



Deltek

# Deltek Talent Management Recruiting 16.2

Administrator Guide

**September 14, 2020**



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# Recruiting Administrator Overview

Employees use the Deltek Talent Recruiting module to perform all tasks related to the recruitment process, such as creating job posts, searching and selecting candidates, processing job offers, and initiating the onboarding process of successful candidates.

The Recruiting Administrator is responsible for configuring this module to suit your organization's requirements.

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


## Recruiting Administration Menu

From the **Recruiting** section of the Administration menu, you can select any learning administration feature.

### Display the Recruiting Administration Menu

Employees use the Deltek Talent Recruiting module to perform all tasks related to the recruitment process, such as creating job posts, searching and selecting candidates, processing job offers, and initiating the onboarding process of successful candidates. The Recruiting Administrator is responsible for configuring this modules to suit your organization's requirements.

**To display the Recruiting Administration menu choices:**

1. Click the **Administration** icon  in the Deltek Talent toolbar.
2. Go to the Recruiting section.

### Contents of the Recruiting Administration Menu

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

#### Configuration

Menu Choice	Description
<b>Application Restriction Rules</b>	This screen lets you temporarily restrict job seekers from applying to other jobs within the organization if a submission from the job seeker has been declined on a previous requisition.
<b>Diversity Data Collection</b>	This screen lets you create and manage the various diversity data collection options for specific countries of operation.
<b>Dynamic Forms</b>	The screen lets you create customized forms to use for requisitions, applications, interviews, offers, onboarding, and résumés.
<b>External Front Ends</b>	This screen lets you manage external job seeker portals or “external front ends”, and the themes applied to each.

Menu Choice	Description
<b>Teams</b>	This screen lets you manage the groups of users or “team” of users who can share recruiting information. The users within a recruiting team are able to access and work on the requisitions, job seekers, candidates, and offers of those members within their team.
<b>Terms of Use</b>	This screen lets you create and manage the various terms of usage that a job seeker must read and acknowledge prior to creating an account.
<b>Workflows</b>	This screen lets you create and manage workflows. Workflows are the mechanism that your organization can use to automate several functions of the recruiting process including status changes for requisitions, the candidate process, form selection for specific stages, user task suggestions, offer management, and onboarding procedures.

### Onboarding

Menu Choice	Description
<b>Document Library</b>	This screen lets you manage upload documents that can be used during the onboarding process.
<b>Bundles</b>	The screen lets allows group onboarding documents together and associate them to specific divisions, jobs, locations, salary grade, or other associations.
<b>Recipients</b>	This screen lets you create distribution lists specifically for onboarding tasks or for notifications regarding newly-hired employee.
<b>Onboarding Task Management</b>	This screen lets administrators and managers view and manage a list of tasks still to be completed by existing users and new hires as part of the Onboarding process.

### Cross-Posting

Menu Choice	Description
<b>Accounts</b>	This screen lets you create accounts for vendors and users at each vendor to allow them access to your organization’s Deltrek Talent system.
<b>Authorization Requests</b>	This screen lets you manage and approve jobs before the requisition is cross-posted to the job board.
<b>Site Selection</b>	This screen lets you add a subscribed external job board to your organization’s list of approved cross-posting sites.

### Vendors

Menu Choice	Description
<b>Accounts</b>	This screen lets you manage active and inactive vendors.

Menu Choice	Description
<b>Charge Codes</b>	This screen lets you add and manage charge codes for recruiters to use when they submit a hiring order on behalf of a division or department within your organization.
<b>Distribution Lists</b>	This screen lets you organizing vendor agency distribution lists. These lists are useful when your organization needs to send out hiring orders to more than one vendor agency.
<b>Locations</b>	This screen lets you organizing the different locations for the vendor agencies used by your company.

### Employee Referral Program

Menu Choice	Description
<b>Awards Pending Approval</b>	This screen lets you review and disposition referral awards earned by employees.
<b>Manage Earned Awards</b>	This screen lets you manage the disbursement of awards earned by employees.
<b>Manage Referral Awards</b>	This screen allows you to create and manage awards used in the employee referral system.
<b>Requisition Referral Award Plans</b>	This screen lets you assign an award plan to requisitions that have been marked as eligible for a referral bonus.  When a requisition is marked as eligible for a referral bonus, it will appear on this screen to allow the Administrator to assign an Award Plan to it. Once a plan is assigned, the requisition must then been approved to appear with that award.
<b>Earned Awards by Job</b>	This screen lets you disposition requisitions that are eligible for referrals. If

### Résumés

Menu Choice	Description
<b>Résumé Deletions</b>	This screen lets you review and disposition resumes that have been recommended for deletion.

### Benefits

Menu Choice	Description
<b>Benefit Packages</b>	This screen lets you create benefit bundles.
<b>Benefits</b>	This screen lets you create and manage benefits used in the Offer Management process.

## Configuration

The following options are available from the Recruiting Configuration menu:

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

### Application Restriction Rules

Application Restriction Rules allow you to temporarily restrict job seekers from applying to other jobs within the organization if a submission from the job seeker has been declined on a previous requisition.

This feature is available if an organization has implemented the **Recruiting** module.

Display the Application Restriction Rules Screen

Follow these steps to display the Application Restriction Rules screen.

**To display the Application Restriction Rules screen:**

In the toolbar, click the **Administration** icon .

In the **Recruiting** group box, click **Application Restriction Rules** under the **Configuration** section.

Contents of the Application Restriction Rules Screen

The following table shows the criteria used in the Application Restriction Rules.

This feature is available if an organization has implemented the **Recruiting** module.

**Warning:** Please consult with your legal department before using this feature.

The table populated with application restriction rules indicates the criteria selected for determining the limitations for job submissions of an individual, if any.

The Application Restriction Rules table includes the following criteria:

- Company

- Country
- Job family
- Job title
- Rejection reason
- Secondary rejection reason, which usually include additional details to support the primary reason for rejection
- Whether or not the individual is eligible for hire to the organization
- Duration in days the restriction is in place for internal or external job seekers.
- The duration countdown begins when the job seeker is initially rejected.

**Note:** An Application Restriction Rule affects only an external job seeker from applying to a job within the organization if the circumstances match the criteria of the rule. It does not restrict a recruiting user from attaching a job seeker to a requisition or a vendor from submitting a job seeker to a hiring order, even if the job seeker would normally fall under the restrictions of an application rule.

## Create an Application Restriction Rule

Follow these steps to create an application restriction rule.

### To create an application restriction rule:

1. Click **Create a New Rule**.
2. Complete the relevant fields in the form.

**Note:** Job seekers are restricted from applying to a job posting only if they match **all** the criteria in a rule.

When you create an application restriction rule, aim to make each rule as detailed as possible so you do not inadvertently restrict more applicants than you intended. If the restriction rule is too broad, it can potentially lock out a large number of job seekers.

Here are pointers to help you narrow down your restriction rules:

- If your company uses the Job Families feature, you can create restriction rules based on a particular job family.
- If you want to restrict a previously-rejected job seeker from applying to a similar job, select a job title or a group of similar job titles from the **Job Title** multi-select box.
- If your company uses the Two-Tier Rejection Reason feature, then make sure that you populate the **Secondary Rejection Reason** field as well after you select the primary **Rejection Reason** field.

**Note:** Rejection reasons and secondary rejection reasons are configured in the **Drop-down and Multi-Select List » s** section of the Administration screen.



- You can apply the rule to internal users (for example, employees), external job seekers, or both.  
An application restriction rule must include a rejection reason and duration, even if that duration value is.

## Set Restriction Duration for an Application Restriction

Follow these steps to set restriction duration.

### To set the restriction duration:

1. In the Create a New Rule screen, enter a value in the **Employees** field.  
Enter **0** in the text box if the rule should NOT be applied to that job seeker type.
2. Enter a value in the **External Job Seekers** field.  
Enter **0** in the text box if the rule should NOT be applied to that job seeker type.
3. Click **Set Rule** to save the new application restriction rule.  
The day count begins when the job seeker receives the rejection notification.  
The application restriction rule takes immediate effect and is applied to any job seeker rejections from that moment onwards. The rule is not applied to job seekers whose applications were rejected before you created the new rule.  
By default, the new rule displays the bottom of the Application Restriction Rules table. However, the display may depend on your sort settings. You can use any of the columns as the display sort criteria.

## How Application Restriction Rules Affect a Job Seeker



A job seeker must match all the criteria in a rule in order to be restricted from applying to a job post.


If Deltek Talent detects an exact match, it automatically replaces the **Apply to the job** button with a customizable button text indicating that the applicant cannot apply to the job at this time, such as **This job is restricted**, for example.

## Customize Application Restriction Button Text

The Application Restriction Button text can be customized to replace the **Apply to the job** button during the restriction duration.

### To customize the button text:

1. In the toolbar, click the **Administration** icon .
2. In the **Global Settings** group box, click **Languages** under the **System Administration** section.
3. Locate the language that you wish to modify, and in that row click the **Search** icon  to launch the search screen.

4. In the **Search** field, enter **apply\_for\_current\_job\_is\_restricted\_for**, and then click **Search**.
5. Click the **Edit this token** icon , and in the text box enter the phrase that you want to use.


**Warning:** The default phrasing contains a **[days]** merge code. Do not remove this merge code. This merge code is used to automatically populate the number of days remaining in the application restriction rule for that job seeker.

When the restriction duration has elapsed, the **Apply to the job** button will once again display for that job seeker.

## Edit Application Restriction Rule

Follow these steps to edit an application restriction rule.



### To edit an application restriction rule:

1. On the Application Restriction Rule screen, locate the rule that you want to edit and in the **Actions** column, click the **Edit this token** icon .
2. On the Edit Application Restriction Rules screen, select the appropriate criteria changes, keeping in mind that the following fields must be populated:
  - **Rejection Reason**
  - **Employees**
  - **External Job Seekers**
3. Click **Set Rule** to save your changes.

## Deactivate/Activate an Application Restriction Rule

Follow these steps to activate or deactivate an application restriction rule.

### To edit the activation status of an application restriction rule:


1. On the Application Restriction Rule screen, locate the rule that you want to edit and in the **Actions** column, either:
2. Click the **Deactivate** icon  to deactivate an active rule; or
3. Click the **Activate** icon  to activate an inactive rule.

Your selection takes immediate effect. An active rule is applied to any job seeker rejections from that moment onwards, but is not applied to job seekers whose applications were rejected before you created the new rule. An inactive rule is no longer applied when a job seeker is rejected from that moment onwards.

## Delete an Application Restriction Rule

Follow these steps to delete an application restriction rule.

### To delete an application restriction rule:

1. On the Application Restriction Rule screen, locate the rule that you want to edit and in the **Actions** column, click the **Delete** icon .
2. On the confirmation pop-up message, click **OK** to confirm the deletion or **Cancel** to reject the deletion.  
Your selection takes immediate effect. A deleted rule is no longer applied when a job seeker is rejected from that moment onwards.

## Diversity Data Collection

This screen allows you to create and manage the various diversity data collection options for specific countries of operation.

**Note:** This does not include the option to add another country or add more diversity categories. If you add a country to the list of available countries, contact your Customer Service Account Manager.

## Display the Diversity Data Collection Screen

### To display the Diversity Data Collection screen:

In the toolbar, click the **Administration** icon .

In the **Recruiting** group box, click **Diversity Data Collection** under the **Configuration** section.

## Contents of the Diversity Collection Options Screen

The default view when you first access the **Diversity Data Collection** screen are categories for your company's default country.

You can change the default country in the System Settings section of the Administration screen. The following columns may not display on your screen if these are not applicable for the country selected in the **Selected Country** field:

### Diversity Collection Options

Column	Description
<b>Has Visual Survey Enabled</b>	This column indicates whether or not a recruiter or another user can base his or her diversity selections on visual observations: for example, what he or she sees of the individual rather than any questions asked.

Column	Description
	The visual survey is applicable for the U.S. only. Editing options for visual survey is disabled for organizations outside the U.S.
<b>Collect During Apply &amp; Passive Processes</b>	This column Indicates whether or not recruiters can collect diversity details from a job seeker during the job application process or when a résumé is passively submitted. "Passively submitted" means the job seeker added his or her résumé to the application, but not for a specific job posting.
<b>Collect During Onboarding</b>	This column states whether or not recruiters can collect diversity details during the onboarding process of a new hire.
<b>Collect Additional Information</b>	This column indicates on whether or not a recruiter or another user in your company can collect additional details regarding a diversity response.
<b>Collect During User Creation/Edit</b>	This column indicates whether a system administrator can collect the diversity details for an employee when the user account is created or edited. This diversity collection option applies to internal users/employees only, not external job seekers.

For each diversity category, the column displays a value indicating the number of options that are available for that category in that country.

As an administrator, you cannot add or remove a diversity category for a country. The diversity categories displayed for each country are derived from a listing provided by an authorized source, such as the Department of Labor or the federal government.

To view the options available for a diversity category, click the value in the **# of Options** column.

### Add an Option to a Diversity Category

Follow these steps to add an option to a diversity category.

#### To add an option to a diversity category:


1. On the Diversity Data Collection screen, locate the row that you want to add a new category to and click the value in the **# of Options** column.
2. In the **Diversity Category Option** field, enter a unique word, term, or phrase.  
Using a duplicate word, term, or phrase in that category results in an error message.
3. Select the **Hispanic or Latino** check box, if applicable.
4. Click **Submit**.

The new diversity category option is immediately available in the application for your company's users to select.

## Edit a Diversity Category Option

Follow these steps to edit a diversity category option.

### To edit a diversity category option:

1. On the Diversity Data Collection screen, locate the row that you want to edit and in the **Actions** column, click the **Edit** icon .
2. From the drop-down lists in the form, select new values for the relevant fields.
3. In the **Selection Type** field, select one of the following.

Selection Type	Description
Single	Select this if recruiters should select only one option for the diversity category.
Multiple	Select this if recruiters can select more than one option for the diversity category. Once the selection type is changed to <b>Multiple</b> , you can no longer change it back to <b>Single</b> .

4. Select the **Allow collection of additional information** check box to enable recruiters to collect more information about an option selected for a diversity category. This triggers a text box to display when an applicant makes a selection for the diversity category. The text box is not a required field, but it allows elaboration if the applicant chooses to provide it.
5. In the **Collection Options** section, select whether the following options are **Hidden**, **Optional**, or **Required**.
  - **Collect when a job seeker applies to a requisition and/or when passively accessing the Diversity information page**
  - **Collect during Onboarding**
  - **Collect when creating or editing a User record**

**Note:** If you require a job seeker to complete a diversity category, we recommend that you include this requirement in the **Diversity** step in the recruiting workflow: both the passive workflow and the active workflow.

6. Click **Submit**.

The edited diversity category option is immediately available in the application for your company's users to select.

DelteK Talent displays an error message if your edits to the diversity category option match an already existing option in that same diversity category.

## Change the Sort Order of the Diversity Category Options

Follow these steps to change the sort order of the diversity category options.



### To change the sort order of the diversity category options:

1. On the Diversity Data Collection screen, locate the row that you want to add a new category to and click the value in the **# of Options** column.
2. Click the left corner of the row that you want to move.
3. Drag the row to the new position and release.

## Deactivate or Activate a Diversity Category Option

Follow these steps to deactivate or activate a diversity category option.


### To deactivate or activate a diversity category option:

1. On the Diversity Data Collection screen, locate the row that you want to add a new category to and click the value in the **# of Options** column.
2. Locate the option that you want to change, and click the **Deactivate** icon  to deactivate an active category option. Click the **Activate** icon  to activate a deactivated category option.

## Delete a Diversity Category Option

Follow these steps to delete a diversity category option.

### To delete a diversity category option:

1. On the Diversity Data Collection screen, locate the row that you want to add a new category to and click the value in the **# of Options** column.
2. Locate the option that you want to delete, and click the **Delete** icon .

**Note:** You can delete a diversity option only if it is not associated with any data in Deltek Talent.

## Additional Information about Diversity Data Collection

By default, if diversity data is collected while a job seeker is passively applying to a company (that is, the job seeker is not applying to a specific requisition or job), the diversity categories displayed are for job seeker's country of location.

Also by default, if diversity data is collected while a job seeker is applying to a specific requisition or job, then the diversity categories displayed are for the requisition's primary location. If your organization wants to override the default settings and have the ability to select which country's diversity data questions are show to job seekers, then select the **Diversity Data Collection Override** check box in the **General** category of the Administration screen. This enables an

override option in the recruiting workflow, and allows the recruiter to select which country's diversity data questions are shown to job seekers regardless of the requisition's primary location. If diversity data is collected during a newly-hired employee's onboarding process, the diversity categories displayed to the individual who initiates the onboarding process are for the requisition's primary location.

## Dynamic Forms

This screen includes the following forms that your organization can use in the recruiting process:

- Requisition
- Résumé Profile
- Secondary Application
- Internal Transfer Form
- Offer Details
- Interview

You can implement the forms as is, or you use this screen to customize the forms to your needs. You can also create new, entirely customized forms.

The Dynamic Forms screen displays a table with the following information:


- Name of the form
- Type of form (for example: Secondary Application, Onboarding, Requisition, or Offers)
- Date the form was created
- Date the form was last modified
- Name of the user who created the form
- Status of the form (for example: **Ready** or **In Use**)

You can delete forms but only if the form is not associated with any data in the system. If the form has associated data, for instance it is attached to a recruiting workflow, then the option to delete the form is disabled.

### Display the Dynamic Forms Screen

Follow these steps to display the Dynamic Forms Screen.

#### To display the Dynamic Forms Screen:

1. In the toolbar, click the **Administration** icon .
2. In the **Recruiting** group box, click **Dynamic Forms** under the **Configuration** section.

## Create Dynamic Form

Follow these steps to create a dynamic form.

### To create a dynamic form:

1. On the Dynamic Form screen, click the **Create New Form** button.
2. In the **Form Type** field, select one of the following options.
  - **Interview:** This type allows you to create a form for use when interviewing job seekers and candidates.  
The Create New Form screen automatically displays interview-related fields.
  - **Requisition:** This type allows you to create a form for use by recruiters when they create requisitions to fill a job or an open position in your organization. The Create New Form screen automatically displays requisition-related fields.
  - **Résumé:** This type allows you to create a form for use by job seekers when they submit their information to a job posting in your organization. The Create New Form screen automatically displays resume-related fields.
  - **Onboarding:** This type allows you to create a form for recruiters to send to an individual or a group when the onboarding process is initiated for a newly-hired employee. The Create New Form screen automatically displays onboarding-related fields.  
As you design the form, make sure to select the **For Internal Completion Only** check box for forms that are intended for completion by internal users only. This ensures that the onboarding form is not routed to new hires.
  - **Secondary Application:** This type allows you to create a form for recruiters to send to a candidate when more information is required. The application will display those fields specifically created for secondary applications. The Create New Form screen automatically displays additional information-related fields.
  - **Offer Details:** This type allows you to create a form for recruiters use when they create a job offer for a potential new hire. The Create New Form screen automatically displays additional offer-related fields.
3. The Create New Form screen displays, along with the workspace for creating the form.
4. Enter a value in the **Form Name** field.
5. Enter a value in the **Page Name** field.
6. Drag and drop the fields from the left pane onto the workspace.  
The fields are categorized as follows:
  - **System Fields:** These are fields that are included by default in the application.
  - **Custom Fields:** These are fields that are created for your organization. If no custom fields have been created for your organization, the area below the **Custom Fields** header is empty.



- **Field Blocks:** These are groups of related fields, for example, education fields or address fields. If no field blocks have been created for your organization, the area below the **Field Blocks** header is empty.

**Note:** Clicking the category titles expands and collapses the listing for each.

If a field name is in red font, followed by one asterisk (\*), then you must add the field to the form in order for the application to function properly. The field is marked as a required field when displayed to the recipient.

If a field name is in red font, followed by two asterisks (\*\*), then you do not need to add the field to the form in order for the application to function properly. However, if you do add this field to the form, then that field is marked as a required field when displayed to the recipient.

If a field name is in black font, without any asterisks, then the field is optional and is not marked as a required field when displayed to the recipient.

The requirement settings for a Field Block are determined when the field is added to the form.

7. Click **Add A Page** to add a page, or **Add Row** to add another row.
8. If you need a field that is available on any of the categories on the left pane, click the **Create Custom Field** button to create the desired field.
9. Save your work by selecting one of the following:
  - Click **Save Draft** to save your selections as a draft form.
  - Click **Save and Continue editing** to save all your selections and continue editing the form.
  - Click **Save** to generate the form.

**Note:** Duplicate form names will result in an error. By default, "Page 1" displays in the **Page Name** field. If the form will have more than one page, it is recommended that you name each page to help distinguish the different pages.

## Add Fields To A Form

Follow these steps to add fields to a form.

### To add more fields to a form:

Drag and drop the fields from the left pane of the Dynamic Forms screen onto the workspace.

Once it is placed on the form, the field name is no longer an option in the field inventory on the left pane of the workspace.

There is no limit to the number of fields that you can place in a row.

## Move Fields Within A Form

Follow these steps to move fields within a form.


### To move a field to a different position:

- Click the field and drag it to a different column or row.
- Field blocks cannot be moved into a column next to another field.

## Removing Field from Form

Follow these steps to remove a field from a Dynamic Form.

### To remove a field from the workspace, do one of the following:

1. Click the **Delete** icon .
2. On the workspace, click the field and drag it back to the field inventory area on the left pane of the workspace.

## Adding and Deleting Rows On A Form

Follow these steps to add or delete rows on a form.

### To add or delete rows on a form, do one of the following:

1. Click **Add Row** to insert a blank row at the bottom of the page.
2. Click **Delete Row** to permanently removes all the fields in that row

**Warning:** When you click the **Delete Row** button, there will be no confirmation message allowing you to cancel the action.

## Adding a Field Block

**Field Blocks** are clusters or groups of fields that collect similar information

Information about a particular element, for example, address, educational attainment, or work history. This feature can help you save time when you build a large form with multiple pages or sections.

### Add a Field Block

Follow these steps to add a field block.

### To add a field block:

1. Click the field from the inventory on the left pane.
2. Drag and drop it onto the workspace.

After it is placed on the form, the field block name will no longer be available from the **Field Blocks** category of the inventory.

When you use a field block that contains system or custom fields, then those fields will no longer be available from the **System** and **Custom** category of the inventory.

**Note:** All fields can be used only once in a form. Additionally, if a field block is added to a row in the workspace, you can no longer add other fields to the row, even if the field block populates only one column.

## Move Field Blocks

Moving a field block is similar to moving a system or custom field.


### To move a field block:

1. Click the field block.
  2. Drag and drop it at a different position on the workspace.
- Field blocks cannot be moved into a column next to another field.

## Remove Field Blocks

When removing a field block you use the same two methods as when you remove a system or custom field

### To remove a field block, do one of the following:

1. Click the **Delete** icon .
2. On the workspace, click the field and drag it back to the field inventory area on the left pane of the workspace.

**Warning:** When you click the **Delete Row** button, there will be no confirmation message allowing you to cancel the action.

## Managing Repeatable Field Blocks


Some fields are created as repeatable fields, say for example, the **Work History** field block.

You can add **Work History** multiple times to require the job seeker to complete a specific number of work history entries.

## Manage Repeatable Field Blocks

Follow these steps to manage repeatable field blocks.

### To manage repeatable field blocks:

Click the **Administration** icon  in the upper right of a repeatable field to reveal the repetition settings of a field block. The preferences for a repeating field or field block include:

- **Repeatable:** Select **Yes** to indicate that the recipient of the form can add more than one response to that field. If you select **Yes** here, an **Add** button appears on the recipient's screen.
- **Require a Minimum of # Times:** Enter a numeric value in this field to indicate how many times the recipient must complete this field or field block.
- **Repeat a Maximum of # Times:** If you enter a value in **Require a minimum of \_ Times** field, then you must also enter a value in the **Repeat a maximum of \_ Times** field. The maximum number of repeats must be greater than the minimum number of repeats or an error will occur. The recipient will see an **Add** button until the selected maximum number of times is met.

## Multiple Page Format

You can opt to use a multiple page format form.

Depending on the purpose, this format can seem easier for recipients to complete because it splits the data into logically grouped sections. For example: An application form can request general information on page one, education history on page two, and work history on page three.

Click **Add A Page** to create another page in a form. The second page displays in a new tab, and the **Page Name** field is automatically named **Page 2**.

When you type a new value into that field, make sure to click **Save Draft** or **Save and continue editing** to ensure that your page selections are stored. The tab at the top of the form updates to show the page name that you have entered. This tab serves as a link to quickly access that cluster of questions on the form.

**Note:** Multiple page forms are still considered one form, so if you use a field or a field block on one page, you cannot use that field or field block on a different page of the same form.

When recipients view a multiple paged form, they can access the pages by clicking **Previous** or **Next**.

You can create custom fields if none of the system or custom fields meet your needs.

For the purposes of this example, we will choose only one type to demonstrate how to create a custom field in a form.

## Create Custom Form Fields

Follow these steps to create custom form fields.

### To create custom form fields:

1. Click **Create Custom Field**.
2. On the Create Custom Field screen, select a type in the **Field Type** drop-down list.
3. The Create Custom Field screen expands to display the following sections, depending on the field type that you selected:
  - **Field Properties:** This section contains the custom field name or **Label**. Here, type a helpful text that explains how to complete the field; whether the custom field is optional, required, or required; and a merge code value to apply to the custom field.

**Note:** Merge codes can only contain alphanumeric characters and cannot contain any spaces; for example, if the custom field you were creating was for sleeve lengths for a uniform, then the merge code could be: **uniform\_sleeve\_length**.
  - **Options to Select From:** This section includes text boxes to create the value options for the custom field.
  - **Current Options:** This section contains a table populated with the values created for the custom field selection.
  - **Field Permissions:** This section contains the permission level options for that custom field. Select as many as applicable.
4. Click **Submit** or **Save and Add New Field** to save the custom field.
5. If you clicked **Save and Add New Field**, repeat Steps 1 to 4.

## Preview Form

At any time during the forms creation, you can preview how the form will appear to the recipient by clicking the **Preview Form** button.

Hovering over any information icons will show the help text that displays to the user.

Click **Return** to return to the form workspace.

When you have finished creating the form or have reached a point in its creation when you need to stop, you have three options available for saving your work:



- **Save Draft:** This option allows you to save the form in its current state, but does not allow others to use the form yet. In the table of forms, the status of that form shows **Pending Completion** and the options available for that form include the ability to edit, copy, and delete. Because the form is not completed and is not available for use, the option to deactivate the form does not display in the **Actions** column.
- **Save and Continue Editing:** This option allows you to save the form and continue entering your changes. Clicking this button saves the form in its current state, but the workspace remains in edit mode.

- **Save:** This option saves the form and returns you to the Dynamic Forms table populated with the previously created dynamic forms. The new form is added to the table and bears the **Ready** status. Options available for the form include the ability to edit, copy, deactivate, and delete.

## Edit Dynamic Forms

Follow these steps to edit a dynamic form.


### To edit a dynamic form:

1. Click the **Edit Dynamic Form** icon  in the **Actions** column of the Dynamic Forms screen for the form you want to edit.
2. Edit information on the form, as needed.
  - Any field that is already in use in the form are not shown in the inventory on the left pane.
  - Removing a field from the workspace re-enables it for use in the same form.
  - Deltek Talent will display an error message if you attempt to drag and drop a field that is part of a field block that already in used on the form.
  - Any changes that you make to a form in In Use status immediately update that form wherever it is used.
3. To move fields on the form, click the field, then drag and drop it to a new position on the form.  
Any fields used in field blocks are disabled when that field block is dragged and dropped into the form workspace.
4. To revise the repetition settings of a field in the form, click .
5. After you have finished editing the form, click one of the following options:
  - **Save and Continue:** Click this to save the form in its current state and continue editing the form.
  - **Save:** Click this to save the form in its current state and return to the Dynamic Forms screen.
  - **Save Draft:** This appears if you are editing a form from the Dynamic Forms Drafts list. Click this to save the form in its current form and return to the Drafts list.

## Copy a Dynamic Form

Follow these steps to copy a dynamic form.

### To copy a dynamic form:

1. Click the **Copy** icon  in the **Actions** column of the Dynamic Forms screen to either create a duplicate of an existing form or use an existing form as the basis of a new form that you can then customize.



2. Make changes to the copy as needed.
3. Click **Save**.

**Note:** While you can create an exact copy of a form, the **Form Name** field must contain a different value or an error will occur upon **Save**.

## Deactivate / Activate Dynamic Form

Follow these steps to deactivate/activate a dynamic form.


**To activate or deactivate a dynamic form, do one of the following:**

- To deactivate a form: Click the **Deactivate Dynamic Form** icon  in the **Actions** column of the Dynamic Forms screen.  
When you deactivate a form, the form no longer displays in the list of options anywhere in Deltek Talent that may use that form type.
- To activate a form: Click the **Activate Dynamic Form** icon  in the **Actions** column of the Dynamic Forms screen.  
When you activate a form, the form automatically displays in the list of options anywhere in Deltek Talent that may use that form type.

## Delete Dynamic Form

Follow these steps to delete a dynamic form.

**To delete a dynamic form:**

Click **Delete Dynamic Form** icon  in the **Actions** column of the Dynamic Forms screen to delete a form.

A confirmation message appears where you can approve or reject the deletion.

You can delete forms if the form **Status** is **Ready** or **Pending Completion** and if the form is not used in the application. However, you will not be able to delete a form if the form **Status** is **In Use** as this status indicates that the form is associated with a recruiting workflow or is used in the application in some capacity.

## Manage Form Fields

Follow these steps to manage the available form fields in the Dynamic Forms application.

**To manage form fields on a dynamic form:**

1. On the Dynamic Forms screen, click **Manage Form Fields**.
2. In the **Select Form Type** drop-down list, select the type of form that you want to create from six available types.  
This drop-down list will always display on top of the screen so that you can use it to easily access other form types.

3. Select one of the following form types from the list that displays after you have selected a form type in step 2:
  - **System Fields:** These are fields that are included by default in the application. Each form type has a set of system fields. The table includes the field type, any restrictions that apply to the field, whether the field is required, and if the field is repeatable. While system fields can be edited and deactivated from use, none of the system fields can be deleted from the application.
  - **Custom Fields:** These are fields that are created for your organization. If no custom fields have been created for your organization, the area below the **Custom Fields** header is empty. Information in the **Custom Fields** table includes the field name, its type, any restrictions on its use, whether the field is required on the form type for which it was created, and if it is repeatable. If the **Restrictions** column has any group restrictions, click **Show/Hide** to expand the column and reveal the restricted groups.
  - **Field Blocks:** These are groups of related fields, for example, education fields or address fields. If no field blocks have been created for your organization, the area below the **Field Blocks** header is empty.


## Manage System Fields

You can edit, activate and deactivate system fields.

### Edit System Fields

Follow these steps to edit system fields.


#### To edit a system field:

1. On the Manage Form Fields screen, locate a system field in the list and click the **Edit this field** icon  edit to display those text boxes and drop down lists which can be edited.  
Editing a system field will update the field for all previous responses as well. You may use this function to correct a syntax error or improve the text of the field, but it is recommended that you not change the intent of the field.
2. When you have made the changes to the system field, click **Submit** to submit the changes to the application.

## Deactivate System Fields


Follow these steps to deactivate a system field.

#### To deactivate a system field:

1. On the Manage Form Fields screen, locate a system field in the list and click the **Deactivate Field** icon  in the Actions menu.  
When a system field is deactivated, it will no longer display in the list of System Fields when creating or editing a form for that form type. You may have a similar system field created for a different form type. Deactivating the system field for one form type does not



deactivate it in a different form type. For example, deactivating the “Country” system field for Requisition forms does not deactivate the “Country” system field for Secondary Applications.

2. To activate a deactivated system field, click the **Activate Field** icon .

## Manage Custom Fields

These are fields that are created for your organization.

When you create custom forms, the contents that you may see on the Custom Form Creation screen may vary depending on what type of custom field you create. However, these three objects are consistent for each form:

- **Label:** This text box is where you type the name of the field. Or, if the field type is a question, then this is where you type or the question phrase.
- **Field Permissions:** This section is where you select the visibility settings for the field. It controls how the field is displayed to different user groups in your company. The available options are as follows:
  - **View & Edit**
  - **View Only**
  - **Hide**
- **Saving Options:** This option allows you to save field type using one of the following buttons:
  - **Submit:** Click this button to submit a field type. The screen refreshes and the new field is immediately added to the field table under the Custom Fields heading.
  - **Save and Add New Field:** Click this to save and add another field. The new field is added to the field table under the Custom Fields heading, but the screen remains in edit mode, allowing you to add more custom fields.

## Create a Custom Field

Follow these steps to create a custom field.

### To create a custom field:

1. Click **Create Custom Field** to display the Create Custom Field screen.
2. In the **Field Type** field, select one of the following drop-down list options.


Option	Description
<b>Single Line Text Box</b>	Select this custom field type if you want to collect only a single line of text. Proceed to Step 3 to continue creating this custom field type.
<b>Multi-Line Text Box</b>	Select this custom field type if you want to collect more data than a single line text box.

Option	Description
	Proceed to Step 4 to continue creating this custom field type.
<b>Date Field</b>	<p>Select this custom field type to allow the form recipient to select a date.</p> <p>Proceed to Step 5 to continue creating this custom field type.</p>
<b>Radio Button</b>	<p>Select this custom field type to require the form recipient to pick only one option from a list of choices. There is no limit to the number of choices you can create for a radio button form type.</p> <p>Proceed to Step 6 to continue creating this custom field type.</p>
<b>Checkbox</b>	<p>Select this custom field type to provide the form recipient to select multiple items from a list of choices. There is no limit to the number of choices that you can create for a checkbox form type.</p> <p>Proceed to Step 7 to continue creating this custom field type.</p>
<b>Drop Down List</b>	<p>Select this custom field type to provide the form recipient a list of choices. Based on how you configure this form field, the recipient may be able to select one or more choices. There is no limit to the number of choices that you can include in the drop-down list. However, once the list exceeds a specific height, a scroll bar will appear on the right side of the list, allowing users to move up and down the list.</p> <p>Proceed to Step 8 to continue creating this custom field type.</p>
<b>Yes/No Field Type</b>	<p>Select this custom field type to add a question field with a simple yes or no response.</p> <p>Proceed to Step 9 to continue creating this custom field type.</p>
<b>DHTML Editor</b>	<p>Select this custom field type if you want to add a field that can collect a large volume of text, including text formatting, if necessary.</p> <p>DHTML editors allow form recipients to apply various font characteristics, such as bold, italics, and underline, to the content of the field.</p> <p>Text editing functions, such as copy and paste, are also available. Editing functions are enabled after the form recipient begins typing into the text area or clicks inside the body of the field.</p> <p>Spell-check and text filtering for “blacklisted” words are available as well.</p> <p>Proceed to Step 10 to continue creating this custom field type.</p>
<b>Full DHTML Editor</b>	<p>Select this custom field type if you want to add a field that can collect a large volume of text, including text formatting, if necessary.</p>

Option	Description
	<p>The main difference between <b>Full DHTML Editor</b> and <b>DHTML Editor</b> is the following additional editing options that are included in the full version of the editor:</p> <ul style="list-style-type: none"> <li>■ Add an image into the field</li> <li>■ Change the alignment of the content</li> <li>■ Add a link to a web page</li> <li>■ Insert a table</li> <li>■ Revise the font family.</li> </ul> <p>As with the <b>DHML Editor</b>, editing functions are enabled after the form recipient begins typing into the text area or clicks inside the body of the field.</p> <p>Proceed to Step 11 to continue creating this custom field type.</p>
<b>Section Header</b>	<p>Select this custom field type to create a section header. Section headers are typically used on forms as titles that declaring the purpose of the form.</p> <p>Proceed to Step 12 to continue creating this custom field type.</p>
<b>Sub-Header</b>	<p>Select this custom field type to create a second level header. Sub-headers are typically used as a means to segregate portions of content.</p> <p>Proceed to Step 13 to continue creating this custom field type.</p>
<b>Plain Text Header</b>	<p>Select this custom field type to create a third level header. Plain text headers are typically used as a simple divider of information.</p> <p>Proceed to Step 14 to continue creating this custom field type.</p>
<b>Encrypted Field</b>	<p>Select this custom field type to add encrypted single-line text boxes. The ideal field length is <b>25</b>.</p> <p>This type will not display as an option unless the feature to allow encrypted data is enabled in the Features page under the Global Settings section of the Administration screen.</p> <p>Once an <b>Encrypted Field</b> type is created for a single line of text, the field type cannot be revised. In other words, an encrypted single line of text will remain an encrypted single line of text.</p> <p>On the form, the encrypted field will not display any differently from a non-encrypted field. It is only when the data is received by the Deltek Talent that encryption is performed.</p> <p>Proceed to Step 15 to continue creating this custom field type.</p>


3. If you selected **Single Line Text Box**, complete the additional fields that appear in the **Field Properties** section of the screen.

You must complete the required fields, which are marked in red font, otherwise, Deltak Talent will not allow you to save the new field. Proceed to Step 16 after you have completed the following fields.

Field	Description
<b>Label</b>	Enter the name of the field or the question phrase.
<b>Help Text</b>	Provide additional, helpful information about the field, if needed. If you populate this field, then an  icon is displayed next to the field on the form. The text that you enter in this field displays when a user hovers over the information icon.
<b>Mark as Required</b>	Select one of the following options: <ul style="list-style-type: none"> <li>▪ <b>Optional:</b> Select this to indicate that neither does the field have to be added to the form, nor is it marked as required if it is added to a form.</li> <li>▪ <b>Required:</b> Select this to indicate that the field must be added to the form and that the field is marked as required when it is added to a form.</li> <li>▪ <b>Required If Present On Form:</b> Select this to indicate that the field does not need to be added to the form. However, if it is added to a form, then the field is marked as required and must be completed by the form recipient.</li> </ul>
<b>Length of Field</b>	Enter a numeric value to set the maximum number of characters that is visible for the custom field. The ideal length is <b>25</b> .
<b>Maximum # of Characters Allowed</b>	Enter a numeric value to set the maximum number of characters that can be typed into the field.
<b>Merge Code</b>	Enter the code to use when you want to insert the field into letter templates. The ideal way to create a merge code is to use the label name and replace the spaces with underscores.

- If you selected **Multi-Line Text Box**, complete the additional fields that appear in the **Field Properties** section of the screen.


You must complete the required fields, which are marked in red font, otherwise, Deltak Talent will not allow you to save the new field. Proceed to Step 16 after you have completed the following fields.

Field	Description
<b>Label</b>	Enter the name of the field or the question phrase.
<b>Help Text</b>	Provide additional, helpful information about the field, if needed. If you populate this field, then an  icon is displayed next to the field on the form. The text that you enter in this field displays when a user hovers over the information icon.

Field	Description
<b>Mark as Required</b>	<p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>▪ <b>Optional:</b> Select this to indicate that neither does the field have to be added to the form, nor is it marked as required if it is added to a form.</li> <li>▪ <b>Required:</b> Select this to indicate that the field must be added to the form and that the field is marked as required when it is added to a form.</li> <li>▪ <b>Required If Present On Form:</b> Select this to indicate that the field does not need to be added to the form. However, if it is added to a form, then the field is marked as required and must be completed by the form recipient.</li> </ul>
<b>Height</b>	Enter a numeric value to set the number of rows that appear in the form. Multi-line text boxes may hold more lines of text than is visible in the form. The ideal height for a multi-line text box is <b>5</b> .
<b>Width</b>	Enter a numeric value to set the width in terms of the number of characters displayed for each row in the text box. The ideal width for a multi-line text box is <b>25</b> .
<b>Merge Code</b>	Enter the code to use when you want to insert the field into letter templates. The ideal way to create a merge code is to use the label name and replace the spaces with underscores.


5. If you selected **Date Field**, complete the additional fields that appear in the **Field Properties** section of the screen.

You must complete the required fields, which are marked in red font, otherwise, Deltak Talent will not allow you to save the new field. Proceed to Step 16 after you have completed the following fields.

Field	Description
<b>Label</b>	Enter the name of the field or the question phrase.
<b>Help Text</b>	Provide additional, helpful information about the field, if needed. If you populate this field, then an  icon is displayed next to the field on the form. The text that you enter in this field displays when a user hovers over the information icon.
<b>Mark as Required</b>	<p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>▪ <b>Optional:</b> Select this to indicate that neither does the field have to be added to the form, nor is it marked as required if it is added to a form.</li> </ul>

Field	Description
	<ul style="list-style-type: none"> <li>▪ <b>Required:</b> Select this to indicate that the field must be added to the form and that the field is marked as required when it is added to a form.</li> <li>▪ <b>Required If Present On Form:</b> Select this to indicate that the field does not need to be added to the form. However, if it is added to a form, then the field is marked as required and must be completed by the form recipient.</li> </ul>
<b>Merge Code</b>	Enter the code to use when you want to insert the field into letter templates. The ideal way to create a merge code is to use the label name and replace the spaces with underscores.

- If you selected **Radio Button**, complete the following steps, then proceed to Step 16.
- In the **Field Properties** section of the screen, complete the relevant fields.  
You must complete the required fields, which are marked with a red asterisk. Otherwise Deltek Talent will not allow you to save the new field.


Field	Description
<b>Label</b>	Enter the name of the field or the question phrase.
<b>Help Text</b>	Provide additional, helpful information about the field, if needed. If you populate this field, then an  icon is displayed next to the field on the form. The text that you enter in this field displays when a user hovers over the information icon.
<b>Mark as Required</b>	Select one of the following options: <ul style="list-style-type: none"> <li>▪ <b>Optional:</b> Select this to indicate that neither does the field have to be added to the form, nor is it marked as required if it is added to a form.</li> <li>▪ <b>Required:</b> Select this to indicate that the field must be added to the form and that the field is marked as required when it is added to a form.</li> <li>▪ <b>Required If Present On Form:</b> Select this to indicate that the field does not need to be added to the form. However, if it is added to a form, then the field is marked as required and must be completed by the form recipient.</li> </ul>
<b>Merge Code</b>	Enter the code to use when you want to insert the field into letter templates. The ideal way to create a merge code is to use the label name and replace the spaces with underscores.

- In the **Options to Select From** section, complete the following required fields, then click **Add**.

Field	Description
<b>Name</b>	Enter the text that is displayed on the form for the user to select.
<b>Value</b>	Enter the value of the <b>Name</b> . The <b>Value</b> can be the same as the content of the <b>Name</b> field. However, each value must be unique. Otherwise, Deltek Talent will display an error message upon <b>Save</b> .

9. If you selected **Checkbox**, complete the following steps, then proceed to Step 16:

10. In the **Field Properties** section of the screen, complete the following required and relevant fields.


Field	Description
<b>Label</b>	Enter the name of the field or the question phrase.
<b>Help Text</b>	Provide additional, helpful information about the field, if needed. If you populate this field, then an  icon is displayed next to the field on the form. The text that you enter in this field displays when a user hovers over the information icon.
<b>Mark as Required</b>	Select one of the following options: <ul style="list-style-type: none"> <li>▪ <b>Optional</b>: Select this to indicate that neither does the field have to be added to the form, nor is it marked as required if it is added to a form.</li> <li>▪ <b>Required</b>: Select this to indicate that the field must be added to the form and that the field is marked as required when it is added to a form.</li> <li>▪ <b>Required If Present On Form</b>: Select this to indicate that the field does not need to be added to the form. However, if it is added to a form, then the field is marked as required and must be completed by the form recipient.</li> </ul>
<b>Merge Code</b>	Enter the code to use when you want to insert the field into letter templates. The ideal way to create a merge code is to use the label name and replace the spaces with underscores.

11. In the **Options to Select From** section, complete the following required fields, then click **Add**.

Field	Description
<b>Name</b>	Enter the text that is displayed on the form for the user to select.
<b>Value</b>	Enter the value of the <b>Name</b> . The <b>Value</b> can be the same as the content of the <b>Name</b> field. However, each value must be unique. Otherwise, Deltek Talent will display an error message upon <b>Save</b> .

12. If you selected **Drop Down List**, complete the following steps, then proceed to Step 16.

13. In the **Field Properties** section of the screen, complete the relevant fields. You must complete the required fields, which are marked in red font. Otherwise Deltak Talent will not allow you to save the new field.

Field	Description
<b>Label</b>	Enter the name of the field or the question phrase.
<b>Help Text</b>	Provide additional, helpful information about the field, if needed. If you populate this field, then an  icon is displayed next to the field on the form. The text that you enter in this field displays when a user hovers over the information icon.
<b>Mark as Required</b>	Select one of the following options: <ul style="list-style-type: none"> <li>▪ <b>Optional:</b> Select this to indicate that neither does the field have to be added to the form, nor is it marked as required if it is added to a form.</li> <li>▪ <b>Required:</b> Select this to indicate that the field must be added to the form and that the field is marked as required when it is added to a form.</li> <li>▪ <b>Required If Present On Form:</b> Select this to indicate that the field does not need to be added to the form. However, if it is added to a form, then the field is marked as required and must be completed by the form recipient.</li> </ul>
<b>Allow for multiple selections</b>	Select this check box to allow the form recipient to select more than one item from the drop-down list.
<b>Merge Code</b>	Enter the code to use when you want to insert the field into letter templates. The ideal way to create a merge code is to use the label name and replace the spaces with underscores.


14. In the **Options to Select From** section, complete the following required fields, then click **Add**.

Field	Description
<b>Name</b>	Enter the text that is displayed on the form for the user to select.
<b>Value</b>	Enter the value of the <b>Name</b> . The <b>Value</b> can be the same as the content of the <b>Name</b> field. However, each value must be unique. Otherwise, Deltak Talent will display an error message upon <b>Save</b> .

15. If you selected **Yes/No Field Type**, complete the additional fields that appear in the **Field Properties** section of the screen, then proceed to Step 16.


You must complete the required fields, which are marked with a red asterisk, otherwise, Deltak Talent will not allow you to save the new custom form field.



Field	Description
<b>Label</b>	Enter the name of the field or the question phrase.
<b>Help Text</b>	Provide additional, helpful information about the field, if needed. If you populate this field, then an  icon is displayed next to the field on the form. The text that you enter in this field displays when a user hovers over the information icon.
<b>Mark as Required</b>	Select one of the following options: <ul style="list-style-type: none"> <li>▪ <b>Optional:</b> Select this to indicate that neither does the field have to be added to the form, nor is it marked as required if it is added to a form.</li> <li>▪ <b>Required:</b> Select this to indicate that the field must be added to the form and that the field is marked as required when it is added to a form.</li> <li>▪ <b>Required If Present On Form:</b> Select this to indicate that the field does not need to be added to the form. However, if it is added to a form, then the field is marked as required and must be completed by the form recipient.</li> </ul>
<b>Merge Code</b>	Enter the code to use when you want to insert the field into letter templates. The ideal way to create a merge code is to use the label name and replace the spaces with underscores.

16. If you selected **DHTML Editor**, complete all relevant fields in the **Field Properties** section of the screen, then proceed to Step 16.


You must complete the required fields, which are marked in red font. Otherwise Deltek Talent will not allow you to save the new custom form field.

Field	Description
<b>Label</b>	Enter the name of the field or the question phrase.
<b>Help Text</b>	Provide additional, helpful information about the field, if needed. If you populate this field, then an  icon is displayed next to the field on the form. The text that you enter in this field displays when a user hovers over the information icon.
<b>Mark as Required</b>	Select one of the following options: <ul style="list-style-type: none"> <li>▪ <b>Optional:</b> Select this to indicate that neither does the field have to be added to the form, nor is it marked as required if it is added to a form.</li> <li>▪ <b>Required:</b> Select this to indicate that the field must be added to the form and that the field is marked as required when it is added to a form.</li> </ul>

Field	Description
	<ul style="list-style-type: none"> <li>▪ <b>Required If Present On Form:</b> Select this to indicate that the field does not need to be added to the form. However, if it is added to a form, then the field is marked as required and must be completed by the form recipient.</li> </ul>
<b>Merge Code</b>	Enter the code to use when you want to insert the field into letter templates. The ideal way to create a merge code is to use the label name and replace the spaces with underscores.

17. If you selected **Full DHTML Editor**, complete all relevant fields in the **Field Properties** section of the screen, then proceed to Step 16.

You must complete the required fields, which are marked in red font. Otherwise Deltek Talent will not allow you to save the new custom form field.

Field	Description
<b>Label</b>	Enter the name of the field or the question phrase.
<b>Help Text</b>	Provide additional, helpful information about the field, if needed. If you populate this field, then an  icon is displayed next to the field on the form. The text that you enter in this field displays when a user hovers over the information icon.
<b>Mark as Required</b>	Select one of the following options: <ul style="list-style-type: none"> <li>▪ <b>Optional:</b> Select this to indicate that neither does the field have to be added to the form, nor is it marked as required if it is added to a form.</li> <li>▪ <b>Required:</b> Select this to indicate that the field must be added to the form and that the field is marked as required when it is added to a form.</li> <li>▪ <b>Required If Present On Form:</b> Select this to indicate that the field does not need to be added to the form. However, if it is added to a form, then the field is marked as required and must be completed by the form recipient.</li> </ul>
<b>Merge Code</b>	Enter the code to use when you want to insert the field into letter templates. The ideal way to create a merge code is to use the label name and replace the spaces with underscores.

18. If you selected **Section Header**, complete the following in the **Field Properties** section of the screen, then proceed to Step 16.

Field	Description
<b>Label</b>	Enter the name of the field or the question phrase.

19. If you selected **Sub-Header**, complete the following in the **Field Properties** section of the screen, then proceed to Step 16.


Field	Description
<b>Label</b>	Enter the name of the field or the question phrase.

20. If you selected **Plain Text Header**, complete the following in the **Field Properties** section of the screen, then proceed to Step 16.

Field	Description
<b>Label</b>	Enter the name of the field or the question phrase.

21. If you selected **Encrypted Field**, complete all relevant fields in the **Field Properties** section of the screen, then proceed to Step 16.

You must complete the required fields, which are marked in red font. Otherwise Deltak Talent will not allow you to save the new custom form field.

Field	Description
<b>Label</b>	Enter the name of the field or the question phrase.
<b>Help Text</b>	Provide additional, helpful information about the field, if needed. If you populate this field, then an  icon is displayed next to the field on the form. The text that you enter in this field displays when a user hovers over the information icon.
<b>Mark as Required</b>	Select one of the following options: <ul style="list-style-type: none"> <li>▪ <b>Optional:</b> Select this to indicate that neither does the field have to be added to the form, nor is it marked as required if it is added to a form.</li> <li>▪ <b>Required:</b> Select this to indicate that the field must be added to the form and that the field is marked as required when it is added to a form.</li> <li>▪ <b>Required If Present On Form:</b> Select this to indicate that the field does not need to be added to the form. However, if it is added to a form, then the field is marked as required and must be completed by the form recipient.</li> </ul>
<b>Length of Field</b>	Enter a numeric value to set the maximum number of characters that is visible for the custom field. The ideal length is <b>25</b> .
<b>Maximum # of Characters Allowed</b>	Enter a numeric value to set the maximum number of characters that can be typed into the field.
<b>Merge Code</b>	Enter the code to use when you want to insert the field into letter templates. The ideal way to create a merge code is to use the label name and replace the spaces with underscores.

22. In the **Field Permissions** section, set the permission levels for each user group listed in the table.

For each user group, select one of the following permission level:

- **View & Edit:** Select this to allow the user group to both see the field on the form as well as edit any data within that field. This is the default permission level.
- **View Only:** Select this to allow the user group to see the content of the field on the form, but not alter the data in that field.
- **Hide:** Select this to hide the field from the user group.


23. Save the field by selecting one of the following buttons:

- **Submit:** Click this button to submit a field type. The screen refreshes and the new field is immediately added to the field table under the Custom Fields heading.
- **Save and Add New Field:** Click this to save and add another field. The new field is added to the field table under the Custom Fields heading, but the screen remains in edit mode, allowing you to add more custom fields.

## Edit a Custom Field

Follow these steps to edit a custom field.

### To edit a custom field:

1. On the Manage Form Fields screen, locate the field that you want to end and click  in the **Actions** column.
2. Enter your changes in the **Field Properties** section and the **Field Permissions** section.


**Warning:** Editing a custom field will update the field values wherever that field is used in the application. You may edit a field to correct a syntax error or improve the content of the field. However, the purpose or intent for the field must not be altered.

3. Click **Submit** to save your changes

## Encrypt a Custom Field

Follow these steps to encrypt a custom field.

### To encrypt custom fields:

1. On the Manage Form Fields screen, select the from type that you want to encrypt from the **Select Form Type** field.
2. Scroll down to the **Custom Fields** section and in the **Actions** column of the field that you want to encrypt, click the **Encrypt field** icon .

**Note:** The encrypt icon is available only if the **Allow encrypted fields** check box is enabled in the **Global Settings » System Administration » Features** screen.



3. Click **Yes** on the confirmation window that displays, which includes a warning indicating that encrypted fields are not available as search options within a form or as criteria for reporting purposes.
4. Click **Yes** again to confirm the action on the warning window that displays, indicating that changing the single line text box to an encrypted field cannot be undone.  
However, any data displayed in the field will be decrypted and available for viewing to those users who have the appropriate user permissions.

**Note:** **Single Line Text Box** field types are the only field types that can accept encrypted data.

## Deactivate or Activate a Custom Field

Follow these steps to activate or deactivate a custom field.


### To deactivate or activate a custom field:

1. Click the **Deactivate Field** icon  in the **Actions** column of the Manage Form Fields screen to deactivate an active field.  
When you deactivate a field, it no longer displays in the list of field options anywhere in Deltek Talent that may use that field type.
2. Click the **Activate Field** icon  in the **Actions** column of the Manage Form Fields screen to activate an inactive field.  
When you activate a field, it automatically displays in the list of options anywhere in Deltek Talent that may use that field type.

## Delete a Custom Field

Follow these steps to delete a custom field.

### To delete a custom field:

1. On the Manage Form Fields screen, click the **Delete this Field** icon  in the **Actions** column of the form you want to delete.
2. Click **Yes** to confirm the deletion on the confirmation window that displays.

## Manage Field Blocks

Field Blocks are composed of two or more fields that collect information about a common element (for example, a job seeker's work history or education history).

There are four field blocks that come with the application for the Résumé form type:

- Address
- Education History
- Reference Name

- **Work History.**

For these four field blocks, only the option to deactivate is available in the **Actions** column.

Using a field block in a form can cut down on development time when creating a form since you can drag one field block to the form workspace instead of dragging one field at a time.

## Create a Field Block

Follow these steps to create a field block.

### To create a field block:

1. On the Manage Forms Fields screen, from the **Select Form Type** field, select the form type for which you are creating the field block.
2. Click **More Options » Create Field Block**.
3. In the **Is this a repeatable block** field, select **Yes** or **No**.  
This allows you to set whether or not the field block can be repeated on a form. Field blocks cannot be repeated in forms created for offers. Skip this step if you are creating a field block for offer forms.
4. In the **Block Type** field, select from the drop-down list.  
The options that appear depend on the Form Type that you selected on the Manage Form Fields screen. If no block type is necessary, select **Default**.
5. Click **Submit**.
6. In the **Field Block Name**, enter a unique name for the field block.
7. If you need to add fields to the field block, click the field that you want to add from the inventory on the left panel and drag and drop the field to the workspace.
8. If you need additional rows, click **Add Row**, then continue adding fields from the inventory.
9. To remove a row and all the fields in a field block, click **✕**.
10. When you are finished adding the fields, click **Submit**.

## Preview a Field Block

Follow these steps to preview a field block.


### To preview a field block:

1. Click **Preview Field » Block**.
2. Click **Return** to return to the field block workspace.
3. Click **Submit** or **Save and Continue Editing**.

## Edit Field Blocks

Follow these steps to edit field blocks.



### To edit field blocks:

1. On the Dynamic Forms screen, click **Manage Form Fields**.
2. In the **Select Form Type** field, select the form that you want to edit from the drop-down list.
3. Locate the field block that you want to edit, then click the **Edit this Field** icon  in the **Actions** column.

## Deactivate/Activate Field Blocks

Follow these steps to activate or deactivate field blocks.

### To deactivate/activate field blocks:

1. On the Dynamic Forms screen, click **Manage Form Fields**.
2. In the **Select Form Type** field, select the form that you want to edit from the drop-down list.
3. Scroll down to the **Field Blocks** section, and click the **Deactivate Field** icon  to deactivate an active field block or click the **Activate Field** icon  to activate an inactive field block.

## Manage Group Access


Managing group access to fields used in the application is similar to selecting field permissions.

The main difference is the fields are listed in a table for a user group rather than a user group is listed for fields. The Manage Group Access screen allows you to review and make access changes in bulk, if needed.

## Display the Manage Group Access Screen

Follow these steps to display the Manage Group Access Screen.

### To display the Manage Group Access Screen:

1. In the Deltek Talent toolbar, click the **Administration** icon .
2. In the **Recruiting** group box, click **Dynamic Forms** under the **Configuration** section.
3. Click **Manage Form Fields**.
4. Select a type from the **Select Form Type** field.
5. Click **Manage Group Access**.

## Manage Group Access

Follow these steps to manage group access.

### To manage group access:

1. On the Manage Group Access Screen, select a group from the **Select a Group** field.
2. Set the permission levels for each user group listed in the table.  
For each user group, select one of the following permission levels:
  - **View & Edit:** Select this to allow the user group to both see the field on the form as well as edit any data within that field. This is the default permission level.
  - **View Only:** Select this to allow the user group to see the content of the field on the form, but not alter the data in that field.
  - **Hide:** Select this to hide the field from the user group.
3. Click **Submit**.

## External Front Ends

This screen allows you to manage the different front ends and the theme applied to each by selecting from one of the designs included with the application or choosing a customized layout created by our team during your Implementation process.

A "front end" is the term used for an external job seeker portal. The application allows for multiple external portals where you can differentiate portals by division, brand, purpose (for example, college recruiting), or location.

Each external portal can have a different look and feel, and have a different URL.


The table in the External Front Ends screen is populated with the external portals that were created for your organization during the Implementation process. The **Hourly Portal** column is displayed on the table if your company has enabled the Hour Portal module.

Similar to external job seeker portals, an organization can have multiple hourly portals.

### Display the External Front Ends Screen

Follow these steps to display the External Front Ends Screen.

### To display the External Front Ends Screen:

1. In the Deltek Talent toolbar, click the **Administration** icon .
2. In the **Recruiting** group box, click **External Front Ends** under the **Configuration** section.



## View Front End Details

Follow these steps to view front end details.

### To view front end details:



On the External Front Ends Screen, click the name in the **Front End Name** column to view the details of the job seeker portal.

This includes the URL of the external portal, the selected theme, and whether or not the external portal is an hourly portal.

## Edit Front End

Follow these steps to edit a front end.

### To edit a front end:


1. Click the **Edit** icon  in the **Actions** column to edit an external front end.  
Alternatively, you can also click the Front End name and then click **Edit Front End**.
2. Edit the **Front End Name** field, if necessary.  
The name that you enter becomes the drop-down list value that is displayed when a recruiter selects a front end to associate with a job during the requisition creation process. This value identifies from which career portal a job seeker applied from or where a requisition is posted.
3. Make your selection from the **Front End Theme** drop-down list, if necessary.  
The options in the **Front End Theme** drop-down list include system themes as well as custom themes requested by your organization.
4. Click  to view the theme.
5. Click anywhere outside the preview pop-up screen to exit Preview mode.
6. In the **Is this an Hourly Portal** question, select either **Yes** or **No**.
7. Click **Submit**.

## Set the Default Front End

The default front end is the first drop-down list value that is displayed when a recruiter selects a front end to associate with a job during the requisition creation process.

**Selecting a default front end does not prevent recruiters from selecting additional front ends or different front ends when creating a requisition.**

### To set the default front end:

Click the **Make Default** icon  in the **Actions** column of the External Front Ends screen to set an external front end as the default.

The default front end is the first drop-down list value that is displayed when a recruiter selects a front end to associate with a job during the requisition creation process.

Selecting a default front end does not prevent recruiters from selecting additional front ends or different front ends when creating a requisition.

There can be only one default external front end.

## Kiosks


A kiosk is a job seeker portal that can have different text and images displayed and has its own URL.

If your organization purchased the Kiosk feature, this section is where you can create welcome pages and manage the kiosks you use.

### Display the Kiosks Screen

Follow these steps to display the Kiosks screen.

#### To display the Kiosks screen:

1. On the Deltek Talent toolbar, click the **Administration** icon .
2. In the **Recruiting** group box, click **Kiosks** under the **Configuration** section.

### Contents of the Kiosks Screen

The current kiosks are listed on the screen, which displays the following columns and actions.

#### Columns

Column	Description
<b>Code</b>	This column displays the code for the kiosk.
<b>Name</b>	This column displays the kiosk's name.
<b>Jobs</b>	This column displays the number of jobs posted to the kiosk.
<b>URL</b>	This column displays the URL of the starting page of the kiosk.

#### Actions

The icons in the Actions column perform the following functions.

Action	Description
<b>Edit</b>	Click this icon to change the Name and Code of the kiosk. You can also make changes to the Welcome Page text.
<b>Deactivate/Activate</b>	Click this icon to deactivate/activate the kiosk. The open lock means the kiosk is active, while the closed lock indicates an inactive kiosk.
<b>Delete</b>	Click this icon to delete the kiosk from the list.

## Create a New Kiosk

Follow these steps to create a new kiosk.

### To create a new kiosk:

1. On the Kiosks screen, click **Create New Kiosk**.
2. Complete the fields on the form.

Field	Description
<b>Name</b>	Enter a name for the kiosk.
<b>Code</b>	Enter a code for the kiosk.

3. Enter a message in the **Welcome Page Text** field.
4. Click **Save**. The Kiosks screen displays the new kiosk, with a URL that you can use when programming the kiosk.

## Social Media Integrations

Use this screen to manage social media integrations with Deltek Talent Management.


The Social Media Integration functionality allows jobseekers to use their social media profiles as a means to create new user accounts, create resumes, or apply for jobs.

This screen allows you to perform the initial setup and configuration for the different social media platforms that integrate with Deltek Talent Management.

### Display the Social Media Integrations Screen

Follow these steps to display the Social Media Integrations screen.

#### To display the screen:

1. On the Deltek Talent toolbar, click the **Administration** icon .
2. In the **Recruiting** group box, click **Social Media Integrations** under the **Configuration** section.

## Configure LinkedIn Integration

Activate integration with LinkedIn to display an **Apply with LinkedIn** button in your company's job pages and allow jobseekers to apply using their LinkedIn profiles.

The **LinkedIn Setup** feature must be enabled on the **Recruiting » Social Media » LinkedIn** section of the Features screen **Administration » Features** before you can proceed with these steps.

**Warning:** You must use your LinkedIn Recruiter credentials. Make sure you are logged out of your personal LinkedIn account, if you have one.

**To enable jobseekers to use their LinkedIn profiles when applying for jobs, complete the following:**

1. Click **LinkedIn** to expand the row, then click **Activate this Integration**.
2. Click **Sign in** and enter your LinkedIn Recruiter credentials.
3. In the **Select Contract** field, click **Continue**. You may see more than one option if your company has multiple LinkedIn contracts.
4. In the **Apply with LinkedIn** row, click **Request**.
5. Click **Go Back**. The screen returns to the main Social Media Integrations screen, which confirms that the integration setup is complete and ready to use.

## Teams


This screen lets you manage the groups of users or “team” of users who can share recruiting information.

The users within a recruiting team are able to access and work on the requisitions, job seekers, candidates, and offers of those members within their team.

### Display the Teams Screen

Follow these steps to display the Teams Screen.


**To display the Teams Screen:**

1. On the Deltek Talent toolbar, click the **Administration** icon .
2. In the **Recruiting** group box, click **Teams** under the **Configuration** section.

### Create a Team

Follow these steps to create a team.

**To create a team:**

1. On the Teams screen, click **Create a New Team** to create a new team.
2. In the **Team Name** field, enter a unique value.
3. In the **Team Members** field, select the team members by completing the following steps:
4. Click the employee name in the **User List** selection box.  
You can select more than one name by holding down the **Ctrl** key and clicking the names.
5. Click  .



This transfers the name(s) to the **Selected Users for this Team** text box.

6. Remove an employee from the **Selected Users for this Team** box by clicking the name, then clicking  .
7. Click **Submit**.

## Edit a Team

Follow these steps to edit a team.

### To edit a team:

1. Click the **Edit** icon  in the **Actions** column of the Teams screen.
2. Make changes as necessary.  
Here are some points to bear in mind when editing teams:
  - While you can edit the team name, you cannot change it to an existing team name. Doing so will result in an error upon **Save**.
  - Similar to when you created the team, you can add and remove users from the team by clicking the name of the employee in the **User List** selection box, and then clicking  .

## View Team Members

Follow these steps to view team members.



### To view team members:

On the Teams screen, click the value in the **# of Members** column to display the details for that team.

## Deactivate/Activate a Team

Follow these steps to deactivate/activate a team.

### To deactivate/activate a team:

1. Click the **Deactivate Team** icon  in the **Actions** column of the Teams screen to deactivate an active team.  
When you deactivate a team, it no longer displays in the list of options when selecting team associations.
2. Click the **Activate Team** icon  in the **Actions** column of the Teams screen to activate an inactive team.  
When you activate a team, it automatically displays in the list of options when selecting team associations.

## Terms of Use


The **Terms of Use** screen application stores the various terms of usage that a job seeker must read and acknowledge prior to creating an account.

The specific statement that is displayed to the job seeker can be selected through a recruiting workflow. The business practices of your organization will determine whether a statement is necessary, and if so, how many versions are warranted.

### Display the Terms of Use Screen

Follow these steps to display the Terms of Use Screen.

#### To display the Terms of Use Screen:

1. In the Deltek Talent toolbar, click the **Administration** icon .
2. In the **Recruiting** group box, click **Terms of Use** under the **Configuration** section.

### Contents of the Terms of Use Screen

The Terms of Use screen contains a table that includes the following information.

- Label or title of the Terms of Use statement
- Version Count or the number of versions created for a Terms of Use document
- Actions or the functions available from this screen:
  - **Make Default:** Use this icon to set the default Terms of Use document. Click the icon of the document that you wish to be the default. The check mark indicates the default status.
  - **Add Version:** Use this icon to add a new version of the Terms of Use document.
  - **Clone Latest Version:** Use this icon to copy the latest version available for the selected Terms of Use document.

The icons in the Actions co

### Create a New Statement

Follow these steps to create a new statement.

#### To create a new Terms of Use statement:

1. Click **Create New Statement**.
2. In the **Statement Label** field, enter a unique label.  
This is the title that is displayed to the job seeker and also the name of the drop-down list value when a recruiter selects a Terms of Use statement for a recruiting workflow.
3. In the **Language**, make your selection from the drop-down list.

This determines the language in which the statement is written. If your organization is configured for multiple languages, the options in the drop-down list display the languages that are enabled in the **Languages** section of the Administration screen.

4. In the **Statement Content** text box, enter the Terms of Use statement.
5. Click **Submit**.

### Add Terms of Use Version

A Terms of Use version can be added either from the Terms of Use index page (**Administration » Recruiting » Configuration » Terms of Use**) or the Terms of Use versions page (**Administration » Recruiting » Configuration » Terms of Use » Version Count**).

**To create a new Terms of Use version, complete the following steps:**

1. Click **Add Version**.
2. Select the **Language**.
3. Enter the new version of the Terms of Use Statement into the **Statement Content** text field.  
You can use the available editing and formatting tools, as needed.
4. Click **Submit**.

### Clone Terms of Use Version

A Terms of Use version can be cloned either from the Terms of Use index page (**Administration » Recruiting » Configuration » Terms of Use**), wherein only the latest version will be cloned, or the Terms of Use versions page (**Administration » Recruiting » Configuration » Terms of Use » Version Count**), wherein specific versions can be cloned.

**To clone a Terms of Use version:**

1. Click **Clone Latest Version/Clone Version** icon.
2. Select the **Language**.
3. Review the Terms of Use statement that you cloned and edit or format it as needed.
4. Click **Submit**.

### Edit Terms of Use Statement Translation

Follow these steps to edit the terms of use statement.

**To edit a Terms of Use statement translation, go to Administration » Recruiting » Configuration » Terms of Use and click the Version Number of the TOU statement you want to edit and complete the following steps:**

1. Click the **Edit Statement Translation** icon on the Actions column.
2. Edit the **Statement Content**.

3. Click **Submit**.

- You cannot edit a statement that has already been acknowledged by a job seeker.

## Add Terms of Use Version Translation

To add terms of use version translation, go to **Administration » Recruiting » Configuration » Terms of Use** and click the Version Number of the TOU statement you want to edit.

### Complete the following steps:

1. In the **Actions** column, click the Add Translation icon.  
This action will not display if your organization is configured for only one language.
2. Select the **Language**.
3. In the **Statement Content** text box, enter the translation for the statement in the language that you selected in the **Language** field.
4. If after you complete the translation, you want to create another translation in a different language, select the **Add Another Translation After Submission**.
5. Click **Submit**.
6. If you selected the **Add Another Translation After Submission** check box, then repeat Steps 2 to 6, but in the **Statement Content** text box, enter a version of the Terms of Use statement in the language that you have selected in the **Language** drop-down list.  
If you did not select **Add Another Translation After Submit**, you will be redirected to the Terms of Use versions page.


**Note:** If you select a language that already has an existing translation record, Deltek Talent will display an error message when you click **Submit**.

The second tier or child statements are added and indented below the first tier statement in the Terms of Use table to indicate their association. The **Language** column shows in what language or dialect the statement was created and the **Date Created** column displays the date the when translation was created.

## Set the Default Statement

The default statement is the first drop-down list value that is displayed to the job seeker if no statement was selected in the recruiting workflow. Selecting a default statement does not prevent recruiters from selecting additional statements or different statements when creating a requisition.

### To set the default statement:

Click the **Make Default** icon  on the Actions column to set a statement as the default.  
There can be only one default statement.



## Update to Latest Version

You can view the list of active workflows that are currently using an outdated version of the a selected Terms of use document by using the **Update to Latest Version** icon.



### To update the version being used in an active workflow:

1. Select a workflow from the table.
2. Click the **Submit** button.  
A new requisition should be created based on the modified workflow in order to display the new version applied in the TOU.

## Deactivate/Activate Statements

Follow these steps to deactivate/activate statements.

### To deactivate/activate statements:


1. Click the  in the **Actions** column of the Terms of Use Versions screen to deactivate an active statement.  
You can deactivate a statement as long as that statement is not associated with a recruiting workflow. When you deactivate a statement, it no longer displays in the list of options when selecting Terms of Use statements.
2. Click the  in the **Actions** column of the Terms of Use Versions screen to activate an inactive statement. When you activate a team, it automatically displays in the list of options when selecting team Terms of Use statements.

**Note:** If you have deactivated a first tier or “parent” statement that has secondary or “child” statements, the second tier statements are automatically deactivated. If you have deactivated a second tier statement, the first tier statement is not automatically deactivated.

## Delete Statements

Follow these steps to delete statements.

### To delete statements:

Click  in the **Actions** column of the Terms of Use Versions screen delete a statement. A confirmation message appears where you can approve or reject the deletion.  
If a Terms of Use statement is associated with a recruiting workflow or has been acknowledged by a job seeker, the action option to delete the statement is disabled.  
For statements that were created but never acknowledged by a job seeker or the association with a recruiting workflow has been removed, the action option to delete is enabled.

## Workflows


Workflows allow you to automate several functions of the recruiting process.

This includes status changes for requisitions, candidate processing, form selection for specific stages, user task suggestions, offer management, and onboarding procedures.

Display the Workflows Screen

Follow these steps to display the Workflows Screen.

### To display the Workflows Screen:

1. In the Deltek Talent toolbar, click the **Administration** icon .
2. In the **Recruiting** group box, click **Workflows** under the **Configuration** section.

Contents of the Workflows Screen

The Recruiting Workflows screen contains a table that includes the name of the workflow, its associations, the date the workflow was created, and the date it was last modified.

**Note:** The workflow for passive job seekers (individuals who create an account on your company's job portal and add a résumé, but do not apply to a specific requisition) is not included in this table, but is covered in the [Passive Resume Submission Workflows](#) section of this document.

If your company has activated the Hourly Portal, then the **Actions** column includes an option to make an hourly workflow the default hourly workflow.

If you inadvertently leave the recruiting workflow creation process without saving it as a draft or as a completed workflow, Deltek Talent will store your selections until you either log out of the application or close your browser.

To return to the unfinished workflow, click **More Options » Continue with Last Workflow**

Preview Recruiting Workflow

Follow these steps to preview a recruiting workflow.

### To preview workflows:

Click the workflow name in the Recruiting Workflows screen.

This gives you a view of the following details:

- Options chosen for each step in the workflow.
- Forms used for specific actions.
- Required tasks for when candidates reach a specific status during the recruitment process.

Each section or step of the recruiting workflow is clearly labeled above the content it represents.

For the **Automated Actions** section, job seeker types are split out into tables to make it easier to differentiate between actions.

If your organization uses the Offers and Onboarding features, then those sections display last in the recruiting workflow preview.

## Lock Workflow Process

Before creating a workflow, you may want to enable the Lock Workflow feature, which limits the candidate statuses available for selection to those configured in the workflow at the time a requisition is created.

You enable this feature from the Features screen (**Administration » » Global Settings » System Administration » » Features » Recruiting » Recruiting Workflows**). When enabled an **Enforce Workflow** option displays at the bottom of the Step 6: Candidate Process screen of the Recruiting Workflow Wizard screen (**Administration » » Recruiting » » Configuration » » Workflows**). When the **Enforce Workflow** check box is selected, recruiters can only move through the statuses defined in the workflow.

## Create a Recruiting Workflow

The **Recruiting** module comes with at least two recruiting workflows for your organization to use. However, your organization may prefer to create workflows from scratch.

### To create a new workflow:

1. Click **Create New Workflow**.
2. Complete the steps in the Workflow wizard form.  
The number of steps may vary depending on the features that are enabled for your organization:
  - Step 1: Associations
  - Step 2: Roles
  - Step 3: Form & Approvers
  - Step 4: Statuses
  - Step 5: Resume Submission
  - Step 6: Candidate Process
  - Step 7: User Tasks
  - Step 8: Automated Actions
  - Step 9: Offers
  - Step 10: Onboarding

**Note:** The steps for Offers and Onboarding only display if the features are enabled for your company.

3. For each step, you can save your changes by clicking one of the following buttons:
  - **Save:** This saves the workflow in its current state. You must complete all required fields, otherwise an error message displays and you will not be able to save the workflow in its current state or proceed to the next step of the wizard.
  - **Save as draft:** This saves the workflow in the Draft section of the Workflows screen. Workflows can be saved as a draft at any point in the creation process without receiving any error messages.

### Step 1: Associations

Associations are used to help identify which workflow is applied to a requisition whenever a requisition is created.

Workflows can be as specific (for example, job type, job title, location) or as general (for example, first tier organizational level) as your organization needs. When a recruiting user creates a requisition, the application determines which workflow steps to follow, based on the associations selected for the requisition.

#### Complete Step 1: Associations

Follow these steps to perform step 1.

#### To complete step 1:

1. In the **Workflow Name** field, enter a unique name.  
The name that you enter becomes the drop-down list value that is displayed when recruiting workflow options appear in the application.
2. Select the **Lock Down # of Hires** check box if you want to limit the number of hires for the workflow.  
The **# of Hires** field will display so you can enter the specific number of hires allowed.
3. Select the **For Hourly Portal Use Only** check box if the workflow will be used with requisitions for hourly jobs.  
This check box displays only if your company uses the Hourly Portal feature.
4. In the **Select Associations** section, select a value for at least one of the following fields:

Field	Description
<b>Organizational Unit</b>	Select the organizational unit associated with the workflow. Depending on your company's organizational structure, when you select a value from this drop-down list, sub-level drop-down lists may display. Select the sub-levels to further drill down into the division or department, if applicable.

Field	Description
	The options in this drop-down list are determined by the hierarchy setup in the <b>Organizational Structure</b> screen of the <b>Global Settings</b> section of the Administration screen.
<b>Job Types</b>	Select whether the recruiting workflow is for full-time jobs, interns, part-time jobs, or other job types. The options in this drop-down list are defined by the job types setup in the <b>Drop Down and Multi-Select Lists</b> screen of the <b>Global Settings</b> section of the Administration screen.
<b>Location</b>	Select where a job will be located when the requisition is created. If you populated the <b>Organizational Unit</b> field, the selection of locations in this drop-down list are filtered according to the relevant locations for that organizational unit. If you did not populate the <b>Organizational Unit</b> field, all locations created for your organization display in the selection of locations for this drop-down list.
<b>Job Title</b>	Select the job profile that to use when the requisition is created. If you populated the <b>Organizational Unit</b> field, the selection of job titles in this drop-down list are filtered according to the relevant job titles for that organizational unit. If you did not populate the <b>Organizational Unit</b> field, all job titles created for your organization display in the selection of locations for this drop-down list.

5. After you have completed the relevant fields, click one of the following buttons:
  - **Next:** Click this to proceed to the next step in the wizard. The number of steps in the wizard is defined by the recruiting workflow used by the job profile.
  - **Save:** Click this to save the workflow in its current state. You must complete all required fields, otherwise an error message displays.
  - **Save as Draft:** Click this to save your current selections as a draft record in your **Drafts** section of the Workflows screen.

## Step 2: Roles


This step allows you to assign the default user in each role for any requisition matching the recruiting workflow.

This is not a required step, however, it can save time if your organization implements specific recruiting users for specific locations or job types.

### Complete Step 2: Roles

Follow these steps to complete step 2.

#### For step 2:

1. In the **Role** drop-down list, make your selection and click **Go**.
2. The **Select Default User** drop-down list, select a name and click **Add**.  
The user is added to the Roles table at the bottom of the screen. The next time a recruiter creates a requisition that uses this recruiting workflow, the name of that user will automatically populate the appropriate field in the requisition form. However, recruiter can still modify the field and select a different user.
3. To delete a user from the table, click .
  - Click **Next** to proceed to the next step in the wizard, **Save** to save the workflow in its current state, or **Save as Draft** to save the workflow in your **Drafts** section of the Workflows screen.

### Step 3: Form & Approvers

This step configures the following settings:

- The requisition form to use for the recruiting workflow
- The approval chain, if applicable
- The approvers, if any
- Who to notify when the requisition is rejected or approved.

### Complete Step 3: Form & Approvers

Follow these steps to complete step 3.

#### To complete step 3:

1. In the **Form** field, make your selection from the drop-down list.  
This is the form that will display to recruiters when they select associations that match the recruiting workflow. The selections in the drop-down list includes all active requisition form types created through the **Dynamic Forms** screen under the **Recruiting** section of the Administration screen.

**Note:** While the recruiting user can modify some of the options within the form, the form itself is always determined by the workflow.

2. In the **Approver Selection** field, select one of the following options:
  - **Skip Approver Selection:** Select this if the requisition does not require an approval process and can be posted to your organization's career site immediately upon completion.

- **User Can Select Approvers or Skip:** Select this to give users the option to select approvers or to skip the approval process when creating requisitions.
  - **User must select at least one approver:** Select this to require users to select at least one approver when creating requisitions. This requires requisitions to complete an approval process before it is be posted to your organization's career site.
3. In the **Approval Reminder (Days)** days field, enter the number of days should the application wait before it reminds approvers to complete the approval process.  
If you populate this field, then the application will automatically send daily email reminders after the set number of days has elapsed.
  4. Select the **Allow Alternate Apply Method** check box, to allow users to recommend alternate application methods in lieu of the online application method when creating requisitions.
  5. In the **Available Approval Chains** field, make your selection from the text box and click **Select**.

You can choose more than one value in this field.


**Note:** Skip this step if you selected Skip Approver Selection in the Approver Section field in Step 2.

The fields in the **Select Approver(s)** section of the form are automatically populated based on the available approval chain that you selected. However, you can edit the default options.


6. If necessary, edit the **Type** field by selecting one of the following options:
  - **Serial:** Select this to set the approval chain to follow a specific sequence. The application sends an approval request notification to the first approver on the list. The succeeding approvers will not receive any notification from the application until the previous approver takes action or if the previous approver in the chain rejected the requisition.
  - **Parallel:** Select this to allow approvers to approve requisitions in no particular sequential order. The application sends an approval request notification to each approver simultaneously. If any of the approvers reject the requisition, the requisition is rejected.
7. If necessary, edit the **Select Approvers by Name** field to add approvers by clicking **Internal Approvers**.

This launches a search screen where you can searching for an employee either by name or by direct report manager.

**Note:** If the **Skip for approvals check box** is selected on the user profile, then that user will not display in the selection of approvers, even if you search for that individual by name.

In the search results screen, select employees by either clicking  or selecting the check box next to the employee name, then clicking the **Add All Selected** button.

Review the names in the **Current Selection** table of the search results screen.

To delete a name from the list click  in the **Actions** column.

To remove all the names from the list, click **Clear**.

To confirm your selection of names, click **Confirm Selection**.

This closes the search results screen and returns you to Form & Approvers screen.

8. If necessary, edit the **Enter External Approvers** field by entering the e-mail address for each external user who should approve or reject the requisition.

Separate the e-mail addresses with commas or type one address per line in the text box.

These approvers will receive a notification with a link to access the requisition for review, but will not have access to other areas of the application.

9. If necessary, edit the **Select Approvers by Job Title** field by making your selection from the multi-select text box.

This option displays the name of any user who has that job title in their user profile in the list of options when a recruiting user selects an approver for a requisition.

**Note:** If the **Skip for approvals check box** is selected on the user profile, then that user will not display in the selection of approvers, even if the user meets the job title criteria.

10. If necessary, edit the **Select Approvers by Managerial Level** field by making your selection from the multi-select text box, and clicking **Update Requisition Approvers**.

You can select up to six managerial levels. When a recruiting user creates a requisition, the application will automatically list users in those managerial levels as approvers.

Note	Managerial levels are based on the hierarchy structure of your organization and who are selected as managers on their user profiles. If the approval chain lists a level two manager and there are no users in that level, then the application will omit that approval requirement.
Note	If the <b>Skip for approvals check box</b> is selected on the user profile, then that user will not display in the selection of approvers, even if the user meets the managerial level criteria.

11. In the **Notify** field of the **Upon Rejection** section, select the user types that the application will notify if an approver rejects a requisition.

You can select more than one user type in this field.

12. Select the **Require Comments When Rejected** check box to require approvers to provide a reason if they reject the requisition

13. Select the **Allow User to Re-submit Original Requisition** check box to allow a recruiting user to re-submit a previously-rejected requisition.

This allows the recruiting user an opportunity to correct the issue that caused the initial rejection, if known.

14. In the **Notify** field of the **Upon Approval** section, select the user types that the application will notify if an approver approves a requisition.

- Take one of the following actions:
- Click **Next** to proceed to the next step in the wizard.
- Click **Save** to save the workflow in its current state.



- Click **Save as Draft** to save the workflow in your **Drafts** section of the Workflows screen.

#### Step 4: Statuses

This section allows you to dictate the requisition statuses and if each change should happen automatically.



The requisition's entire lifecycle can be programmed here using the statuses listed and repeating the process for each step.

#### *Complete Step 4: Statuses*

Follow these steps to complete step 4.

#### **To complete step 4:**

1. In the **Requisition Status** field, select a status.  
The options in this drop-down list are defined by the statuses for requisitions that were created in the **Drop Down and Multi-Select Lists** screen of the **Global Settings** section of the Administration screen. The default options for recruiting workflow requisition statuses include the following:
  - **Open:** This status indicates that the requisition is posted on your external job portal as well as the internal job portal. Requisitions with this status are available for cross-posting, employee referrals, and hiring orders.
  - **On Hold:** This status creates no automatic changes in the system, but it can be used for reporting purposes.
  - **Pending:** This status creates no automatic changes in the system, but it can be used for reporting purposes.
  - **Confidential:** This status is used for jobs that are created, but not posted. Typically these are used for requisitions a recruiter creates for "invitation only" inquiries.
  - **Internal:** This status indicates that the requisition is posted on your organization's internal job portal only.
  - **Closed:** This status is used to indicate that a requisition was closed by a recruiting user before the position was filled. This is typically used if your organization does not want "evergreen" job postings and prefers to create new requisitions after a job has been posted for a specific number of days.
2. In the **Duration of Status (days)** field, enter a value and click **Add**.  
The countdown does not begin until the requisition is approved (if applicable) and posted. If the requisition will only have one status in the recruiting workflow, then leave this field blank.
3. Repeat Steps 1 and 2 for each relevant status.  
You can have as many requisition status options as your organization requires. Each entry that you add displays in the **Status(es) and Duration** table.

4. Click  in the **Actions** column to edit a status in the table, or click  to delete a status in the table.
5. Select the **Allow status change on requisition form** check box, if you want to allow users to change the status on the requisition form itself.  
Any changes made there will override the workflow status settings.
6. In the **Send Notification of Status Change** field, indicate in number of days when the application will send a notification before it changes the status of a requisition.

**Note:** This is an optional field. However, if you type a value in for the number of days, then you must select the individuals who will receive the notification.

7. In the **Notify** field, select who will be notified when the **Status** field changes.

**Note:** The statuses that are visible on the external and internal job portals are configurable in the **Requisitions** section of the **Administration » Global Settings » System Settings** screen.

- Take one of the following actions:
- Click **Next** to proceed to the next step in the wizard.
- Click **Save** to save the workflow in its current state.
- Click **Save as Draft** to save the workflow in your **Drafts** section of the Workflows screen.

## Step 5: Résumé Submission


The Résumé Submission step is used to configure the application process for job seekers.

It is organized into the following sections, which are based on resume types:

- **Contact:** This resume type for resumes that entered the database through a recruiting user who added
- Employee Referral
- External
- Internal
- Recruiter Uploaded
- Vendor Submitted

**Note:** A  flag next to the resume type label indicates that the process has already been defined for that type.

Here are some points to keep in mind for this step:


- Click  to view the options within each résumé type.
- Each résumé type can have its own individualized application procedure.


- Use the **Copy process to selected Résumé Types** button as a convenient tool to copy options to another résumé type.
- Each job seeker type will have a checkmark icon to indicate the process for the recruiting workflow has not been defined.


### *Complete Step 5: Résumé Submission*

Follow these steps to complete step 5.

#### **To complete step 5:**

1. In the **Default Process** field, set the default job seeker type to use if during the requisition creation process, the recruiting user selects a job seeker type that does not have a defined process.  
Select one of the following from the drop-down list:
  - **Contact**: Created when a recruiting user submits one of his or her contacts to a requisition.
  - **Employee Referral**: Created when an employee refers a friend to a job posting.
  - **External**: Created when applicant submits his or her résumé to a job posting on your organization's external portal.
  - **Internal**: Created when an employee in your organization submits his or her résumé (or completes an internal transfer form) to a job posting.
  - **Recruiter Uploaded**: Created when a recruiting user adds a job seeker to the résumé database or adds the job seeker directly to a requisition.
  - **Vendor Submitted**: If your organization utilizes the job agency vendors, any résumé the agency submits to a hiring order is tagged as a vendor submitted job seeker.
2. If applicable, click  to expand the different job seeker types and select your customized process options.  
You can opt to customize only the job seeker type that you have selected in the **Default Process** field.
3. If applicable, select the **Require Screening Questionnaire Responses** check box to require applicants to complete the screening questionnaire during the application process.
4. If applicable, in the **Notify Recruiter of Résumé Submissions**, **Notify Hiring Manager of Résumé Submissions**, and **Notify Additional Individual(s) of Résumé Submissions** fields, select from the drop-down list.
5. If applicable, in the **E-mail Address(es)** text box, enter the e-mail address of each recipient to notify when a résumés is submitted to a requisition.  
These are typically the e-mail addresses of individuals who are not employed by your organization. Use a comma to separate each e-mail address.
6. If applicable, in the **Employees to Add** field, click **Search Users** to search for and select employees to include in the notifications list.

In the search results screen, select employees by either clicking  or selecting the check box next to the employee name, then clicking **Add All Selected**.

7. If applicable, in the **Contacts to Add** field, click **Search Contacts** to search for and select contacts.
8. In the Results table, select contacts by either clicking  or selecting the check box next to the contact name, then clicking **Add All Selected**.
9. Click **Confirm Selection**.
10. In the **Résumé Form** field, make your selection from the drop-down list.
11. If applicable, in the **Secondary Application Form** field, select from the drop-down list.
12. If applicable, in the **Terms of Use** field, select from the drop-down list.


This is the statement that each applicant must acknowledge before they submit a job application to your organization.

13. If applicable, in the **Checklist** field, choose which items to include in the application process for the job seeker by selecting one of the following options for the **Cover Letter**, **Attachments**, **Diversity**, **Skills Profile**, and **Competency Profile** drop-down lists:
  - **Hidden**: Select this to hide the checklist item for that job seeker type.
  - **Optional**: Select this to display the checklist item for that job seeker type. However the applicant can opt to skip the task.
  - **Required**: Select this to display the checklist item and require the job seeker to complete the task. Skipping the task will result in an error message.

Note	The <b>Allow override of data collection rule</b> check box allows the recruiting user to override the default Diversity Data Collection rule when creating a requisition. The default rule dictates that the Country of the requisition's primary location determines which Diversity Data questions are shown to the job seeker.
Warning	If you chose to require the Diversity step in the application processes for a job seeker type, it is highly recommended that you include a "Decline to Identify" option in the <b>Diversity Data Collection</b> . However, if Diversity is required, the recruiting workflow will review the available categories to verify that all the categories are active. If a category is disabled, it will not be shown to a job seeker even if Diversity is required in the check list.

14. Click **Update** to update the process settings. The icon next to the job seeker type label changes to a check mark indicating it has been saved.

**Warning:** Make sure that you click the **Update** button after you have completed your customization options, otherwise your selections will not be saved to the application.

15. If applicable, click the **Copy process to selected Résumé Types** button to copy the process options that you have just saved to another résumé type.
16. To tweak the process options that you have just copied, click  and repeat Steps 3 to 10.
17. Take one of the following actions:

- Click **Next** to proceed to the next step in the wizard.
- Click **Save** to save the workflow in its current state.
- Click **Save as Draft** to save the workflow in your **Drafts** section of the Workflows screen.

### Step 6: Candidate Process


This step allows you to configure the stages (also referred to as “statuses”) that each candidate will undergo during the recruiting process.

The options that you select in this step are displayed in the candidate's Résumé Dashboard under the Workbench tab.

This step is organized into the following sections, which are based on resume types:

- Contact
- Employee Referral
- External
- Internal
- Recruiter Uploaded
- Vendor Submitted



Each candidate type can have its own individualized recruiting process.

**Note:** A  flag next to the candidate type label indicates that the process has already been defined for that type.

### Complete Step 6: Candidate Process

Follow these steps to complete step 6: Candidate Process.

#### To complete step 6:

1. Click  next to the candidate type label that you want to customize.
2. From the multi-select text box on the left, make your selections then click  to add the status to the candidate process for that type.

The available options are as follows:

- **Résumé Submitted:** This status is automatically assigned to any job seeker who submits a résumé to a job. This status **MUST** be first in the list. If you rename this status to a different term used by your organization (for example, Applied), that term must be the first in the list of statuses in the candidate recruiting process.
- **Candidate:** This status is used to indicate that a job seeker is under consideration for a job and is usually the next status after **Résumé Submitted**. Changing the job seeker's status to **Candidate**, adds that job seeker to the table of candidates for the same job.




- **Interview:** This status indicates that the candidate already completed or is scheduled for an interview.
- **Offer Extended:** This status is manually selected by a recruiting user when the candidate is offered a position in your organization.
- **Offer Accepted:** This status can be manually selected by a recruiting user when a candidate accepts an offer, or the system can automatically set the status to this value when the candidate accepts an offer, depending on how your system is configured. For more information, see the note below.
- **Offer Declined:** This status can be manually selected by a recruiting user when a candidate rejects an offer, or the system can automatically set the status to this value when the candidate rejects an offer, depending on how your system is configured.

**Note:** To configure DTM to automatically set the status to **Offer Accepted** or **Offer Declined** based on the candidate's action, you must:

- Enable the Candidate Automatic Status Change feature (**Administration » Global Settings » System Administration » Features » Recruiting » Candidates**) to enable the Enable Automatic Status Change check box.
- Select **Offer Accepted** or **Offer Declined** as a status to include in the workflow.
- Check the **Enable Automatic Status Change** option that displays below the list of statuses.

- **Offer Rejected by Approver:** The system automatically sets the applicant status to this value if the approver rejects the offer.
- **Hired:** This status is used to indicate that a candidate's application is successful, and is now a newly-hired employee in your organization. This can be done manually or automatically when the new hire begins the onboarding process.
- **Removed Self from Consideration:** The system automatically sets the applicant status to this value when a candidate withdraws from recruitment process.
- **Rejected:** This status is used by recruiting users to indicate that a candidate is no longer being considered for a job.

**Note:** Only select the statuses that require action from the recruiting user.

3. Click  to remove a status from the candidate process.
4. Click  and  to rearrange the sequence of the statuses in the selected status text box.
5. If applicable, click the **Copy process to selected Résumé Types** button to copy the process options that you have just saved to another résumé type.
6. If your System Administrator enabled the **Candidate Automatic Status Change** feature and you have selected both **Offer Accepted** and **Offer Declined** in step 2 the **Enable Automatic Status Change** option is enabled.

7. Select **Enable Automatic Status Change** to automatically set the applicant status to **Offer Accepted** when the candidate accepts the job offer, or to **Offer Declined** when a candidate rejects an offer.
8. To tweak the status options that you have just copied, repeat Steps 1 to 4.
9. Take one of the following actions:
  - Click **Next** to proceed to the next step in the wizard.
  - Click **Save** to save the workflow in its current state.
  - Click **Save as Draft** to save the workflow in your **Drafts** section of the Workflows screen.

### Step 7: User Tasks

This step was originally called “Triggers” and allows you to associate candidate statuses directly to tasks in the recruiting process.

The options that you select in this step are displayed the candidate’s Résumé Dashboard under the Workbench tab.

Each candidate status contains the same task selections. Statuses that have been selected in Step 6: Candidate Process step are marked with two asterisks.

**Note:** A  flag next to the candidate type label indicates that the process has already been defined for that type.

### Complete Step 7: User Tasks

Follow these steps to complete step 7: User Tasks.

#### To complete step 7:

1. Select a task from the option list for each candidate status that you included in the Candidate Process step.  
 You can also select tasks for candidate statuses that you did not include in the Candidate Process step in case these statuses become relevant to a candidate.  
 By default, all tasks are set to **None**.  
 The available tasks for each drop-down list are as follows:
  - **Route to Hiring Manager:** This task is used after a job seeker is “screened-in”, completed a phone screen interview, or when the applicant **Status** is changed to **Candidate**.
  - **Send Request to Complete Background Check:** This task is used for those candidates who are under consideration. Recruiting users can request background checks before or after they issue a job offer. The decision to hire the individual is contingent on the results from the background check. This task will not display in the list of drop-down options the feature is enabled for your company and a background check vendor is integrated with your application.

- **Check References:** This task is used for candidates who are under consideration. It includes a link that redirects the recruiting user to the **References** section of the **Résumé Dashboard**.
  - **Initiate the Offer Management Process:** This task is associated with the **Offer Extended** candidate status. It includes a link to create a job offer, add approvers (if any), and send the job offer either to the approvers or to the candidate.
  - **Select an Interview Form:** This task is associated with the **Interview** candidate status. It includes a link that directs the recruiting user to select an interview form to use for logging the interview with the candidate.
  - **Add to Pool:** This task is used to add a candidate to a recruiting pool. Recruiting pools group candidates that have similar qualifications. The task includes a link to redirect the recruiting user to the **Add to Pool** section on the **Résumé Dashboard**.
  - **Send a Letter:** This task is used to send a letter to a candidate. This can be useful when candidates are screened-out or when a different was hired for the position.
  - **Initiate Onboarding:** This task is associated with the **Hired** candidate status. It includes a link to direct the recruiting user to begin the onboarding process for the candidate.
  - **Secondary Application:** This task is to obtain more information from candidates after they are screened-in. Secondary applications are created in the **Dynamic Forms** section of the Recruiting module.
2. Take one of the following actions:
- Click **Next** to proceed to the next step in the wizard.
  - Click **Save** to save the workflow in its current state.
  - Click **Save as Draft** to save the workflow in your **Drafts** section of the Workflows screen.

### Step 8: Automated Actions

This step allows you to automate actions when certain conditions are met.

Each candidate type is listed and each can have their own automated actions.

**Note:** A  flag next to the candidate type label indicates that the process has already been defined for that type.

This is not a mandatory step, but it can be useful if your organization only wants to configure automated actions for each candidate type.



### Complete Step 8: Automated Actions

Follow these steps to complete step 8: Automated Actions.

#### To complete step 8:

1. In the **Default Process** field, choose the default value from drop-down list if your organization wants to create a series of automated actions and apply those automated actions to all job seeker types.
2. Click ☒ next to the candidate type label that you want to customize.
3. In the **When** field, select the event that triggers the automated action.  
Additional drop-down list or multi-select fields will appear, depending on the event that you select.


Event	Description
<b>Candidate Status Change</b>	<p>Select this to trigger automated actions when the Deltek Talent detects a change in the candidate's status.</p> <p>If you select this event, an additional <b>Select Status</b> field appears, where you select the specific status that triggers the automated action. You must choose a value for this field. The options are:</p> <ul style="list-style-type: none"> <li>▪ <b>Applied</b></li> <li>▪ <b>Screened-out</b></li> <li>▪ <b>Phone Screen</b></li> <li>▪ <b>Declined</b></li> <li>▪ <b>Candidate</b></li> <li>▪ <b>Secondary Application</b></li> <li>▪ <b>Interview</b></li> <li>▪ <b>Offer Extended</b></li> <li>▪ <b>Offer Rejected by Approver</b></li> <li>▪ <b>Offer Accepted</b></li> <li>▪ <b>Offer Declined</b></li> <li>▪ <b>Hired</b></li> <li>▪ <b>Removed Self from Consideration</b></li> </ul> <p>Several scenarios that can occur based on the candidate status that you select. See Scenarios for "Action to Perform" for further detail.</p>
<b>Job Seeker Screens Out</b>	<p>Select this to trigger automated actions when the job seeker screens out either due a poor rating on the screening questionnaire or for lack of qualifications.</p>

Event	Description
<b>Job Seeker Screens In</b>	Select this to trigger automated actions when the job seeker screens in due to having passed the screening questionnaire or for meeting the required qualifications.
<b>Action Pending Completion</b>	<p>Select this to trigger automated actions when Deltek Talent detects that the candidate has tasks or requirements that prevent the candidate from moving to the next step in the recruitment process.</p> <p>If you select this event, an additional <b>Select an Event</b> field appears, where you select the specific action that is pending completion. You must choose a value for this field. The options are:</p> <ul style="list-style-type: none"> <li>▪ <b>Incomplete Application</b></li> <li>▪ <b>Unclaimed Interview</b></li> <li>▪ <b>Offer Pending</b></li> <li>▪ <b>Onboarding Documents Pending</b></li> <li>▪ <b>Assessment Pending</b></li> <li>▪ <b>Background Check Pending</b></li> </ul>

4. In the **Action to Perform** field, select the action in response to the event trigger.
- The options that appear in this drop-down list depend on the value that you selected in the **When** field. Additional drop-down list or multi-select fields will appear on your screen, depending on the action that you select.

Event	Description
<b>Send Letter</b>	<p>Select this to automatically send a letter. If you select this action, the following additional fields appear:</p> <ul style="list-style-type: none"> <li>▪ <b>Letter to Send</b></li> <li>▪ <b>Recipients</b></li> <li>▪ <b>Timing</b></li> </ul> <p>See Scenarios for “Action to Perform” for further detail.</p>
<b>Change Status</b>	<p>Select this to automatically change the candidate’s status. If you select this action, an additional <b>What to do</b> field appears, where you select the new <b>Status</b> for the candidate. You must choose a value for this field. The options are:</p> <ul style="list-style-type: none"> <li>▪ <b>Applied</b></li> <li>▪ <b>Screened-out</b></li> <li>▪ <b>Phone Screen</b></li> </ul>

Event	Description
	<ul style="list-style-type: none"> <li>▪ <b>Declined</b></li> <li>▪ <b>Candidate</b></li> <li>▪ <b>Secondary Application</b></li> <li>▪ <b>Interview</b></li> <li>▪ <b>Offer Extended</b></li> <li>▪ <b>Offer Rejected by Approver</b></li> <li>▪ <b>Offer Accepted</b></li> <li>▪ <b>Offer Declined</b></li> <li>▪ <b>Hired</b></li> <li>▪ <b>Removed Self from Consideration</b></li> </ul> <p>Several scenarios that can occur based on the status that you select. See Scenarios for “Action to Perform” for further detail.</p>
<b>Redirect to URL</b>	Select this to automatically redirect the applicant to a specific website. If you select this action, an additional <b>What to do</b> field appears. In the <b>URL</b> text box, enter the website address.

5. If applicable, click the **Copy Current Actions to Selected Types** button to copy the process options that you have just saved to another résumé type.
6. To tweak the status options that you have just copied, repeat Steps 1 to 4.
7. Click **Save** to save the workflow in its current state or **Save as Draft** to save the workflow in your **Drafts** section of the Workflows screen.  
The automated action is added to a table that shows you when the action should occur, what action is performed, and what will be the end result of the action.
8. To delete an automated action from the table, click .
9. **Next** to proceed to the next step in the wizard.

#### Scenarios for “Action to Perform”


The Automated Actions feature is designed to help your organization automate several tasks in the application.

As you can imagine, there are a large number of automated actions that can be configured by selecting different options from the **When** column and different options from the **Action to Perform** column. Rather than include screen shots for every conceivable scenario, one configuration is included below with instructions. After this scenario is explained, several other scenarios are briefly described.

If **Action Pending Completion** is selected in the **When** column, a second drop-down list field displays with a list of potential pending events. All of these pending events include the **Send a**

**Letter** option in the **Action to Perform** column. Selecting **Send a Letter** option adds three other columns to the table: **Letter to Send**, **Recipients**, and **Timing**.

The letters available in the **Letter to Send** column are the letter templates created in the application and the choices available do not alter based on the pending event chosen.

After you select an option in the **Letter to Send** column, click  in the **Action** column to view the letter template. A modal window opens that displays the details of the letter template.

**Note:** The recruiting user will have an option to select a different letter, if necessary.

In the **Recipients** column, you can select one or more user group from the drop-down list or search for employees by click the **Search Employee** link.

**Note:** You can have both user types and employee names as recipients.

The **Timing** column is used to set up reminders that are automatically sent to the recipients about pending action. In the first field, enter a number to indicate how often the reminder is sent (in days). In the second field, enter the number of days that the reminder will be sent to recipients. These fields are not required and if left blank, the application will send only one letter and no follow up reminders.

Click **Save** to save your selections.

Scenario: Candidate Status Change Field Set to Declined

The drop-down list for **Primary Rejection Reason** displays.

Select a reason from the drop-down list selection. If applicable, another drop-down list for **Secondary Rejection Reason** displays.

If **Action to Perform** field is set to **Send Letter**, a **Letter to Send** column displays. Select a letter template from the drop-down list. Also, select the recipients. In the **Timing** column, set the number of hours before a letter is sent to the recipients or set reminder options.

Scenario: Change Status Change Field Set to Job Seeker Screens Out

If the **Action to Perform** field is set to **Send Letter**, a **Letter to Send** column displays.

Select a letter template from the drop-down list. Also, select the recipients. In the **Timing** column, set the number of hours before a letter is sent to the recipients.

Scenario: Candidate Status Change Field Set to Job Seeker Screens Out and Change Status Field Set to Declined


The drop-down list for **Primary Rejection Reason** displays.

Select a reason from the drop-down list options. If applicable, another drop-down list for **Secondary Rejection Reason** displays.

Scenario: Action Pending Completion Field Set to Unclaimed Interview

In the the **Action to Perform** field, select **Send Notification**.

An **Available Notification Events** drop-down list displays indicating which notifications are available for the event. Select the recipients, and if applicable, set reminder options in the **Timing** column.

For each automated action configuration you create, you must click **Save** on in order to add the action to the table of automated actions. Once an automated action is saved for a job seeker type, the  icon displays beside the job seeker label to indicate it includes automated actions.

### Step 9: Offers


Step 9 is available only if the Offers feature is enabled for your organization.

This step allows you to configure the options for creating and approving offers.

#### Complete step 9: Offers

Follow these steps to complete step 9: Offers.

#### To complete step 9:

1. In the **Offer Details Form** field, select the form to use when the recruiting user generates a job offer.  
The options in this drop-down list are defined by the **Offer** type forms created in the **Dynamic Forms** screen under the **Recruiting** section of the Administration screen.
2. If the offer requires approvers, then complete the required fields in the **Select Approval Chain** and **Select Approver(s)** sections.  
See Step 3: Form & Approvers for detailed information on approver selection settings.
3. Alternatively, you can opt to use the same approval options as the requisition, by clicking the **Copy Requisition Approval Chain to Offers** button.  
However, if you did not select an approval chain in the Form & Approvers step, then clicking the button will result in an error message.  
Click  to edit the approval chain options, if necessary.
4. In the **Offer Workflow Detail** section, select the job offer letter template and notification settings.
5. In the **Offer Letter** drop-down list, select the letter template. The options in this drop-down list are based on the templates that were uploaded in the **Documents** screen under the **Global Settings** section of the **Administration screen**.
6. In the **Notify upon Approval** text box, select whether you want Deltek Talent to notify the **Creator** of the offer, the **Approvers** of the offer, or both when the offer is approved.
7. In the **Notify upon Rejection** text box, select whether you want Deltek Talent to notify the **Creator** of the offer, the **Approvers** of the offer, or both when the offer is rejected.
8. Take one of the following actions:
  - Click **Next** to proceed to the next step in the wizard.

- Click **Save** to save the workflow in its current state.
- Click **Save as Draft** to save the workflow in your **Drafts** section of the Workflows screen.

### Step 10: Onboarding

This step is available only if the Onboarding feature is enabled for your organization.

This step allows you to configure the onboarding process for new hires in your company.

Onboarding options may include legal documentation, notifications sent to different departments alerting them of the new hire, tax credit documentation, and welcome letters sent to new hires.

#### Complete Step 10: Onboarding

Follow these steps to complete step 10: Onboarding.

#### To complete step 10:


1. In the **Onboarding** section of the form, complete the relevant fields in the form. The fields include the following:

Field	Description
<b>Use Onboarding</b>	Select this check box to enable onboarding for the recruiting workflow. If you leave this unselected, onboarding is skipped for this recruiting workflow regardless of what other options are selected in this step.
<b>Allow Recruiter to Add Documents</b>	Select this check box to allow recruiting users to add other documents to an onboarding package for a new hire. If you leave this unselected, the recruiting user can use only pre-assigned documents in the recruiting workflow and the onboarding bundle.
<b>Require Letter to be Sent to New Hire</b>	Select this check box to require recruiting users required to send a letter to new hires during the onboarding process. If you leave this unselected, a recruiting user can skip this step regardless of whether you have selected a letter template in the <b>Select Letter to Send to New Hire</b> section.
<b>Display Tax Credit Screening Questionnaire Invitation</b>	Select this check box to allow recruiting users to invite a job seeker to complete a questionnaire determining whether or not your organization will receive a tax credit for hiring the new employee.  This is a U.S.-specific feature and must be integrated with your application. Contact your Client Services Account Manager if your organization wants more information.
<b>Onboarding Documents</b>	Select documents from this multi-select text box. The options in this field are documents that were uploaded in the <b>Document Library</b> screen under the <b>Onboarding</b> section of the

Field	Description
	Administration screen. This list may include onboarding documentation for different countries to enable your organization to create a country-specific recruiting workflow.
<b>Dynamic Forms</b>	Select forms from this multi-select text box. The options in this field are documents created in the <b>Dynamic Forms</b> screen under the <b>Configuration Section</b> of the Administration screen.

- In the **Global Templates** column of the **Select Letter to Send to New Hire** section of the form, select the radio button next to the template that you want to select.
- Click the template name to view the contents of the letter.  
If you selected the **Require Letter to be Sent to New Hire** check box, then this is the letter that is automatically sent to new hires when recruiting users begin the onboarding process.
- If applicable, select the **Request Return Receipt** check box to generate an automatic notification address to recruiting user when the recipient receives the letter.
- If applicable, select the **Allow User to Select Letter During Onboarding Process** check box to allow recruiting users to choose a different letter other than the pre-configured default letter.

**Note:** This is a U.S.-specific feature and must be integrated with your application. Contact your Client Services Account Manager if your organization wants more information.


- If you select both this check box and the **Require Letter to be Sent to New Hire** check box, but did not select a global template under **Select Letter to Send to New Hire**, then clicking the **Save** button at this point will result in an error message.
- In the **New Hire Notification Recipients** section of the form, make your selection for the following fields, if applicable:
    - Recipient:** This drop-down list displays previously-created onboarding recipient lists. Recipient lists can contain one or more employee or external individual.
    - Letter to Send:** Select the letter template from this drop-down list.
  - If applicable, select the **Allow User to Create Notifications During Onboarding Process** check box to allow recruiting users to create their own notification rather than the default notification associated with workflow.  
Enabling this feature also allows recruiting users to override the default recipient list.
  - Click **Add Notification** to select an additional recipient lists and a letter templates.  
This feature allows your organization to send the same notification to one or more recipient lists.
  - Click  to delete a notification from the New Hire Notification Recipients table.
  - Take one of the following actions:
    - Click **Save** to save the workflow in its current state and add it to the table of workflows on the Workflos screen.

- Click **Save as Draft** to save the workflow in your **Drafts** section of the Workflows screen.

## Edit Recruiting Workflows

Follow these steps to edit a workflow.

### To edit a workflow:

- Click  in the **Actions** column of the Workflow screen.
- On the Create Recruiting Workflow screen click the step that you want to edit.
- Revise any of the fields as necessary. However, you cannot change the **Workflow Name** field.

**Note:** If you change the settings in the Associations step, any requisition that uses that workflow will follow the old settings, even if the associations no longer match the requisition.


Revisions to the Associations step affects the requisitions that are created after you save the new settings.

- Click **Save**.  
The date in the **Last Modified** column on the Workflow table updates to display the date when changes were last saved.  
If you clicked **Save as Draft**, the **Drafts** table on the Workflow screen is updated appropriately.

## Copy Recruiting Workflow

Follow these steps to copy a recruiting workflow.

### To copy a workflow:

- Click  in the **Actions** column of the Workflow screen.
- On the Step 1: Associations screen, enter a new value in the **Workflow Name** field.  
By default, this field bears the name of the workflow that you copied. You must change the workflow name, otherwise the application will display an error message upon **Save** and you will not be able to save the new workflow.
- Complete the Association settings.  
Association options from the original workflow are not copied to the new workflow because no two recruiting workflows can have exactly the same associations.
- If your organization has enabled the Hourly Portal feature, you can copy a recruiting workflow and have the same associations under **Select Associations** as long as the **For Hourly Portal Use Only** check box is selected in the original workflow.
- Review the workflow options and edit as needed.
- Take one of the following actions:



- Click **Save** to save the workflow in its current state and add it to the table of workflows on the Workflows screen.
- Click **Save as Draft** to save the workflow in your **Drafts** section of the Workflows screen.

## Selecting the Default Recruiting Workflow

Deltek Talent uses the default workflow if a recruiting user creates a requisition that does not match the associations of any active workflow.

Choosing a default workflow does not prevent users from selecting other active workflows.

## Select the Default Recruiting Workflow

Follow these steps to select the default recruiting workflow.

### To select the default recruiting workflow:

Click the **Copy** icon  in the **Actions** column of the Workflows screen.



You cannot set a deactivated workflow as the default recruiting workflow.

If your company uses the Hourly Portal feature, then each workflow has an additional option displayed in the **Actions** column that allows you to set it as the default hourly portal workflow. You cannot select a non-hourly workflow as the default hourly portal workflow default.

## Deactivate/Activate Recruiting Workflow

Follow these steps to deactivate/activate a recruiting workflow.

### To deactivate/activate a recruiting workflow:

1. Click the **Deactivate** icon  in the **Actions** column of the Workflows screen to deactivate an active form.  
Deactivated workflows are no longer available for use, even if requisitions match the associations. If a recruiting workflow is the default workflow for an organization, the option to deactivate the workflow is disabled.
2. Click the **Activate** icon  in the **Actions** column of the Workflows screen to activate an inactive form.

## Configure Passive Résumé Workflows

This screen allows you to configure how passive job seekers of each type submit their résumés.

Passive job seekers are those individuals who add résumés to your organization's database but do not apply to a specific job posting. \

The different passive job seeker types are as follows:

- **Internal:** This refers to résumés of current employees.

- **External:** This refers to résumés submitted through the Career Center portal.
- **Employee Referral:** This refers to résumés that an employee submitted through the Employee Referral System (ERS).
- **Vendor Submitted:** This refers to résumés entered by a Vendor partner.
- **Contact:** This refers to résumés added to the database from the **Contacts** list.
- **Recruiter Uploaded:** This refers to résumés uploaded by a recruiter.
- **Kiosk:** This refers to résumés submitted from kiosks.

The types that have processes already created display a **Checkmark** icon next to the passive seeker type label. The types that have no options selected will show the **Cancel** icon.


Similar to several steps in the recruiting workflow, the passive submission workflow lists the different résumé types with options to expand the view of that résumé type. Each type has an icon indicating that résumé type has been configured for the submission workflow.

**Note:** As with recruiting workflows, the type of the résumé is determined by how the job seeker's account is created in the application: for example, an employee adds the résumé of a friend, an external user creates an account, or a recruiter adds a résumé to the database.

## Create a Passive Résumé Workflow

Follow these steps to create a passive résumé workflow.


### To create a passive résumé workflow:

1. On the Workflows screen, click **Passive Résumé Workflows**.
2. Click  next to the relevant passive seeker type label to expand the choices available for the submission workflow.
3. If applicable, in the **Résumé Form** field, select from the drop-down list.  
The available forms for passive submissions are the same as the available forms for recruiting workflows.
4. If applicable, in the **Terms of Use** field, select from the drop-down list.  
If selected, this is the statement that each applicant must acknowledge before submitting a résumé.
5. If applicable, in the **Checklist** field, choose which items to include for the job seeker by selecting one of the following options for the **Cover Letter**, **Attachments**, **Diversity**, **Skills Profile**, and **Competency Profile** drop-down lists:
  - **Hidden:** Select this to hide the checklist item for that job seeker type.
  - **Optional:** Select this to display the checklist item for that job seeker type. However the applicant can opt to skip the task.
  - **Required:** Select this to display the checklist item and require the job seeker to complete the task. Skipping the task will result in an error message.

**Warning:** If you chose to require the Diversity step in the application processes for a job seeker type, it is highly recommended that you include a “Decline to Identify” option in the **Diversity Data Collection**. However, if Diversity is required, the recruiting workflow will review the available categories to verify that all the categories are active. If a category is disabled, it will not be shown to a job seeker even if Diversity is required in the check list.

6. When you have finished making your selections for a résumé type, click on the button to update the process settings.  
Until this button is clicked, the selections are not saved to the application.
7. Click **Update** to update the process settings.  
The icon next to the job seeker type label changes to a check mark indicating it has been saved.

**Warning:** Make sure that you click the **Update** button after you have completed your customization options, otherwise your selections will not be saved to the application.

8. If applicable, click the **Copy process to selected Résumé Types** button to copy the process options that you have just saved to another passive job seeker type.
9. To tweak the process options that you have just copied, click  and repeat Steps 3 to 7.
10. Click **Save**.

## Testing Workflow Associations

This screen allows you to test recruiting workflow associations.

The test results can assist you to verify and calibrate workflow associations

The Passive Submission Workflow does not have associations and will not display as a matching workflow.

## Test Workflow Associations

Follow these steps to test workflow associations.

### To test workflow associations:

1. On the Workflows screen, click **More Options » Test Workflow Associations**.
2. Select a set of association criteria using the following fields:
  - Hourly
  - Organizational Unit
  - Job Types
  - Location
  - Job Title

**Note:** The **Hourly** check box will not display if the Hourly Portal feature is not enabled for your organization.

3. Click **Test Association**.

The search results table displays the criteria used for the evaluation, the results of the evaluation, and what workflow matched the criteria. Click the name of any matching recruiting workflows to preview the workflow contents.

If no recruiting workflow matches the selected criteria, then only the default recruiting workflow is shown in the search results table.

## Global Notification


This screen lets you create customized messages, such as regulatory changes and/or new Terms of Use statements, that on your external career portal.

The messages display to existing external job seekers as they log in.

Display the Global Notification Screen

Follow these steps to display the Global Notification Screen.

### To display the Global Notification Screen:

1. In the Deltek Talent toolbar, click the **Administration** icon .
2. In the **Recruiting** group box, click **Global Notification** under the **Configuration** section.

Contents of the Global Notification Screen

The screen contains a table that includes the following information:



- Label or title of the global notification
- Date when the notification was created
- Date when the notification was last revised
- Name of the user who created the notification
- Actions you can take for each notification, such as **Publish**, **Unpublish**, **Edit**, or **Delete**.

Create and Activate a Global Notification Message

Follow these steps to create and activate a global notification message.

### To create a Global Notification Message:


1. In the **Global Notification Title** field, enter a name for the notification.
2. In the **Global Notification Content** field, enter your notification message.

3. Apply various font characteristics, such as bold, italics, and underline, to the content, as needed.
4. If necessary, click the  **Word Filter** button to review the message content for unique and inappropriate words, and edit the content as needed.
5. Click **Submit** to save the global notification message.  
The newly-created message displays on the Global Notification table.
6. In the **Actions** column, click  **Publish** to activate the global notification message and display it to all existing external job seekers.

### Edit a Global Notification Message

Follow these steps to edit a global notification message.


#### To edit a global notification message:

1. On the Global Notification Message table, locate the row of the message that you want to edit.
2. In the **Actions** column, click  **Edit**.
3. Edit the fields as necessary, then click **Submit**.

### Delete a Global Notification Message

Follow these steps to delete a global notification message.

#### To delete a global notification message:

1. On the Global Notification Message table, locate the row of the message that you want to edit.
2. In the **Actions** column, click  **Delete**.
3. In the confirmation message, click **OK**.

### Deactivate a Global Notification Message


After the global notification message you have created is accepted by at least one external career portal user, you can no longer edit or delete it.

However, you can unpublish the message so that it no longer displays on your external career portal.

## Unpublish a Global Notification Message

Follow these steps to unpublish a global notification message.

### To unpublish a global notification message:

1. On the Global Notification Message table, locate the row of the message that you want to deactivate.
2. In the **Actions** column, click  **Unpublish**.
3. In the confirmation message, click **OK**.

## Onboarding

Onboarding is the term used for the events that occur after a successful candidate is hired.

These events may include sending documents to the new hire for signature, completing government forms for taxes and payroll, and alerting those within your organization of the start date of the new hire.


## Onboarding System Settings

This screen allows you to configure default settings for the Onboarding process.

### Display the Onboarding System Settings

Follow these steps to display the Onboarding System Settings.

### To display the Onboarding System Settings:

1. In the toolbar, click .
2. In the **System Administration** section under **Global Settings**, click **System Settings**.
3. Click **Onboarding** to expand the section.
4. In the **Collect County during Onboarding** row, select **Yes** to set the **County** field as required information when Recruiting users complete the first step of the Onboarding process.  
This setting is set to **No** by default.
5. In the **Require Employee ID** row, select **Yes** to set the **Employee ID** field as required information when Recruiting users complete the first step of the Onboarding process.  
This setting is set to **No** by default.
6. In the **Require Date of Birth** row, select **Yes** to set the **Date of Birth** field as required information when Recruiting users complete the first step of the Onboarding process.  
This setting is set to **No** by default.


## Onboarding-Specific Features

The Features screen contains settings that determine the functionality that is available in the system and for each user group.

Display the Onboarding Specific Features Screen

Follow these steps to display the onboarding specific features screen.

**To display the Onboarding Specific Features screen:**

1. In the Deltek Talent toolbar, click .
2. In the **Global Settings » System Administration** section, click **Features**.
3. Make your selection from the **Select a Group** drop-down list.
4. Click **Recruiting » Onboarding** to expand the section.
5. Enable or disable onboarding-specific features by selecting or clearing the check box next to the following feature options:
  - **Ad Hoc Onboarding Documents:** This feature controls the ability to upload ad hoc documents during the onboarding process.
  - **Document Signature Requirements:** If enabled, the overall requirement that each document be signed by the New Hire will be changed to allow the selection of specific documents to be signed, or none at all, via Onboarding > Document Library.
  - **Welcome Page » Management:** This feature controls the ability to configure the Onboarding Welcome page that new hires see as they log on to Deltek Talent Management
  - **Initiate Onboarding:** Enabling this feature allows the user to Initiate Onboarding. Onboarding notifies the candidate there are documents the company wishes to have completed. Based on permissions and workflows, the user may or may not be permitted to select these documents for the candidate.
  - **Manage Onboarding:** This feature gives users/recruiters access to the page to manage new hires actively being onboarded.
  - **Onboarding Bundle:** This feature allows members of the group to create, edit, and delete onboarding bundles.
  - **Onboarding Details:** This feature allows recruiters and hiring managers to view the details of a new hire's onboarding session, including which documents have been routed and completed.
  - **Onboarding Document Library:** This feature allows members of the group to administer the onboarding document library.
  - **Onboarding New Hire Checklist:** This feature allows new hires to view their pending onboarding documents and to complete them electronically in the career center.
  - **Onboarding Recipients:** This feature allows members of the group to create, edit, and delete onboarding recipient lists.

- **Optional Onboarding:** If enabled, clients will be able to configure whether each workflow should use onboarding or not. If a workflow is not configured to allow onboarding, the entire onboarding process will be skipped.
- **View All Onboarding Sessions:** This feature grants the users in the selected group to access to view all onboarding sessions.
- **View Onboarding Document:** This feature allows the user to view documents that are part of the Onboarding process. Documents are "static" and not completed online: they are viewed only but may allow the job seeker sign in acknowledgment.
- **View Onboarding Form:** This feature allows the user to view forms that are part of the Onboarding process. Forms are those which may be completed online (or built dynamically).

**Note:** Additional Onboarding-specific features that are located outside the Onboarding section are as follows:

Internal Onboarding Form Completion Assignment: This feature allows members of the group to assign internal users to complete an Onboarding form. This feature is found under **Global Settings » System Administration » Features » Core » Dynamic Forms**.

Onboarding Tasks Widget: This feature controls whether or not the Main Dashboard can display the new Onboarding Tasks widget. This feature is found under **Global Settings » System Administration » Features » Recruiting » Applicant Tracking Widgets**.

## Welcome Page Management

As they log on to Deltek Talent Management, new hires are automatically redirected to the Onboarding Welcome page if they have pending or incomplete onboarding documents or forms. This screen allows you to configure that page.

The Onboarding Welcome page can include a personalized welcome text, onboarding videos, and onboarding task lists.


**Note:** Make sure to first enable the Welcome Page Management feature on the Features screen (**Administration » Global Settings » System Administration » Features » Recruiting Onboarding » Welcome Page**).

Your parent organization has an effect on content visibility. The content that you add on this screen will only be visible to new hires who belong to your parent organization.

### Display the Welcome Page Management Screen

Follow these steps to display the Welcome Page Management Screen and Customize the Welcome Page.

#### To display this screen and customize the Onboarding Welcome page:

1. In the Deltek Talent toolbar, click the **Administration** icon .



2. In the **Recruiting** group box, click **Welcome Page** under the **Onboarding** section.
3. In the **Welcome Page Text** field, enter the welcome message.  
You can apply various font characteristics, as well as include any of the following elements if necessary:
  - Add an image.
  - Add a link to a web page.
  - Change the alignment of the content.
  - Insert a table
4. In the **Video** field, click **Browse** to add a video, if necessary.

## Document Library


This library stores houses all the documents that are available for use during the Onboarding process.

The Document Library screen displays a table that includes the name of the document, the number of versions that exist for that document, whether an e-signature is required by the new hire during the onboarding process, and an **Actions** column where you can easily deactivate or activate documents.

### Display the Document Library

Follow these steps to display the Document Library.

#### To display the Document Library:

1. In the Delttek Talent toolbar, click .
2. In the **Recruiting** group box, click **Document Library** under the **Onboarding** section.

### Remove E-Signature Requirement

Follow these steps to remove e-signature requirements.

#### To remove the requirement for an e-signature:



1. Locate the document that you want from the Document Library table.
2. In the **Actions** column, unselect the **Require E-Signature** check box.

**Note:** The **Require E-Signature** check box will not be available for the selection unless the **Change to Document Signature Requirements** feature is enabled under **Global Settings » System Administration » Features** on the Administration screen.

## Add an Onboarding Document

Follow these steps to add an onboarding document.

### To add an onboarding document to the library:

1. On the Document Library screen, click **Add Document**.
2. In the **Document Name** field, enter a unique name.  
Duplicate names for onboarding documents will result in an error message.
3. In the **Document Valid From** field, click  to select or enter a date in the text field.
4. In the **Document Valid To** field, click  to select or enter a date in the text field.  
This field is optional because not all documents expire.
5. In the **File** field, click **Browse** to choose a file to upload from your computer.  
When a document is sent to a new hire or added to an onboarding bundle, the application automatically uses the most current version of the document.
6. Click **Save**.  
The file is added to the table of documents on the Document Library screen, with the **Version Count** column displaying the value **1** to indicate that it is a new document and no other versions exist in the library.

## Manage Onboarding Document Versions



Click the value in the **Version Count** column to view the different versions for an onboarding document in the library.

Document information is displayed in a table that includes the **Valid From** date for the document is valid, the expiration date for the document, the document file type (for example, PDF, TXT, JPG), the name of the user who uploaded the document, and the date the document was created. The table also displays an Actions column where you can download and view or edit the onboarding document. If the version of an onboarding document is not used by the application or associated with a new hire's records, the option to delete is displayed in the Actions column.

## Add Onboarding Document Versions

Follow these steps to add onboarding document versions.

### To add onboarding document version:


1. On the Onboarding Document Library screen, click the value in the **Version Count** column of the document that you want to update.
2. Click **Add Version**.
3. In the **Document Valid From** field, click  to select or enter a date in the text field.
4. In the **Document Valid To** field, click  to select or enter a date in the text field.  
This field is optional because not all documents expire.

5. In the **File** field, click **Browse** to choose a file to upload from your computer.
6. Click **Save**.

## Download an Onboarding Document

Follow these steps to download an onboarding document.

### To download an onboarding document:




1. On the Onboarding Document Library screen, click the value in the **Version Count** column of the document that you want to download.
2. In the Onboarding Document Versions table, locate the version that you want to download, and click .
3. In the Save File dialogue box, select whether you want to open the file, save the file to your computer, or cancel the request.
4. If you chose to open the file, your computer will open the onboarding document version in the appropriate software application.  
For example, PDF files open in Adobe Reader or Adobe Acrobat, DOC doc files open in Microsoft Word.

**Note:** The exact behavior of your computer will depend on your operating system, your browser, the settings within your browser, and the available software on your computer to open the file.

## Edit an Onboarding Document Versions

Follow these steps to edit an onboarding document version.

### To edit onboarding document versions:


1. On the Onboarding Document Library screen, click the value in the **Version Count** column of the document that you want to download.
2. In the Onboarding Document Versions table, locate the version that you want to download, then click .
3. In the **Document Valid From** field, click  to select or enter a date in the text field, if applicable.  
Changing this field to a date that overlaps an existing version will result in an error upon **Save**. No two versions of an onboarding document can be valid at the same time.
4. In the **Document Valid To** field, click  to select or enter a date in the text field.  
This field is optional because not all documents expire, if applicable.  
Changing this field to a date that overlaps an existing version will result in an error upon **Save**. No two versions of an onboarding document can be valid at the same time.
5. Click **Save File**.

## Delete an Onboarding Document Version

Follow these steps to delete an onboarding document version.

**If a version of an onboarding document is not in use by the application, an option to delete the version displays in the Action column.**




**To delete onboarding document versions:**

1. Click the  to delete the version.
2. Click **Yes** to confirm the deletion when a confirmation message displays.  
The document is permanently removed from the Onboarding Document Version table.

## Deactivate/Activate Onboarding Document

Follow these steps to deactivate/activate onboarding documents.

**To deactivate/activate an onboarding document:**

1. Click the  in the **Actions** Click the  in the **Actions** column of the Onboarding Document Library screen to deactivate an active document.  
Deactivated documents are no longer available for use in onboarding tasks.
2. Click the  in the **Actions** column of the Onboarding Document Library screen to activate an inactive form.

## Bundles

Onboarding Bundles are designed to assist in creating groups of documents required for certain onboarding scenarios or associations.

For example, a particular bundle of documents can be bundled to use with onboarding in specific locations. The bundle association by location is based on the requisition's primary location. When there are multiple locations associated with a bundle, as long as the locations match, the association will be triggered.

Each bundle shows the Bundle Name, Description, any Associations and the Documents in the bundle. Click the document name to view the item.

If a document is required for the onboarding process, a red asterisk (\*) displays next to the document title name. If a version of an onboarding document has expired without another version available, "(Expired)" displays next to the document title name. If the onboarding document has been deactivated from the Onboarding Document Library, "Deactivated" will display next to the document title.

Unless the onboarding document version has expired, each document in the **Onboarding Documents** column is a clickable link, allowing you to easily download the most recent version of that document for viewing.

## Display the Bundles Screen

Follow these steps to display the Bundles Screen.

### To display the Bundles Screen:

1. In the Delttek Talent toolbar, click .
2. In the **Recruiting** group box, click **Bundles** under the **Onboarding** section.

## Create Onboarding Bundle

Follow these steps to create Onboarding Document Bundles.

### To create an onboarding document bundle:

1. On the Onboarding Bundles screen, click **Create New Bundle**.
2. In the **Onboarding Bundle Name** field, enter a unique name.
3. In the **Onboarding Bundle Description**, enter a description.

**Note:** When recruiters select an onboarding bundle from a list for a new hire, it is possible that the description will not display with the bundle name. Therefore it is recommended that you select a descriptive name in the **Onboarding Bundle Name** field, which doubles as a reminder of the purpose of the bundle. For example, “Canadian New Hires,” which suggests that the bundle includes only those associations and documents that are relevant for new hires in Canada.

4. Complete the relevant fields on the form.  
However, pay particular attention to the following fields:

Field	Description
<b>Company</b>	Populating this field filters the list of options in all the other fields on the form.
<b>Location Group/Region</b>	You can select more than one value in this field. Selecting a value from the drop-down list triggers additional drop-down lists to further filter down <b>Location Group/Region</b> information.
<b>Location</b>	You can select more than one value in this field. Selecting a value from the drop-down list triggers additional drop-down lists to further filter down <b>Location</b> information. The bundle association by location is based on the requisition's primary location. When there are multiple locations associated with a bundle, as long as the locations match, the association will be triggered.
<b>Job Family</b>	This field automatically searches and filters available options as you type into the text box.


Field	Description
<b>Jobs</b>	You can select more than one value in this field. Selecting a value from the drop-down list triggers additional drop-down lists to further filter down <b>Job</b> information.
<b>Available States/Provinces</b>	You can select more than one entry in this field.
<b>Available Countries</b>	You can select more than one entry in this field.

5. In the **Documents** section, review the list of documents and for each one, select one of the following options:
  - **Required:** Select this to include the document in the bundle.
  - **Suggested:** Select this to include the form in the list of suggested or optional documents to include in the bundle.
  - **Do Not Display:** Select this to exclude the document from the bundle.
  - **Due Date:** Using the new hire's start date as the basis, select one of the valid options from the drop-down list:
    - Due Before**
    - Due On**
    - Due After**
 As you make a selection, the **# of Days** field displays for you to populate with the appropriate numeric value.
6. In the **Dynamic Forms** section, review the list of documents and for each one, select one of the following options:
  - **Required:** Select this to include the document in the bundle.
  - **Suggested:** Select this to include the form in the list of suggested or optional documents to include in the bundle.
  - **Do Not Display:** Select this to exclude the document from the bundle.
  - **Assign:** Click the **Assign** button to launch the user selection screen. New hires are automatically excluded if the **For Internal Completion Only** check box is selected for that dynamic form.
  - **Due Date:** Using the new hire's start date as the basis, select one of the valid options from the drop-down list:
    - Due Before**
    - Due On**
    - Due After**
 As you make a selection, the **# of Days** field displays for you to populate with the appropriate numeric value.
7. Click **Create Bundle**.

## Edit Onboarding Bundle

Follow these steps to edit onboarding bundles.



### To edit onboarding bundles:

1. On the Onboarding Bundles screen, locate the bundle that you want to edit and click .
2. Edit the fields on the form as needed. However, you cannot change the **Onboarding Bundle Name** field to an existing bundle name or an error will occur.
3. Click **Update Bundle** to save the revisions.

## Deactivate/Activate Onboarding Bundle

Follow these steps to deactivate/activate an onboarding bundle.


### To deactivate/activate an onboarding bundle:

1. Click the  in the **Actions** column of the Onboarding Bundles screen to deactivate an active document.  
Deactivated bundles are no longer available for use in onboarding tasks.
2. Click the  in the **Actions** column of the Onboarding Bundles screen to activate an inactive form.

## Delete Onboarding Bundle

Follow these steps to delete onboarding bundles.

### To delete onboarding bundles:

1. On the Onboarding Bundles screen, locate the bundle that you want to edit and click  in the **Actions** column.
2. In the confirmation message that appears, click **OK** to confirm the deletion.

## Recipients

This screen lets you create distribution lists specifically for onboarding tasks or for notifications regarding newly-hired employees.

Your recipient list can consist of all employees, all external recipients, or a mixture of both. However, you must have at least one recipient to successfully create an onboarding recipient list.

## Display the Recipients Screen

Follow these steps to display the Recipients Screen.

**To access this screen, complete the following steps:**

1. In the Deltek Talent toolbar, click .
2. In the **Recruiting** group box, click **Recipients** under the **Onboarding** section.

## Create Recipient List


Follow these steps to create an onboarding recipient list.

**To create an onboarding recipient list:**

**On the Onboarding Recipient List screen, click Add Recipients List.**

1. In the **Recipient Group Name** field, enter a unique name. Duplicate recipient group names will result in an error message.

**Note:** Since no description is included with the recipient group name, it is recommended that you select a descriptive name in the **Recipient Group Name** field, which doubles as a reminder of the purpose of the recipient list. For example, "Training" which suggests that the recipient list includes only users involved in the training of new hires.



2. If applicable, in the **Add Employees** section, click **Select Users from Employee List** to search for users.  
You can search by employee name, or find individuals who report to a specific manager.
3. Click **Search** to generate the search results table.
4. In the **Employees to Add** field, click **Search Users** to search for and select employees to include in the recipient list.  
In the search results screen, select recipients by either clicking  or selecting the check box next to the employee name and clicking **Add All Selected**.
5. Click **Confirm Selection**.
6. If applicable, in the **Add External Recipients** section, enter the **Name** and **E-mail address** of the external recipient.
7. If you want to add more than one recipient, click **Add Another Recipient**, and repeat Step 8.
8. Click **Submit** to save the recipient list.



## Edit Onboarding Recipient List

Follow these steps to edit an onboarding recipient list.


### To edit an onboarding recipient list:

1. On the Onboarding Recipient List screen, locate the recipient list that you want to edit and click  in the **Actions** column.
2. Edit the relevant fields, as needed.  
If you change the value in the **Recipient Group Name** field, make sure that the new name does not any existing recipient group names.
3. If applicable, in the **Add Employees** section, click **Select Users from Employee List** to search for users.  
You can search by employee name, or find individuals who report to a specific manager.
4. Click **Search** to generate the search results table.
5. In the **Employees to Add** field, click **Search Users** to search for and select employees to include in the recipient list.  
In the search results screen, select recipients by either clicking  or selecting the check box next to the employee name, then clicking **Add All Selected**.
6. Click **Confirm Selection**.
7. If applicable, in the **Add External Recipients** section, enter the **Name** and **E-mail address** of the external recipient.
8. If you want to add more than one recipient, click **Add Another Recipient**, and repeat Step 8.
9. Click **Submit** to save the recipient list.

## Delete Onboarding Recipient List

Follow these steps to delete an onboarding recipient list.

### To delete an onboarding recipient list:

1. On the Onboarding Recipients List screen, locate the recipient list that you want to edit and click  in the **Actions** column.
2. In the confirmation message that appears, click **OK** to confirm the deletion.

## Onboarding Tasks Management

This screen lets administrators view and manage a list of tasks still to be completed by existing users and new hires as part of the Onboarding process.

**Note:** Make sure to first enable the Onboarding Task Management feature on the Features screen (**Administration » Global Settings » System Administration » Features » Select Group Administration » Recruiting » Onboarding » Task Management**).

## Display the Onboarding Tasks Management Screen

Follow these steps to display the Onboarding Tasks Management Screen.




### To display the Onboarding Tasks Management Screen:

1. In the Delttek Talent toolbar, click .
2. In the **Recruiting** group box, click **Task Management** under the **Onboarding** section.

## Contents of the Onboarding Tasks Management Screen

The Onboarding Tasks management screen contains the following fields.

### Contents

Field	Description
<b>Task</b>	The name of the task.
<b>Desc</b>	A short description of the task.
<b>Due Date</b>	The date the task is due. Users can set this to BEFORE, ON, or AFTER a particular date.
<b>Assigned To</b>	The employee (or type of employee) this task is assigned to.
<b>Actions</b>	Click  to deactivate the task. Click  to edit the task. Click  to delete the task.
<b>System Generated Tasks (Documents and Learning)</b>	This is a list of links to documents related to the onboarding process, which DTM generates automatically for various types of users (for example, New Hire). Learning items display only if you have purchased the Learning module.
<b>Create Tasks</b>	Click this button to create a new task.

## Create An Onboarding Tasks

Follow these steps to create an onboarding task.

### To create an onboarding task:

1. On the Onboarding Task Management screen, click the **Create tasks** button.
2. In the **Task** field, enter a name for the task.


**Note:** Since no description is included with the recipient group name, it is recommended that you select a descriptive name in the **Recipient Group Name** field, which doubles as a reminder of the purpose of the recipient list. For example, “Training” which suggests that the recipient list includes only users involved in the training of new hires.

3. Enter a short description about the reason for the task in the **Description** field.
4. Click **Select** in the **Assign Task** field to select the type of employee who will be assigned this task. Select employees based on one or more of the following search criteria:
  - **New Hire:** Select this option to have all new hires complete the task.
  - **Other:** Select this option to assign the task to employees other than new hires. Use the following criteria to specify the employees or types of employees who will complete the task:
  - **Job Title:** Select the job titles of the employees you want to complete the task.
  - **Managerial Level:** Select a group of employees to complete the task based on their managerial level.
  - **Team:** Select a project team from the list. If you select a team, all individuals on that project team are listed in the Assign for Completion column. Anyone on the selected team can complete the task.
  - **External Individuals:** Enter the external email addresses of the people who you want to perform the task. Separate entries by using commas, or by placing each email on a separate line.
5. Select one of the following options in the **Due Date** field :
  - Due BEFORE first day (start date)
  - Due ON first day (start date)
  - Due AFTER first day (start date)
6. If you select Due BEFORE or Due AFTER, enter the number of days the employee has to complete the task in the # of Days field.
7. In the **Due Day Reminder** field, enter the number of days before the due date that you want a reminder to display on the employee's Dashboard.
8. In the Onboarding Task Attachments section, select the **Required** check box to require the upload of task attachment to complete the task.
9. Click **Submit** to create the task.

## Edit Onboarding Task

Follow these steps to edit an onboarding task.

### To edit an onboarding task:


1. On the Onboarding Task Management screen, locate the task you want to edit in the list and click  in the Actions column.

2. Edit the relevant fields, as needed.
3. Click **Submit** to save the changes.

## Delete An Onboarding Task

Follow these steps to delete an onboarding task.


### To delete an onboarding task:

1. On the Onboarding Task Management screen, locate the task that you want to delete and click  in the **Actions** column.
2. In the confirmation message that appears, click **OK** to confirm the deletion.

## Deactivate An Onboarding Task

Follow these steps to deactivate an onboarding task.

### To deactivate an onboarding task:

1. On the Onboarding Task Management screen, locate the task that you want to deactivate and click  in the **Actions** column.
2. In the confirmation message that appears, click **OK** to confirm the deletion.

## Cross-Posting

Cross-Posting is the term used for distributing jobs to external job boards.

Cross-posting options give you the means to perform the following:

- Select which external job boards your company's users can use to post requisitions
- Configure the accounts created for each of those job boards
- Choose which job boards require authorization before the requisition can be posted.

## Accounts

Jobs can be cross-posted to multiple external job boards from this screen.


The management of cross-posting accounts is divided into two sections:

- **Company Information:** This holds your company's cross-posting information.
- **Subscribed Sites:** This displays the sites that have been selected for cross-posting.

## Display the Accounts Screen

Follow these steps to access the Accounts Screen.

### To display the Accounts Screen:

1. In the Deltek Talent toolbar, click  .
2. In the **Recruiting** group box, click **Accounts** under the **Cross-Posting** section.  
Jobs can be cross-posted to multiple external job boards from this screen.

## Manage Accounts

Follow these steps to manage accounts.

### To manage accounts:

1. In the Company Information section, complete all the fields on the form with the details of the employee designated as the contact for your organization.
2. In the » **Error Email** field, enter the e-mail address of the employee assigned to receive error messages from job boards relating to job content issues or transmission of the requisition to the external job board.  
Any error message generated by the subscribed site is sent to this e-mail address with an explanation of what occurred.
3. Select the **Allow cross-posting recruiters to edit contact information** check box if you want recruiters to see and change the contact information. Otherwise, clear this check box if you want the default information you have configured on this screen to be used during cross-posting.
4. In the **Site Mode** field, select **Live Mode** if your company is ready to post requisitions to external job boards.  
This field is initially set to **Test Mode** during your organization's Implementation process to ensure that no requisitions are cross-posted under your accounts while employees in your organization are still learning to use the application.
5. In the **Subscribed Sites** section, customize the settings for each subscribed external job board.  
The table displays the following columns:
  - **Active:** This column indicates whether or not an external job board is activated or inactive.
  - **Auth Required:** This column indicates whether or not a requisition requires authorization before the requisition can be cross-posted to an external job board.
  - **Autocrosspost:** This indicates whether or not your company can automatically cross post to the external job board. Only the external job boards that allow companies to post for free are **Enabled** for cross posting. Otherwise, **N/A** will display in this column.
  - **Accounts:** This indicates how many active accounts each subscribed site has.

To add or edit account details, scroll down to the **Subscribed Sites** section, locate the site that you want to edit, and click the value in the **Accounts** column for that row.

The Crossposting Account Management screen displays.

To add a new account for that job board, click the **Add a new account** button, and complete the relevant fields.

The fields that are available for each job board may vary. However, these four fields are standard for all external job boards.

Field	Description
<b>Name</b>	Enter the name of the account.
<b>Username</b>	Enter the username issued by the job board.
<b>Password</b>	Enter the password issued by the job board
<b>Preferred language</b>	Select a preferred language, if applicable. When you select a language in this drop-down list field, Deltek Talent will automatically send jobs for cross-posting in that language, if the translation exists.  If you do not select a preferred language, Deltek Talent will use the default language of the requisition or your company's default system language.

To edit an existing account, scroll down to the **Edit Existing Accounts** section, and edit the relevant fields.

Select the **Delete?** check box to delete an existing account.

Click **Apply Changes** to save your changes.

Click **I'm Finished**.

**Note:** Enabling this feature for a job board will automatically send all open jobs to that job board nightly without any additional steps.

## Authorization Requests


This screen allows you to manage any jobs that require authorization before they are cross-posted to external job boards.

Any requisitions requiring authorization are displayed in the Postings Requiring Authorization table, which includes the job title, the name of the employee who requested the cross-posting, the date it was requested, the destination or job board to which the requisition will be cross-posted, and the account name.

## Display the Authorization Requests Screen

Follow these steps to display the Authorization Requests Screen.

### To display the Authorization Requests Screen:

1. In the Deltek Talent toolbar, click .
2. In the **Recruiting** group box, click **Authorization Requests** under the **Cross-Posting** section.

## Authorize or Reject a Requisition for Cross-Posting

Follow these steps to authorize or reject a requisition for cross-posting.

### To authorize or reject a requisition for cross-posting:

Perform one of the following:

- To authorize, select the check box in the **Authorize** column for that job and click **Change Authorization**. If there are more than one authorization requests, you can quickly approve all requests by selecting the **All** check box in the **Authorize** column and clicking **Change Authorization**.
- To authorize, select the check box in the **Reject Posting** column for that job and click **Change Authorization**. If there are more than one request pending authorizations, you can reject all requests by selecting the **All** check box in the **Reject Posting** column and clicking **Change Authorization**.

From this screen you can also click on the Edit icon next to a job title to change cross-posting options for that requisition. Click **Submit** to save your changes to the external job board site options.

To view the requisition details, click the job title name.

## Site Selection

This screen contains the listing of your organization's approved cross-posting sites.

**Note:** The application either automatically sends a requisition to the external job board once the status of a requisition is changed to **Approved** and the recruiting user triggers a job-posting requests, or it sends the requisition to the job board once the cross-posting action is authorized.

There is a search filter feature to limit the number of external job boards that display in the table. You can search by name or description of the job board. You can search according to job board type to identify job board free job boards, subscription-based job boards, or job boards that distributed to other boards.

Select the check box next to the site name if you want to add that job board to to your organization's list of subscribed sites, then click **Apply Changes**.

To revise the sequence that subscribed sites are displayed to a recruiting user, click **Manage crossposting site order**. This opens a pop-up window with a list of your company's approved

sites for cross-posting. Drag and drop the rows to your preferred sequential order. A success message displays to indicate that the new order is saved. Any changes made to the order are automatically updated in the application wherever these sites are listed.

**Note:** Contact your Deltek Talent Client Services account manager for any questions regarding cross-posting credits.

## Display the Site Selection Screen

Follow these steps to display the Site Selection Screen.

### To display the Site Selection Screen:

1. In the Deltek Talent toolbar, click .
2. In the **Recruiting** group box, click **Site Selection** under the **Cross-Posting** section.

## Vendors

This application allows you to manage your company's external recruitment agencies.

## Accounts

This screen lists active and inactive vendor agencies.

Information in the table includes the name of the vendor agency, the name of the main contact for that agency, the primary phone for that agency, and the number of users added for that agency.

## Display the Vendor Accounts Screen

Follow these steps to display the Vendor application's Accounts Screen.

### To display the Accounts screen:

1. In the Deltek Talent toolbar, click .
2. In the **Recruiting** group box, click **Accounts** under the **Vendors** section.

## View Vendor Agency Details

Follow these steps to view vendor agency details.

### To view vendor agency details:

Click the name in the **Vendor** column.

This launches a screen that details the name of the vendor representative, the e-mail address of the vendor agency, whether the vendor is active or inactive, the account number, and if the vendor is an in-house vendor.



## View Vendor Agency Users

Follow these steps to view the users created for each vendor agency.

### To view the users created for each vendor agency:

Click the value in the **Users** column.

This launches a screen that details the name of the each user, e-mail address information, and the user's location.

## Add a Vendor Agency

Follow these steps to add a vendor agency.

### To add a new vendor agency:

1. On the Vendors screen, click **Add Vendor**.
2. Complete the relevant fields in the form.

All fields in red font, followed by an asterisk (\*) are required and must be populated in order to save the new vendor record, but pay particular attention to the following fields:


Field	Description
<b>Rate Type</b>	This field indicates whether the billing rate type is a flat value, percentage, or a different value.
<b>Markup</b>	This field indicates the value over the rate that the vendor is billed.
<b>In-House Vendor</b>	This field indicates whether the vendor agency in-house or external.
<b>Résumé exclusivity time period</b>	This field indicates the number of days that the vendor has exclusivity over the résumés that they enter. This field will not appear if your company does not use the Resume Exclusivity feature.

3. Click **Save**.





## Edit a Vendor

Follow these steps to edit a vendor's details.

### To edit vendor details:

1. On the Vendors screen, click  in the **Actions** column.
2. Edit the relevant fields.


All fields in red font, followed by an asterisk (\*) are required and must be populated in order to save the new vendor record.

3. If you need to edit the vendor's address, click  in the **Actions** column of the **Addresses** section.
4. To delete an address, click  in the **Actions** column of the **Addresses** section.
5. If you need to edit the vendor's phone number, click  in the **Actions** column of the **Phones** section.
6. To delete a phone number, click  in the **Actions** column of the **Phones** section.
7. Click **Save**.

## Add an Address to a Vendor Agency

Follow these steps to add an address to a Vendor Agency.


### To add an address to a vendor agency:

1. On the Vendors screen, click  in the **Actions** column.  
In the **Addresses** section, click **Add Address**.
2. In the **Address Type** field, select **Business** or **Personal**.
3. Complete all other relevant fields.
4. Click **Add Address**.

## Add Vendor Users

Follow these steps to add Vendor Users



### To add vendor agency users:

1. On the Vendors screen, click  in the **Actions** column.
2. Enter the user's e-mail address and click **Continue**.  
The e-mail address must be unique. An error will display if Deltek Talent detects that a duplicate e-mail address already exists in the database.
3. Complete the fields in the form.  
All fields in red font, followed by an asterisk (\*), are required and must be populated in order to save the new vendor user.  
The value in the **Password** and **Confirm Password** fields must match; otherwise, an error displays.
4. Click **Save**.
5. Back on the Vendors screen, the value indicated in the **Users** column for that vendor increases by 1.

## Deactivate/Activate Vendor Agency

Follow these steps to deactivate/activate a vendor agency.


### To deactivate/activate a vendor agency:

1. Click  in the **Actions** column of the Vendor Users screen to deactivate an active vendor.  
Once deactivated, the vendor agency no longer displays as an option in the application whenever vendor agencies are shown. Deactivating a vendor agency will also deactivate all vendor users associated with that agency.
2. Click  in the **Actions** column of the Manage Vendor Users screen to activate an inactive vendor user.  
Activating a vendor agency does not automatically reactivate all the vendor users within that agency. See Deactivate/Activate Vendor Users.

## Edit Vendor Agency Users

Follow these steps to edit vendor agency users.



### To edit vendor agency users:

1. On the Vendors screen, click the value in the **Users** column.
2. Locate the user that you want to edit and click  in the **Actions** column.
3. Edit the relevant fields and click **Update**.

## Deactivate/Activate Vendor Users

Follow these steps to deactivate or activate vendor users.

### To deactivate or activate a vendor user:

1. Click the **Deactivate** icon  in the **Actions** column of the Manage Vendor Users screen to deactivate an active vendor user.
2. Click the **Activate** icon  in the **Actions** column of the Manage Vendor Users screen to activate an inactive vendor user.

## Charge Codes

This screen allows you to manage the charge codes used hiring orders are submitted to vendors.

Display the Charge Codes Screen

Follow these steps to display the Charge Codes Screen.

### To display the Charge Codes Screen:

1. In the Deltek Talent toolbar, click .
2. In the **Recruiting** group box, click **Charge Codes** under the **Vendors** section.

Create Charge Code

Follow these steps to create charge codes.


### To create charge codes:

1. Complete the form on the Charge Codes screen.
2. In the **Charge Code**, enter a value.  
This is a required field and must be populated in order to save the new charge code.
3. Complete all other relevant fields in the form.
4. Click **Save** to add the vendor charge code.  
The new charge code is added to the Charge Codes table, which displays the values for **Budget** and **Expenses**. The value shown in the **Remaining** column is the amount left after subtracting the expense value from the budget value.

Edit Charge Code

Follow these steps to edit charge codes.


### To edit charge codes:

1. On the Charge Codes screen, click  in the **Actions** column.
2. Edit the relevant fields.  
If no values were previously given for the **Budget** and **Expenses** fields, then the fields will display a value of **zero (0)**.
3. Click **Save**.

## Delete Charge Code

Follow these steps to delete a charge code.

### To delete charge codes:

1. On the Charge Codes screen, locate the charge code that you want to delete and click  in the **Actions** column.
2. In the confirmation message, click **OK** to confirm the deletion.

## Distribution Lists

This screen allows you to manage and create distribution lists of staffing agencies.

This is useful when sending out hiring orders to more than one vendor.

### Display the Distribution Lists

Follow these steps to display the Distribution Lists.

#### To access the Distribution Lists:

1. In the Deltek Talent toolbar, click .
2. In the **Recruiting** group box, click **Distribution Lists** under the **Vendors** section.



### Create Distribution List

Follow these steps to create a distribution list.

#### To create a distribution list:

1. In the **Name** field, enter a unique name for the distribution list.



**Note:** It is recommended that you assign a name that also serves as a reminder of the purpose of the distribution list. For example, "IT Hiring Orders," which suggests that the list includes only vendor agencies that represent job seekers in the Information Technology field.

2. In the **Members** field, select the names from the **Vendors** text box, and click  to move the individuals into the **Selected Vendors** text box.
3. To remove individuals from the **Selected Vendors** list, select the names, and click .
4. Click **Save**.

## Edit Distribution List

Follow these steps to edit a distribution list.

### To edit distribution lists:

1. On the Vendor Distribution Lists screen, locate the distribution list that you want to edit and click the Edit icon in the **Actions** column.
2. In the **Members** field, select the names from the **Vendors** text box, and click  to move the individuals into the **Selected Vendors** text box.
3. To remove individuals from the Selected Vendors list, select the names, and click  .
4. If you want to change the name of the distribution list, enter a new value in the **Name** field, but make sure that the name is unique and descriptive of the purpose of the distribution list.
5. Click **Save**.

## Delete Distribution List

Follow these steps to delete a distribution list.

### To delete a distribution list:

Locate the distribution list that you want to delete from the Vendor Distribution Lists screen, and click the **Delete** icon **X** in the **Actions** column.

## Locations

This screen allows you to manage and create different locations for the vendor agencies used by your company.

### Display the Locations Screen

Follow these steps to display the Locations Screen.

### To access the Locations screen:

1. In the Deltek Talent toolbar, click  .
2. In the **Recruiting** group box, click **Locations** under the **Vendors** section.

## Add Vendor Agency Location

Follow these steps to add a vendor agency location.,

### To add a location for a vendor agency:

1. On the Manage Vendor Locations screen, click the **+** icon to add in the **Actions** column.
2. Complete all the fields in the form.  
All the fields in the form are required and must be populated in order for you to successfully create a new location.
3. In the **Tax Rate** field, enter the numeric percentage without the percentage symbol (%).  
Decimal points are allowed in the field, but must be preceded with a zero (for example, 0.825).
4. Click **Save**.

## Edit Vendor Agency Location

Follow these steps to edit vendor agency locations.

### To edit a location for a vendor agency:

1. On the Manage Vendor Locations screen, click value in the **Locations** column.
2. On the View Vendor Locations screen, click the Edit icon in the **Actions** column for the location row that you want to edit.
3. Enter the new values in the relevant fields, then click **Save**.

## Delete Vendor Agency Location

Follow these steps to delete a vendor agency location.

### To delete a location for a vendor agency:

1. On the Manage Vendor Locations screen, click value in the **Locations** column.
2. On the View Vendor Locations screen, click the **X** icon in the **Actions** column for the location row that you want to delete.
3. In the confirmation message that displays, click **OK** to confirm the deletion.

## Employee Referral Program

The Employee Referral Program feature allows you to create and manage awards earned by employees when they refer friends to requisitions.

To create awards, go to **Manage Referral Awards**. After awards are created, they can be assigned to specific Candidates Statuses for individual requisitions. This is called an Award Plan. When a referred person reaches a status with an award, the Employee will earn that award.

To assign an Award Plan to a requisition, the person creating the requisition must first mark it as eligible for a referral bonus. When that happens, that requisition will then appear on the **Requisition Referral Award Plans** screen.


## Awards Pending Approval

When a referred person reaches a Candidate Status with an award, the system will display the earned award details on the **Award Pending Approval** screen for review and disposition.

Display the Awards Pending Approval Screen

Follow these steps to display the Awards Pending Approval Screen.

**To display the Award Pending Approval screen:**

In the Deltek Talent toolbar, click .

In the **Recruiting** group box, click **Awards Pending Approval** under the **Employee Referral Program** section.

Contents of the Awards Pending Approval Screen

The screen displays a table with the following columns.

### Columns

Column	Description
<b>Referral</b>	This column displays the name of the referral.
<b>Award Title</b>	This column displays the award that was earned.
<b>Award Type</b>	This column displays the type of award.
<b>Award Value</b>	This column displays the monetary value of the award.
<b>Job Title</b>	This column displays the referral's job title.
<b>Job Code</b>	This column displays the code of the referral's job.
<b>Date Referred</b>	This column displays when the referral was made.
<b>Referred By</b>	This column displays who made the referral.

Approve/Reject an Award

Follow these steps to approve/reject an award.

**To approve or reject an award:**

1. Select the check box next to the individual on the list, or select the column's check box to select all.



2. Click either the **Approve** or **Reject** button to process the selections.  
 If you are rejecting the referral, you must enter a comment in the **Comment for the action taken (required for rejection)** field.  
 Approving an earned reward will prompt an award icon to be displayed on the job seeker's **Referrals** page. This denotes that the award has been earned and approved.


## Manage Earned Awards

You can find all the options you need to manage the disbursement of awards earned in this section.

Display the Manage Earned Awards

Follow these steps to display the Manage Earned Awards screen.

**To access the Manage Earned Awards screen:**

In the Deltek Talent toolbar, click .

In the **Recruiting** group box, click **Manage Earned Awards** under the **Employee Referral Program** section.

You can also click the **Manage Earned Awards** button on the Awards Pending Approval screen.

Contents of the Manage Earned Awards Screen

The screen displays the awards that have installment plans.

The table displays the same columns as the Awards Pending Approval screen but with two additional columns.

### Columns

Column	Description
<b>Next Payment/Disbursement</b>	This column displays the date of the next disbursement of the award.
<b>Next Payment/Disbursement Amount</b>	This column displays the amount of the award to be disbursed.

### Actions

The icons in the Actions column perform the following functions.

Action	Description
<b>Approve next payment disbursement</b>	Click this icon to approve the next disbursement of the award.

Action	Description
<b>View installments</b>	Click this icon to view the details of the assigned award installment. A new screen displays showing the number of award installments, the interval (in days) of the disbursements, the amount per disbursement, the installment approval date, and the name of the approver.

When the final disbursement is made, the award will be removed from the Manage Earned Awards screen and moved to the Earned Awards History screen.


## Earned Awards History

This screen displays a table that lists all of the awards that have been disbursed to the referrer.

Display the Earned Awards History screen.

Follow these steps to display the Earned Awards History screen.

**To display the Earned Awards History screen:**

1. On the Manage Earned Awards screen, click View Earned Awards History.
2. Click the  icon in the Actions column to see the disbursement dates for the awards that had a disbursement plan.


## Manage Referral Awards

This screen displays all of the awards that have been created and the details for each.

Display the Manage Referral Awards Screen

Follow these steps to display the Manage Referral Awards Screen.

**To display the Manage Referral Awards screen:**

In the toolbar, click .

In the **Recruiting** group box, click **Manage Referral Awards** under the **Employee Referral Program** section.

Contents of the Manage Referral Awards Screen

The Manage Referral Awards screen displays the following columns.

### Columns

Column	Description
<b>Award Name</b>	This column displays the name of the award.

Column	Description
<b>Award Type</b>	This column displays the type of award.
<b>Award Value</b>	This column displays the monetary value of the award.
<b>Award Inventory</b>	This column displays the number of awards that are still available.
<b>Taxable Value</b>	This column displays the award's taxable value.
<b>Approved</b>	This column indicates if the award has already been approved.

### Actions

The icons in the Actions column perform the following functions.

Action	Description
<b>Edit</b>	Click this icon to access the award information form where you can make changes to the award name, description, type, value, and inventory. Once the award is in use, several details cannot be changed to ensure data integrity.
<b>Activate/Deactivate</b>	Click this icon to change the status of an award. An unlocked icon indicates that the award is active and can be used in creating Award Plans. The locked icon indicates that the award is inactive and is not visible for use.
<b>Approve</b>	Click this icon to approve an award. An award must be approved for it to be used in an Award Plan.
<b>Reject</b>	Click this icon to reject an award. The award will then be removed from the listing.

### Add an Award

Follow these steps to add an award.

#### To add an award:

1. On the Manage Referral Awards page, click **Add an Award**.
2. Complete the fields on the form.

Field	Description
<b>Award Name</b>	Enter a name for the award.
<b>Award Description</b>	Enter a brief description for the award.
<b>Award Type</b>	Select a type from the drop-down list: <ul style="list-style-type: none"> <li>▪ <b>Cash:</b> The individual will earn cash as the reward.</li> </ul>

Field	Description
	<ul style="list-style-type: none"> <li>■ <b>Prize:</b> The individual will earn a prize, such as a gift card or other tangible item. This option could also be used for an award of paid time off.</li> <li>■ <b>Points:</b> The individual will earn points that he/she can accrue and redeem based on your specific referral program.</li> </ul>
<b>Award Value</b>	Enter the monetary value of the award.
<b>Taxable Value</b>	Enter the award's taxable value.
<b>Award Inventory</b>	Enter the number of awards available.

3. Click **Save Award**.

## Requisition Referral Award Plans


When a requisition is marked as eligible for a referral bonus, it will appear on this screen to allow the Administrator to assign an Award Plan to it.

After a plan is assigned, the requisition must then be approved to appear with that award.

Display the Requisition Referral Award Plans Screen

Follow these steps to display the Requisition Referral Award Plans screen.

**To display the Requisition Referral Award Plans screen:**

In the Delttek Talent toolbar, click .

In the **Recruiting** group box, click **Requisition Referral Award Plans** under the **Employee Referral Program** section.

Contents of the Requisition Referral Award Plans Screen

The screen displays details of the requisitions.

### Columns

Column	Description
<b>Company Name</b>	This column displays the name of the company.
<b>Job Title</b>	This column displays the title of the job.
<b>Requisition #</b>	This column displays the requisition number for the job.
<b>Requisition Creation Date</b>	This column displays when the requisition was created.
<b>Employee Name</b>	This column displays who created the requisition.

The **Filter by Requisition Creation Date** option on this screen allows you to view all requisitions from a specific date of when it was marked as eligible for a referral bonus.

### Actions

The icons in the Actions column perform the following functions.

Action	Description
<b>Reject</b>	Click this icon to reject a requisition. The requisition will be deleted from the list. If the requisition is not truly eligible for a referral bonus, it should be rejected on this screen.
<b>Approve</b>	Click this icon to approve a requisition. Until an award plan has been added, the icon in this column will be gray. When a plan is created, the icon will change to green.  When approved, the requisition will be removed from the list and added to the <b>Earned Awards by Job</b> list with an Approved status.  It is recommended that an Award Plan be tied to the requisition before it is approved. However, it's not entirely necessary here. After it's approved, an Award Plan can be associated via the Earned Awards by Job screen.
<b>Edit/View Award Plan</b>	Click this icon to view and edit the details of an existing award plan.
<b>Create a new award plan</b>	Click this icon create a new award plan for the requisition.

### Create New Award Plan

Follow these steps to create a new award plan.

#### To create a new award plan:

1. Click the Create a new award plan icon under the Actions column.
2. Complete the fields on the form.

Field	Description
<b>Available Awards</b>	Select an award from the drop-down list.
<b>Status</b>	Select a status from the drop-down list that the candidate must reach for the referrer to receive that award.
<b>Scope</b>	Select a scope from the drop-down list. The scope identifies who is eligible to earn awards. Select one of the following options: <ul style="list-style-type: none"> <li>▪ <b>Any:</b> This option allows both Internal and External job seekers to earn that award.</li> </ul>


Field	Description
	<ul style="list-style-type: none"> <li>▪ <b>Internal:</b> This option allows only employees to earn that award.</li> <li>▪ <b>External:</b> This option allows only non-employees to earn that award.</li> </ul>

3. Click **Add Award**. The award is added to the Current Award Plan table at the bottom of the screen.
4. Multiple awards can be added.  
For example, an employee will earn an award if his referral reaches the "Interview" status and then another award if the referral is "Hired". Repeat steps 2–3 to add more awards to the plan.
5. The Current Award Plan table displays all the awards in the plan and provides the option to have an award disbursed in installments.
6. Click the Installments icon to set up the disbursements for the award.
7. Complete the fields on the form.

Field	Description
<b>Pay after Start Date</b>	Select this option if the disbursement will occur after the new hire's start date.
<b>Days between Payments</b>	Enter the number of days between disbursements.
<b>Number of Installments</b>	Enter the number of installments for the award..

8. Click **Set Installments**.
9. Additional fields display, depending on the number of installments and interval between payments that you entered. Enter values to be disbursed in the additional fields.

**Note:** The total of the values that you enter in these fields should equal the value of the award. Otherwise, an error message displays.

10. Click **Save Installments**. The disbursement details display in the **Installments** column of the Current Award Plan table.
11. You can click the  icon under the Actions column to remove an award from the plan.
12. When you are done entering the details of the Award Plan, click **Save Award Plan**.

After saving the award plan, you will be routed back to the Requisition Referral Award Plans screen. The icon to **Approve** the requisition will now show as green. Approving the requisition will show the Award(s) to the job seeker when searching for jobs.

Once a job has been sent to the Referral system and the award plan approved, a flag will appear in the **ER** column on the Manage Requisitions screen.


## Earned Awards by Job

The Earned Awards by Job screen lists the requisitions that are eligible for referrals.

Display the Earned Awards by Job Screen

Follow these steps to display the Earned Awards by Job Screen.

### To display the Earned Awards by Job screen:

In the Delttek Talent toolbar, click .

In the **Recruiting** group box, click **Earned Awards by Job** under the **Employee Referral Program** section.

Contents of the Earned Awards by Job Screen

This screen contains the following columns.

### Columns

Column	Description
<b>Job Title</b>	This column displays the title of the job. To view the job's details as shown to a job seeker, click the Job Title.
<b>Requisition #</b>	This column displays the requisition number.
<b>Award Count</b>	This column displays the number of awards for the Award Plan.
<b>Total Amount</b>	This column displays the total value of the awards.
<b>Approval Status</b>	This column displays the Approval Status. If the Approval Status displays <b>Pending Approval</b> , it can be approved or rejected in the Requisition Referral Award Plans screen.

### Actions

The icons in the Actions column perform the following functions.

Action	Description
<b>View Award Plan</b>	Click this icon to see the Award Plan for the requisition.
<b>Edit/View Award Plan</b>	Click this icon to view and/or edit the details of the Award Plan for the listed requisition.

## Résumés

This section allows you to review résumés that have been suggested for deletion.

### Résumé Suggested for Deletion


The **Résumés Suggested for Deletion** screen displays a table of the résumés that were selected by recruiting users for deletion.

The role of the administrator in this section is to determine whether to remove the suggestion for the deletion or to approve the deletion of the résumé.

#### Display the Résumés Suggested for Deletion Screen

Follow these steps to display the Résumés Suggested for Deletion Screen.

#### To display the Résumés Suggested for Deletion screen:

In the Deltek Talent toolbar, click .

In the **Recruiting** group box, click **Résumé Deletions** under the **Résumés** section.

#### Contents of the Display the Résumés Suggested for Deletion Screen

This screen displays the following columns.

#### Columns

Column	Description
<b>Type</b>	This column displays the job seeker type, for example, external job seeker, employee referral, vendor submitted.
<b>Résumé/CV Name</b>	This column displays the name of the job seeker. The name is linked and accesses the Résumé Dashboard of the job seeker.
<b>Requested by Name</b>	This column displays the name of the recruiting user who suggested the deletion.
<b>Reason</b>	This column displays the reason for the suggestion. When a recruiting user suggests a résumé for deletion, a note is added to the Résumé Dashboard of the job seeker advising other recruiting users that the résumé has been suggested for deletion.
<b>Date</b>	This column displays when the suggestion was submitted.

#### Actions

The icons in the Actions column perform the following functions.



Action	Description
<b>Remove Delete Suggestion</b>	Click this icon to remove the suggestion from the table without deleting the résumé from the system. The note on the résumé of the job seeker stating the résumé is suggested for deletion no longer displays.
<b>Delete Résumé</b>	<p>Click this icon to confirm the request to delete the résumé.</p> <p>A confirmation message displays to provide the administrator with an opportunity to approve or reject the action before permanently deleting the résumé.</p> <p>Clicking the option to confirm deletes the résumé from the database and denies the job seeker any future access to the system. The suggestion no longer displays in the table and the résumé will no longer display in any job seeker searches.</p>

In addition to the reason for the deletion given by the recruiting user, the administrator can access the résumé of the job seeker and review in detail the reason for the deletion.

## Job Seeker Account Deletion

Through a series of **Features** and **System Settings**, the **Allow Account Deletion** feature can be configured to allow a job seeker to remove his or her own account from the application or have a job seeker account deletion occur automatically.

**Warning:** The feature and related system settings must be configured by your Client Services Account Manager (CSAM). If your organization is interested in implementing this functionality, contact your CSAM.

### Job Seeker Delete Own Account

If the **Allow Account Deletion** feature is enabled, the job seeker must still meet the following criteria to be eligible for deletion.

1. The job seeker's primary residence must be in a country selected to allow account deletions. Country selection is completed by the CSAM.
2. The job seeker cannot be a current or former employee of the organization. Former employees are recognized by the system when they use the same login they were given when they were off-boarded.

If the job seeker meets both of these criteria, there is a link available on his or her Career Center menu labeled **Delete my account**.

Clicking the link displays a confirmation message to the job seeker allowing him or her to approve or reject the action and advises the job seeker the action is permanent. Clicking the button to confirm the deletion of the account automatically logs out the job seeker from the application.

If the job seeker completes this action, all of his or her information is removed from the system. Any location in the application where the job seeker previously displayed to

recruiting users will show a message indicating the job seeker was removed from the system.

## Automatic Job Seeker Account Deletion

If the **Allow Account Deletion** feature is enabled, there are three system settings that must be set up to automatically purge job seeker accounts.

- **Inactive Account Deletion E-mail Notice:** This indicates the number of days prior to deleting a job seeker account that an email warning should be sent to the job seeker. The CSAM will set this value based on the request of your organization.
- **Inactive Account Deletion Number of Inactive Months:** This indicates the number of months of inactivity before the account of the job seeker is automatically deleted. The CSAM will set this value based on the request of your organization.
- **Inactive Account Deletion Reply E-mail Address:** The email address value in this text box is the “reply” address provided in the email warning sent to a job seeker before his or her account is deleted. The CSAM will assist you with creating this email address.

Similar to allowing a job seeker to delete his or her own account, there are certain criteria that must be met before a job seeker’s account can automatically be deleted:

1. The job seeker must have had no activity on his account for the specified number of months. “No activity” means that the job seeker has not logged in or had any activity from a recruiting user. The recruiting user viewing the résumé does not count as an activity.
2. The job seeker's current status for all requisitions must be in “Candidate” status. If the job seeker is attached to more than one requisition, but the job seeker is in “Candidate” status for only one requisition, the job seeker will not be deleted.
3. The job seeker's primary residence must be in a country designated to allow account deletion. Country selection is completed by the CSAM.
4. The job seeker cannot be a current or former employee of the organization. Former employees are recognized by the system when they use the same login they were given when they were off-boarded.

All four criteria must be met before the application will automatically delete the job seeker account.

When an account is automatically deleted, the areas in the system that previously showed the job seeker’s name will be change to read “Removed from system”.

## System Changes When Job Seeker Account Deleted

The system updates its records when a job seeker account has been deleted.

- The system replaces the following job seeker account information with “Removed from system”: first name, last name, middle name, first line of address, zip code, email address, login, original email, phone numbers, descriptive phrase, cover letter, résumé body, and national identifiers (SSN, SIN, and so on).
- The job seeker is no longer searchable and will not display in search results.

- The system deletes all data in the résumé profile or application, interview details, and secondary application information.
- The system deletes any job search agents created by that job seeker.
- Reports will still include the job seeker's data for reporting purposes, but the system replaces identifying details with "Removed from system".

## Benefit Packages

This list displays all the benefit packages that can be offered to new employees.

Packages can be created, edited, and managed using this screen.

### Contents of Benefit Packages Screen

The Benefit Packages screen displays the following columns and actions.

#### Columns

Field	Description
<b>Benefit Package Name</b>	This displays the name of the benefit package.
<b>Benefit Package Description</b>	This displays the benefit package description.
<b>Associated Benefits</b>	This displays the benefits associated with the benefit package.

#### Actions

The icons in the Actions column perform the following functions.

Action	Description
<b>Edit</b>	Use this to edit the benefit package.
<b>Disable</b>	Use this to disable the benefit package.
<b>Delete</b>	Use this delete the benefit package.

### Create a Benefit

You can create a benefit through the Create Benefit Package menu.

#### To create a benefit package:

1. On the Benefit Packages screen, click **Create Benefit Package**.
2. Enter the `Benefit Package Name` and select the **Benefit Category** from the list.
3. Enter the `Benefit Merge Code`

The code should be a unique word or short phrase that will be entered without spaces. For example, New Hire Bonus will be entered as `new_hire_bonus`.

4. Enter the Benefit Letter text. This text will display in the letter to the new employee.
5. Select **Yes** or **No** for the **Benefit Override**.  
If **Yes** is selected, the Hiring Manager can override the benefit value with a new value. If **No** is selected then the benefit must be offered as it was created.
6. Enter the `Benefit Value`.
7. Select the Date Available.  
For the available date, selecting **Immediately** means the benefit will be available from the start of employment. To choose a specific number of days from the hire date, click the second radio button, and then select the **Number** and **Increment**. To roll the available date to the following month, select the check box and select the **Number** and **Day** from the lists provided. Alternatively, you can choose a specific date by selecting the date from the **Calendar** icon.

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## About Deltek

Better software means better projects. Deltek is the leading global provider of enterprise software and information solutions for project-based businesses. More than 23,000 organizations and millions of users in over 80 countries around the world rely on Deltek for superior levels of project intelligence, management and collaboration. Our industry-focused expertise powers project success by helping firms achieve performance that maximizes productivity and revenue.

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