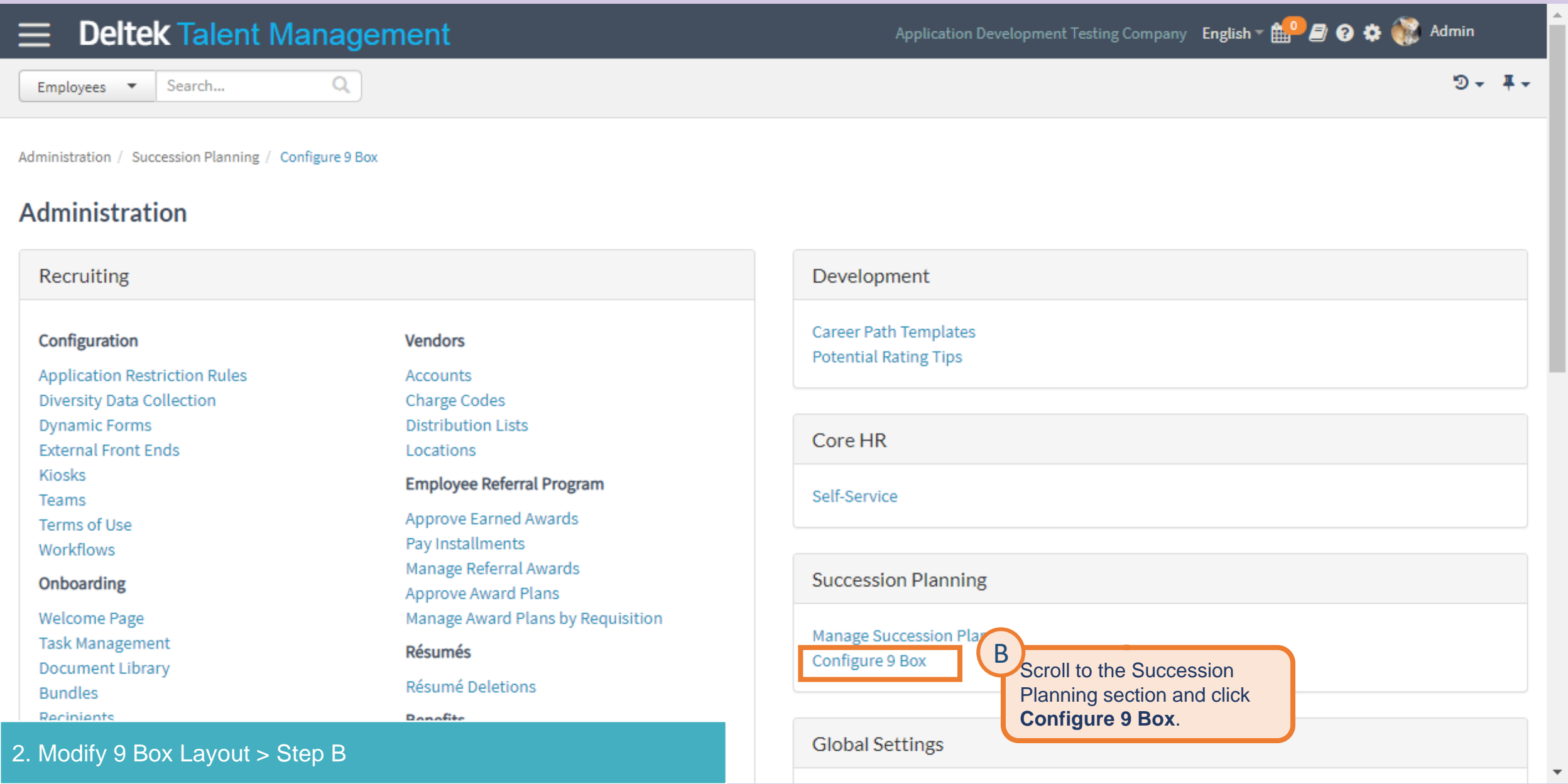
A



Click the **Administration** icon.

Alerts 

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

Show All



Employees  Search... 



Administration / Succession Planning / Configure 9 Box

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

Global Settings

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

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.

MY EMPLOYEES

My Employees
My Matrix Employees

9 Box

Project Teams
Certifications
Approvals

RECRUITING
PERFORMANCE
LEARNING
SUCCESSION
CAREER CENTER
REPORTS

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

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	Future Contributor - 2	Ready / Move - 1
		McKenzie, Namor
0 Employees (50.00 %)	0 Employees (50.00 %)	1 Employee (50.00 %)

Edit

C
Click Edit.

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

Deltek Talent Management

Application Development Testing CompanyEnglish0?Sean Cassidy

EmployeesSearch...

My Employees / 9 Box

9 Box

Standard Mode

Exceeds Expectations

Meets Expectations

Expert-in-Place - 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

D

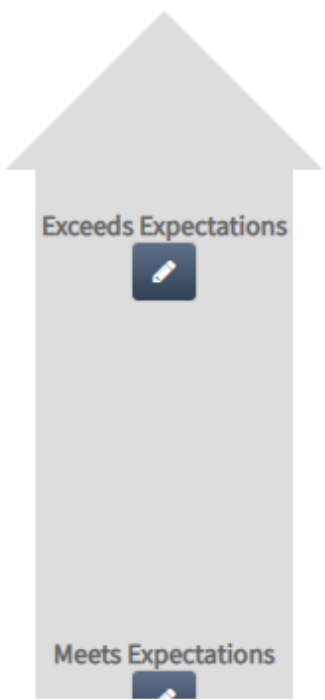
To change information in a cell, click **Edit this box**, in that cell.

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

My Employees / 9 Box

9 Box

Standard Mode



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

Deltek Talent Management

Application Development Testing CompanyEnglish0?Sean Cassidy


EmployeesSearch...

My Employees / 9 Box

9 Box

Standard Mode

Exceeds Expectations




F

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


Meets Expectations

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

Deltek Talent Management

Application Development Testing CompanyEnglish0?Admin

EmployeesSearch...

My Employees / 9 Box

9 Box

Standard Mode

Meets Expectations

Exceeds Expectation

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

G

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

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

