Deltek

Deltek Talent Management

Version 17.1 Release Notes

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Contents

Overview

Welcome to the Deltek Talent Management Version 17.1 Release Notes. These release notes contain a summary of the following:

- Enhancements
- Software Issues Resolved

Important Note

Talent Information Center

For fast and easy access to the information that you need, Deltek offers the Talent Information Center (TIC), which collects all Talent Management documentation in one convenient location.

On the TIC page, you can access:

- Online Help and tips about how to maximize your searches
- Instructions for sending feedback to Deltek about any Help topic
- Links to the Talent Management GA and Cumulative Update release notes
- Learning Aids for the Talent Management user interface and individual modules
- Links to Talent Management user guides, administrator guides, and technical guides
- Information about the Talent Management Cloud Solutions for SaaS Administrators
- Information about the Deltek Learning Zone

To access the TIC, click this link: Talent Information Center

Talent Information Center Overview Video:

To view a two-minute orientation video about the TIC, click this link: TIC Intro Video

Documentation Feedback

Your comments, questions, and suggestions about our documentation are important to us. You can email your feedback to deltekdocumentationfeedback@deltek.com.

Alternatively, you can also click the **Send Feedback** icon from the online help toolbar to send us your comments and suggestions for improving the topic.

Enhancements

This section includes summaries of the enhancements made to existing features in this release.

Certain feature controls in this release have the following default settings. You enable feature settings on the Features screen (**Administration » Global Settings » System Administration » Features**).

Module	Feature Name	Location on the Features Screen	Default Setting
Core	View External Job History	**Core » Total Talent Profile » Personal and Contact Details**	On
Core HR	Bulk Import Employee Historical Information	**Core HR**	Off
Core HR	Edit Areas of Expertise View Areas of Expertise	**Core HR » Total Talent Profile » General**	Off
Recruiting	Onboarding Task Reassignment	**Recruiting » Onboarding**	Off
Core	Edit Offboarded Users	**Core » User Management**	Off

API/SOA

New Student External Certification API

The new Student External Certification API enables clients who integrate enterprise resource planning (ERP) systems to retrieve the following external certification information from Talent Management employee records:

- student_external_cert_id
- student_external_cert_name
- student_external_cert_acronym
- student_external_cert_description
- student_external_cert_issued_by
- student_external_cert_date_received
- student_external_cert_expiration
- student_external_cert_approved
- student_external_cert_required_for_job

New External Trainings API

The new External Trainings API enables Talent Management to import the external training information of users who completed their training in other learning platforms:

This API accepts the following training information and creates an external training entry in Talent Management:

- external_training_name
- external_training_type
- external_training_description
- external_training_school
- external_training_degree_type
- external_training_start_date
- external_training_completion_date
- external_training_url
- external_training_address
- external_training_cost
- external_training_grade
- external_training_comments

Core Framework

Employment Periods (PBI 1470575, 1690243, 1690244)

In Talent, employee changes to the following fields (Job Title, Manager, Location, HR Organization, Annual Rate/Pay Rate (salary), Termination Date, Rehire Date, Original Hire Date) are recorded in a table called Employee Employment Records. With this release we have added Employment Periods to group these records to facilitate the ability for our Core HR clients to revise these three date fields: Original Hire Date, Rehire Date, and Termination Date. These back-end improvements may impact processes such as integration and reporting. For more details, see Employment Periods in the Core HR section, specifically referring to the Database migration and Integrations section.

Update to HRBP and Matrix Manager Roles

The HR Business Partner (HRBP) and Matrix Manager user roles are now available to all Deltek Talent Management clients, regardless of the modules enabled for your company. Previously, these roles were only available if your company has enabled the Performance module. With this enhancement, organizations can assign HRBPs and Matrix Managers to employees, allowing HRBPs and Matrix Managers to see their employees' Total Talent Profiles.

New Onboarded but Not Hired Filter

A new **Only display users that are onboarded but not hired** filter has been added to the User Management screen (**Administration » Global Settings » Your Organization » Users**). This check box allows administrators to quickly view users who are company employees and users who are not company employees. This filter is useful if your organization initiates onboarding as a separate step before marking the candidate as hired.

Off-Boarded Employee Link to Total Talent Profile

This enhancement updates the View Offboarded Users screen (**Administration » Your Organization » View Off-Boarded Users**) so that you can now click the **Name** of the former employee and get redirected to their Total Talent Profile (TTP). Your ability to view the View Off-Boarded Users screen is determined by the configuration settings of your user profile. This enhancement affects clients who do not use the Core HR module. Functionality remains the same for Core HR users.

New Onboarding Task Reassignment Reasons Listing

This enhancement adds a new **Onboarding Task Reassignment Reasons** listing to the Select Lists Management screen (**Administration » Global Settings » System Administration » Drop-Down and Multi-Select Lists**), with the following default values:

- Assignee's responsibilities have changed
- Assignee is no longer responsible for task
- Assignee is on LOA
- Assignee terminated
- Task assigned incorrectly
- Task no longer needed

This enhancement is dependent on the new Onboarding Task Reassignment functionality. Please see the *Onboarding Task Reassignment* section of this document for details.

Edit Off-Boarded Users

This enhancement adds a new **Edit Off-Boarded User** setting under the **Core » User Management** section of the Features screen (**Administration » Global Settings » System Administration » Features**). This feature affects clients who do not have the Core HR feature enabled. If Core HR is enabled for your company, the Edit Off-Boarded Users functionality will not be available. Instead, user information can be edited from the off-boarded employee’s Total Talent Profile (TTP), in line with standard Core HR functionality.

When enabled, this enhancement allows you to click **Edit** on the **Actions** column of the View Off-Boarded Users screen (**Administration » Global Settings » Your Organization » View Off-Boarded Users**) to edit off-boarded user information.

Field	Description
Last Working Day	The date when the termination action took effect. You cannot edit this read-only field.
Separation Date	The employee’s last working date. You cannot edit this read-only field.
Separation Type	Select from the following options: **Voluntary Separation**, **Involuntary Termination**, and **Retirement Separation**.
Reasons for Termination	Select from the pre-populated list of reasons why the employee left the company or was terminated.

Field	Description
Eligible for Re-Hire	Select **Yes** or **No** to specify whether the user can be rehired if they apply for a job in the future.
Email Address to be Used as New Login	Edit this field to update the username used to access the External Career Center for this employee.
Comments	Enter comments or additional information, if applicable.

When you click **Save** to submit the changes, you receive a warning message stating that your edits will overwrite current user information and you must either click **OK** to confirm or click **Cancel**.

Talent Management maintains a log containing the following change information:

- User who performed the edits
- User whose details were changed
- Timestamp when change occurred
- Which fields were changed and the specific changes made to the value of those fields

Redesign of Total Talent Profile Tabs-Overview Tab Removed

To improve usability, the following enhancements have been made to the Total Talent Profile tabs:

- **Overview Tab:** The Overview tab has been removed and data on the Overview tab has been moved to the following Total Talent Profile tabs:
  - **Performance:** This is a new tab that displays if the Performance feature is enabled for your organization on the Features screen. The sections that display depend on the Performance sub-features that have been enabled. Up to five sections are available (Appraisals, Continuous Feedback, Goals, Employee Recognition, 360s). In the Appraisals section all open appraisals display. In the other sections, up to five items can be displayed. If more than five items exist for an employee, a **View All** button displays at the bottom of the section. Click this button to navigate to the proper screen to display all items (for example the Employee Recognition, Continuous Feedback, My 360s, or Employee Goals Screen). Note: 360s, which used to display under Appraisals, now display in their own section. You must have the feature **Performance » 360 » 360 Only** enabled for the Employee group for all employees to see this.
  - **Development:** This is a new tab that displays when any of the following features are enabled for your organization: The Development feature **(Development)**, the Competency Profile feature **(Core » Competency Profile),** and the Development Plans feature **(Core » Development Plans)**. The sections that display depend on whether the features that correspond to the sections have been enabled. There are up to six sections that can be displayed. Some are enabled as sub-features under Development on the Features screen **(Development » Career Path), (Development » Project Teams), (Development » Succession Planning), (Development » Mentoring)**. Some are enabled under the Core menu on the Features screen: **(Core » Competency Profile), (Core » Development Plans)**.
  - **Learning:** This is a new tab that displays for all employees. The Education History section displays for all employees. The other sections that display are determined by what is selected on the Learning Profile Screen. In addition to Education History, which is displayed for everyone, you may see up to six additional sections: Learning Paths, Certifications & Certification History, Courses & Course History, External Training, Watch/Waiting Lists, Current Recommendations. In each section, up to five items can be displayed. If more than

five items exist for an employee (for example, courses or certifications), a **View All** button displays at the bottom of the section. Click this button to navigate to the proper screen to display all items.

- **Job History Data Moved to Personal & Contact Details Tab:** Internal and External Job History Data from the Overview tab has been moved to the bottom of the Personal & Contact Details Tab. Internal Job History does not display if your organization uses Core HR. External Job History displays only if the View External Job History non-global feature is enabled **(Core » Total Talent Profile » Personal and Contact Details).** This feature is enabled by default.

- **Overview Feature:** The Overview feature (**Core » Total Talent Profile » Overview**) has been removed.
- **Tab Display:** All tabs now always display on a single row at the top of the Total Talent Profile, with icons that enable users to scroll left or right on that row, as necessary.

Core HR

Default Options Updated on SOC Code Select List

The default options on the SOC Code Select List have been updated. Clients can add values or mark values as inactive from the Drop-down and Multi-Select Lists screen (**Administration » Global Settings » System Administration » Drop-down and Multi-Select Lists**). When adding options to the list, you define the **Name** and **Code**, and select the corresponding EEOC Job Category. You cannot delete default values, or those that have already been used. If you try to do so, an error displays if you attempt to delete a value in use.

Employment Periods

Employee changes to effective-dated fields are recorded in a database table called Employee Employment Records; this allows the insertion of information anywhere within an employee's timeline. To improve the ability to revise the three effective-dated date fields (Original Hire Date, Rehire Date and Termination Date), we have added Employment Periods to the database tables.

Employment Periods group an employee's employment records together based on the date(s), enable Original Hire Date and Termination Dates to be revised, and define when historical employment records can be inserted.

An Employment Period is defined as time between hire/rehire and termination. Effective-dated employment records are organized between those dates. When employees first join the organization, an initial Employment Period is created with a period start date based on their Original Hire Date, and any effective-dated changes will be part of that Employment Period. If the employee is terminated, their termination date becomes the period end date of that Employment Period. If they are rehired in the future, a new Employment Period is created with a period start date based on their Rehire date. Based on this functionality, every active employee has a single active Employment Period with a period start date (which will be the Original Hire Date or, if rehired, their Rehire Date).

With the creation of Employment Periods, the ability to set or edit an employee's Original Hire Date, Rehire Date, and Termination date will based on the following rules:

- **Original Hire Date:** This date can be set when an employee has no Employment Periods, meaning they are a new hire. The Original Hire Date can be edited when the Active Employment Period is the employee's first Employment Period, which means the employee has never been terminated and re-hired.
- **Rehire Date:**

    - Rehire Date can be set when:
        - The employee has no Active Employment Periods, which indicates the employee is currently in a terminated state. (For example, they have one or more periods but all with a period end date, which indicates the employee is currently terminated.)
        - The Rehire Date being added occurs after the most recent Period End Date.
    - Rehire Date can be edited when:
        - Only the Active Period is enabled for editing, which indicates the employee is not in a terminated state.
        - The Active Period is not the first period, which indicates the employee has been rehired.
        - The current Rehire Date occurs after the Period End Date.
- **Termination Date:**
    - Termination Date can be set when:
        - The employee has an Active Period, which indicates the employee is not currently in a terminated state.
        - The Termination Date being added occurs after the Active Period Start Date.
    - Termination Date can be edited when:
        - The employee has no Active Period set, which indicates the employee is currently in a terminated state.
        - One or more periods with a Period End Date, which indicates the employee has at some point been terminated.
        - An employee is in an active state where edits are allowed for only the most recent Employment Period.
        - The current Termination Date occurs after the Period Start Date.
        - An **Un-terminate** button is also available if an employee was terminated in error and the termination needs to be removed (this removes the termination to continue the Employment Period; as such it should not be used for Rehires).

When an employee is hired, terminated, or rehired in Deltek Talent Management, or when existing values for these dates are edited, Deltek Talent Management performs the appropriate updates related to Employment Periods. The above rules for validating the original hire, rehire, and termination dates are enforced to ensure data integrity.

The following changes have been made to improve the way Employment Periods are handled for Database migrations and integrations.

- **Database Migrations:** The following database schema changes were made to support Employment Periods:
    - A new hua_employee_employment_period table has been added to the database.
    - A new Employment Period ID column has been added to hua_employee_employment_record.
    - Employment Period rows are created for current and active employees
    - Existing employment rows are associated to the new Employment Period entries.
- **Integrations:** When an employee is hired, terminated, or rehired via integrations, or when existing values for these dates are edited, Deltek Talent Management performs the appropriate updates related to Employment Periods. The rules for validating the original hire, rehire, and

termination dates are enforced to ensure data integrity. **These updates are made for all users, whether Core HR is enabled or disabled.**

The **User Status** icon on an employee's Total Talent Profile is based on the Employment Period information:

- **Active (Green)**: If an employee is Active, their current Employment Period has a Period Start Date occurring before today's date, and no Period End Date or their Period End Date is in the future.
- **Inactive (Grey)**: If an employee is Inactive, their current/last Employment Period has a Period Start Date and Period End Date in the past (terminated employee) or it has an Employment Period with a future Period Start Date (future starting new hire).

Import File for Bulk Upload of Historical Employee Records

When the Bulk Import Employee Historical Information feature is enabled, Core HR Administrators can bulk upload historical data for one or more existing employee records into the Core HR module. This is useful when administrators must import job history data from another system. This functionality applies to effective-dated fields only. It runs on the **batch_process_daily.php** cron.

To enable this functionality, access the Features screen (**Administration » Global Settings » System Administration » Features**). Select the group, then select the **Bulk Import Employee Historical Information** feature (**Core HR » Bulk Import Employee Historical Information)**.

When enabled for a group, the Bulk Employee Historical Information Import link is available on the Administration screen **(Administration » Core HR » Bulk Employee Historical Information Import).** Click the link to open the Upload Employment Record Historical File screen. Administrators cannot upload new hires using this feature. You must add a new user through the interface, or via a new user upload prior to using this functionality.

A sample comma-separated values (CSV) file is provided at the top of the screen (sample_upload_er_historical_file.csv). Download this file to get started configuring your CSV file for upload. The following columns are included in the sample:

- **user_email:** An email address that acts as a unique identifier for the employee. This is required.
- **job_code:** Job Title
- **manager:** Manager
- **location:** Location of the previous job
- **organization:** Organization name
- **salary:** Salary paid
- **currency_type:** Currency type for payment
- **rate_type:** Rate type for the work done
- **work_schedule:** Work schedule
- **termination_date:** The date the employee was terminated
- **rehire_date:** The date the employee was rehired, if available
- **hire_date:** The date the employee was hired
- **effective_date:** The effective date of the change made
- **reason:** The reason for the record change. This field is required.

Total Talent Profile Areas of Expertise

The Areas of Expertise feature enables users with proper access to view and/or edit a list of key skills in the area below the employee's name in the Total Talent Profile record. Access is granted via the **View Areas of Expertise** and **Edit Areas of Expertise** features and is also determined by the logged in user's role in relation to the employee, and for Employee, Manager, and HRBP users, by Self-Service administration permissions. For example, when the Global Edit Areas of Expertise feature is enabled, and the Areas of Expertise section is enabled on the Manager tab of Self-Service Administration, a member of the Manager role can edit the skills of employees who report to that manager. A user can also edit their own record, if the Areas of Expertise section is enabled on the Employee tab of Self-Service Administration. Others with the **View Areas of Expertise** enabled for their role can see the skills listed beneath an employee's name in the Talent Profile.

To Enable the Edit Areas of Expertise Global Feature**:**

1. Open the Features screen (**Administration » Global Settings » System Administration » Features**).
2. Select the **Global** group to enable the feature for your organization.
3. Expand **Core HR » Total Talent Profile » General**.
4. Select **Edit Areas of Expertise**.
5. Click **Update Features**.

With this option enabled for your organization and depending on the logged in User's role in relation to the employee record and Self-Service administration rights, an edit icon displays to the right of the Areas of Expertise heading, beneath the employee name in the Total Talent Profile. Click the icon and enter up to 80 characters of text in the field.

To Enable the View Areas of Expertise Feature:

1. Open the Features screen (**Administration » Global Settings » System Administration » Features**).
2. Select the group to be granted access.
3. Expand **Core HR » Total Talent Profile » General**.
4. Select **View Areas of Expertise**.
5. Click **Update Features**.

Self-Service Feature

In addition to having the **Edit Areas of Expertise** feature enabled, the **Areas of Expertise** section must be enabled on the Self-Service Administration screen for Employee, Manager, or HRBP roles to use this feature (**Administration » Core HR » Self-Service**). Self-Service options (require approvals, notify, do nothing) can be configured on the Self-Service Administration screen (**Administration » Core HR » Self-Service**). Grant the appropriate action for changes to Areas of Expertise by Employee, Manager, and HRBP roles, as desired, in the General -- Areas of Expertise section.

Self-Service and History Tabs

All changes made to the **Areas of Expertise** field display on the Self-Service and History tabs, as appropriate.

Development

Development Plan Notification Event

A notification event will be sent when a Development Plan is added, edited or deleted. The notification is sent to all users associated with the plan, including the plan creator and the plan owner. (For example, the notification goes to the manager and employee).

Email Notification Text:

This notification is to let you know that a development plan has been [merge code] for [development_plan_employee_full_name]. The plan can be viewed by clicking on the action link below:

[action_url].

Thank you.

SMS Notification Text:

A development plan has been [merge code] for [development_plan_employee_full_name]. It can be viewed at: [action_url]

Learning

Support for New Media File Types for E-Learning Courses

The Learning module now supports MP4 videos and PDF file types, allowing you to upload .mp4 and .pdf files for E-Learning courses. This enhancement adds new options to the following screens:

- Add Course (**Administration » Learning » Courses & Classes » Courses » Create a New Course**)
- Edit Course (**Administration » Learning » Courses & Classes » Courses » Edit**)
- EPIQ Jobs (**Administration » Learning » Courses & Classes » EPIQ Jobs**)
- Course Profile (**Administration » Learning » Courses & Classes » Courses » <Course Name>**)

Changes to the Add Course and Edit Course Screens

On the E-Learning Package tab, the **E-Learning Standard** field is now a drop-down list field rather than a radio button field. It includes the following new options in addition to **SCORM** and **AICC**:

- **Video (mp4):** This enables you to upload courses in .mp4 video format. The maximum file size is 250MB. Selecting this e-learning standard enables the following sub-field:

Field Name	Definition
Media Content Threshold %	This sets the percentage of video length a user must view to be considered complete. This field accepts only values ranging from **1** to **100**. If left blank, it defaults to **95**.

- **PDF**: This enables you to upload courses in .pdf format. The maximum file size is 250MB. File names cannot contain spaces. Selecting this e-learning standard enables the following sub-fields:

Field Name	Definition
Media Content Threshold %	This sets what percentage of the total document page count a user must read for the course to be considered complete. This field accepts only values ranging from **1** to **100**. If left blank, it defaults to **95**.
PDF Page Duration in Seconds	This sets the number of seconds a user must view a page for it to be credited for progress/completion. This field must have a value greater than **0**. If left blank, it defaults to **5**.
PDF Content Scaling	This sets the page magnification of the PDF document. Select from the following options: ▪ **Auto**: For pages in portrait mode, this scales the page by height. However, if the PDF is too wide to fit horizontally, then it scales the page by width. ▪ **Page Actual**: This displays the page in its original dimensions. ▪ **Page Fit**: This scales the page to fit the available size of the document viewer. ▪ **Page Height**: This scales the page to fit the document viewer vertically. ▪ **Page Width**: This scales the page to fit the document viewer horizontally.

If you select **Video (mp4)** or **PDF** as the **E-Learning Standard** and upload a non-corresponding file format such as a .zip file in the **Upload Package** field, you receive an error and cannot save the course. Similarly, for the fields that accept only numeric values, typing a value outside the accepted range results in an error message and you are prevented from saving the course.

On the E-Learning Package tab, for courses for which the **Package Location** field is set to **FTP**, you can now select MP4 and PDF files from the Select Package pop-up screen when you click **Upload FTP Package**.

Changes to the EPIQ Jobs Screen

The E-Learning Package Import Jobs screen now includes MP4 and PDF files in the package import jobs listing.

Changes to the Course Profile screen

The Launch Package Properties Editor pop-up screen now includes the following options, depending on whether the course is an MP4 video or a PDF document:

Field	Description
Media Content Threshold %	This displays for video and PDF courses. This field sets the percentage of video length or total document page count, respectively, that a user must view for the course to be considered complete. This field accepts values ranging from **1** to **100**. If left blank, it defaults to **95**.

Field	Description
PDF Page Duration in Seconds	This displays only for PDF document courses. This sets the number of seconds a user must view a page for it to be credited for progress or completion. This field must have a value greater than **0**. If left blank, it defaults to **5**.
PDF Content Scaling	This displays only for PDF document courses. Set the page magnification of the PDF document by selecting from the following options: ▪ **Auto**: For pages in portrait mode, this scales the page by height. However, if the PDF is too wide to fit horizontally, then it scales the page by width. ▪ **Page Actual**: This displays the page in its original dimensions. ▪ **Page Fit**: This scales the page to fit the available size of the document viewer. ▪ **Page Height**: This scales the page to fit the document viewer vertically. ▪ **Page Width**: This scales the page to fit the document viewer horizontally.

Add Courses to Learning Path

This enhancement introduces design improvements to make it easier for Administrators and Learning Managers to search for and assign courses to learning paths. When you launch the **Add a Course** screen from the Manage Learning Paths application (**Administration » Learning » Learning Paths » Manage Learning Paths » Actions » Add a Course**), the course selection process has been completely redesigned.

- **New Dynamic Course Listing**: The courses are now displayed in a two-pane Dynamic Forms interface. Active courses available for you to add are listed under **Available Items** on the left pane. Courses selected for the learning path are listed under **Selected Items** on the right pane.

  To add a course to the learning path, click **+** in the **Available Items** pane**.** To remove a course from the learning path, click **x** in the **Selected Items** pane. To rearrange the sequence of the selected courses, use the toggle to drag and drop the courses.

- **New Smart Search Functionality.** Two new fields have been added to help you more quickly find the courses you need:
  - **Sort:** You can display the course titles in ascending or descending alphabetical order from this drop-down list.
  - **Filter:** Enter a full or partial course name to display course titles containing your search key.

The View Course screen (**Administration » Learning » Learning Paths » Manage Learning Paths » Courses » <#>**) has also been updated to allow you to reorder the sequence of courses. You can drag and drop the course names to change the display order using the toggle. To remove a course from the learning path, click **x**. Any change that you make in this screen is reflected in the **Selected Items** pane of the Add a Course screen.

External Training Continuing Education Units

This enhancement updates the following screens to improve how students capture and display continuing education units:

- Add External Training modal screen (**Learning » External Training » Add External Training**)
- Edit External Training modal screen (**Learning » External Training » Actions » Edit**).
- External Training Details screen (**Learning » External Training » <Name/Title of External Training>**).

On the Add External Training and Edit External Training modal screens, education unit information is now captured in a form table containing the following fields. You can add multiple education units to an external training record, with education units displayed in separate rows.

Field	Description
Educational Unit	This drop-down list field replaces the fields **Credit** and **CEUs**. Use this field to identify the educational unit type awarded by the external training. This field leverages the existing **Educational Unit** values configured under **Administration » Global Settings » System Administration » Drop-down and Multi Select Lists**.
Educational Unit Category	Use this field to identify the educational unit category. This field leverages the existing **Educational Unit Category** values configured under **Administration » Global Settings » System Administration » Drop-down and Multi Select Lists**.
Education Unit Value	Enter the number of units earned upon completion of the course.
Remove	Click **X** to remove the educational unit.

The External Training Details screen (**Learning » External Training » <Name/Title of External Training>**) then captures the education unit information you entered under a new **Education Units** header.

External Training Import File for Continuing Education Units

On the Import External Training screen (**Learning » External Training » Import External Training**), the configured CSV file used to bulk upload external training has been updated. The **Credits** and **CEUs** columns are removed and replaced with the **Education Unit** column. In this column, you can upload multiple educational units per external training row by using the pipe symbol (**|**) to separate the education unit type, category, and value and then by using a semicolon (**;**) to separate the data points.

To ensure that you are using the correct data format and can successfully upload education unit information using this tool, use the sample CSV file as a template. A link to the sample file is provided on the Import External Training screen.

Performance

Apply a Different Scale to Each Category in a Workflow

Administrators responsible for Appraisal workflows can now apply a different scale to each category in a workflow. The existing overall scale category remains and is used when the overall score is displayed in the user interface, for example on the My Employees screen.

The following changes have been made to the screens and fields on Step 4 and Step 11 of the Appraisal Workflow Wizard, and on the Appraisal Summary tab.

Step 4 -- Scale:

- **Appraisal Overall Scale field:** The label on the **Scale** field has been changed to **Appraisal Overall Scale**. A warning displays below this field to remind the user that if the value is changed for this field, it will change the values selected for each individual category.
- **Overall Scale Preview:** The preview display of the Overall Scale has been removed.
- **Select a Scale for Each Scorable Category Added in Step 2:** Below the **Appraisal Overall Scale** field, each scorable category added to the workflow in step 2 is displayed as a drop-down field (Drop-down lists are not included for non-scoreable fields, such as Achievements, Recognition, and Continuous Feedback Sessions). Select the scale for each category from the associated drop-down list.
- **Information Icon Previews Selected Scale:** An informational icon displays to the right of every Category drop-down list on Step 4 of the Appraisal Workflow Wizard. Hover over the icon to see how the currently selected scale looks.
- **Workflows Created Prior to Go-Live:** Category scales in workflows created prior to going live default to the currently in-use appraisal scale. This ensures that there is no retroactive impact for the user.

Step 11 -- Review:

- **Appraisal Overall Scale field:** The label on the **Scale** field in the Scale section has been changed to **Appraisal Overall Scale**.
- **Scale Section:** This section lists all category scales beneath the Appraisal Overall Scale.

Appraisal Summary Tab:

- **View Category Scale:** On the Summary tab of an appraisal, each section on the tab that corresponds to a category with score-able metrics, for example Goals or Competencies, contains a **View Category Scale** link in the upper right. Click the link to see details about the scale applied to this category. Administrators have the option to apply different scales to each score-able category in an appraisal, although in some cases the Overall Scale and category scales will be the same.

Anniversary Date Based Bulk Appraisal Launch

When selecting dates during the Bulk Launch Appraisal process (Step 2 - Select Employees), administrators can now select a range by month and day only, without specifying a year. This makes it easier for those who want to launch appraisals using an anniversary date-based process. To do this select **Month and Day Only** in the **Calendar Option** field. When you launch the bulk launch process, all active employees with anniversaries within this month/day timeframe for any year are selected. For those who want to specify a year, select **Default** from the **Calendar Option** field.

Submit Button on the Add Journal Entry Dialog Always Displays

The Journal Entry dialog has been modified to ensure the **Submit** button always displays, regardless of screen size. This dialog is accessible from multiple screens throughout Talent Management, such as Appraisals, Project Teams, and Continuous Feedback.

Recruiting

Offer Merge Code

Users with access to **Offer** under the Recruiting feature can now enable or disable **Offer Merge Codes in Recruiting Letters** (**Administration » Global Settings » System Administration » Features: Recruiting » Offer » Offer Merge Code in Recruiting Letters**).

Once enabled, the offer merge codes display as available event merge codes when creating and editing a recruiting type letter. The offer merge code populates if the candidate has an offer tied to their candidate record, whether the offer is fully approved or is under the approval process. If the user sends a letter that does not tie with a specific candidate (bulk send letter from Resume Search), the offer merge codes will not populate.

Onboarding Task Page Column Sorting

The Onboarding Task page now displays two separate tables for Onboarding Tasks and Dynamic Forms with individual pagination and sorting that allow users with access to Onboarding Task to view the data in specific order using the following columns:

- **Task / Form Name**
- **Due Date**: Tasks and forms are ordered from newest to oldest by default to put importance to the most current tasks.
- **Start Date**
- **Completed**: Sorting is performed based on the task completed date.
- **Name**
- **Job Title**

If no task or form is available, a “No Tasks / Form available” is also indicated under the table title.

Create New Pool from Résumé Dashboard

Recruiters can now create a new candidate pool from the **Actions** tab of the Résumé Dashboard using a new **Create New Pool** option under the **Add to Pool** dropdown menu (**Résumé Dashboard » Actions » Add to Pool » Create New Pool**). This new feature can help screen candidates who might be a good fit for future positions. When you create a new pool, the changes are reflected in the transaction log.

New Employee ID Field on the Résumé Dashboard

A new **Employee ID** field now displays when a candidate is moved to **Hired** status through the Status panel of the Résumé Dashboard (**Résumé Dashboard » Workbench » Status**). The **Employee ID** field displays under the Hire Candidate section and allows users to specify an employee ID for a new hire or rehire without having to use the Onboarding functionality. The field is only editable before the recruiter clicks the **Hire Candidate** button.

Onboarding Task Reassignment

Administrators and configurators can now enable the task reassignment feature to allow internal users to reassign Onboarding Tasks assigned to them. Disabled by default, the feature is enabled through **Administration » Global Settings » System Administration » Features: Recruiting » Onboarding – Onboarding Task Reassignment**.

Once this feature is enabled, a new **Onboarding Task Reassigned** notification event becomes available in **Administration » Global Settings » Notification Events » Onboarding** and a new **Reassign Task** action is enabled for the task owner. This functionality, which is on its first iteration, serves as a foundation for providing administrators or other users with the ability to reassign onboarding tasks in a future release.

In connection with the onboarding task reassignment feature, the **Task** column on the Onboarding Task page is now replaced with an **Action** column, which displays the following icons:

Action Icon	Description
Reassign Task	Use this icon to reassign a task. This icon is available for internal incomplete tasks, but not for files and documents. For completed tasks, this icon is disabled.
View Attachment	Click this icon to display any available attachment. “There are no attachments” is displayed when no attachment is available.
View Reassign Log	Use this icon to view the audit log of the reassigned task.

To Reassign a Task:

1. Click the **Reassign Task** icon to display the Reassign Task modal window, which displays the new hire’s **Name**, **Job Title**, **Task**, current task owner (**Assigned To**), a **Reassign To** lookup field, and **Reassign Reason** drop-down menu.
2. On the **Reassign To** lookup field, choose the employee you want to reassign the task to.

   The lookup field only displays internal users, excluding the new hire target of the onboarding task and the current owner or owners, for tasks with multiple owners.
3. Select the **Reassign Reason** and click **Reassign Task**.

After the user originally assigned to the task has reassigned it to a new user, the new task owner receives a notification containing the details of the task, including the task name, previous owner, reason for reassignment, and due date.

Click the **View Reassign Log** icon to view the reassignment history, which displays in newest to oldest order.

Reporting Tool

Talent Pool Report

A new standard report, Talent Pool, has been added to the Reporting Tool. This report displays information pertaining to the pool and candidates within each pool. The Talent Pool report includes the following columns:

- Pool Name
- Pool Creation Date
- Owner
- Number of Candidates in Pool
- List of Candidates
- Candidate Type (For example, External, Recruiter Uploaded, Internal)
- Public/Private
- Candidate Creation Date
- Candidate Last Modified Date

Onboarding Reassign Tasks Report

A new standard report, Onboarding Reassign Tasks, has been added to the Reporting Tool. This report gives users an easy way to see all tasks that have been reassigned, along with the audit log details. The Onboarding Reassign Tasks Report includes the following columns:

- Candidate Name
- Start Date
- Task Name
- Job Title
- Previous Task Owner Name
- New Task Owner Name
- User Who Reassigned the Task
- Reassign Reason
- Date Task Was Reassigned
- Task Due Date
- Task Complete Date

Reporting Tool Upgraded to Latest Version of PHP 8.1

To add compatibility for PHP 8.1 for the Reporting Tool, we have upgraded to Ubuntu version 1.19.5 and updated backend libraries and scripts.

Standard Reports and Data Objects Modified to Use a Category's Scale for Score Calculations

To accommodate the new feature that allows administrators to apply a different scale to each category in a workflow, all data objects and standard reports that expose scores for individual metrics have been updated to apply a category's scale to the raw score saved in the database.

SSL Connectivity Enabled for the Production Servers Used by DRT

Backend changes have been made to add new certificates on MyISAM productions servers, which enables SSL connectivity when the application accesses the database server.

New Dynamic Form Type Object: Employee TTP Form Dynamic Form

The Reporting Tool now includes a new Dynamic Form Type special object called **Employee TTP Form Dynamic Form Answers**. This object corresponds to the new Total Talent Profile Additional Information tab. Fields included are defined by the client. As with all data objects, this object is now available to use on reports. The object is updated with each nightly data refresh, and new columns are added as they are created in Talent Management.

Software Issues Resolved

Core Framework

Invalid Time Zones

Deltek Defect Number: 1414720

Description: The **Time Zone** drop-down list field displayed invalid selections.

Customers Impacted: This affected all clients.

Merge Codes Not Reflected in Email Notifications

Deltek Defect Number: 1561426

Description: Merge codes that were added in the Referral Reminder and the Referral Apply Notification were not reflected when Talent Management generated the email notifications.

Customers Impacted: This affected clients who use merge codes in their email notifications.

Error When Viewing Résumé Search Results

Deltek Defect Number: 1833758

Description: When viewing search results that returned multiple result pages on the Resume Search Result screen (**Recruiting » Résumés » Search Résumés**), clicking the page links in the External Matches section of the search results table resulted in an “Unauthorized Access” error message.

Customers Impacted: This affected all Talent Management clients.

Integrations

Unterminated Users Not Reflected

Deltek Defect Number: 1746762

Description: When some users were un-terminated via file feeds, Talent Management did not reflect the action immediately. Instead, the integration returned an error response. However, the user record was correctly updated the following day when the un-termination date took effect.

Customers Impacted: This affected integration clients with user file feeds.

Learning

No Error Displayed for Mismatched or Empty E-Learning Postback URL

Deltek Defect Number: 1494996

Description: When creating an E-Learning course, the wizard did not display an error warning when the E-Learning Postback URL did not match the ID of the site or when the **URL** field was empty.

Customers Impacted: This affected clients who use the Learning module.

Unable to Export Employee’s Learning Profile

Deltek Defect Number: 1508714

Description: When a manager tried to print the learning profile of their employees, Talent Management exported the manager's learning profile instead. This occurred if the Tuition Assistance feature was not enabled.

Customers Impacted: This affected clients who use the Learning module.

Recruiting

Misspelled reCAPTCHA Error Notification Text

Deltek Defect Number: 763034

Description: The word “verification" was misspelled in the error notification of the external job site login screen when you tried to skip the reCAPTCHA verification option.

Customers Impacted: This affected clients who use the external job site feature.

Unable to Scroll Horizontally

Deltek Defect Number: 1154580

Description: The horizontal scroll bar on the New Résumé Submissions screen (**Recruiting » Applicants » New Résumé Submissions**) and Active Candidates (**Recruiting » Candidates » Active Candidates**) screen did not allow you to scroll. This occurred when the columns on the table are sorted.

Customers Impacted: This affected clients who use the Recruiting module.

Empty Bulk Download Resume Zip File

Deltek Defect Number: 1399834

Description: When you extracted a zipped file of candidate resumes using the **Bulk Download Resume Attachments** tool, the file extract folder was empty. This occurred when using the default zip file extractor of your computer’s operating system, but not when using third party apps, such as 7zip and WinZip.

Customers Impacted: This affected clients who use the Recruiting module.

Education History Entry Caused Duplicates When Edited

Deltek Defect Number: 1552484

Description: When the Educational History section of a user's resume contained multiple education block entries, editing the **Education Level** and **University** fields for one entry also changed the other entries.

Customers Impacted: This affected clients who use the Recruiting module.

Issues Displaying Bulleted Job Descriptions in Firefox

Deltek Defect Number: 1672199

Description: When viewing the job details from the Manage Requisitions screen (**Recruiting » Requisitions » Manage Requisitions » View Requisition**), content in bulleted list format did not display correctly in Firefox.

Customers Impacted: This affected Recruiter user profiles.

Unable to Delete Existing Locations

Deltek Defect Number: 1725356

Description: If the **Location** field was in the first column of a two-column requisition form that had fields in both columns, deleting the location yielded no response from the screen, and you were unable to remove existing locations.

Customers Impacted: This affected clients who use the Recruiting module.

Résumé Dashboard Formatting Issues

Deltek Defect Number: 1740681

Description: The Résumé section of the Résumé Dashboard displayed the **First Name**, **Last Name**, and other details below the field label instead of beside it.

Customers Impacted: This affected clients who use the Recruiting module.

Appendix A: For Additional Information

Deltek Support Center

The Deltek Support Center is a support Web site for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options that the Deltek Support Center provides:

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Support Center Community
- Access Cloud-specific documents and forums
- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes
- Initiate a Chat to submit a question to a Customer Care analyst online

Attention: For more information regarding Deltek Support Center, refer to the online help available from the Web site.

Access Deltek Support Center

To access the Deltek Support Center:

1. Go to https://deltek.custhelp.com.
2. Enter your Deltek Support Center **Username** and **Password**.
3. Click **Login**.

Note: If you forget your username or password, you can click the **Need Help?** button on the login screen for help.

About Deltek

Better software means better projects. Deltek delivers software and information solutions that enable superior levels of project intelligence, management, and collaboration. Our industry-focused expertise makes your projects successful and helps you achieve performance that maximizes productivity and revenue. www.deltek.com