Deltek

Deltek Talent Management 16.2

Getting Started Administrator Guide

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Contents

Getting Started Administrator 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.

When relating to Core Administration Menu choices, the term "Core" refers to portions of the system that are independent from the specific modules, like Recruiting, Performance, Learning, and Development. The Core components are shared among the modules.

This guide details all of the administrative functions dealing with the Core application. This refers to items like users, company organization, job profiles, locations, and so on.

> **Note:** This guide contains details on all of the functionality available in the system. What you see on your screen depends on the modules your company is using as well as the permissions that have been enabled for the Group(s) to which you belong.

Display the Administration Menu

Follow these steps to display the Administration menu.

To display the Administration menu:

1. Click the **Administration** icon in the toolbar to display the Administration menu.
2. From the **Global Settings** section of the Administration menu, you can select the Core functionalities.
   - **System Administration**: This section includes settings and options that control the behavior of the system.
   - **Your Organization**: This section includes settings and options that relate to your organization.

Administration Menu Contents

The following features and options are available from the Administration menu.

System Administration

Menu Choice	Description
Custom Menus	This screen lets you add menu items to the Custom Menu tab as well as rename the menu tab itself.
Drop-down and Multi-Select Lists	This screen lets you configure the drop-down and multi-select lists in the system.
FAQs	This screen lets you create and manage Frequently Asked Questions.
Features	This screen lets you determine the functionality used in the system and what functionality should be available for each user group.

Menu Choice	Description
Groups	This screen lets you determine how an individual fits within the organization by creating groups, such as Employees, Managers, Administrators, External Job Seekers, Vendors, and so on.
Languages	This screen lets you control the language in which all the content displays throughout the system, apart from the data entered by users.
Notification Events	This screen lets you manage the content of notifications that are triggered by events that occur in the system.
Page Options	This screen lets you determine the details, fields, and columns that display on certain pages within the system.
System Settings	This screen lets you configure settings and options that control much of the behavior of the system.

Your Organization

Menu Choice	Description
Approval Chains	This screen lets you create different approval chains for use with recruiting workflows, requisitions, offers of employment, performance workflows, and performance appraisals.
Competencies	This screen lets you create and manage competency categories and individual competencies to help match appropriate candidates to positions, provide a basis for appraisal ratings, and help employees succeed in career goals.
Documents	This screen lets you upload documents and make these documents accessible to various groups within your company.
Job Families	This screen lets you create and manage job families, which are related groups of jobs that have similar job competencies and skills.
Job Profiles	This screen lets you create and manage job profiles to use when creating requisitions, when associating performance appraisals, and as a guide for advancement within the organization.
Location Groups	This screen lets you create and manage groups of locations.
Locations	This screen lets you create and manage the locations of your organization.

Menu Choice	Description
Organizational Structure	This screen lets you manage your company's organizational structure: divisions, departments, business units, or any other groups that make up its infrastructure.
Scales	This screen lets you create and manage scales to be used for measuring the competency experience of an employee or rating an employee's performance.
Skills	This screen lets you create and manage the skills library, which helps you match the appropriate candidate to positions in the company and provides a basis for appraisal ratings.
Users	This screen lets you manage a variety of employee details as well as send correspondence and off-board (terminate) an employee.

Core HR Administration

The Core HR section of the Administration screen contains links to screens such as the Self-Service screen, which allow administrators to configure options and settings related to the Core HR module.

Self-Service Administration

Use the Self-Service Administration screen to configure which parts of the Total Talent Profile are editable by employees and managers.

On the Self-Service Administration screen, Core HR administrators can configure which parts of the Total Talent Profile that employees can edit on their own profiles and that managers can edit for their reports. Additionally, Core HR administrators can configure the notification or approval path process that accompanies any edits made to a profile.

Note:

Any user (employee or manager) who a Core HR Administrator grants edit rights must also belong to a group that has been granted the appropriate View access to the sections of the Total Talent Profile the user will be editing. (**Administration** » **Global Settings** » **System Administration** » **Features** » **Core HR** » **Total Talent Profile**) View access options include:

- Employment Information
    - View Compensation Information
    - View Hire and Termination Information
    - View Job Information
    - View Contact Information

    - View Professional Information
- Personal and Contact Details
    - View Vet, Citizenship and Passport Information

Display the Self-Service Screen

Follow these steps to display the Self-Service screen.

An administrator must enable the Core HR Self-Service Configuration feature for you to access the Self-Service screen located in the Core HR section on the Administration screen.

To display the Self-Service Screen:

1. Click the **Administration** icon in the toolbar to display the Administration menu.
2. In the **Core HR** section, click **Self-Service**.

Contents of the Self-Service Administration Screen

The Self-Service Administration screen contains two tabs, the Employee and the Manager tab. Core HR Administrators use these tabs to configure which parts of the Total Talent Profile a manager or employee can edit. Additionally, Core HR administrators can configure the notification or approval path process that accompanies any edits made to a profile.

Contents

Field	Description
Employee Tab	On the Employee tab, Core HR Administrators disable or enable which sections an employee can edit on his or her own Total Talent Profile. The Core HR Administrator can also define what approvals and notifications are required, if changes are made.

Field	Description
Manager Tab	On the Manager tab, Core HR Administrators disable or enable which sections of a direct or indirect report's profile that a manager can edit. The Core HR Administrator can also define what approvals and notifications are required, if changes are made by a manager.

Employee Tab of the Self-Service Administration Screen

Core HR Administrators use the Employee tab of the Self-Service Administration screen to disable or enable which sections an employee can edit on his or her own Total Talent Profile. The Core HR Administrator can also define what approvals and notifications are required, if changes are made.

Contents

The Employee tab is divided into the following sections:

- **General:** This corresponds to the Employee Summary Pane on the Total Talent Profile.
- **Personal & Contact Details:** This corresponds to the Personal & Contact Details Tab on the Total Talent Profile.
- **Employment Details:** This corresponds to the Employment Details Tab on the Total Talent Profile.

Each of these sections contains the following columns:

Field	Description
Section	The name of the section on the tab, for example About Section, Personal Information section, or Compensation section.
Enabled	This column indicates whether the section is enabled for editing by the employee. If a **Yes** is selected, the section is enabled for editing. To disable it, click the Disable icon in the Actions column. If a **No** is selected, the section is disabled for editing. To enable it, click the Enable icon in the Actions column.
Option Selected	This column indicates which notification or approval option is selected for edits made to this section. To edit the option selected, click the Edit icon in the Actions column.
Employees	This column lists the employees who are selected to participate in the approval process, if necessary, or those selected to receive notifications if edits are made. To change the employees, click the Edit icon in the Actions column.

Actions

The following actions are available in all sections:

Field	Description
Disable/ Enable	Click the Disable icon to mark the section as not editable by the employee who owns the profile. Click the Enable icon to mark the section as editable by the employee who owns the profile.
Edit	Click the Edit icon to open the Edit dialog where you can select the appropriate option for approvals and notifications related to the section. Options are: ▪ **No Approval/Notification:** Select this option to allow an employee to make changes without requiring approval, and without notifying any managers. ▪ **Notification Only:** Select this option to send a notification when changes are made. You select the users to notify after clicking **Next**.

Field	Description
	▪ **Approval Required:** Select this option to specify one or more approvers to sign off on changes made to the profile. After selecting this option, click **Next.** Then make the selections in the following sections to specify approvers: ▪ **Select Approval Chain:** Select an available approval chain from the list of previously defined approval chains. ▪ **Select Approver(s)**: Define a new approval chain in this section by selecting a type of approval chain: **Serial** or **Parallel**, then selecting approvers by name or by managerial level. When finished, click **Next.** On the next screen, drag and drop approvers to determine the order of approvals. When finished, click **Submit**.

Manager Tab of the Self-Service Administration Screen

On the Manager tab, Core HR Administrators disable or enable which sections of a direct or indirect report's profile that a manager can edit. The Core HR Administrator can also define what approvals and notifications are required, if changes are made by a manager.

Contents

The Manager tab is divided into the following sections:

- **General:** This corresponds to the Employee Summary Pane on the Total Talent Profile.
- **Personal & Contact Details:** This corresponds to the Personal & Contact Details Tab on the Total Talent Profile.
- **Employment Details:** This corresponds to the Employment Details Tab on the Total Talent Profile.

Each of these sections contains the following columns:

Field	Description
Section	The name of the section on the tab, for example About Section, Personal Information section, or Compensation section.
Enabled	This column indicates whether the section is enabled for editing by the employee. If a **Yes** is selected, the section is enabled for editing. To disable it, click the Disable icon in the Actions column. If a **No** is selected, the section is disabled for editing. To enable it, click the Enable icon in the Actions column.
Option Selected	This column indicates which notification or approval option is selected for edits made to this section. To edit the option selected, click the Edit icon in the Actions column.
Employees	This column lists the employees who are selected to participate in the approval process, if necessary, or those selected to receive notifications if

Field	Description
	edits are made. To change the employees, click the Edit icon in the Actions column.

Actions

The following actions are available in all sections:

Field	Description
Disable/ Enable	Click the Disable icon to mark the section as not editable by the employee who owns the profile. Click the Enable icon to mark the section as editable by the employee who owns the profile.

Edit	Click the Edit icon to open the Edit dialog where you can select the appropriate option for approvals and notifications related to the section. Options are:
	▪ **No Approval/Notification:** Select this option to allow a manager to make changes to a direct or indirect report's profile without requiring approval, and without notifying any other employees or managers.
	▪ **Notification Only:** Select this option to send a notification when changes are made. You select the users to notify after clicking **Next**.
	▪ **Approval Required:** Select this option to specify one or more approvers to sign off on changes made to the profile. After selecting this option, click **Next.** Then make the selections in the following sections to specify approvers:
	    ▪ **Select Approval Chain:** Select an available approval chain from the list of previously defined approval chains.
	    ▪ **Select Approver(s)**: Define a new approval chain in this section by selecting a type of approval chain: **Serial** or **Parallel**, then selecting approvers by name or by managerial level. When finished, click **Next.** On the next screen, drag and drop approvers to determine the order of approvals. When finished, click **Submit**.

Custom Menus

Use the Custom Menus screen to add options to the main menu.

These menu options can be a frequently visited Web site for employees (for example, an internal Web site), to a specific page on a Web site, and so on.

Display the Custom Menus Screen

Follow these steps to display the Custom Menus screen.

To display the Custom Menus screen:

1. Click the **Administration** icon in the toolbar to display the Administration menu.
2. In the **Global Settings** » **System Administration** section, click **Custom Menus**.

Contents of the Custom Menus Screen

The screen displays the current menu items.

You can perform the following actions on these items.

Icon/Button	Action	Description
	Add Menu Item	Click this button to add a menu item to the Custom Menu.
	Reorder	To arrange the order of the menu items as they should appear in the menu listing, click this icon and drag the item to the desired position.
	Edit	To edit the menu item's details, click this icon and apply changes to the name and URL as needed.
	Delete	To remove a menu item from the listing, click this icon.

Add Menu Items

Follow these steps to add menu items to the Custom Menu.

To add a menu item to the Custom Menu:

1. On the Custom Menus screen, click **Add Menu Item**.
2. In the **Menu Item Name** field, enter the name that will display on the Custom Menu tab.
3. In the **Menu Item URL** field, enter the URL associated with the new menu item.

   Note: The link must include the **http://** or **https://** portion of the Web site address.

4. Click **Save**.

Rename the Menu Tab

By default, the name of the tab that displays in the main menu ribbon is **Custom Menu**. You can rename this if desired.

To rename the Custom Menu tab:

1. On the Custom Menus screen, click Add Menu Item.

2. In the **Rename Custom Menu tab label to** field, enter the new name for the tab.
3. Click **Save**.

> **Note:** Your change will take immediate effect.

Drop-down and Multi-Select Lists

Many of the drop-down and multiple-select lists displayed in the system can be configured with the values that meet your business processes.

You can select lists to configure using the Select Lists Management screen.

Display the Drop-Down and Multi-Select Lists Screen

Follow these steps to display the drop-down and multi-select lists screen.

To display the Select Lists Management screen:

1. Click the **Administration** icon in the toolbar to display the Administration menu.
2. In the **Global Settings** » **System Administration** section, click **Drop-down and Multi-Select Lists**.

Available List Options

The following are the available lists that you can configure in the **Select Listing** field.

Name	Description	Module Where It's Used
Appraisal Workflow Type	These are the types of performance appraisal workflows (for example, **Annual** or **90 Day Review**).	Performance
Benefit Category	This is used to label the category of a benefit (for example, **Annual Bonus** or **Incentive/Perk**).	Recruiting
Candidate Rejection Reasons	This is used to state the reason a candidate was removed from a requisition (for example, **Could not meet salary constraints**). The candidate rejection reasons have an option, if the feature is enabled, to create a secondary reason to provide more granularity. When rejecting a candidate from a requisition, the secondary reasons will display after a primary reason is selected (for	Recruiting

Name	Description	Module Where It's Used
	example, **Salary requirements were too high**).	
Candidate Statuses	This is used to indicate the status of an applicant or candidate in process. Items must be mapped with a logical value so the system knows how to expedite them. See Logical Values.	Recruiting
Career Levels	This is used to state the experience level of a job seeker in the position he or she is seeking (for example, **Entry Level** or **Manager**).	Multiple
Class Status	This is used to indicate the status of a class (for example, **Enrolling** or **Closed**).	Learning
Compensation: Currency	This is used to indicate the country currency type (for example, **USA** or **EUR**).	Recruiting
Compensation: Salary Type	This is used to indicate salary compensation frequency (for example, **Bi-weekly** or **Monthly**).	Recruiting
Contacts: Address Type	This is used to state the type of address for a Contact (for example, **Business** or **Personal**).	Recruiting
Contacts: Phone Types	This is used to state the type of phone number for a Contact (for example, **Mobile** or **Home**).	Recruiting
Contacts: Types	This is used to state how you know a Contact (for example, **Client** or **Prospect**).	Recruiting
Cost Center	This is used for indicating the departments for allocating costs (for example, **Marketing**). An example of a cost center code is **MKTG**.	Multiple
Countries	This is a list of Countries.	Multiple
Course Status	This is used to indicate the current status of a course (for example, **Open** or **Archived**).	Learning
Date Format	This is used to indicate the setting preferences for how dates are displayed.	Multiple

Name	Description	Module Where It's Used
Education Levels	This is used to state the highest level of education a user reached (for example, **High School** or **Master's**).	Multiple
EEOC Job Category	U.S. Specific. This is used to indicate the EEOC equivalent for a job category of a requisition.	Recruiting
EEOC Job Group	U.S. Specific. This is used to indicate the EEOC equivalent for a job group of a requisition.	Recruiting
Exemption Types	This is used to state if an individual is paid a straight salary or receives overtime (for example, **Non-exempt** or **Exempt**).	Multiple
External Certifications	This is used to indicate the list of certifications job seekers can add to their profiles during their application process.	Recruiting
External Resource Degree Type	This is used to indicate the type of degree received.	Learning
External Resource Type	This is used to state the type of external resource (for example, **University**).	Learning
Hiring Type	This is used to indicate the type of hire made (for example, **Rehire** or **New Hire**).	Recruiting
Hiring Reason	This is used to indicate why the hire was made (for example, **New Position** or **Backfill**).	Recruiting
Job Categories	This is used to indicate in which field a job belongs (for example, **Customer Service** or **Sales** or **Finance**).	Multiple
Job Change Reason	This is used to track the history of changes to an employee's job, such as location, title change, or pay change. (For example **Promotion** or **Terminated**).	Core
Job Classifications	This is used to indicate the job classification (for example, **Hourly** or **Salaried**).	Multiple

Name	Description	Module Where It's Used
Job Grades	This is used for job profiles, similar to a Job Code (for example, **GS7** or **NE12**).	Multiple
Job Purposes	This is used to define the reason for the job (for example, **Promotion**, **Rotation**, or **Transfer**).	Multiple
Job Roles	This can be used as subcategories for Career Level or as a standalone category for a job's function (for example, **Vice President**, **Individual Contributor**, or **Director**).	Multiple
Job Seeker Reference Type	This is used for classifying a reference type for a job seeker (for example, **Personal** or **Professional**).	Recruiting
Job Types	This is used to indicate whether the job is full-time, part-time, internship, or so on.	Multiple
Material Types	This is used to indicate the type of material (for example, **Book** or **DVD**).	Learning
Next Actions	This is used to indicate the next action recommended by the manager for a direct report (for example, **Promotion** or **Termination**).	Career Development & Succession Planning
Pay Frequency	This is used to indicate the frequency of payment (for example, **Weekly** or **Monthly**).	Core HR
Phone Types	This is used to indicate the phone type for an individual (for example, **Home** or **Mobile**).	Multiple
Progress	This is used to indicate the progress on task or activity planned from a Continuous Feedback session. (for example, **Not Started** or **At Risk**).	Performance
Re-Hire Eligibility	This is used to indicate the rehire eligibility when an employee is off-boarded.	Core
Readiness for Position	This is used to indicate an employee's time-frame to be ready for a new position in a career path (for example, **12–24 Months**).	Career Development & Succession Planning

Name	Description	Module Where It's Used
Reason(s) for Termination	This is used to state the reason for the termination of an employee from a company (for example, **Poor Performance**).	Core
Referral Sources	This is used to indicate the source of the referral (for example, **Our Homepage**). An example of a referral source URL is **www.ourhomepage.com**.	Recruiting
Relocation Availability	This is used to indicate whether or not an individual would relocate for a job.	Multiple
Requisition Statuses	This is used to indicate the status of a requisition in a recruiting workflow. Items must be mapped with a logical value so the system knows how to expedite them. See Logical Values. Examples are **Open** or **Filled**.	Recruiting
Risk of Loss	This is used to indicate the level of likelihood the employee will leave the company.	Career Development & Succession Planning
Salary Grade	This is used to indicate the salary range for a job. This is similar to **Job Grade**; however, the **Salary Grade** allows for the input of a low-to-high salary range and select Exemption Status. An example is **EX10, 46,000 – 52,000, Exempt**.	Multiple
Shift Schedule (Hourly)	This is used to create the shift schedule for different locations for the Hourly portal (for example, **DFW Metroplex Stores**). If a **Location Group** option is selected, the **Location** list only displays those locations applicable for that location group. After creating a shift schedule, click to expand it and see the options to create the different shifts within that schedule. The **Days** options are the days your company is open for business and are based on the System Setting **Work**	Recruiting

Name	Description	Module Where It's Used
	Week. An example of **Shift Name** is **First Shift**.	
Shift Type	This is used to indicate the type of the shift. (This is different from the **Shift Schedule (Hourly)** which is used only in the Hourly portal, if enabled.). Examples of shift types are **First Shift** and **Rotating**.	Recruiting
Skill Last Used	This is used to indicate the number of years since a skill was last utilized by an individual (for example, **5–7 years ago**).	Multiple
Skill Level	This is used to indicate the skill level (for example, **Intermediate**).	Multiple
Skill Usage	This is used to indicate the number of years that an individual has used a skill (for example, **4–5 Years**).	Multiple
SOC Job Code	U.S. Specific. A list of Standard Occupational Classifications, which are used to classify workers into occupational categories for the purpose of collecting, calculating, or disseminating data. Default values are shipped with this list and cannot be deleted. Values can be added, if need be, as regulations change.	Core
Social Networking Sites	This is the list of social networking sites that a recruiting user can look up a job seeker via the Résumé Dashboard.	Recruiting
Time Format	This is used to indicate how the time format for hours and minutes is displayed in the system.	Multiple
Time Zones	This is used to indicate the time zones an individual may select based on his or her location. For a new time zone, you need to select an existing time zone area so the system knows how to adjust time-related actions.	Multiple

Name	Description	Module Where It's Used
Topics Covered	This is used to indicate a topic for a class (for example, **Safety** or **Leadership**).	Learning
Total Years Relevant Experience	This is used to indicate the total number of relevant years of working experience an individual has in relation to the position for which he or she is applying.	Recruiting
Travel	This is used to indicate the percentage of travel that is either required by a position or that an individual is willing to do while in a position.	Multiple
Universities	This is a listing of universities job seekers can select from when creating their résumé profile or application.	Recruiting
Vendor Close Reason	This is used to indicate the reasons for closing a vendor account (for example, **Contract expired**).	Recruiting
Workers Compensation Class	U.S. Specific. Used to indicate the Workers compensation Class code, which insurance companies use to identify specific categories of work and then effectively estimate workers comp rates. Default values are shipped with this list and cannot be deleted. Values can be added, if need be, as regulations change. Example: "Piano-Mfg").	Core

Add List Items

Follow these steps to add list items.

To add a list item:

1. On the Select Lists Management screen, select an option from the **Select Listing** drop-down field.
2. Depending on the option selected, the form to add an item will have at least one required field: **Name** (or some equivalent label). Enter a value for this field.
3. Complete any other required fields on the form.
4. Click **Save**.

Logical Values for List Categories

If a list category has a **Logical Value** field (for example, Candidate Status or Requisition Status), the drop-down option selected for this value tells the system what to do when actions are executed from that item.

Contents

Field	Description
Candidate Statuses	▪ **Candidate**: This indicates that the job seeker is in the candidate process. (manual change by recruiting user) ▪ **Declined**: This indicates that a job seeker has been declined for a requisition. (manual change by recruiting user or automatically via the workflow) ▪ **Deleted**: This indicates a resume was deleted. (for system use only) ▪ **Hired**: This indicates that the candidate has been hired for a requisition. (manual change by recruiting user) ▪ **Interview**: This indicates that the candidate is in an interview step in the process. (manual change by recruiting user) ▪ **Offer Accepted**: This indicates that an offer has been accepted. (manual change by recruiting user) ▪ **Offer Declined**: This indicates that an offer has been declined. (manual change by recruiting user) ▪ **Offer Extended**: This indicates that an offer has been extended. (manual change by recruiting user) ▪ **Offer Rejected by Approver**: This indicates that an offer has been rejected. (manual change by recruiting user) ▪ **Removed Self from Consideration**: This is automatically given to job seekers that remove themselves from consideration after applying to a requisition. ▪ **Résumé Submitted**: This is automatically given to any new job seeker that has applied to a requisition.
Requisition Statuses	▪ **Closed**: This indicates that the requisition is no longer accepting applications. (manual change by recruiting user or automatically via the workflow) ▪ **Confidential**: This indicates that the requisition is not to be published externally. Requisitions in this status do not display to external job seekers or employees nor can they be cross-posted. This behavior is hard-coded. (manual change by recruiting user or via the workflow)

Field	Description
	■ **Filled**: This indicates that the requisition has been filled. (requisition is automatically marked as filled when the # of hires needed is zero, or automatically via the workflow, or can be manually changed by the recruiting user) ■ **Internal**: This indicates that the job should only be visible to employees. Requisitions in this status do not display to external job seekers nor can they be cross-posted. This behavior is hard-coded. (manual change by recruiting user or automatically via the workflow) ■ **Open**: This indicates that the requisition is accepting applications. Requisitions in this status display to external job seekers and employees. (manual change by recruiting user or automatically via the workflow) ■ **Pending**: This indicates that the requisition is not completed. (manual change by recruiting user or via workflow) ■ **Declined**: This is automatically given to requisitions that have been declined by the final approval. ■ **Suspended**: This indicates that the requisition is on hold or not currently accepting applications. This status has impact on the time to fill report. ■ **Template**: This status is reserved for requisition templates. (for system use only)

Actions in the Select Lists Management Screen

For a new list item in a category, the action icons available will depend on the category, how it is used in the application, and how the category is sorted.

Actions may include the following.

Icon	Action	Description
	Sort Manually	To manually sort list items, click this icon and drag the bar to the desired position in the listing.
	Sort Alphabetically	To alphabetically arrange the list items, click this icon.
	Edit	To edit the details of the list item, click this icon.
	Deactivate	To deactivate a list item, click this icon. When an item is deactivated, it no longer appears in the listing for end users to select.
	Activate	To reactivate a list item, click this icon. Once activated, end users will see the item as an option in the drop-down list.

Icon	Action	Description
✔	**Make Default**	To make a list item default (if applicable), meaning it is preselected in the drop-down list for the end user, click this icon. When clicked, the icon changes to ✔ .
✖	**Delete**	To delete a list item, click this icon. You can only delete a list item when it has not been used yet in the system. Once it has been used, the delete icon will be disabled. You can deactivate it if you no longer wish end users to select that option.

FAQs

Use the FAQs screen to manage the Frequently Asked Questions (FAQs) displayed to users.

For ease of use, the FAQs are arranged in categories.

Display the FAQs Screen

Follow these steps to display the Frequently Asked Questions (FAQs) screen.

To display the FAQs screen:

1. Click **Administration** icon in the toolbar to display the Administration menu.
2. In the **Global Settings** » **System Administration** section, click **FAQs**.

Contents of the FAQs Screen

The initial view of the screen displays the FAQ categories with these columns.

Columns

Column	Description
Category	This column displays the name of the FAQ category. Click the name to view and add questions.
Order Displayed	This column indicates the order the questions are displayed on the page. For example, assigning a value to questions that are asked most often (with '1' being the most often) will cause the question to show up first in the list.
Questions	This column indicates the number of questions in that category. Click the number to view and add questions.

Actions

Clicking the icons in the Actions column perform the following functions.

Icon	Action	Description
	Disable	Click this icon to disable a category. If disabled, the category will not show to users.
	Enable	Click this icon to enable a category.
	Edit	Click this icon to edit the category's details.

Create a New FAQ Category

Follow these steps to create a new FAQ category.

To create a new FAQ category:

1. On the FAQs screen, enter a name in the **Category Name** field.
2. In the **Select a Group** field, select the group that will see the FAQ.
3. In the **Order** field, enter the order the category should be displayed in the list.
4. Select the **Active** check box if you want to activate the question immediately.
5. Click **Save**. The new Category is displayed in the list with a **0** in the Questions column.

Add a Question to an FAQ Category

Follow these steps to add a question to an FAQ category.

To add a question to a category:

1. On the FAQs screen, click either the category name or number of questions.
2. Enter the **FAQ Question** and **Answer** in the fields provided.
3. Enter the **Order** you would like the question to display.
4. Select the **Active** check box to make it visible to users.
5. Click **Save**. The new question displays in the table below the form. The question will appear to users in real-time.

FAQs Questions Management Screen

After clicking an FAQ category name or the number of questions for a category, the form to create a new question displays.

Columns

Below the form, the following columns are displayed.

Column	Description
FAQ Question	This column displays the question.
Answer	This column displays the answer.

Column	Description
Order	This column displays the order in which the question appears to the user.
Rating	This column displays the votes given by users as to how helpful the question/answer was. For example, **75% (3/4 votes)** indicates that 3 out of 4 users found this question helpful.

Actions

You can perform the following actions using the icons in the Actions column.

To display the other icons, click .

Icon	Action	Description
	Disable	To hide a question from users, disable it by clicking this icon.
	Enable	To make a question visible to users, activate it by clicking this icon.
	Edit	To edit the question's details, click this icon.
	Copy	To copy a question so that you can create a new one based on that question, click this icon. You can also copy it into a different FAQ category.
	Move	To move a question up or down in the displayed list, click this icon.
	Delete	To delete a question, click this icon.

Features

The settings in the Features section determine the functionality that is available in the site for each user group.

The majority of these settings will be handled by your Implementation Manager during the implementation process. However, once you have the site in production, you may want to change a feature setting to better accommodate your organization’s processes.

> **Note:** Enabling and disabling these settings may have a broader impact on the system functionality than intended, so it is important to plan for these changes.

Display the Features Screen

Follow these steps to display the Features screen.

To display the Features screen:

1. Click the **Administration** icon in the toolbar to display the Administration menu.

2. In the **Global Settings** » **System Administration** section, click **Features**.

Configure Features Settings

Follow these steps to configure the features settings.

To change the features for the system:

On the Features screen, select a group from the drop-down list for which you want to configure the features.

1. After selecting a group, the Modules list is displayed.

   > **Note:** Only those modules you have purchased and enabled will be active. The other modules will be hidden or disabled.

   Solutions are listed in the following sections:

   - **Core**: This includes features that are shared by the Recruiting, Performance, Development, and Learning modules.
   - **Recruiting**: This includes features related to recruitment functionality.
   - **Performance**: This includes features pertaining to the functionality of performance rating of employees.
   - **Development**: This includes features related to career development of employees and succession planning for positions.
   - **Learning**: This includes features which pertain to the learning aspects of an employee.
   - Demo Site
   - Debug Mode
   - **Core HR**: This includes features which pertain to the Core HR module, such as personal and job related data stored on Core HR tabs in the Total Talent Profile, saved history of changes made to employment information, and fields such as Job Title, with effective dating functionality to ensure time-sensitive changes related to jobs happen when intended.

> **Note:** After enabling the Core HR feature, you must add your organization's Hr administrator(s) to the Core HR Administrator group, on the Groups screen (**Administration** » **Global Settings** » **System Administration** » **Groups**), or select the group in the employee's User profile on the Users screen **Administration** » **Global Settings** » **Your Organization** » **Users**). This enables Edit rights to the Core HR specific tabs on the Total Talent Profile.

2. Click a module name to view the features in the module.

   > **Tip:** You can hover on a feature name to view a description of that feature.

3. Enter a keyword in the **Filter** field to search for a specific feature.

4. If a feature has sub-features, a **More Options** icon displays next to the feature name. Click this to expand the list.
5. To enable a feature, select the check box beside the feature name, and clear the check box to disable a feature.

   Features with sub-features have **Enable All** and **Disable All** options. Click an option to enable or disable the feature and all its sub-features.

   > **Note:** A disabled check box indicates that the feature is enabled on your site and the feature cannot be disabled due to system requirements. If you have a feature you want disabled that is required by the system, contact your Customer Service Account Manager.

6. Click **Update Features** to save your changes; click **Cancel** so no changes are saved; or click **Reset** to revert any changes you made.

   > **Note:** You will need to log out and log back in to see the changes to the suite.

Enable Dashboard Widgets

Widgets are tables and graphs of summary data displayed on the Dashboard. This table lists all Deltek Talent Management widgets and identifies the Feature toggles that enable them for your company's users.

Users can add widgets to the Dashboard and re-order them as desired. However, you must first enable the widgets in order for them to appear as options on the Dashboard.

This table lists all available Deltek Talent Management widgets and the corresponding Features that enable them. The options that are available to you and your users may vary based on the features and modules that have been enabled for your company, as well as each individual's role within your organization.

To enable a specific widget, please locate and select the check box next to the setting indicated in the **Feature Toggle** column.

Core

Widget Name	Description	Feature Toggle
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 .	**Core Widgets » Mini-Calendar**
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.	**User Management**

Recruiting

Widget Name	Description	Feature Toggle
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.	**Applicant Tracking Widgets** » **Activity Since Last Login**
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.	**Applicant Tracking Widgets** » **Candidates by 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.	**Applicant Tracking Widgets** » **Candidates by Status**

Widget Name	Description	Feature Toggle
E-Verify Case Alerts	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.	**Integrations** » **E-Verify** » **Case Alert Widget**
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.	**Applicant Tracking Widgets** » **My Activity**
My ATS Averages (last 30 days)	This displays the average count in number of days for the following Recruiting activities: ▪ **Days to Fill a Requisition** ▪ **Days to Hire** ▪ **Screened In Rate** ▪ **Screened Out Rate**	**Applicant Tracking Widgets** » **My Averages**
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.	**Applicant Tracking Widgets** » **My Candidates**
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.	**Applicant Tracking Widgets** » **My New Résumé Submissions**
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.	**Hourly Module** » **New Résumés/CVs and Candidate Pipeline**
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.	**Applicant Tracking Widgets** » **Onboarding Status**
Onboarding Tasks	This displays the onboarding tasks that require your action.	**Applicant Tracking Widgets** » **Onboarding Tasks Widget**

Widget Name	Description	Feature Toggle
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.	**Hourly Module** » **Quick Job Posting Widget**
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.	**Applicant Tracking Widgets** » **Recent Requisitions**
Résumé E-mail Reader Instructions	This displays instructions about how to upload résumés by e-mail.	**Applicant Tracking Widgets** » **Résumé/CV Email Reader**
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.	**Applicant Tracking Widgets** » **Requisitions by Status**
Search Requisitions	his allows you to use keywords to search for requisitions according to **Requisition Number**, **Job Title**, and/or **Description**.	**Applicant Tracking Widgets** » **Search Requisitions**
Search Candidates	This allows you to search for a candidate by **Candidate Name** or **E-mail**.	**Applicant Tracking Widgets** » **Search Candidates**
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.	**Applicant Tracking Widgets** » **Search Résumés**

Performance

Widget Name	Description	Feature Toggle
Active Appraisals	This gives managers quick access to any active appraisals or 360 reviews in progress for	**Performance Management Widgets** »

Widget Name	Description	Feature Toggle
	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.	**Active Appraisal widget feature**
Continuous Feedback	This displays the sessions you have created for your direct reports as well as the sessions created for you by your manager.	**Performance Management Widgets** » **Continuous Feedback Widget**
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.	**Performance Management Widgets** » **Goal Completion for Team**
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**.	**Performance Management Widgets** » **Goal Completion 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.	**Performance Management Widgets** » **New Pending Appraisals**
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.	**Performance Management Widgets** » **Phase Overview**
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.	**Performance Management Widgets** » **Search Employees**

Learning

Widget Name	Description	Feature Toggle
Classes Just Added	displays shows the 10 most recently-added classes, and displays their **Start Date** and **End Date**.	**Learning Widgets** » **Classes Just Added**

Widget Name	Description	Feature Toggle
Completed Class Assignments and Tests	Completed Class Assignments and Tests	**Learning Widgets » Assignments & Tests**
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.	**Learning Widgets » Employees Monthly Class Participation Statistics**
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.	**Learning Widgets » Enrollment Statistics**
My Curriculum Completion Status	This graph shows the percentage of curriculum completion per employee enrolled and approved in each curriculum.	**Learning Widgets » My Curriculum Completion Status**
New Skills Added	This lists the new skills your employees have added and are awaiting your approval.	**Learning Widgets » New Skills Added**
Pending Certificates	This lists the certificates that are ready to be granted to employees. Click the number to take that action.	**Learning Widgets » Pending Certificates**
Search Classes	This allows you to search for classes. Enter all or part of a class name to find a match.	**Learning Widgets » Search Classes**
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.	**Learning Widgets » Top Courses by Enrollment**

Development

Widget Name	Description	Feature Toggle
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.	**9 Box**
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%.	**Career Development & Succession Planning Widgets » Career Path Progress**

Widget Name	Description	Feature Toggle
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.	**Career Development & Succession Planning Widgets » Competency Fit**
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.	**Career Development & Succession Planning Widgets » Development Plan Completion Status**
Development Progress	This allows managers to track the Development Plan progress of their direct reports.	**Career Development & Succession Planning Widgets » Development Progress**
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.	**Career Development & Succession Planning Widgets » Employees With Active Career Paths**
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.	**Career Development & Succession Planning Widgets » My Plans With Successors**
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.	**Career Development & Succession Planning Widgets » New Skills & Competencies**
Top Career Paths	This table lists the most popular active career paths and shows the number of employees on the path displayed.	**Career Development & Succession Planning Widgets » Top Career Paths**

Groups

Functional access in the application is determined by the Features screen, but the Groups feature allows you to determine how an individual fits within the organization.

Display the Groups Screen

Follow these steps to display the Groups screen.

To display the Groups screen:

1. Click the **Administration** icon in the toolbar to display the Administration menu.
2. In the **Global Settings** » **System Administration** section, click **Groups**.

Contents of the Groups Screen

When accessing this screen, you will see a form to create a new group and a table for each module that is enabled.

Listed in each table are the groups that are specific for that module and the number of users (members) in that group.

Columns

Column	Description
Group	This column displays the groups per module.
Members	This column displays the number of users for every group. To view a listing of users in a group, click the number.

Actions

When you click in the Actions column, the following Actions display.

Icon	Action	Description
	Add Group Members	To add users to a group, click this icon. You will be taken to a page that lists the existing users in that group and an option to search for ones to add. Click **Search Users** to find a user you wish to add. There is no option to add users to External Job Seekers and Vendors under Recruiting Groups. Membership in these Groups is controlled differently. Individuals are added to the External Job Seekers group when they apply and create an account on your career center. Users are added to the Vendors group when the administrator creates Vendor accounts.

Icon	Action	Description
	Edit Group	To edit the group's name, click this icon. The default groups for each module cannot be edited; therefore, that option is disabled.
	Copy Group	To create a group using the Feature set from an existing group, click this icon. Use this option if you wish to create a similar role with just a few feature changes.
	Manage Features	To manage features, click this icon. This will take you to the Features page.
	Delete Group	To delete a group, click this icon. The default groups for each module cannot be deleted; therefore, that option is disabled.

Module Association for Groups

Depending on which modules are enabled, the standard groups will include the following:

- **Cross Module:** The members of this group are not module-specific and are available regardless of which modules are enabled by your organization. The default groups are Administrator, Employee, Manager, and HR Business Partner.
- **Recruiting:** The default groups are Recruiter, Hiring Manager, External Job Seekers, Vendor, and Hiring Manager (Hourly).
- **Performance:** The default groups are Matrix Manager and 360.
- **Development:** The default group is Executive.
- **Learning:** The default groups are Instructor and Learning Manager.
- **CoreHR:** The default group is Core HR Administrator.

Create a New Group

Follow these steps to create a new group.

To create a new group:

1. On the Groups screen, select the module in the **Select Module** field that will use the new group.
2. In the **Add New Group** field, enter a name for the new group.

   > **Note:** Duplicate names within the same group are not allowed, Duplicate names are allowed if they do not occur in the same module.

3. Click **Save**.

Languages

Use the Languages screen to control all the content displayed throughout the system, apart from the data entered by users.

You have the ability to rephrase existing verbiage and to add a term or phrase as "inappropriate for use".

Display the Languages Screen

Follow these steps to display the Languages screen.

To display the Languages screen:

1. Click the **Administration** icon in the toolbar to display the Administration menu.
2. In the **Global Settings** » **System Administration** section, click **Languages**.

Contents of the Languages Screen

The application is built using content placeholders which are referred to as tokens.

The use of tokens makes it easier for you to revise and maintain wording that is more applicable for your business or industry.
The Languages screen has a table that lists all of the languages installed on your system.

Columns

Column	Description
Language Name	This column displays the name of the language.
Abbreviation	This column displays the abbreviation of the language.
Language Locale (Without Country Code)	This column includes the abbreviation of the language and the Country.
Language is Displayed Right-to-Left	This column indicates if the language is displayed right-to-left.
Token Count	This column indicates the number of tokens in the system. See Token Count.
Help Admin	This column specifies the user who can manage the Online Help,

Actions

The icons in the Actions column perform the following functions.

Icon	Action	Description
	Search Tokens	To search for a specific token, click this icon in the desired Language row. There is also a search icon in the Actions column header which allows you to search all languages at once. ▪ Use this option to find a word or phrase you wish to change. The search field searches on the Token ID and the word/phrase of the token's translation. ▪ The search results will return all matches and provide an edit option. ▪ On the search results screen, the Type column indicates if it is a System token or a Custom token. Custom means that it was created by the site administrator and didn't come standard with the system. ▪ When you click to edit a token, a small form displays in which you can make the changes. There will be instances where the translations are simple text. However, there will be some translations that include HTML coding or other programming code. **Do not edit or remove the code**. If you are unsure of what you can change, contact your Client Services Account Manager (CSAM). ▪ After making your updates, click **Save**. In many cases, you will be able to see your revisions to a translation immediately. However, if you do not see the update in the application where that translation displays, log out of the application and log back in.
	Add New Token	To add a new token, click this icon.
	Refresh Language	To refresh the tokens for a language, click this icon. Taking this action updates translations in that language to display the most recent revisions. The numeric value next to the **System Tokens** label may increase, indicating that new tokens/translations were added through recent development to the application. The system's language tokens are updated from Deltek Talent Management each night. This ensures that the application has the latest updates. However, after you modify a token, the refresh will **not** affect your changes.

Icon	Action	Description
		After you change a token, it is ignored by the nightly refresh.
	Deactivate	There is an option to deactivate a language, but this is not recommended. Typically, your company paid for all the installed languages, and deactivating one makes it no longer available to any user. If a language has been deactivated, you can reactivate it by clicking .
	Make Default	To make a language the default in the application, click this icon. The icon changes to , indicating that it is the default language. Unless users of the system (for example, external job seekers, employees, and vendors) personalize their language preference, the system is presented in the default language.

Token Count in the Languages Screen

Clicking the linked number in the Token Count column displays a list of all tokens that need translation.

- **System Tokens**: These tokens are a combination of Standard tokens and Overridden tokens. Standard tokens are those that come directly from the application. The content is written by our Product Management team. Tokens are considered Overridden when you change the verbiage or terms used in the original content.
- **Custom Tokens**: These are tokens that have either been added to the application when you create a new token or when data is added to the system that prompts a token creation (for example, requisition title, job position, class name, and skill category).

  If a system token is edited by an administrator, the numeric value next to the Standard label decreases by one and the numeric value next to Overridden increases by one.

  Warning: If your company uses custom tokens and multiple languages, please make sure to add translations for the custom tokens in all the languages that you use. Otherwise, the custom token will display in its default input language while the rest of the page is translated into the viewer's localized language

Set the Language Administrator

The employee listed in the Help Admin column is the individual who is the administrator of the online help documentation for that language.

If None displays in the column, no employee has been assigned as the administrator for that language.

Follow these steps to assign an employee to a language or reassign an administrator for a language:

1. On the Languages screen, click the linked text in the Help Admin column.
   A field populated with all the employees in the organization displays above the table of languages. The label next to the field indicates for which language you are choosing an administrator.
2. Select an employee name from the drop-down field.
3. Click **Submit**.

Edit the Welcome Token

Follow these steps to edit the Welcome token.

To modify the welcome message shown to internal users:

1. On the Languages screen, click in the row of the language.
2. Enter “welcome” in the **Search** field and click **Search**.
3. Look for Token ID **welcome** in the search results listing and click .
4. Edit the welcome message in the text field, and click **Save**.

Add New Languages

If you need a language added to the system, contact your Client Services Account Manager (CSAM) to verify if the language is available for the application.

Note: If the language is unavailable, your CSAM will advise of the next steps. There is a fee associated with adding a new language.

Follow these steps to add a new language:

1. On the Languages screen, click **Add New Language**.
2. If you are adding a language that has been enabled by your CSAM, you will have a drop-down list of languages that are available.
   Select the language to install it.
3. Click **Add New Language**.
   The system will take a few minutes to install the language. Once completed, you will be routed back to the main Languages page.
4. Scroll to find the new language, and activate it by clicking in the Actions column.
   By default, a new language is deactivated.

Add New Custom Languages

Needs short description.

To add an entirely new language:

Click Add New Language.

Complete the fields on the form.

- **Language Name**: Enter the proper name of the language.
- **Language Name Shown to User**: Enter the common term used for the language.
- **Language Abbreviation**: Enter a two-letter abbreviation for the language.
- **Language Locale (without country code)**: Enter a two or more letter locale abbreviation for the language.
- **Country**: Choose a country for the language. This may indicate which language to display in the application if a user selects this country for his or her location.
- **Language is Displayed Right-to-Left**: Select this check box to indicate if the language is read right-to-left, such as Arabic or Chinese.

  Click **Add New Language**.

> **Note:** After adding a new language, each system token will need a translation in that language. In most cases, if a translation does not exist for a token, the verbiage for the default language will display for the user.

Bulk Translate Custom Tokens

Follow these steps to bulk translate custom tokens.

To create translations for custom tokens for a specific language:

1. On the languages screen, click the linked value next to **Custom Tokens** in the Token Count column for that specific language.

   > **Note:** If the numeric value on the left is equal to the numeric value on the right, there are no custom tokens available for translating.

2. The screen will display a table with the tokens that are missing a translation in the chosen language.
3. In the text box in the Translation column, enter the translation for the verbiage displayed in the Current Translation column.
4. Click **Bulk Translate** at the bottom of the page to save your updates.

   In the table showing all the available languages, the number of Custom Tokens that can be translated has decreased by the number of translations created.

Word Filter

The Word Filter functionality allows you to control what content is considered sensitive and/or inappropriate for the site.

The language filter icon is displayed throughout the system wherever text boxes are used. They assist the user by scanning the text entered for words that have been identified as inappropriate.

Add Values in the Word Filter

Follow these steps to add a word or value to the word filter.

To add a word for the system to check:

1. Click **Word Filter**.
2. Enter the word in the **Inappropriate Word** field.
3. Click **Insert**.

View Filter Values

To view the current listing of words, click the **Inappropriate Words and Phrases List** link.

Delete Filter Values

To delete a word from the list, click .

Notification Events

The system contains a large set of notifications that are triggered by events that occur in the system.

Use the Notification Events screen to manage these notifications, their content, and which ones are enabled.

Display the Notification Events Screen

Follow these steps to display the Notifications Events screen.

To display the Notification Events screen:

1. Click in the toolbar to display the Administration menu.
2. In the **Global Settings** » **System Administration** section, click **Notification Events**.

Notification Categories

The notification categories are listed alphabetically.

Click a category name to expand it. Each Notification includes a name and a description with details of what action triggers it.

- A notification with the check box selected indicates that it is enabled.
- A notification with the check box cleared and a gray background is disabled and will not be sent when that event is triggered
- Some notifications are required by the system and cannot be disabled. The following message displays next to these system notifications:

"This event is critical to system functionality and cannot be disabled."

Categories

Depending on which modules your organization has purchased or which features are enabled, you may not see some of the categories listed.

Category	Description	Module Where It's Used
360	This contains templates relating to 360 assessments.	Performance
Appraisal	This contains templates relating to appraisals.	Performance
Building Management	This contains templates relating to buildings and rooms.	Learning
Candidates	This contains templates relating to interviews and the screening process for job seekers.	Recruiting
Certifications	This contains templates relating to expiring certifications.	Learning
Classes	This contains templates relating to class enrollment, curricula, instructors, grades, outside coursework, class recommendations, class evaluations, and testing.	Learning
Development Plan	This contains templates relating to development plans.	Multiple
Employee Referral System	This contains templates relating to referrals made by employees for open jobs within the organization.	Recruiting
Equipment Management	This contains templates relating to equipment used in a class.	Learning
External Training	This contains templates relating to external training courses.	Learning

Category	Description	Module Where It's Used
General	This contains templates associated with various modules in the application. Events in this category are not specific and include appointment reminders from the calendar, competency notifications, skill notifications, password change notices, company separation notices, account change notifications, and career center details.	Multiple
Integrations	This contains templates relating to assessments and background checks used for recruiting purposes.	Recruiting
Job Seeker	This contains templates relating to job seekers.	Recruiting
Jobs	This contains templates relating to job profiles and positions within jobs.	Multiple
Libraries	This contains templates relating to library resources for an organization.	Learning
Mentoring Relationships	This contains templates relating to mentoring relationships between employees.	Development
Notifications	This contains a template relating to sending job details to users.	
Offers	This contains templates relating to job offers created for and sent to candidates.	Recruiting
Onboarding	This contains templates relating to the onboarding process of new hires.	Recruiting
Project Team	This contains templates relating to project teams.	Development
Requisitions	This contains templates relating to requisition assignment, routing requisitions, requisition approvals, and requisition statuses.	Recruiting
Résumés	This contains templates relating to résumé searches, routing a résumé, job seeker submissions, internal transfers, and printable batches of résumés.	Recruiting
Succession Planning	This contains templates relating to succession planning, successors on a succession plan, and career paths.	Development
Tuition Assistance Administration	This contains templates relating to tuition assistance requests, tuition assistance payments, and tuition caps.	Learning

Category	Description	Module Where It's Used
Vendors	This contains templates relating to recruiting vendors, hiring orders, and résumés submitted by vendors.	Recruiting
Talent Relationship Management (TRM)	This contains templates relating to recruiting talents and prospective employees.	Recruiting

Notification Events Details

The Notification Events Details screen has two sections: Event Details and Templates.

Event Details

The Event Details section displays the notification's title, a brief description of the action that triggers it, and the category under which the template is listed.

Notification Templates

In the Templates section, there is a tab for each language that has been installed on your site. Each template contains a **Subject**, the template **Body**, and if available, an **SMS Version** of the notification.

> **Note:** The SMS Version will only display if you are using the SMS (Text Message) functionality.

Display Notification Details

Follow these steps to display notification details.

To view a Notification's details:

1. On the Notification Events screen, click to expand the appropriate category.
2. Locate the desired notification, and click to view its details.

Add Recipients to Event Notifications

Follow these steps to add recipients to Event Notifications.

To add recipients to the CC and BCC fields:

1. Click .
2. Enter complete email addresses in the **CC** and **BCC** fields. Use semicolons to separate each email address.
3. Click **Save**.

SMS Version Notification Templates

If your company uses the SMS (TXT) notification feature, the template section provides a text area to create or edit the SMS version for the notification.

Job seekers and/or users who elect to receive notifications via TXT message will receive their notifications in this format.

Merge codes are permitted in the TXT version of a notification; however, the character count does not take into consideration the number of characters in the value that will replace the merge code (for example, [selected_time] or [candidate_full_name]). System data replaces merge codes when the message is delivered to the recipient. Merged data may cause the message to exceed the maximum 140-character limit and result in multiple sent messages.

While the character and message counters cannot predict the length of merged data, you can see the character and message count with any merge codes, which is helpful when constructing the TXT version of a notification.

> **Note:** URLs generated from the merge codes are reformatted as "tiny" URLs in the interest of the 140-character message limit.

For example, an SMS version of a notification in the template field may read as: "An account has been created for you at [company_name]: [action_url]"

On the mobile phone of the job seeker or user who is receiving the notification, the message will read as: "An account has been created for you at [company_name]: [action_url]".

Edit Notification Content

Follow these steps to edit a notification's content.

To edit the content of a notification:

1. In the **Templates** section, click ✎ .
2. Edit the content in the **Subject**, **Body**, and **SMS Version** text fields.

   > **Note:** Editing a notification only changes the template in the language selected.

3. Click **Save**.
4. After editing a template, you can click ↺ to revert to the content it had when the system was first deployed.

   For templates that remain unchanged from the date the application was implemented, the option to revert is disabled. After the content has been reverted, the icon will be disabled.

Add Merge Codes

Follow these steps to add merge codes to notifications.

To add merge codes for a notification:

1. In the **Templates** section, click .

   Click **Available Merge Codes** to view the available merge codes for the notification.

   > **Note:** Not all notifications use the same merge codes, so Deltek recommends that you verify the merge code is in the list before inserting it into the notification. If a merge code is used that is not considered applicable for an event, the merge code will not properly populate with the system value when the notification is sent.

   You can either use the **Search** field or click expand the merge code category to find available merge codes.

   Merge codes are listed in two categories:

   - **Standard Merge Codes:** These are merge codes that are typically available for all categories of notifications.
   - **Event Merge Codes:** These are merge codes that are specific to the event that triggers the notification being sent.

     Position the cursor in the appropriate text box at the location to insert the merge code, and click to add it.

     > **Note:** Do not edit the merge code; if the merge code is altered, it will no longer work.

2. Click **Save** when done.

Page Options

Use the Page Options screen to control what details or which fields to display on certain pages within the application.

Display the Page Options Screen

Follow these steps to display the Page Options screen.

To display the Page Options screen:

1. Click in the toolbar to display the Administration menu.
2. In the **Global Settings** » **System Administration** section, click **Page Options**.

Contents of the Page Options Screen

The Page Options screen contains the following tabs:

- Core

  The Core tab includes those pages that are not module-specific. If your organization has the Applicant Tracking System enabled, the Recruiting tab is available to control certain pages within that portion of the system.

  > **Note:** If the Hourly Portal is enabled, there are options displayed to manage those details.

- Recruiting

Core Tab of the Page Options Screen

The options on the Core tab allow for the configuration of not only the account creation form for each résumé type, but also what data points the system will use to validate a user or job seeker's uniqueness.

The tab includes the following types:

- **Contact**: This determines the uniqueness criteria when a contact is added to a requisition as a candidate.
- **External Job Seeker**: This controls the uniqueness criteria when an external job seeker creates an account.
- **Internal Employee**: This determines the uniqueness criteria when an employee creates an account.
- **Recruiting User Upload**: This controls the uniqueness criteria when a recruiter uploads a résumé and creates the account for the external job seeker.
- **Referrals**: This determines the uniqueness criteria when an employee adds the résumé of a friend and creates him or her a job seeker account.
- **Vendor Submitted Résumé**: This controls the uniqueness criteria when a vendor creates an account for a job seeker.

Manage User-Specific Options on the Core Tab

Follow these steps to manage user-specific options on the Core tab.

To manage the options that are available for a user type:

1. Click in the row of type.
2. Each type listed under the Core tab has three similar sections that you can edit:
   - Account Creation Form Management
   - National Identifier Collection
   - Duplication Rules

> **Note:** The basic functionality works the same for each type, only the choices available may vary.

Sections of the Core Tab

The Core tab sections provides the ability to manage the forms that are being presented to job seekers and users, collect National Identifier during account creation, and create rules on data duplication.

Account Creation Form Management

This section provides the ability to configure the account creation form presented to job seekers and users. In addition, it allows for the requirement of a unique username rather than an email address for account creation. The table grid displays all of the fields available for the account creation form for that specific user type.

> **Note:** Based on the user type selected, the options available in the table may vary. If the SMS (TXT) messaging feature is enabled, the option to add the **Preferred Method of Electronic Communication** field is available under **Contact Details** in the table.

National Identifier Collection

This section provides the ability to collect the National Identifier during the account creation process.

Duplication Rules

This section provides the means to create rules regarding duplication of data. These rules determine what data points to use to verify whether or not the user/job seeker is already in the system. Depending on the rule, the system will display an error or warning message.

There are two types of rules:

- **Warning but Allow**: This rule checks against the selected criteria and warns the job seekers that a possible duplicate has been found. The system will prompt the job seekers to retrieve their login information, but will allow them to continue creating an account.

Type	Using this type of rule could allow duplicate entries of a job seeker.

- **Deny**: This rule checks against the selected criteria and advises job seekers that a duplicate has been found. The system will prompt them to retrieve the login information in order to proceed. The application will not allow them to continue creating an account.

Configure Account Creation Form Management Settings

Follow these steps to configure the settings for Account Creation Form.

To set the options for Account Creation Form Management:

1. In the **Account Creation Form Management** section, select the check box on the row under the Display column to display that field on the form.

2. Select the check box on the row under the Mark Required column to mark that field as one that must be completed by the user.

   > **Tip:** Marking a field as required automatically selects the check box in the Display column.

3. For those fields that are required by the system, the check boxes will automatically be preselected and cannot be changed by the administrator.

   > **Note:** The system requires a method to authenticate the job seeker or user; therefore, it will enforce the collection of **either** the email or username field.

Create National Identifier Collection Rules

Follow these steps to set the rules on collecting national identifier information.

To create a rule regarding the collection of national identifier information:

In the National Identifier Collection section, select an option from the Country drop-down list.

1. Select an option from the **Basis for Display** drop-down list.

   The following are the available options:

   - **Always**: This option indicates the national identifier will be requested, regardless of any conditions.
   - **Country of residence**: This option indicates the national identifier will be requested if the country of residence for the job seeker or user matches the country selected for the rule.
   - **Requisition primary location**: This option indicates the national identifier will be requested only if the primary location of the requisition matches the country selected for the rule.
   - **Either residence or** » **req. l** » **ocation**: This option indicates the national identifier will be requested if the country of residence for the user or the country of the primary location in the requisition matches the country selected for the rule.

2. Select an option from the **Rule** drop-down list.

   The following are the available options:

   - **Display only**: If chosen, the field for the national identifier information is displayed on the form.
   - **Display and require**: If chosen, the field for the national identifier information is displayed on the form and marked as required.

3. Click **Add Rule** to save the rule settings.

   The rule is added to the listing on the right.

4. To delete the rule, click in the Action column.

Create Duplication Rules

The duplication rules determine what data points to use to validate whether or not a user or job seeker is already in the system, which will then display an error or warning message, as applicable.

To create a duplication rule:

1. In the **Duplication Rules** section, click a field that you want to use in the rule from the **Available Fields** area and drag it to the **Selected Fields** area.

   Repeat this step for all the fields that you want to use.
2. For the **Rule Type**, select either **Warn but Allow** or **Deny**.
3. Click **Add Rule** to save it.

   The rule is added to the listing on the right.
4. Click to delete the rule.

   > **Note:** Some duplication rules are required by the system and cannot be deleted. Those will appear with a disabled delete icon.
5. After you have made all the changes to the three sections for Page Options, click **Submit**.

Recruiting Tab of the Page Options Screen

The Recruiting tab includes four sections that have options for page configuration.

- Job Search
- Job Details
- New Résumé Submissions and Active Candidates
- Résumé Search

Sections of the Recruiting Tab

The Recruiting tab provides options for managing recruitment, from job searches and details to resume submission and activation, and up to onboarding a new employee.

Job Search

You can configure the job search form and the search results screen for external job seekers, employees (Internal), and job seekers searching for hourly jobs. If the Hourly Portal is enabled, there is an option to manage the **Hourly Job Search Options**.

Job Details

The Job Details page is what a job seeker sees when searching for a job. It contains all the information about the job.

New Résumé Submissions and Active Candidates

These options allow you to control the display and filtering of custom fields on the two New Résumé Submissions screens, the Historical View screen, and the Active Candidates screen.

Résumé Search

The options in the **Résumé Search** section allow you to configure the résumé search form and the search results screen for vendor users and for internal recruiting users.

Onboarding

You can configure the Onboarding form for new employees, specifying which fields display in the **Step 1** page of the new hire Onboarding process (**Recruiting** » **Candidates** » **Initiate Onboarding**). You can manage both custom and system fields as follows:

- For custom fields, you can select which fields display and set the field order.
- For system fields, you can select which fields display and designate whether a field is required for completion by the new hire or internal user, such as the recruiter, hiring manager, or administrator.

> **Note:** The names and types of fields that display on the Page Options screen are managed in **Administration** » **Recruiting** » **Configuration** » **Dynamic Forms**. Therefore, if you need to create a custom field or modify a field label, you would do so from the Dynamic Forms screen.

Manage Job Search Options

These instructions apply to all job search management options even though the individual options vary by type.

To manage the Job Search options:

In the Job Search section of the Recruiting tab, click ✎ for the options you want to edit.

1. Edit the following options.
   - **Enable Search Options**: If disabled, the ability to search for a job will not be shown. Only the option to View All Jobs will be available to the job seeker.
   - **Enable Advanced Search**: If disabled, the ability to use the advanced job search form will not be shown.
   - **Enable Position Search**: This determines whether or not the option to search by position is displayed.

     This option is available only if the Hourly Portal is enabled.
   - **Enable Quick Search**: If disabled, the short job search form will not be shown.
   - **Enable Location/Proximity Search**: This determines whether or not the option to search by location/proximity is displayed.

     This option is available only if the Hourly Portal is enabled.

- **Default Search**: This determines whether **Quick Searches** or **Advanced Search** is the default search option for the job seeker.
- **Radius Default**: This allows you to select a default value to display when an employee searches for a job using distance as a factor.

  This option is not available for **External Job Search Options**.
- **Require Login**: This indicates whether the job seeker must log in or create an account before being allowed to search for jobs.
- **Keyword Fields**: This field contains four available options. If none are selected, the keyword search field is not displayed in the résumé search form.
- **Advanced Search Fields**: To add a field to the search form, drag the field from the **Available Fields** area to the **Selected Fields** area.

  Repeat this with all of the fields you wish to include.

  To place the columns in the order you want them to display in the form, drag them up or down to the desired position.

  To remove a field, drag it back into the **Available Fields** area.
- **Quick Search Fields**: This allows you to add fields to the quick search form.

  You configure these fields the same way as the **Advanced Search Fields**.
- **Allowed Groups**: This allows you to select which Groups have access to search for jobs. For example, the group selected for the **External Job Search Options** would be the **External Job Seekers** whereas the group selected for the Internal Job Search Options would be those users who are considered Internal.
- **Results Fields**: This area allows you to select which columns are shown in the search results table.

  You configure these fields the same way as the **Advanced Search Fields**.
- **Internal Portal Theme**: This allows you to control the page theme used on internal job seeker pages. This will not apply to non-job seeker pages, such as Manage Requisitions or résumé searching.

  This option is available for **Internal Job Search Options** only.

  > **Note:** If the **Hourly Portal** is enabled, the **Hourly Job Search Options** provide search management options similar to the external and internal ones.

2. Click **Submit**.

   To view the layout of the page after saving, click **View This Page**.

Manage Job Details

You can configure different fields to display for employees and for external job seekers.

If the Hourly Portal is enabled, there will be an option to manage the Hourly Job Details Fields.

To manage the fields on the Job Details page:

Click ✎ in the appropriate row.

1. Complete the fields on the page.
   - **Fields to Display**: This allows you to select which fields to display to the job seeker.

     To add a field, drag the field from the **Available Fields** area to the **Selected Fields** area. Repeat this with all the fields you want to include.

     To place the fields in the order that you want them to appear in the form, drag them up or down to the desired position.

     To remove a field, drag it back into the **Available Fields** area.
   - **Salary Display Format**: If you opted to display the salary, this option allows you to designate the display format:

     Show Salary Range: For example, 45,000 to 57,000

     Show Salary Grade Name Only: For example, EX-100

     Show Salary Range and Name: For example, 45,000 to 57,000 (EX-100)
2. Click **Submit**.

Manage Options for New Résumé Submissions and Active Candidates

Follow these steps to manage the options for New Résumé Submissions and Active Candidates screens.

To manage the options for New Résumé Submissions and Active Candidates screens:

Click ✎ in the appropriate row.

1. Complete the fields on the page.
   - **Filter Options**: This option allows you to select which custom fields should be displayed as filter options. The field type is shown in parenthesis after the field name.
   - **Columns**: This option allows you to select which custom fields should be displayed as columns in the listing and the order in which they appear. The field type is shown in parentheses after the field name.

     To add a field, drag the field from the **Available Fields** area to the **Selected Fields** area. Repeat this with all the fields you wish to include.

     To place the fields in the order that you want them to display in the form, drag them up or down to the desired position.

     To remove a field, drag it back into the **Available Fields** area.
2. Click **Submit**.
3. To view the layout of the page after saving, click **View This Page**.

Manage Résumé Search Options

Follow these steps to manage Résumé Search options.

To manage the Résumé Search options:

Click in the appropriate row.

> **Note: The options available for the vendor users and the internal recruiting users are similar. The primary difference is that for vendor users, there are no options for internal matches since vendor users do not have access to employees' résumés.**

1. Complete the fields on the page.
   - **Keyword Fields**: This section contains four available options from which you can select. If none are selected, the keyword search field is not displayed in the résumé search form.

     If you want to give users the ability to search using Boolean logic, that option is a Feature setting. Enabling Boolean search for a Group will hide the four individual keyword fields regardless of the options selected in the **Keyword Fields** area.
   - **Search Fields**: This section allows you to select which fields to display on the search form. The **Available Fields** area lists the standard system fields as well as any custom fields for the Résumé and Secondary Application form types. The **Selected Fields** area lists what fields have been selected and in what order they are displayed.

     To add a field, drag the field from the **Available Fields** area to the **Selected Fields** area. Repeat this with all the fields you wish to include.

     To place the fields in the order that you want them to display in the form, drag them up or down to the desired position.

     To remove a field, drag it back into the **Available Fields** area.
   - **Internal Matches Column**: This section is only available for Internal search options. It allows you to select which columns display in the search results table for employee matches.

     To configure the fields, use the same steps described in **Search Fields**.
   - **External Matches Column**: This section allows you to select which columns display in the search results table of external job seekers.

     To configure the fields, use the same steps described in **Search Fields**.
2. Click **Submit**.

Manage Onboarding Options

You can configure the Onboarding form for new employees, specifying which fields display in the **Step 1** page of the new hire Onboarding process (**Recruiting** » **Candidates** » **Initiate Onboarding**).

To manage Onboarding options:

In the Onboarding section of the Recruiting tab, click to edit Onboarding options.

1. Edit the following options:
   - **Onboarding Step 1 (Custom Fields)**: This option allows you to select which custom fields display in Step 1 of the Onboarding form (**Recruiting** » **Candidates** » **Initiate Onboarding**).

In the **Available Fields** column, click the field(s) you want to move, drag it over to the **Selected Fields** column, and release it.

To arrange the order, drag fields up or down within the **Selected Fields** column.

To remove a field, drag it back into the **Available Fields** area.

- **System Fields**: For each system field you want to include on the Onboarding form, select the **Display** check box. To make a field required, select the **Mark Required** check box.

> **Note:** You can configure whether the following fields display and are required by default via the Onboarding section of the System Settings screen (**Administration** » **Global Settings** » **System Administration** » **System Settings**):
>
> **Collect County information during Onboarding**
>
> **Require Date of Birth**
>
> **Require Employee ID**

2. Click **Submit**.

   Your customizations are reflected in **Step 1** of **Recruiting** » **Candidates** » **Initiate Onboarding**. Custom field modifications display under **Additional Details and** System field modifications display under **Review/ Update New Hire Contact Information**.

System Settings

Use the System Settings screen to control the various aspects and behaviors of the system.

Your Customer Service Accounts Manager (CSAM) or Implementation Manager (IM) will set up the necessary configuration items during implementation; however, any changes needed can be performed by the Site Administrator.

Display the System Settings Screen

Follow these steps to display the System Settings screen.

To display the System Settings screen:

1. Click in the toolbar to display the Administration menu.
2. In the **Global Settings** » **System Administration** section, click **System Settings**.

> **Warning: Proper training to manage this area is required before making any changes.** Each setting has a detailed description explaining what the setting does in the application. Before enabling, disabling, or changing a setting, make sure to read the description and understand how the change will impact the system.

Approval Chains

An approval chain is a listing of users who are selected to approve or reject something.

Use this screen to create different approval chains for use with recruiting workflows, requisitions, offers of employment, performance workflows, or performance appraisals.

Display the Approval Chains Screen

Follow these steps to display the Approval Chains screen.

To display the Approval Chains screen:

1. Click in the toolbar to display the Administration menu.
2. In the **Global Settings** » **Your Organization** section, click **Approval Chains**.

Contents of the Approval Chains Screen

The Approval Chains screen displays the following columns.

Columns

Column	Description
Name	This column displays the name of the approval chain.
Description	This column provides a description of the chain.
Type	This column indicates if the approvals are **Serial** or **Parallel**.
Members	This column specifies the users who are in the chain. Click to view the names of the individuals. They are listed in the order in which they will be sent the request for approval.

Actions

The icons in the Actions column perform the following functions.

Icon	Action	Description
	Edit	To edit the approval chain's details, click this icon.
	Deactivate	If the competency is active, this icon appears. To deactivate the competency, which removes it from being used by end users, click this icon.
	Reorder	To reorder the sequence of approvers, click this icon. On the next screen, you can change the order by clicking the person's name and dragging it to the desired position.

Icon	Action	Description
		When the order of an approval chain is revised, any recruiting workflows or performance workflows are updated as well. However, if the approval process of an approval chain is already in motion in the application, the approval request follows the original order of the approvers, not the revised order. Reordering the sequence of approvers is only applicable to **Serial** approval chain types.
	**Delete**	To delete an approval chain, click this icon. A chain can be deleted at any time. If an approval chain that was previously associated with a recruiting workflow or a performance workflow is deleted, that association is removed. The workflows need to be updated with a new approval chain selection.

Create an Approval Chain

Follow these steps to create an approval chain.

To create an approval chain:

1. On the Approval Chains screen, click **Create Approval Chain**.
2. Enter a name for the chain. Duplicate names are not allowed.
3. In the **Approval Chain Type** field, select one of the following options:
    - **Serial:** This approval chain type requires that those in the chain approve or reject in a specific order. If an individual in the chain rejected the action, subsequent approvers would not receive the request to approve or reject it.
    - **Parallel**: This approval chain type has no order restrictions on when individuals can approve or reject. All individuals receive the request simultaneously; however, if at least one individual on the approval chain rejects the action, the action is rejected.
4. Use the following fields to identify approvers for the approval chain:
    - **Select Approvers by Name:** These approvers are current users of the system. Click **Internal Approvers** to open the search window. After selecting employees, click **Confirm Selection**. The names of those employees you selected display under the link to search for internal approvers.
    - **Enter External Approvers:** These are individuals who are not users of the system. In the text field, enter the email address for each user. To add more than one, use commas to separate the email addresses.
    - **Select Approvers by Job Title:** These are individuals who currently occupy a specific position in a job title.

> **Note:** If the **Skip this user in Approval Chains** option is selected in an employee's User Profile, that employee will not receive an approval request even if in a position with the job title.

- **Select Approvers by Managerial Level:** This type of approver is similar to a job title approver and is selected based on their manager level within the organizational hierarchy and how it relates to the requisition being approved, the performance appraisal being approved, or the job offer request.

5. After selecting all approvers for the approval chain, click **Create Chain**.
   - If the type for the approval chain is Parallel, the new approval chain is added to the table and no further action is needed by you.
   - If the type for the approval chain is Serial, the next screen will display the approvers in an ordered list.
6. To change the order of the approvers, drag a person's name to the desired position.
7. After the correct order is displayed, click **Save Order**.

Bulk Upload User Skills and Competencies

Administrators use the Bulk Upload User Skills and Competencies screen to upload skills and competencies for a group of users, using a configured CSV file.

Enable the Bulk Upload User Skills and Competencies Feature

An Administrator must enable the Bulk Upload User Skills and Competencies Feature.

To enable the Bulk Upload User Skills and Competencies feature:

1. Click the **Administration** icon in the toolbar to display the Administration menu.
2. In the **Global Settings** » **System Administration** section, click **Features**.
3. Select a group from the **Select a Group** field.
4. Expand Core » Administration.
5. Click **Bulk Upload User Skills and Competencies**
6. Click **Update Features**.

Display the Bulk User Skills and Competencies Screen

Follow these steps to display the Bulk User Skills and Competencies Screen.

To access this screen, the Bulk User Skills and Competencies feature must be enabled for your group (Administration » Global Settings » Features). This feature is found under Core » Administration » Bulk Users Skills and Competencies.

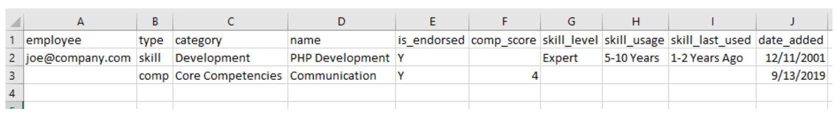
To display the Bulk User Skills and Competencies screen:

1. Click the Administration icon on the toolbar on the upper right corner of the Talent Management screen.
2. Go to **Global Settings » Your Organization**.
3. Click **Bulk Upload Users Skills and Competencies**.

Contents of the Bulk Upload User Skills and Competencies Screen

Use these fields and options to bulk upload skills and competencies.

Contents

Field	Description
Sample File	Download the sample CSV file (sample_skill_competency.csv) at the top of the screen to get started configuring your CSV file. 
User Skills & Competencies Import File	When you have your file configured, click **Browse** in the **Users Skills & Competencies Import File** field, browse to the location of your file and click **Upload File**.

	A	B	C	D	E	F	G	H	I	J
1	employee	type	category	name	is_endorsed	comp_score	skill_level	skill_usage	skill_last_used	date_added
2	joe@company.com	skill	Development	PHP Development	Y		Expert	5-10 Years	1-2 Years Ago	12/11/2001
3		comp	Core Competencies	Communication	Y	4				9/13/2019
4										

Competencies

A competency is a behavior trait or knowledge that a person possesses that he or she can use to make him or her effective and essential to a specific job or organization.

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

Display the Manage Competencies Screen

Follow these steps to display the Competencies screen.

To display the Competencies screen:

1. Click in the toolbar to display the Administration menu.
2. In the **Global Settings** » **Your Organization** section, click **Competencies**.

Contents of the Manage Competencies Screen

The Competencies screen displays the competency categories.

Columns

Column	Description
Category Name	This column displays the name of the competency category. Click the name to view the individual competencies.
Number of Competencies	This column displays the number of competencies in that category. Click the number to view the individual competencies.

Actions

The icons in the Actions column perform the following functions.

Icon	Action	Description
	Edit	To edit the category's name, click this icon.
	Deactivate	If the competency is active, this icon appears. To deactivate the competency, which removes it from being used by end users, click this icon. Historical instances of the category or competency are maintained on user profiles and in instances where it is used in an active appraisal. The only exception to future use of a deactivated competency category is if an appraisal is copied and it holds competencies from a deactivated category. Those competencies will still be copied along with the appraisal.
	Delete	To delete a competency category, click this icon. For those competency categories that have existing competencies, this icon is disabled.

Add a New Competency Category

Follow these steps to add a new competency category.

To add a new competency category:

1. On the Competencies screen, click **Add New Competency Category**.
2. In the **Competency Category Name** field, enter a name for the category. Duplicate names are not permitted.
3. Click **Submit**.

View Competencies in a Category

Follow these steps to view the competencies in a category.

To view the competencies in a category:

Click either the category name or the number in the Number of Competencies column.

Contents of the Competencies Screen

This listing displays all the competencies in a category using the following columns.

Columns

Column	Description
Competency Name	This column displays the name of the competency.
Competency Description	This column displays the description of the competency.
Rating Tips	This columns indicates if Rating Tips exist for that competency.

Actions

The icons in the Actions column perform the following functions.

Icon	Action	Description
	**Edit**	To edit the competency's details, click this icon.
	**Add a Rating Tip**	To add a Rating Tip, click this icon. See the Rating Tips section below.
	**Add Development Suggestions**	To add a development suggestion, click this icon.
	**Deactivate**	If the competency is active, this icon appears. To deactivate the competency, which removes it from being used by end users, click this icon.
	**Delete**	To delete a competency, click this icon. If a competency has been used, it cannot be deleted, and this icon is disabled.

Add a New Competency

Follow these steps to add a new competency.

To add a new competency:

1. Click **Add a New Competency**.
2. Enter a name in the **Competency Name** field.

3. Select the appropriate category name in the **Competency Category Name** drop-down field.
4. Enter a description of the competency in the **Competency Description** text field.
5. Click **Submit**.

Edit a Competency

Follow these steps to edit a competency.

To edit a competency:

1. On the screen for a specific Competency Category (**Administration icon** » **Global Settings** » **System Administration** » **Your Organization** » **Competencies** » **Click a category in the Category Name column**), click the **Edit** icon.
2. Enter a name in the **Competency Name** field.
3. Select the appropriate category name in the **Competency Category Name** drop-down field.
4. Enter a description of the competency in the **Competency Description** text field.
5. Click **Submit**.

Display Rating Tips

Follow these steps to display the Rating Tips screen.

To display the Rating Tips screen:

On the Competencies screen, click in the Actions column for the desired competency.

Contents of the Rating Tips Screen

Rating Tips can be added to any competency to provide further explanation of the competency in terms of observable behaviors in an employee.

For example, a rating tip for a competency may help a manager determine the most fair scale value to attribute to an employee for a competency on an appraisal.
Each scale appears as a tab. Click that tab to view the rating tips by scale value.

Columns
The Rating Tips screen displays the following.

Column	Description
Scale Values	This column displays the details of the selected scale.
Rating Tips	This column displays the rating tip created for that scale value. Click to either create a new tip if none exists or to edit an existing tip.

Add Rating Tips

Add tips managers can use when rating employee performance.

To add a rating tip:

1. On the Competencies screen, click in the Actions column for the desired competency.
2. The next screen displays a table with tabs for each scale type created.
3. To enter a rating tip or edit an existing one, click .
4. Enter a descriptive phrase for demonstrating how the competency can be measured by the behaviors of the employee.

   For example, if your company uses a five-point scale similar to the Company Default scale, you might create rating tips that read like the following:

   - **Seldom Meets Expectations**: Does not participate in team work.
   - **Meets Most Expectations**: Does not willingly participate with teams to accomplish goals.
   - **Meets All Expectations**: Works to build consensus within the team toward common goals.
   - **Exceeds Expectations**: Solicits the input of others within the team and gives recognition to participants.
   - **Greatly Exceeds Expectations**: Demonstrates concern for treating people fairly and provides positive feedback.
5. Click **Submit**.

   > **Tip:** When you add a rating tip for a competency, a separate tip is created for each value (for example, “2 – Meets Most Expectations”) on the scale for each competency. If more than one scale is used, you can create a rating tip for each value on the scale.

Development Suggestions

Development Suggestions are examples provided for a manager to use when recommending methods to employees for improving their proficiency in a competency.

Display the Development Suggestions Screen

Follow these steps to display the Competency Development Suggestions screen.

To display the Competency Development Suggestions screen:

On the Competencies screen, click in the Actions column for the desired competency.

Contents of the Development Suggestions Screen

Development Suggestions are examples provided for a manager to use when recommending methods to employees for improving their proficiency in a competency.

Columns

The Competency Development Suggestions screen displays the following columns.

Column	Description
Suggestion Name	This column displays the name of the suggestion.
Suggestion Description	This column displays the description of the suggestion.

Actions

The icons in the Actions column perform the following functions.

Icon	Action	Description
	Edit	To edit the suggestion's details, click this icon.
	Delete	To delete a suggestion, click this icon.

Add Development Suggestions

Follow these steps to add development suggestions.

To add development suggestions:

1. On the Competency Development Suggestion screen, click **Add Competency Development Suggestion**.
2. In the **Suggestion Name** field, enter a name for the suggestion.
3. In the **Suggestion Description** field, enter the description for the suggestion.
4. Click **Submit**.

Upload Bulk Upload Competencies

Follow these steps to upload competencies in bulk.

To upload competencies in bulk:

1. On the Competencies screen, click **Bulk Upload Competencies**.
2. Click the link to download the sample competencies template, and save the file on your computer.
3. Open the sample file.

The first row in the spreadsheet is the row that determines where your data belongs in the database. Enter the data in the spreadsheet. There are certain row/column combinations that are required to upload a file:

- **competency_name**: This name must be unique in a competency category.
- **competency_description**: This field contains a description of a competency and what abilities an individual must possess to have this competency.
- **competency_category**: This field provides the category of the competency. If the category does not exist, a new category is created.

4. After you have completed the required fields, save the file on your computer.

> **Note:** You must save the file in the same CSV format in which you downloaded it. A TXT or XLS format will not upload correctly to the system.

5. Go back to the screen in the system, and click **Browse** to find the file you just saved.
6. Click **Upload**.

Documents

You can upload documents and make these documents accessible to various groups within an organization.

The content available in the document library is not limited by the number of items that can be added to it; however, it does have a limit on the capacity amount allocated for your organization's library.

> **Note:** By default, there is a ten (10) megabyte limit to the document library's content. This limit can be revised by changing the Maximum Upload Directory Size through System Settings.

Display the Documents Screen

Follow these steps to display the Documents screen.

To display the Documents screen:

1. Click in the toolbar to display the Administration menu.
2. In the **Global Settings** » **Your Organization** section, click **Documents**.

Contents of the Documents Screen

The **Directory Usage** field displays a count of the total files uploaded against the maximum allowed size of the entire library, for example, 58.5KB / 10.0 MB.

Columns

The Documents screen displays the following columns.

Column	Description
Document Name	This column displays the name of the document.
Document Description	This column provides a description of the document.
Document Size	This column displays the document's file size.
Group	This column lists the groups that are allowed access to the document.

Actions

The icons in the Actions column perform the following functions.

Icon	Action	Description
	**Email**	To send a document via email, click this icon. Only one recipient can be sent an email at a time. The document is sent as an attachment in an email to the recipient.
	**Download**	To download a document, click this icon.
	**Edit**	To edit the details of a document, click this icon.
	**Delete**	To delete a document, click this icon.

Add a Document

Follow these steps to add a document.

To add a document to the library:

1. On the Documents screen, click **Add New Document**.
2. In the **Groups** section of the form, select which groups have permission to access (view and download) the document.
3. In the **Document Name** field, enter a name.
4. In the **Document Description** field, enter a description that summarizes the contents of the document.
5. In the **Upload Document** field, click **Browse** to locate and select the document that you want to upload.

   The file types accepted by the system are:

   - Text (TXT)
   - Adobe (PDF)
   - XML
   - Microsoft Word (DOC or DOCX)
   - Microsoft Excel (XLS or XLSX)

- GIF
- PNG
- JPG

  By default, each file added to the library is limited to 100 kilobytes in size. This value can be revised by changing the **Max File Upload Size** through System Settings.

6. Click **Save**.

   When the new document is added to the library, the value next to the **Directory Usage** field updates with the revised balance available.

Job Families

A job family is defined as a related group of jobs that have similar job competencies and skills.

Assigning a job family to similar jobs allows a user to associate a requisition workflow or an appraisal workflow at the job family level rather than at the job profile level.

Display the Job Families Screen

Follow these steps to display the Job Families screen.

To display the Job Families screen:

1. Click in the toolbar to display the Administration menu.
2. In the **Global Settings** » **Your Organization** section, click **Job Families**.

Contents of the Current Job Families Section

The **Current Job Families** section of the Job Families screen displays the following columns.

Columns

Column	Description
Company Name	This column displays the organizational entity tied to the job family.
Job Family Name	This column displays the name of the job family.
Description	This column provides a description of the job family.
Job Profiles	This column displays the number of job profiles using that job family.
Employees	This column displays the number of employees in that job family. Click the number to view a listing of employees.

Actions

The icons in the Actions column perform the following functions.

Icon	Action	Description
✎	**Edit**	To edit a job family's details, click this icon. If the job family is associated with a job profile, recruiting workflow, or performance workflow, the Company value cannot be changed and will be hard-coded in the form.
🔓	**Deactivate**	If the job family is active, it is available for the users to use in the system. To remove it from being used by end users, click this icon to deactivate it.
✖	**Delete**	If the job family has not been used in the system by either a job profile, a recruiting workflow, or a performance workflow, you can delete it completely. Otherwise, you cannot delete it.

Add a New Job Family

Follow these steps to create a new job family.

To create a new job family:

1. In the **Add a New Job Family** section of the Job Families screen, complete the following fields.
   - **Company**: Select a company from the drop-down list.
   - **Job Family Name**: Enter a name for the Job Family.
   - **Description**: Enter a description for the Job Family.
2. Click **Submit**.

Job Profiles

The Job Profiles screen houses all the full job descriptions.

These are used when creating a requisition, when associating performance appraisals, as a guide for advancement within an organization, and most importantly, to describe the role of an employee with that job title.

The requisition form is pre-populated with details from the Job Profile. Depending on the restrictions in the Recruiting Workflow and form field permissions, the creator of the requisition may have the ability to select alternate choices or overwrite the details in certain fields.

If you want to keep a user from modifying the data displayed in the requisition form, there is a **View Only** option for fields in the **Manage Form Fields**. This means that when the information from the Job Profile is displayed in that field, the user will not be able to edit it, only view it. This is a good way to keep your job description and requirements from being altered when requisitions are posted.

Display the Job Profiles Screen

Follow these steps to display the Job Profiles screen.

To display the Job Profiles screen:

1. Click ⚙ in the toolbar to display the Administration menu.
2. In the **Global Settings** » **Your Organization** section, click **Job Profiles**.

Contents of the Job Profiles Screen

The Job Profiles screen displays the following columns.

Columns

Column	Description
Company	This column displays the organizational entity tied to the Job Profile.
Job Title	This column displays the job title. To view the Job Profile's details, click the job title.
Job Code	This column displays the code given to the Job Profile.
Location Group	This column displays the location group tied to the Job Profile (if applicable).
Job Family	This column displays the job family tied to the Job Profile.
Employees	This column displays the number of employees in that job family. Click the number to view a listing of employees.
Hourly	This column indicates if the Job Profile is allowed to be displayed on the Hourly Portal.

Actions

The icons in the Actions column perform the following functions.

Icon	Action	Description
✎	**Edit**	To edit a Job Profile's details, click this icon.
⚙	**Manage Positions**	To view and create new positions for the Job, click this icon. The positions created here will be used when hiring an employee. See Managing Positions.
🔓	**Deactivate**	If the Job Profile is active, it appears to users in the system to utilize. To deactivate the Job Profile, which removes it from being used by end users, click this icon.

Icon	Action	Description
	**Delete**	If the Job Profile has not been used in the system yet, you can delete it completely. Otherwise, the ability to delete is disabled.

Create a Job Profile

Follow these steps to create a Job Profile.

To create a Job Profile:

1. On the Job Profiles screen, click **Create a Job Profile**.
2. Complete the fields on the form.
    - **Include in Hourly Portal**: If the Hourly Module is enabled, this option displays**.** If you select **Yes**, another field could display if there is more than one Hourly Portal. This field allows you to indicate on which Hourly Portal(s) the Job Profile should display.

      This populates the Quick Job Posting and Applicant Pipeline widgets as well as the job searching options that are exclusive to the Hourly Portal. This indicator also means that only requisitions created from these Job Profiles will be available for searching in the Hourly Portal and not visible in the corporate job searching options, and vice versa.
    - **Job Title**: Enter a job title.
    - Alternate Job Title: If you enter an alternate job title, it will be used throughout the applicant tracking system and displayed to job seekers. This could also be thought of as a “marketing” job title.
    - **Job Code**: Enter a job code, which is an abbreviation created by the organization for use in reports and in relation to open requisitions.
    - **Company**: Select the company from the drop-down list.
    - **Division**: Select a division from the drop-down list.
    - **Job Family**: Select a job family to which the job profile should belong.
    - **Job Classification**: Select a job classification from the drop-down list.
    - **Job Role**: Select a job role from the drop-down list.
    - **Key Job**: Select Yes if the job is important to the organization. This will prompt the system to automatically start a Succession Plan for it. This option will only display if you are using the Development module.
    - **Minimum Job Duration (Months)**: Enter the number of months an employee is expected to remain in this job position before advancing to the next position in his or her career path.

      This option will only display if you are using the Development module.
    - **Salary Grade**: Select the salary grade for the job.
    - **Job Description**: Enter a summary of the job in the **Job Description** text field.

- **Requirements**: Enter requirements for the job in the **Requirements** text field.
- **Education Required**: Select the educational attainment required for the job.
- **Job Category**: Select the job category from the drop-down list.
- **Career Level**: Select a career level from the drop-down list.
- **Job Grade**: Select the job grade for the position.
- **Job Type**: Select the job type.
- **Location Group/Region**: Select the location group or region.
- **Location**: Select the location for the job.
- **Cost Center**: Select the cost center for the job.
- **EEOC Job Category**: Select an EEOC Job Category, which is similar to **Job Category** options, but the content is determined by the EEOC.

  This option will only display if the EEOC feature is enabled.
- **EEOC Job Group**: Select an EEOC Job Group. Options are based on the job groups created by the EEOC to label a job profile.

  This option will only display if the EEOC feature is enabled.
- **Travel Required**: Select the percentage probability for travel.

3. If the Learning module is enabled for the application, you have the option to add a course to the Job Profile form.

   This course could describe training that is recommended prior to advancing to the position, or it could describe training that is recommended while an employee is in that position.
4. In the **Training Required** section, click .
5. In the Advanced Course Search window, specify values in the **with**, **without**, **Skills Gained**, and **Competencies** fields, and click **Search**.

   The window refreshes and displays courses that match the search criteria.
6. Click on the row for each course you want to add to a job profile.
7. In the **Current Selection** section, click if you want to remove a course.
8. Click **Confirm Selection**.

   The window closes and the name of the course displays below the **Training Required** section.

   > **Note:** Training information associated with a job profile will display in several areas within the application: Career Paths, Development Plans, and Total Talent Profile.
9. Job profiles can have skills that are required to be in that job position and skills that are gained by being in that job position.

   Both items are maintained in the **Skills** section.
10. Click **Skills** to expand the view of the section.

11. Click **Add Required Job Skills**. The page refreshes with a table populated with available skill categories and a numeric value indicating the number of skills within that category.
12. Click a skill category. A table displays the skills for that category and drop-down lists for selecting the skill level, skill usage, and when the skill was last used.
13. Select the check box for a skill name, and select an option from the **Skill Level**, **Skill Usage**, and **Skill Last Used** drop-down lists.
14. Click **Submit**. Each skill is displayed in a table of Job Skills Required.
15. To add skills from another skills category, repeat steps b–e.
16. To add the specific skills gained while in the job position, click **Add Gained Job Skills**. The page refreshes with a table populated with available skill categories and a numeric value indicating the number of skills within that category.
17. Click a skill category. A table displays the skills for that category.

    Note: There are no options to select skill level, skill usage, or when the skill was last used. This information will be modified later when the skills are added to the skills profile of an employee.

18. Select the check box for the skill name, and click **Submit**. Each skill is displayed in a table of Skills Gained.
19. To add skills from another skills category, repeat steps g–h.
20. To remove a skill from either the **Job Skills Required** or **Skills Gained** table, click on the row of the skill that you want to remove.
21. Similar to skills, job profiles can have competencies that are required to be in that job position and competencies that are gained by being in that job position.

    Both items are maintained in the **Competencies** section.
22. Click **Competencies** to expand the section.
23. Click **Add Required Job Competencies**. The page refreshes with a table populated with available competency categories and a numeric value indicating the number of competencies within that category.
24. Click a competency category. A table displays the competencies for that category and drop-down lists for selecting the minimum rating acceptable.

    Note: Ratings can be obtained through self-nomination of a competency as well as from a performance appraisal.

25. Select the check box for a **Competency Name**, and select a **Minimum Rating** option.
26. Click **Submit**. Each competency is displayed in a table of Job Competencies Required.
27. To add competencies from another competency category, repeat steps b–e.
28. To add the specific competencies gained while in the job position, click **Add Gained Job Competencies**. The page refreshes with a table populated with available competency categories and a numeric value indicating the number of skills within that category.
29. Click a competency category. A table displays the competencies for that category.

30. Select the check box for the competency name, and click **Submit**. Each skill is displayed in a table of Competencies Gained.

    > **Note:** There is no option to select a minimum rating value. This information is modified later when the competencies are added to the competencies profile of an employee.

31. To add skills from another competency category, repeat steps g–i.
32. To remove a competency from either the Job Competencies Required or Competencies Gained table, click ✖ on the row of the competency that you want to remove.
33. If your organization purchased assessments for pre-hire screening, the section to attach an assessment is displayed.

    The assessment options displayed are packages purchased from the assessment provider. Some providers allow for more than one assessment to be attached.

34. Select the initial assessment from the **Assessment Category** drop-down list.
35. In the **Additional Assessment(s)** drop-down list, select how many more are needed, if any.
36. Select the appropriate additional assessment from each drop-down list.

    > **Note:** When a user creates a requisition using the job profile, the assessments assigned will prepopulate the Assessments selections on the requisition form.

37. If your organization purchased background checks for pre-hire screening, you can select a provider from the **Background Check Provider** drop-down list.
38. You can also assign a screening questionnaire.

    When a user creates a requisition using the job profile, the questionnaire assigned will prepopulate the Screening Questionnaire selections on the requisition form.

    > **Note: Assessments**, **Background Check**, and **Screening Questionnaire** are only displayed if the Recruiting module is enabled and if those options are enabled.

39. Click **Save**.

Occupational Information Network (O*NET)

The Occupational Information Network (O*NET) is a free online database that contains hundreds of occupational definitions.

Deltek Talent Management has O*Net integrated into the application so that you can pull job descriptions to create a new job profile if desired. Using this interface, you have access to the Department of Labor's library of Job Titles and corresponding responsibilities and skills associated with each job title.

Create a Job Profile Using O*NET

Follow these steps to create a Job Profile using O*NET.

To create a job profile using O*NET:

1. On the Job Profiles page, click **More Options** » **O*NET Job Library**.
2. On the O*NET Job Library screen, enter keywords in the **Search Job Titles** field, and click **Search**.
3. The matching job titles are displayed.
4. In the Actions column, you can click to filter the results listing by that particular job code or job category.
5. Click the job title to view the details of the job as well as to use it to create the job profile.
6. The first portion of the screen displays the job details.
7. The job library provides an additional listing of job titles that typically match the job description and tasks list.

   You can select an existing job title. If none of the job titles match your needs, enter a job title in the **Or use your own job title** field.
8. Similar to creating a job profile, the other fields contain options to provide more details for your job profile.

   Complete the fields on the form.
9. The **Knowledge** and **Skills** section of the job profile form is specific to the O*NET job library.

   The two columns consist of the Department of Labor’s findings on what knowledge or skills (that is, competencies) are typically associated with the job title.
10. When you have completed all the required fields, click **Import O*NET Job Data**.
11. The new job profile is now displayed in the Job Profiles listing.

Bulk Upload Jobs

Follow these steps to bulk upload job profiles.

To upload job profiles:

1. On the Job Profiles page, click **More Options** » **Bulk Upload Jobs**.
2. Click the link to download the sample job template, and save the file on your computer.
3. The first row in the spreadsheet is the row that determines where your data belongs in the database.

   Enter the data in the spreadsheet. The listing below does not enumerate all of the fields in the sample template, just those that you need a little more detail on.

   - **include_job_in_hourly:** Even if the hourly portal is not configured for your application, you will need to put either a **0** or a **1** in this cell for each job profile you are uploading. A zero indicates an hourly portal is not applicable.

- **hourly_portal:** This cell must contain a value if the value under the include_job_in_hourly column for that row is **1**. The hourly portal name must match an existing hourly portal value in the system or an error occurs.
- **job_title:** This cell contains a brief description of the job, which is displayed to internal and external job seekers.
- **job_code:** This job code is an abbreviation created by the organization for use in reports and in relation to open requisitions.
- **job_type** This cell indicates whether the job is full-time, part-time, or internship.
- **org_level_id:** The company value must match an existing company name in your organizational structure or an error will occur. If the spelling is not exact, an error occurs.
- **job_family_id:** The job family value must match an existing job family for the company in the org_level_id cell or an error occurs. If the spelling is not exact, an error occurs.
- **key_job:** This cell is only required if the Development module is enabled for your organization. Values for this cell are either **0** for **No** or **1** for **Yes**.
- **job_duration:** This cell is only required if the Development module is enabled for your organization. Only numeric values are acceptable in this cell.
- **job_description:** This field describes the job duties and responsibilities for the job profile.

4. After you have completed the required fields, save the file on your computer.

> **Note:** You must save the file in the same CSV format in which you downloaded it. A TXT or XLS format will not upload correctly to the system.

5. Go back to the Bulk Upload Jobs screen, and click **Browse** to find the file you just saved.
6. Click **Submit**.

Managing Positions

A position is an instance of a job.

In the system, each employee will have a position within the company. When a new hire is made, the recruiting user will either select a position for him/her or the system will automatically generate a position for that person.

Display the Managing Positions Screen

Follow these steps to display the Managing Positions screen.

To display the Managing Positions screen:

On the Job Profiles screen, click ⚙ in the Actions column.

Contents of the Manage Positions Screen

The Manage Positions screen displays all employees currently in a position, indicates any open positions, and allows you to create new positions for a job profile.

Columns

Column	Description
Employee Name/Position Status	This column displays the name of the employee in that position. If the column displays **Open**, the position is vacant.
Location	This column displays the location of the employee.
Position Code	This column displays the code for the position.
Salary	This column displays the salary for that position.
Hire Date	This column displays the employee's hire date into that position.
Position Start Date	This column displays the employee's start date for that position.

Actions

The icons in the Actions column perform the following functions.

Icon	Action	Description
	Edit	To edit the position details for an employee, click this icon. Enter any changes in that row and then click the Save icon. To cancel and not save any changes, click the Cancel icon. If Core HR is licensed, the Edit icon does not display. Core HR Administrators cannot perform this action on this screen.
	Add Employee	To add an employee to an **Open** position, click this icon. If Core HR is licensed, the Add Employee icon does not display. Core HR Administrators cannot perform this action on this screen.
	Remove Position	To remove an **Open** position, click this icon.

Create a Position for a Job Profile

Follow these steps to create a position for a Job Profile.

To add a new position for a Job Profile:

1. Complete the fields under the Add New Position section.

- **Location**: Select a location from the drop-down list.
- **Position Code**: Enter a position code. This number must be unique.

2. If you are using the Development module, the **Key Position** check box displays. Select this option to indicate that the position is key to your organization.
3. Click **Add**.
   The new Position appears in the listing.
4. To delete the new position, click .

Assign an Employee to the New Position

Follow these steps to assign an employee to a new position.

To assign an existing employee to the position that you created:

1. Click .
2. On the Users screen, use the search options to find the employee.

   > **Attention:** See **Users** for more information.

3. After locating the employee, click in the Actions column.
4. On the Create/Change User Position window, enter details about the employee's entry in the new position, and click **Continue**.

   > **Note:** To add the skills from the Job Profile to the employee's skills profile, select the **Transfer Job Skills** option. The next screen will allow you to select the **Skill Level**, **Skill Usage**, and **Skill Last Used** options for any skill that is associated with the job profile.

5. The employee is now assigned to the position.

Location Groups

A location group is used to identify a set of locations for quicker association when creating a recruiting or performance workflow.

Use the Location Groups screen to create and manage location groups.

Display Location Groups

Follow these steps to display the Location Groups screen.

To display the Location Groups screen:

1. Click in the toolbar to display the Administration menu.
2. In the **Global Settings** » **Your Organization** section, click **Location Groups**.

Contents of the Location Groups Screen

The Location Groups screen displays the following columns.

Columns

Column	Description
Company Name	This column displays the organizational entity tied to a location.
Location Group	This column displays the location group to which a location belongs (if applicable).
Location Group Code	This column displays the code of the location group (if applicable).
# of Locations	This column shows a count of the locations included in the group. To view the locations, click the number.
Country	This column displays the country of the location.

Actions

The icons in the Actions column perform the following functions.

Icon	Action	Description
	**Edit**	To edit a location groups' details, click this icon.
	**Delete**	To delete a location group, click this icon. If the location group has not been used in the system, you can delete it completely; otherwise, you cannot delete it.

Add a Location Group

Follow these steps to add a Location Group.

To create a new Location Group:

1. In the **Add a Location Group** section of the Location Groups screen, complete the following fields.
   - **Location Group**: Enter a name for the location group. Each name must be unique.
   - **Location Group Code**: Enter a code for the location group.
   - **Company Name**: Select the company name.
   - **Country**: Select the country. Only one country can be affiliated with a location group.
2. Click **Submit**.

   > **Note:** You can only add a location to an existing location group by editing that location and selecting the location group to which it should belong.

Locations

Use the Locations screen to create and manage the locations of your organization.

The Locations Management screen displays all the locations created for your organization. Locations are used throughout the system for indicating the physical or virtual location of a requisition, a position, a building, a class, or a company.

Display the Locations Management Screen

Follow these steps to display the Locations Management screen.

To display the Locations Management screen:

1. Click in the toolbar to display the Administration menu.
2. In the **Global Settings** » **Your Organization** section, click **Locations**.

Contents of the Locations Management Screen

The Locations Management screen displays the following columns.

Columns

Column	Description
Company Name	This column displays the organizational entity tied to the location.
Location Name	This column displays the name of the location. To view the details of the location, click its name.
Location Code	This column displays the location's code.
Location Group	This column displays the location group to which the location belongs (if applicable).
Location Group Code	This column displays the code of the location group to which the location belongs (if applicable).
Location City	This column displays the city of the location.
ST/PR	This column displays the state/province of the location.
Country	This column displays the country of the location.
Time Zone	This column displays the time zone set for that location.
Currency	This column displays the monetary currency value set for that location.
# of Employees	This column displays a count of the employees in that location. To view a listing of the employees, click the number.

Actions

Click the icons in the Actions column to perform the following functions.

Icon	Action	Description
✎	**Edit**	To edit a location's details, click this icon.
🔓	**Deactivate**	If the location is active, this icon appears to users in the system to utilize. To deactivate a location, which removes it from being selected by end users, click this icon.
✖	**Delete**	To delete a location, click this icon. If the location has not been used in the system yet, you can delete it completely. Otherwise, the ability to delete is disabled.

Types of Locations

You can create two types of locations:

- **Physical**: A physical location has an address with a street name, a city, and so on.
- **Remote (Virtual)**: A remote (virtual) location provides a means for an organization to account for those employees who telecommute or do not have a company physical location close to their residence.

Create a Physical Location

A physical location has an address with a street name, a city, and so on.

To create a physical location:

1. On the Locations Management screen, click **Add New Location**.
2. Select the **Physical** option.
   If you have the **Hourly Module** enabled, a secondary choice will display.
3. If the location is a retail outlet/store, select **Yes**. This option controls some fields on the next page.
4. Click **Continue**.
5. Complete the fields on the form.
   - **Location Name**: Enter the location name.
   - **Location Code**: Enter a code for the location.
   - **Location Group**: If you are using Location Groups, select which group this one belongs to.
   - **Company Name**: Select a company name.
   - **Country**: Select the country from the list provided.
   - **Time Zone**: Select the appropriate time zone.

- **Currency**: Select the monetary currency from the drop-down list.
- **Address One**: Enter an address for the location.
- **Address Two**: Enter a second address (if applicable).
- **Address Three**: Enter a third address (if applicable).
- **City**: Enter the city of the location.
- **ST/PR**: Select the state or province of the location from the drop-down list.
- **Zip Code/Postal Code**: Enter the zip/postal code of the location.
- **Phone Number**: Enter a phone number for the location.
- **Fax Number**: Enter a fax number for the location.
- **Default Recruiter for this Location**: This field allows you to set a default recruiter for any requisitions created for that location. This setting does not prevent the individual creating the requisition from assigning the requisition to a different recruiter. It simply means that when a user creates a requisition and selects this location, the select box for **Recruiter Assigned** will automatically default to display the name of the recruiter assigned here.

  If the location is an outlet/store, this field is marked as required.

  Clicking the link to select a default recruiter opens the Select from Recruiter Group window. You can search by employee name, find those individuals under a specific manager, or display all available users, but the system will only display those employees who are in the Recruiter group.
- **Select a corresponding location on Monster**: If you want to cross-post any jobs to Monster, Deltek recommends that you select a corresponding location on Monster from the drop-down list provided. This listing displays locations as defined on Monster's Web site. Selecting a location ensures that the job is cross-posted to the desired location on their site.

6. Click **Save**.

Create a Remote (Virtual) Location

A remote (virtual) location provides a means for an organization to account for those employees who telecommute or do not have a company physical location close to their residence.

To create a remote (virtual) location:

1. On the Locations Management screen, click **Add New Location**.
2. Select the **Remote (Virtual)** option, and click **Continue**.
3. Complete the fields on the form.
   - **Location Name**: The location name is automatically created by the system.
   - **Location Code**: Enter the location’s code.
   - **Company Name**: Select a company name from the drop-down list.
   - **Country**: Select the country from the list provided.

- **Currency**: Select the monetary currency from the drop-down list.

4. Click **Save**.

> **Tip:** There can only be one remote location per country for a company. However, if an organization has more than one company (that is, first tier in the organizational structure) in a country, a remote location can be created for each first level in the company hierarchy.

Bulk Upload Locations

Follow these steps to upload locations in bulk.

To upload your locations:

1. On the Locations Management screen, click **Bulk Upload Locations**.
2. On the Locations screen, click the link to download the sample locations template and save the file on your computer.
3. The first row in the spreadsheet is the row that determines where your data belongs in the database.

   Enter the data in the spreadsheet. The listing below does not enumerate all of the fields in the sample template, just those that you need a little more detail on.

   - **location_name**: This name must be unique and cannot already exist in the system.
   - **company**: The company value must exactly match an existing company name in your organizational structure.
   - **country_abbreviation**: The abbreviation used must exactly match an abbreviation in the system. For example, USA will result in an error if US is the abbreviation used by the system.
   - **location_group**: This is not a required field, but if it is completed, the value in the cell must exactly match an existing Location Group name in the system.
   - **location_business_partner_email**: While this is not a required field, this is the field that allows the administrator to designate a default recruiter for the location being uploaded. The email address in this cell must exactly match an existing user in the system so the recruiting user can be assigned. If there is no match in the system, an error will occur.
4. After you have completed the required fields, save the file on your computer.

   > **Note:** You must save the file in the same CSV format in which you downloaded the file. A TXT or XLS format will not upload correctly to our system.
5. Go back to the screen in the system, and click **Browse** to find the file you just saved.
6. Click **Upload**.

Organizational Structure

Use the Organizational Structure screen to enter your organization's divisions, departments, or business units, and any other groups that make up your company's infrastructure.

The departments and divisions created here are used throughout the system. The content is tied to various data points in the Core application as well as the different modules such as requisitions (Recruiting), classes (Learning), career paths (Development), appraisals (Performance), and so on.

Display the Organizational Structure Screen

Follow these steps to display the Organizational Structure screen.

To display the Organizational Structure screen:

1. Click in the toolbar to display the Administration menu.
2. In the **Global Settings** » **Your Organization** section, click **Organizational Structure**.
   Most often, the organizational structure is broken down into a company, its divisions/ subdivisions, and then departments within each. However, this is very flexible and you can use it how it best fits your business model and process.

View Structure Levels

The top level of the structure is referred to as the Parent. If a sub-level is displayed with this expand icon, that sub-level has levels underneath it.

To view all of the levels underneath a parent:

Click to expand the structure.

Organization Level

The new level will have action icons to edit, add users to the level, deactivate, and delete.

You will notice that some of these options become disabled at some point. This is because data has been attached to them. You would not be able to delete/disable an organizational level until all the data tied to it has been reassigned to another one.

A level that is disabled will not display in the system for the end user to select; however, it will remain displayed in the organizational structure table.

Add an Organizational Level

Follow these steps to add an organizational level.

To create a new organizational level:

1. On the Organizational Structure screen, click **Add a New Level**.

2. Take one of the following actions:
   - If you are creating a Parent (top level), do not select anything in the **Parent** drop-down list.
   - If you are creating a unit that should be within the Parent or another level, select the appropriate unit from the **Parent** drop-down list and any subsequent drop-down lists until you find the level you want to add to.
3. Enter a **Name** for the level.

   > **Note:** The system allows divisions with duplicate names in different Parent levels but does not permit duplicate levels within the same Parent.

4. If you use an **Organizational Code**, enter it.

   It will display in parentheses next to the name in the organizational structure tree.
5. Click **Save**.

Bulk Upload Structure

Follow these steps to upload organization structures in bulk.

To upload your organizational structure:

1. On the Organizational Structure screen, click **Bulk Upload Structure**.
2. Click the link to download the sample company structure template and save the file on your computer.
3. Open the sample file.

   The first row in the spreadsheet is the row that determines where your data belongs in the database. Enter the data in the spreadsheet.
   - **org_level_parent_name:** This name must exactly match an existing parent level name in your organizational structure.
   - **org_level_name**: This field contains the name of the division level you are adding. You can have more than one division level with the same name; however, the org_level_name and org_level_parent_name combination must be unique.
   - **org_level_code**: This field contains the code for the level you are adding.
4. After you have completed the required fields, save the file on your computer.

   > **Note:** You must save the file in the same CSV format in which you downloaded the file. A TXT or XLS format will not upload correctly to our system.

5. Go back to the screen in the system, and click **Browse** to find the file you just saved.
6. Click **Submit** to upload the organizational structure.

Add Employees to Organizational Level

You can associate employees to an organization via the Organizational Structure.

To add an employee directly to an organizational level:

1. On the Organizational Structure screen, navigate the structure until you reach the level that you want to add a user, and click .

   The next screen displays the functionality to add users to the named division as well as a listing of any employees currently assigned to that unit.
2. Click **Add Users**.

   This will open a pop-up window to search for employees.
3. On the Search for Employees window, search for the employee(s) to add.

   After searching, the Results section of the window displays those employees who matched the search criteria.
4. To select an employee, either click the icon to **Add** or select the check box beside each person and click **Add All Selected**.
5. The names are added to the **Current Selection** table with a delete icon in case you want to remove someone from the list.

   If needed, you can remove all employees from the table by clicking **Clear**.
6. When finished with your employee selection, click **Confirm Selection**.

   The Search for Employees window closes and the selected employees are inserted into the organizational structure.
7. Click **Update** to save your changes.

Scales

Use the Scales screen to customize the methods for measuring competency experience of an employee or for rating an employee's performance on an appraisal.

Display the Scales Screen

Follow these steps to display the Scales screen.

To display the Scales screen:

1. Click in the toolbar to display the Administration menu.
2. In the **Global Settings** » **Your Organization** section, click **Scales**.

Contents of the Scales Screen

The Scales screen displays the following columns.

Columns

Column	Description
Scale Name	This column displays the name of the scale. Click the name to view its details.
Appraisal Count	This column indicates the number of appraisals using that scale and how many performance workflows are associated with the scale. This column will only display if the Performance module is enabled. The ability to select a default scale for the Development module is available only if that module is enabled.

Actions

The icons in the Actions column perform the following functions.

Displayed below the scale settings is the table populated with the rating values including the rating name, the value range for that rating, a description of the rating, and whether or not a comment is required if an employee is given that rating.

Icon	Action	Description
	Edit	Click this icon to edit the scale's details using a wizard. ▪ On the Settings page of the wizard, you cannot alter the scale type or any of the scale increment values if the scale is the Overall Scale. ▪ On the Values page, you can revise the name of the rating, its description, and the range value. The choices for requiring comments or for deleting the value from the scale cannot be edited if the scale is the Overall Scale.
	Make Scale the Overall System Scale	Click this icon to select the scale as the overall system scale for the organization. The icon changes to , indicating that it is set as the overall system scale. ▪ Selecting a scale as the overall system scale means that the scale is used throughout the application whenever a scale is necessary, unless another scale has been selected (that is, workflow associations). ▪ The application can only have one overall system scale. If you select a different scale to be the overall system scale, the icon on the previous system scale changes back to .

Icon	Action	Description
	Make Scale the CDSP Overall Scale	If the Development module is enabled, click this icon to select the Overall Development Scale as the default. The icon changes to , indicating that it is set as the overall development scale. Similar to the Overall System Scale, there can be only one overall development scale. If you select a different scale to be the overall development scale, the icon on the previous development scale changes back to .
	Delete	Click this icon to delete the scale. If the scale is currently in use (that is, set as the overall scale associated with a performance workflow or appraisal), you cannot delete it.

Create a New Scale

To add a new scale for rating an employee's performance, click **Create a New Scale** on the Scales screen.

Complete the following steps in the Create Scale wizard:

- Step 1: Settings
- Step 2: Values
- Step 3: Review

Step 1: Settings

This step allows you to specify the settings for the scale.

For this step:

1. Enter a name for the scale.
   Duplicate names are not permitted.
2. From the **Scale Type** drop-down field, select one of the following options:
   - **Radio Button**: This scale displays a group of radio buttons ranging from the top limit of the scale to the bottom limit. An individual chooses a score by selecting the appropriate radio button.
   - **Slider Scale**: This scale displays a bar with a bottom limit of the scale located on the left side of the bar and the top limit of the scale located on the right. An individual chooses a score by either sliding the marker along the bar to a point value or clicking a plus or a minus sign until the rate is appropriate.
3. Enter values for the following fields:
   - **Scale Increment**: This is the value indicating the degree of change in the scale as it progresses from the lowest point to the highest limit.

> **Note:** Radio scales must increment using whole numbers (for example, 1, 3, 6); slider scales can have an increment carried to a decimal number (for example, 2.5, 3.6, 6.9).

- **Scale Upper Limit:** This is the highest point or value on the scale and the best score.
- **Scale Lower Limit:** This is the lowest value available on the scale and the worst score.

4. Select the **Include the N/A Option** check box to allow the user to select **N/A** as a score and omit the item from the scoring calculation.
5. In the **Display Options** section, indicate the information that is visible to the employee, the manager, and an appraiser who is not the employee or manager.

   The three options include:

   - **Numeric:** This option displays only the numeric value for the rating on the scale (for example, 4).
   - **Text**: This option displays only the textual name of the scale rating (for example, Meets Expectations).
   - **Both:** This option displays both the numeric value and the textual name of the scale rating (for example, 4 – Meets Expectations).
6. Click **Next**.

Step 2: Values

This step allows you to enter and edit the values of the scale.

The Rating Name field displays the value by default. The Scale Value Range field is automatically configured by the system based on the values added in Settings for increment, high limit, and low limit.

For this step:

1. In the **Rating Description** field, enter a description for the rating.
2. Select the **Comment Required** check box to indicate that a comment is required for that rating value if that rating value is selected in an appraisal.
3. The **Delete** check box is only applicable for a Slider type scale.

   Select this option if you do not want the value to be displayed on the sliding scale. This option is useful if your organization wants to use a wide range, but not necessarily show each value on the scale.
4. After completing the fields for Values, click **Next**.

Step 3: Review

This screen displays all the details for the new scale.

For this step:

1. Review the details you entered in the **Settings** and **Values** sections.
2. In the Values section of the review, there is a working example of the scale type. If you selected the slider type, a bar displays with a marker which can move up and down by using the mouse. If you selected the radio type, the **Your Rating** area has radio buttons for each rating value and displays the rating name next to each value.
3. Next to each section label, click to edit any choices made.
4. If the scale information is correct, click **Finish**.

   The new scale is added to the table populated with previously created scales. The appraisal count and workflow count both display **0**.

Overall Scale Warning

When more than one scale is created and one of the scales has been indicated as the Overall Scale, a warning will display beneath the scale that may have reporting issues.

This warning indicates that if items assigned to be rated by this scale are compared to items ranked by the overall scale, there is not a one-to-one correlation and the comparison may be affected. For example, if one scale has an upper limit of five (5) and another scale has an upper limit of three (3), there is no means of correctly comparing an appraisal using the five-point scale and an appraisal using the three-point scale. When the system calculates these scores to determine an employee's potential, the result may be skewed.

How Scales Rate an Appraisal

When an appraisal is created, weights are assigned to specific competency areas.

After the appraiser submits the scores, the scores are multiplied by the competency weight. The final score awarded for the appraisal is the result of the scores submitted by the appraiser and the performance workflow weight distribution.

For example, an employee is using a performance workflow with a 10-point scale and has a Core Competency weighted at 75% and a Job Skill weighted at 25%. The employee's Self-Appraisal is weighted at 25% and the manager's appraisal is weighted at 75%. The overall score is calculated as follows.

Skills

Skills are proficiencies that are learned or developed through training or experience. Skills differ from competencies in that skills do not include behaviors or innate abilities. They help match the appropriate candidate to positions within the organization, provide a basis for appraisal ratings, and can be earned through classes or project teams.

Display the Skills Screen

Follow these steps to display the Skills screen.

To display the Skills screen:

1. Click in the toolbar to display the Administration menu.
2. In the **Global Settings** » **Your Organization** section, click **Skills**.

Contents of the Skills Screen

Upon entering the page for managing skills, the administrator sees the skill categories and skills that were suggested by employees to include in the current list.

Actions

Action	Description
Approve	Click this action to approve a suggestion. Doing so will immediately add it to the listing for users to select from.
Reject	Click this action to reject a suggestion.

Manage Skill Categories

The Manage Skill Categories screen displays all the skill categories.

You can use this screen to view the skill category and the skills within a category, and also to edit the skill category name.

Display the Manage Skill Categories Screen

Follow these steps to display the Manage Skills Categories screen.

To display the Manage Skill Categories screen:

On the Skills screen, click **Manage Skill Categories**.

Contents of the Manage Skill Categories Screen

The Manage Skill Categories screen lists all the main skill categories in a table with the following columns.

Columns

Column	Description
Skill Category	This column displays the name of the skill category.
Skills	This column displays the number of skills in that category. Click the number to view the individual skills.

Actions

Click the icon in the Actions column to perform the following functions.

Icon	Action	Description
✎	**Edit**	To edit the skill category name, click this icon.

Create a New Skill Category

Follow these steps to create a new skill category.

To create a new skill category:

1. In the **New Skill Category** field, enter a name for the skill category.
   Duplicate names are not permitted.
2. Click **Save**.
3. To add skills to the new category, click the number in the Skills column.
4. In the **New Skill** field, enter a name for the skill.
5. Click **Save**.

Manage Skills

The Manage Skills screen lists all of the skills.

You can use this screen to edit, deactivate, or delete a skill.

Display the Manage Skills Screen

Follow these steps to display the Manage Skills screen.

To display the Manage Skills screen:

On the Skills screen, click **Manage Skills**.

Contents of the Manage Skills Screen

The Manage Skills screen lists all of the skills in a table with the following column.

Columns

Column	Description
Skill Name	This column displays the name of the skill.

Actions

The icon in the Actions column perform the following functions.

Icon	Action	Description
	Edit	To edit the skill name, click this icon.
	Deactivate	If the skill is active the icon displays and the skill is available throughout Deltek Talent Management. To remove it from being used by end users, click this icon to deactivate it and display this icon.
	Delete	Click this icon to delete the skill. If the skill is currently in use anywhere Deltek Talent Management, you cannot delete it.

View Skills in a Specific Category

You can select a specific category and display the skills for that category.

To view the skills in a specific category:

Select the category from the **Select Skill Category** drop-down field.

Create a New Skill

Follow these steps to create a new skill.

To create a new skill:

1. From the **Select Skill Category** drop-down field, select a category.
2. In the **New Skill** field, enter a name for the skill. Duplicate names are not permitted.
3. Click **Save**.

Users

The Users screen lists all the employees of the company who have access to the system.

Display the Users Screen

Follow these steps to view the Users screen.

To display the Users Screen.

1. Click the in the toolbar to display the Administration menu.
2. In the **Global Settings** » **Your Organization**, click **Users**.

Search for Specific Users

To search for a specific user or group of users, enter all or part of the name in the **Search Users** field, or select a group from the **Show Only This Group** list.

Use the **Filter by Location** drop-down field to display only users in that location. **Show only Active users** is selected by default. To view users that have been deactivated, clear this check box.

Contents of the Users Screen

The Users screen displays the following columns.

Columns

Column	Description
Groups	This column indicates in what Group(s) the employee is a member. The Group affiliation determines the employee's level of access and what functionality is available. Click a group in the column to see all the Groups to which the employee belongs.
Name	This column displays the name of the employee, which is linked to the employee's Total Talent Profile.
Company/Division	This column indicates the organizational unit to which the user is tied.
Job Title	This column displays the employee's current job title.
Manager	This column displays the employee's current manager.
Last Login	This column displays the last time the employee logged into the system.

Actions

The icons in the Actions column perform the following functions.

Icon	Action	Description
	Deactivate an employee	Click this icon to deactivate this user. The icon changes to , indicating the user is no longer active. Deactivating an employee is not the same as off-boarding. When a user is deactivated, they will no longer have access to the system, no longer display in lists when selecting an employee, and will have a message indicating they are deactivated if the employee is enrolled in a class, part of a succession plan, or a member of a project team.
	Off-board an employee	Click this icon to terminate the employee from the system using the Off-Boarding wizard. Employees can be off-boarded in bulk using the **Bulk Actions** at the bottom of the listing. See Off-Board an Employee. If Core HR is licensed, Core HR administrators do not have access to these functions. Off-board a user on the Termination Information section of the Employment Details tab of the Total Talent Profile.
	Edit	Click this icon to launch the Edit User Profile screen and edit the user's information as well as reset their password.
	E-mail	To send the user an email, click this icon.

Bulk Action Options on the Users Screen

Below the listing of users are several bulk actions.

Action	Description
Send a Letter	Use this option to send a letter to multiple users.
Activate Selected Users	This option activates all selected users.
Deactivate Selected Users	This option deactivates all selected users.
Off-Board Selected Users	To terminate multiple users at once, use this option. Follow the process defined in the Off-Board an Employee section. The options selected in the wizard apply to all the selected users. The field for the email address to be used as the new login is disabled and displays **Original on File** since the function is for multiple users and one email address cannot be submitted for more than one individual.

Action	Description
Assign HR Business Partner	This action provides the option to assign an HR Business Partner to multiple employees at once.

Send a Letter

Follow these steps to send a letter to multiple users.

To send a letter to multiple users:

1. In the **Bulk Actions** drop-down field, select **Send a Letter**.
2. Select the letter from the listing. (These are pulled from the Letter Templates library.)
   You have the option to view or edit its content.
3. Select the **Request Return Receipt** check box to receive a notification when the recipient has opened the email.
4. After selecting a letter template, click **Submit** to send it.

Add New User

Follow these steps to add a new user.

To add a new employee:

1. On the Users screen, click **Add a User**.
2. A form displays containing several sections to set user access levels and to collect user information, job title, location, status, organizational entity, manager, and other related fields.
3. Complete the fields on the form. The following details specific sections, fields, and options of the form that require more explanation. Note that the following effective dated fields are not visible to Core HR Administrators (Organizational Unit, Location, Hire Date, Manager, and Job Title).

   > **Note:** Many of the fields displayed in the form are selected through **Page Options**. See **Account Creation Form Management**.

   - **User Access Levels**: This section is where you select group associations for the new user. Group affiliation determines the areas to which a user has access and what functionality is available for the individual to use.

     At least one group must be selected for a user, but the user can be associated with more than one group. Only those modules enabled by your organization will display.

     Cross Module Groups: Those listed in this group are available regardless of which modules are enabled. Every employee should be in the **Employee** group regardless of which other Groups they are in (for example, **Manager** or **Recruiter**).

     Recruiting Groups: These groups have various levels of access to the recruiting module.

Performance Groups: These groups have various levels of access to appraisals and performance functionality. Managers automatically have access to complete performance appraisals for their direct reports.

Development Groups: The Executive group has access to Succession Planning functionality.

Learning Groups: These groups have various levels of access to learning management functionality.

- **Manager**: To assign a manager to an employee, click **Search for Manager**. Clicking the button opens the Search for Manager window. The individual selected as a manager is automatically added to the Manager user group.
- **Job Title**: To place the employee into a job, click **Select Job**. Clicking the link opens the Select Job window that you can use to search for a job title. First, search for a job, and then complete the form displayed. When a position is created through the user's profile, the position is added to that Job Profile. See **Managing Positions**.
- **Skipping a User in an Approval Chain**: If you are using Approval Chains and there are employees who should **not** be included in the approval process, select the **Skipping a User in an Approval Chain** option for those employees.

  If the user is included in an approval chain (due to reporting structure or job title), the Approval Chain will bypass the user and continue with the next approver in the list. If the user is the last approver in the chain or the only approver selected, the approval process is marked as completed in the application. The user will be marked as **(Skipped)** when this scenario occurs.
- **Copy Personal Templates & Notes**: This option allows you to copy personal templates (for example, requisitions and letter templates) and notes from the internal user with other users. Clicking **Search for Recipients** opens the Search for Recipients window that you can use to search for employees.

  Upon submitting the form, the personal templates and notes are copied to the appropriate areas in the application. Since the templates and notes are copied and not shared, if the originator of the personal templates changes any of the documentation, the recipients will not receive an updated copy. This provides the recipient with the ability to personalize the templates and notes for their own use.
- **Location Responsibility**: This section is where you select the locations for which the employee is responsible. When this option is used, the employee will only be able to access the selected locations when creating a requisition. This section will only display if the Recruiting module is enabled.

4. Click **Submit**.

   After the form is submitted, the application will run a duplication check to verify that there is not an existing account found. If no duplicate is found, the new user is sent a notification containing login details.

Sections in the Edit User Profile Screen

When you click to edit a user's record, two additional sections display:

- **Activity Information**: This provides a simple view of when the user last accessed the application, whether the internal user is deactivated or locked out of the system, and whether or not the user is terminated.
- **Performance Participants:** This section displays if the Performance module is enabled.
  - **Matrix Manager:** Those selected for this group are given manager-level access to the employee's appraisals and automatically added to the Matrix Manager Group. Matrix Managers can score appraisals and view those notes or journal entries meant for managers.
  - **Peer Appraiser:** Those selected for this group score appraisals of the employee, but they can only view their own notes, ratings, and any public notes added to the appraisal.
  - **Approver:** Those selected as an approver can only view the scores and notes after the completion of the appraisal's Assessment phase.

    > **Note:** Typically these are Human Resources personnel assigned to verify the appraisal is completed correctly.

Bulk Upload Users

Follow these steps to upload users in bulk.

To upload users (employees):

1. On the Users screen, click **Upload User File**.
2. Click the link to download the sample user file to your computer.

   > **Note:** If your company has licensed Core HR, a number of additional fields, such as soc_code, are included in the sample file. Customers not licensed for Core HR will have access to a sample file (.csv) that contains all but the Core HR specific fields.

3. Open the file, and enter the user data.
   Be mindful of the following information:
   - The CSV will create, as well as update, users.
   - If you are creating new users, there are required fields in the file. If you are missing required fields, you will receive an error message and the row will not be added.
   - If you are updating users, only include the fields/columns that you are updating (do not include blank columns to avoid inadvertently deleting existing data). If you are missing required fields, you will receive an error message and the row will not be updated.

- The best practice is to populate the CSV upload file with your top-level employees (that is, managers with direct reports) first to ensure that managers can be assigned to employees. Managers need to be in the system before they can be assigned to the employees as their manager. If the file cannot be populated in this sequence, you may need to upload the file multiple times to assign managers to employees. .
- The file upload limit is maximum of 100 employees at a time.

The first row in the spreadsheet is the row that determines where your data belongs in the database. The following list provides more details on some of the fields in the sample template:

- **user_login**: Each user in the system requires a unique login. This field cannot contain an @ symbol.
- **user_firstname**: First names can contain hyphens, accents, and can be two words (for example, **Mary Jane**). If you receive an error when attempting to upload a user with a special character in the first name, contact your Client Services Account Manager.
- **user_lastname**: Last names can contain hyphens, accents, and can be two words (for example, **Hyde White**). If you receive an error when attempting to upload a user with a special character in the last name, contact your Client Services Account Manager.
- **user_email**: Each user in the system requires a unique email address.
- **user_state**: This is not a required field, but if it is completed, the value in the cell must match an existing state value for the country specified in the user_country field. If the spelling is not exact, an error occurs.
- **user_country**: This is not a required field, but if it is completed, the value in the cell must match an existing country abbreviation as defined by an administrator in the Countries Drop Down & Multi Select List (**Admininstration** » **Global Settings** » **System Administration** » **Drop-down and Multi-Select Lists** » **Countries**). If the spelling is not exact, an error occurs.
- **user_location**: This is not a required field, but if it is completed, the value in the cell must match an existing location name as defined by an administrator in the Locations screen (**Admininstration** » **Global Settings** » **Your Organization** » **Locations**) or an error will occur. If the spelling is not exact, an error occurs.
- **user_status**: This is not a required field, but if it is completed, the value in the cell must match an existing user status (for example, **Exempt**, **Non-Exempt**) in the system or an error occurs. If the spelling is not exact, an error occurs.
- **user_org_level:** The company value must match an existing company or division level name in your organizational structure or an error occurs. Values are defined by an administrator on the Organizational Structure screen (**Admininstration** » **Global Settings** » **Your Organization** » **Organizational Structure**). If the spelling is not exact, an error occurs.
- **job_code**: This file corresponds to an employee's job title. This is not a required field, but if it is completed, the value in the cell must match an existing job code (job title) defined by an administrator in the Job Profile (**Admininstration** » **Global Settings** »

Your Organization » **Job Profile**) or an error occurs. If the spelling is not exact, an error occurs.

- **user_group**: This cell contains the group affiliations to which the internal user must be added. The group name must match an existing group name established by an administrator on the Groups screen (**Admininstration** » **Global Settings** » **System Administration** » **Groups**) or an error occurs. To add the user to more than one group, enter the pipe symbol (**|**) between each group name (no spaces before or after). If the spelling is not exact, an error occurs.
- **marital_status**: Core HR licensed users only. This cell must match one of the pre-defined values established in the code: Unmarried, Married, Divorced, Separated, Widowed or Unknown.
- **primary_contact_relationship**: Core HR licensed users only. This cell contains the relationship of the primary contact to the employee. The value in this field must match one of the values pre-defined by an administrator in the Relationship Drop Down & Multi Select List (**Admininstration** » **Global Settings** » **System Administration** » **Drop-down and Multi-Select Lists** » **Relationship**). Values are pre-defined by an administrator.
- **secondary_contact_relationship**: Core HR licensed users only. This cell contains the relationship of the secondary contact to the employee. The value in this field must match one of the values pre-defined by an administrator in the Relationship Drop Down & Multi Select List (**Admininstration** » **Global Settings** » **System Administration** » **Drop-down and Multi-Select Lists** » **Relationship**).
- **veteran_type**: Core HR licensed users only. This cell contains a value such as Disabled Veteran. The value in this field must match one of the values pre-defined by an administrator in the Veteran list defined in the Diversity Data Collection. **Admininstration** » **Recruiting** » **Configuration** » **Diversity Data Collection**.
- **job_level**: Core HR licensed users only. This cell contains a value indicating the type of job, such as Entry Level. The value in this field must match one of the values pre-defined by an administrator in the Career Levels Drop Down & Multi Select List (**Admininstration** » **Global Settings** » **System Administration** » **Drop-down and Multi-Select Lists** » **Career Levels**).
- **soc_code**: Core HR licensed users only. This cell contains the employee's Standard Occupational Classification code. The value in this field must match one of the pre-defined values in the SOC Job Code Drop Down & Multi Select List (**Admininstration** » **Global Settings** » **System Administration** » **Drop-down and Multi-Select Lists** » **SOC Job Code**).
- **annual_rate**: Core HR licensed users only. This cell must match the employee's annual rate of pay.
- **annual_rate_type**: Core HR licensed users only. This cell must match one of the pre-defined values set by an administrator in the Job Classifications Drop Down & Multi Select List. (**Admininstration** » **Global Settings** » **System Administration** » **Drop-down and Multi-Select Lists** » **Job Classifications**).
- **pay_frequency**: Core HR licensed users only. This cell must match one of the pre-defined values set by an administrator in the Pay Frequency Drop Down & Multi

Select List (**Admininstration** » **Global Settings** » **System Administration** » **Drop-down and Multi-Select Lists** » **Pay Frequency**).

- **work_schedule**: Core HR licensed users only. This cell must match one of the pre-defined values for work schedule, such as **Full Time** or **Part Time**.
- **change_reason**: Though this field is specific to Core HR, if your company does not have a Core HR license, a default value (Employee Import) is entered in this field and the value is not saved upon import. For Core HR users, this field contains the reason for a change to an existing job, and the value in this field must match one of the pre-defined values in the Job Change Reason Drop Down & Multi Select List (**Admininstration** » **Global Settings** » **System Administration** » **Drop-down and Multi-Select Lists** » **Job Change Reason**). Values are pre-defined by an administrator.
- **effective_date**: Though this field is specific to Core HR, if your company does not have a Core HR license, a default value (the date of the import) is entered in this field and the value is not saved upon import. Core HR licensed users only should enter the effective date for the change.

4. After you completed the required fields, save the file on your computer.

> **Note:** You must save the file in the same CSV format in which you downloaded the file. A TXT or XLS format will not upload correctly to our system.

5. Go back to the screen in the system, and click **Browse** to find the file you just saved.
6. Click **Upload File**.

Off-Board an Employee

Follow these steps to off-board an employee.

If the Core HR module is licensed, Core HR Administrators do not have access to the Off-board fields on the Users screen. Instead, off-board employees on the Termination Information section on the Employment Details tab of an employee's Total Talent Profile.

> **Note:** Before you off-board a manager, you need to reassign his or her direct reports to a different manager.

To off-board an employee:

1. On the Users screen, locate the name of the employee, and click in the Actions column.
2. **Step 1: User Separation**.

   Complete the following fields.

Option	Description
Last Working Day	This is the date the employee last reported for work. It is used in tandem with the **Separation Date** field. However, the **Separation**

Option	Description
	Date field must contain a date that falls on or after the value entered in the **Last Working Day** field.
Separation Date	**Separation Date**: This is the date that the system will terminate the employee. If you set this to a future date, then the system will execute the action in the early morning hours. If you set the termination date as today's date, then access is immediately terminated. If the employee is associated with any appraisals, the administrator will need to access Appraisal Administration and either cancel or close the appraisals. This field is used in tandem with the **Last Working Day** field. However, the **Separation Date** field must contain a date that falls on or after the value entered in the **Last Working Day** field.
Separation Type	If you select Voluntary Separation, the Reason(s) for Leaving field displays. If you select Involuntary Termination, the Reasons(s) for Termination field displays.
Reason(s) for Leaving	This is a list of reasons why the employee is leaving. You can configure this list via the Drop-down and Multi-Select Lists feature; however, a set of standard reasons is provided.
Reason(s) for Termination	This is a list of reasons why the employee is being terminated. You can configurable this list via the Drop-down and Multi-Select Lists feature; however, a set of standard reasons is provided.
Eligible for Re-hire	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 you can configure this list via the Drop-down and Multi-Select Lists feature. Different actions will happen based on the option selected. ▪ If you select **Yes**, the **E-mail Address to be used as New Login** field is marked as required. If the individual applies in the future using the login provided, the system will mark them with a green flag to indicate that the person is eligible for re-hire. This icon will be hyperlinked to view details about the rehire eligibility status. ▪ If you select **No**, the **Comments** box is marked as required. If the individual applies in the future using the login provided, the system will mark them with a red circle to indicate that the person is not eligible for re-hire. This icon will be hyperlinked to view details about the rehire eligibility status. ▪ If you select **Conditional**, the **Comments** box is marked as required. If the individual applies in the future using

Option	Description
	the login provided, the system will mark him/her with a yellow warning ⚠ to indicate that the person is eligible for re-hire but on a conditional basis. This icon will be hyperlinked to view details about the rehire eligibility status.
E-mail Address to be used as New Login	If it exists, the system pre-populates this field with the original email address stored for the user. If it doesn't exist, then the field displays the user's current company login. This field should be overwritten to contain the user's personal email address. The individual's username to access the external career center will be changed to this email address.
Comments	Use this text box to record any additional information needed as to why this user separation is taking place.
Send Notification of Career Center Login	If you select this option, then the system will email the individual with his/her new username to be used when applying in the future.

3. Click **Next**.
4. **Step 2: Review**.

   This step allows you to review the information entered in Step 1. If you need to edit any of the fields, click **Previous**. If the information in the fields is accurate, click **Finish**.

Upon the execution of this action (or the separation date entered is reached), the system automatically changes the individual's username from the company email address to the alternate email address entered in the form and converts the user to an External type.

> **Note:** When the individuals apply through your career center using the login provided, the system will mark them with to indicate that they are former employees.

View Offboarded Users

The View Offboarded Users screen allows you to view offboarded users and easily reassign the following items that are still tied to their user record:

- Direct reports
- Pending Self-Service Approvals
- Pending Requisition Approvals
- Pending Offers
- Requisitions

- Pending Onboarding Tasks
- Appraisal Approvers
- Appraiser
- Appraisal Manager
- Cross-Posting

As items are reassigned, the new owners are automatically notified via email. That way, the new owners are informed that items have been reassigned to them and require their attention.

Display the View Offboarded Users Screen

Follow these steps to view offboarded users.

To access the View Offboarded Users screen:

1. Click in the toolbar to display the Administration menu.
2. In the **Global Settings** » **Your Organization** section, click **View Offboarded Users**.

Contents of the View Offboarded Users Screen

By default, the View Offboarded Users screen displays the following information.

Columns

Field	Description
Name	This is the name of the offboarded user. **Note:** If Core HR is licensed by your company, Core HR Administrators can click the name of the offboarded user to access the user's Total Talent Profile, where the administrator can rehire the user by entering a date in the **Rehire Date** field on the Employment Details tab.
Offboarded By	This is the name of the individual who processed the off-boarding.
Eligible for Re-hire	This indicates whether the user is eligible for rehire if they apply for a job in the future.
Last Working Day	This is the date the employee last reported for work.
Separation Type	For Voluntary Separation types, additional information displays in the Reason(s) for Leaving column. For Involuntary Termination types, additional information displays in the Reasons(s) for Termination column.
Separation Reason	This displays the list of reasons why the employee left or was terminated from the company.

Field	Description
Separation Date	This is the date the system terminated the employee.
Actions	Select one of the following. Options may depend on your role and your permissions: ▪ : Click this icon to remove the national identifier. ▪ : Hover over this icon to view comments. ▪ : Click this icon to remove the employee ID of the selected user. ▪ : Click this icon to delete the employee's data. This is a permanent action and cannot be undone. Proceed with caution. Deleting this data will prevent the ex-employee from logging in to the external career portal. The ex-employee will have to create a new account if applying for a job with the company again. ▪ : Click this icon to select the user and launch the Reassign Pending Items screen.
Last Working Day	This is the date the employee last reported for work.

Filter the View Offboarded Users Screen

Follow these steps to filter the list of offboarded users.

To filter the list of displayed offboarded users:

1. Click **Search Criteria**.
2. Enter the values in the following fields, if applicable:
   - **First Name**
   - **Last Name**
   - **Termination Date From**
   - **Termination Date To**

Reassign Pending Items

Follow these steps to reassign pending items.

To reassign pending items:

1. Select the check box next to the row of the requisition, offer or other item that you want to reassign.
2. Click the **Search an Employee** button at the bottom of the screen.

This launches the Search for Employees window, which allows you to find the user to whom you want the item reassigned.

3. In the Results section of the Search for Employees window, click **Select**.

   This assigns the pending item to the selected user and closes the Search for Employees window.

4. Back on the Reassign Pending Items screen, click **Submit**.
5. Then click **Confirm**.

Reassign Pending Items

You can use the Reassign Pending Items screen to reassign pending items from offboarded employees.

As items are reassigned, the new owners are automatically notified via email. That way, the new owners are informed that items have been reassigned to them and require their attention.

Sections of the Reassign Pending Items Screen

When users are offboarded, workflow items such as pending requisitions, pending offers, and appraisal approvals remain associated with their user record. This screen lets you easily view and reassign specific workflow items that are still tied to the user record of an offboarded user.

Reassigning an item is accomplished by selecting the check box next to the row of the requisition, offer, or other item that you want to reassign, and then searching and selecting a user via the **Search Employee** button.

Direct Reports Section

This section on the Reassign Pending Items screen lists direct reports of the offboarded user that must be reassigned.

Contents

Field	Description
Name	The name of the employee who must be reassigned to a new manager. Check the name and click the **Search Employees** button to select a manager.
Job Title	The employee's current job title.

Pending Self-Service Approvals Section

This section on the Reassign Pending Items screen lists changes to an employee's Total Talent Profile that he or she submitted for approval.

Contents

Field	Description
Employee	The name of the employee profile that was changed.
Attribute	The field name of the Total Talent Profile attribute that was changed.
Previous Value	The attribute value before the change was made.
New Value	The value entered in the field on the profile, which requires approval.
Effective	The date the change will become effective.
Reason for Change	The reason the employee gave for making the change.
User	The name of the employee or manager who made the change.

Pending Requisitions Section

This section on the Reassign Pending Items screen contains the following columns.

Column	Description
Division	This is the organizational unit of the requisition.
Job Code	This is the Job Code of the Job Profile.
Req #	This is the individual requisition number.
Requisition	This is the name or title of the requisition.
Date Created	This indicates the date when the requisition was created.
Recruiter	This is the person assigned as the recruiter.
HM	This is the person assigned as the hiring manager.
Members	This indicates that the offboarded user is a member of an Approval Chain. Reassigning the requisition to an active user right away ensures that the requisition approval proceeds without delay.

Pending Offers Section

This section contains the following columns.

Column	Description
Candidate	This is the candidate's name.
Offer Date	This is the date when the offer was made.
Division	This is the organizational unit of the requisition or candidate to whom the offer is pending.
Job Code	This is the Job Code of the Job Profile.
Req #	This is the individual requisition number.
Requisition	This is the name or title of the requisition.
Initiated By	This is the person who initiated the offer.
Members	This indicates that the offboarded user is a member of an Approval Chain. Reassigning the pending offer to an active user right away ensures that the offer approval process proceeds without delay.

Requisitions Section

This section contains the following columns.

Column	Description
Division	This is the organizational unit of the requisition.
Job Code	This is the Job Code of the Job Profile.
Req #	This is the individual requisition number.
Requisition	This is the name or title of the requisition.
Date Created	This indicates the date when the requisition was created.
Recruiter	This is the person assigned as the recruiter.
HM	This is the person assigned as the hiring manager.

Appraisal Approver Section

This section contains the following columns.

Contents

Field	Description
Division	This is the business unit of the employee whose performance appraisal requires the offboarded user's approval.
Employee	This is the name of the employee who is being appraised.
Job Title	This is the job title of the employee who is being appraised.
Appraisal	This is the name or title of the appraisal.
System Calculated Rating	This is 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. This displays the manager’s rating.
Manager	This is the name of the employee’s manager.
Members	This indicates that the offboarded user is a member of an Approval Chain. Reassigning this item to an active approver right away ensures that the performance appraisal proceeds without delay.

Appraiser Section

This section contains the following columns.

Column	Description
Division	This is the business unit of the employee whose performance is being appraised.
Employee	This is the name of the employee who is being appraised.
Job Title	This is the job title of the employee who is being appraised.
Appraisal	This is the name or title of the appraisal.
System Calculated Rating	This is the Overall Rating, which is calculated based on the scores entered by the raters for all competencies, skills, and goals in the appraisal.

Column	Description
Manager Override Rating	Depending on your organization's settings, a manager may be able to override the automatically calculated Overall Rating. This displays the manager's rating.
Manager	This is the name of the employee's manager.

Appraisal Manager Section

This section contains the following columns.

Column	Description
Division	This is the business unit of the employee with a pending performance appraisal and who is still flagged in the Performance module as reporting to the offboarded user.
Employee	This is the name of the employee who reported to the offboarded user.
Job Title	This is the job title of the employee who reported to the offboarded user.
Appraisal	This is the name or title of the appraisal.
System Calculated Rating	This is 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. This displays the manager's rating.
Manager	This is the name of the offboarded user's manager.

Cross-Posting Section

This section displays a reminder for administrators to check the Posting Manager setup in the event that the offboarded user record also has an impact your company's Crossposting Management settings.

Search for Duplicates

The Search for Duplicates screen provides a **National Identifier** search field and a **Type of National Identifier** drop-down menu.

Use this screen to manage information on Deleted User Accounts, Existing Users, and Employee Data.

Table 1: National Identifiers

Country	National Identifier	Abbreviation
Mauritius	National Identity Card	NIC
United Kingdom	National Insurance Number	NINO
Brazil	Cadastro de Pessoas Físicas (Natural Persons Register)	CPF
France	Numéro d'inscription au répertoire" (National Repertory registration)	NIR
South Africa	South African Identity Card	ID Number
Canada	Social Insurance Number	SIN
India	Permanent Account Number	PAN
Italy	Codice Fiscale (Fiscal Code)	CF
United States of America	Social Security Number	SSN

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