Deltek

DTM SaaS Administrator Guide

This edition published .

Contents

Talent Management SaaS Administrator Guide

SaaS Administrators use this guide during the initial activation and ongoing management of the TM solution. The guide contains information used to manage the TM implementation, such as available environments, processes and service requests, requirements for the development of customer-specific content, and general information regarding the offering itself.

Overview

Welcome to your Talent Management (hereafter, TM) solution.

The TM solution is delivered via the Cloud to meet the ever-changing needs of small and mid-size organizations, allowing you to leverage the benefits of the Cloud while always taking advantage of the latest Deltek software capabilities.

This SaaS Customer Administrator guide is a critical component of the SaaS customer administrator's role—both during the initial activation and ongoing management of the TM solution. Here you will also find information to help you manage your TM implementation.

- Available environments
- Requirements for the development of customer-specific content
- General information regarding the offering itself.

This guide is updated frequently, and the latest version is always available from this Support Center.

Deltek Solutions Offering

Deltek offers the following solutions as part of the Talent Management Suite:

- Talent Management Suite (includes all modules listed below)
- Talent Management Recruiting
- Talent Management Core HR
- Talent Management Performance & Development
- Talent Management Learning
- Deltek Reporting Tool (DRT)

Additional details on these offerings can be found at www.deltek.com.

This document is written for the TM Suite which encompasses all offerings. The guide will indicate when information pertains to only one of the solutions.

SaaS Customer Administrator

Each TM customer must have a designated SaaS customer administrator for the Deltek Support Center.

You must provide the name and email address of your company's SaaS customer administrator during, or prior to, signing your Subscription Agreement.

The SaaS customer administrator is responsible for managing your organization's TM implementation with Deltek. In addition, the SaaS customer administrator's responsibilities include the following:

- Access Management to your TM environment
- Coordinating with implementor for initial setup
- Uploading data
- Adding New Users
- Uploading Users in bulk
- Uploading pre-existing Resumes
- Configuring Skills and/or Competencies
- Facilitate internal training and adoption of the software
- Receiving and communicating system maintenance announcements

Companies often assign third-party implementation consultants as SaaS customer administrators during the implementation period. This will provide the third-party implementation consultant with full SaaS customer administrator authority over your Talent Management solution.

Your organization can have a **maximum of three SaaS customer administrators** at any given time. Each SaaS customer administrator will have the same authority to administer the TM solution and will receive the same communications from Deltek. Please note that the SaaS customer administrator varies from the TM solution administration role, which includes many capabilities to configure and adjust settings within the solution. You may assign an unlimited number of administrators for the solution (the three-person limit is specific to the Saas Customer Admin only).

If your organization needs to change the SaaS customer administrator or add a SaaS customer administrator, please submit a support case to Deltek Support.

SaaS customer administrators are provided with a SaaS Customer Administrator Guide as part of the on-boarding process.

Core Administration Menu Choices

Click  in the toolbar to display the Administration menu.

From the **Global Settings** section of the Administration menu, you can select the Core functionalities.

System Administration

This section includes settings and options that control the behavior of the system.

Screen	Description
Custom Menus	This screen lets you add menu items to the Custom Menu tab as well as rename the menu tab itself.
Drop-down and Multi-Select Lists	This screen lets you configure the drop-down and multi-select lists in the system.
FAQs	This screen lets you create and manage Frequently Asked Questions.
Features	This screen lets you determine the functionality used in the system and what functionality should be available for each user group.
Groups	This screen lets you determine how an individual fits within the organization by creating groups, such as Employees, Managers, Administrators, External Job Seekers, Vendors, and so on.
Languages	This screen lets you control the language in which all the content displays throughout the system, apart from the data entered by users.
Notification Events	This screen lets you manage the content of notifications that are triggered by events that occur in the system.
Page Options	This screen lets you determine the details, fields, and columns that display on certain pages within the system.
System Settings	This screen lets you configure settings and options that control much of the behavior of the system.
License File	This screen displays your number of active users, number of allowed users based on your license file limit, number of licenses available, number of deactivated users, and number of total users (active and deactivated).

Your Organization

This section includes settings and options that relate to your organization.

Screen	Description
Approval Chains	This screen lets you create different approval chains for use with recruiting workflows, requisitions, offers of employment, performance workflows, and performance appraisals.
Competencies	This screen lets you create and manage competency categories and individual competencies to help match appropriate candidates to positions, provide a basis for appraisal ratings, and help employees succeed in career goals.
Documents	This screen lets you upload documents and make these documents accessible to various groups within your company.
Job Families	This screen lets you create and manage job families, which are related groups of jobs that have similar job competencies and skills.
Job Profiles	This screen lets you create and manage job profiles to use when creating requisitions, when associating performance appraisals, and as a guide for advancement within the organization.
Location Groups	This screen lets you create and manage groups of locations.
Locations	This screen lets you create and manage the locations of your organization.
Organizational Structure	This screen lets you manage your company's organizational structure: divisions, departments, business units, or any other groups that make up its infrastructure.
Scales	This screen lets you create and manage scales to be used for measuring the competency experience of an employee or rating an employee's performance.
Skills	This screen lets you create and manage the skills library, which helps you match the appropriate candidate to positions in the company and provides a basis for appraisal ratings.

Screen	Description
Users	This screen lets you manage a variety of employee details as well as send correspondence and off-board (terminate) an employee.
Search For Duplicates	This screen, which is only available to administrators, includes a search user interface that includes a National Identifier input field and Type of National Identifier drop-down list, with search results displayed under the sections: Deleted Users, Existing Users, and Employee Data.

Additional Support Roles

As a Deltek customer, various support roles must be filled besides the role of the SaaS Customer Administrator.

These roles include the Primary Support Contact (PSC), Authorized Support Contact (ASC), and Support Contact Manager (SCM). A single individual may be assigned multiple roles or just one role. To further understand the various Deltek roles, please review KB 84696 To understand the steps of adding and updating support contacts, please review KB# 36134.

For security purposes, Deltek will only process requests that are submitted to Deltek Support Center by your company's Authorized Contacts. Requests submitted by personnel other than your Authorized Contacts will be rejected.

How to Stay Informed

Deltek is committed to keeping you informed of any developments that may affect the availability or functionality of your TM solution.

There are several ways to stay informed:

- Deltek Support Center Knowledge Base
- Deltek TM Learning Center
- Deltek Customer Support Site
- Deltek System Notification made visible within the solution itself after logging in

Deltek Support Center Knowledge Base

The Support Center Knowledge Base contains TM-related articles as well as announcements regarding planned and unplanned maintenance.

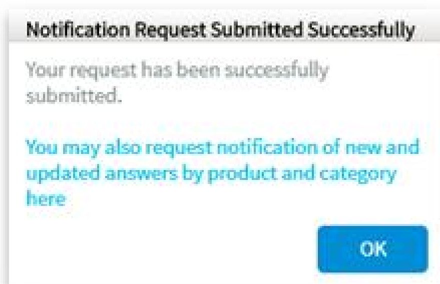
After subscribing to a KB you will receive an email any time that KB is changed or updated.

Subscribe to TM Knowledge Base Articles

To subscribe to TM Knowledge Base articles:

1. Go to https://deltek.custhelp.com/app/answers/detail/a_id/84696.
2. Log on to the Deltek Support Center site using the credentials provided to you when your initial TM order process was completed.
3. Click **Notify Me** on the bottom right-hand side of the page.

4. Click **OK** on the confirmation screen.



Support Center Site

The Deltek Support Center site 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 Support Center site 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 Community.
- Access Cloud-specific documents and forums
- Search Deltek's knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Support Center analyst
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes
- Use Quick Chat to submit a question to a Support Center analyst online

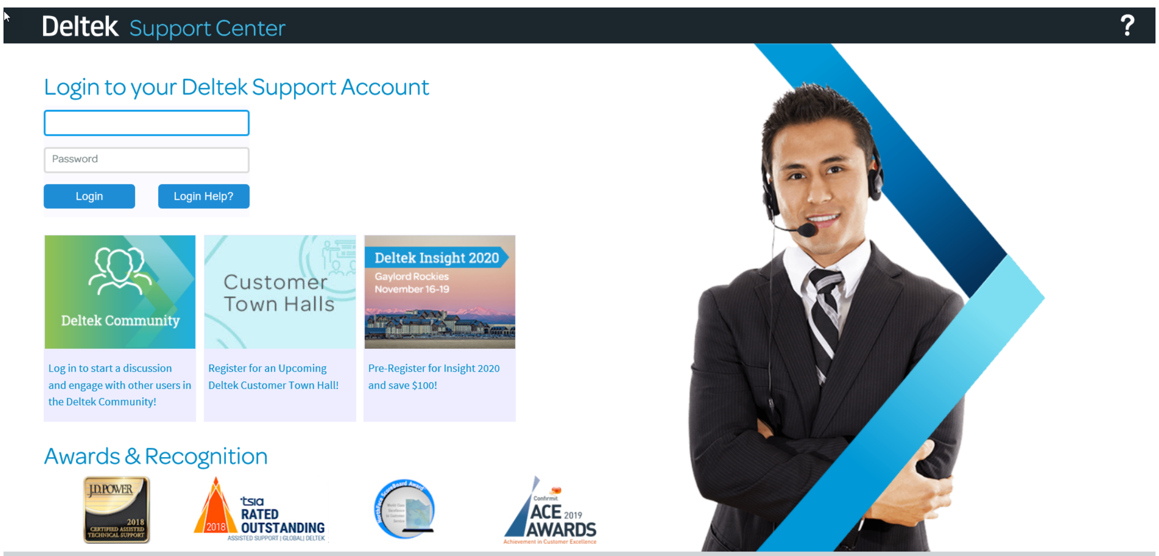
- Request a Call with Support from our support team
- Change contacts and communications preferences with Deltek

Access Support Center

To access the Support Center site:

1. Go to http://support.deltek.com.
2. Enter your Support Center **Username** and **Password**.
3. Click **Log In**.

> **Warning:** If an issue is being reported, ensure that you are using the ID of the affected client.



> **Note:** If you do not have a username and password for the Support Center site, contact your firm's Deltek Talent Management Administrator. If you forget your username or password, you can click the **Login Help?** button on the login screen for help.

Environments and Databases

The table below details the types of environments and databases that are included in the TM solution.

Environment	Description
Production Site	This site is where your company's live production databases are deployed and maintained.

Environment	Description
	Only the Deltek Cloud Ops team has access to the Production Site and associated databases.
Training Site	The Training Site is where you can test configuration changes before you implement these changes in your company’s production database. The Training Site runs the same version of the application as your company’s Production Environment and is typically made available upon request for 3–4 weeks and can be refreshed/extended upon request. Up to a maximum of two times per year, you can request that your company’s Talent Sandbox database be refreshed with your current Talent Production database. To do so, submit a support case to process the database refresh.
Implementation Test and Training Site (ITTS)	An Implementation Test and Training Site (ITTS) is provided upon submission of a support case or upon the customer’s indication during the sales process. A typical implementation spans three months, although it can be quicker based on the scope of the overall implementation effort. ▪ The ITTS runs the same version of the TM applications as the Production Environment. ▪ Deltek will decommission your ITTS 30 days after you promote your ITTS to your Production Site. Please contact support to request that your ITTS availability be extended beyond 30 days if required.
Pre-release Site for Customer Preview	A pre-release site provides customers the option to request a test site prior to the upgrade of their production site for an upcoming major release. Upon request, pre-release sites can be deployed and made available with demodata which allows you to test any new and/or exisiting functionality before your site is upgraded. This provides customers with an opportunity to familiarize themselves and their teams with functionality

Environment	Description
	and provide feedback to Deltek regarding the new functionality. Pre-release sites are only available just before a major upgrade will expire in coordination with the release launch date.
Early Adopter Program	Major releases and new modules may involve early adopter programs which are for a group of selected customer participants. These customers will be provided a test site with demodata along with a set of specific test cases for the new functionality or modules in order to provide feedback around functionality and usability. Early adopter sites will expire in coordination with the completion of the program for that release.

Standing Maintenance Windows

Deltek maintains a standing maintenance window the first weekend of every month from Saturday midnight to Monday midnight.

Please note, while we try to maintain a consistent maintenance window, the times may sometimes deviate; maintenance window times will always be included in communications.

Region Served	Maintenance Time Window
Americas	12 am–12 am Eastern Time
Europe, Middle East, Africa	6 am–6 am Central European Time
Pacific Rim	1 pm–1 pm Standard China Time

Credential Management Tools

The following tools are available to TM customers:

- **Users**: As the SaaS Customer Administrator, you have administrative rights to User Manager. User Manager is used to manage your employee's user credentials. As a SaaS customer administrator, you can manually enter your company's employees into User Manager, or you can follow the Bulk-Load instructions and request Deltek to load users into User Manager.

  Upon entering a user into User Manager, User Manager generates a username that will be used by the employee to authenticate into all of the cloud applications.
- **Self Service**: Individual users can use the forgot password self-service function.

You can access User Manager via the following navigation path:

- Click the administration wheel in the upper-right corner.

- Click **Global Settings** » **Your Organization** » **Users**.

Talent Management Domain Names

During the sales process, you provided the domain name that you wished to use for TM.

Deltek uses the following pattern to establish the domain names of the TM site for your company:
<SiteName>.tm.deltek.com
For example, if the customer provided **Regent** as the domain name, their TM URL would be:
https://regent.tm.deltek.com
Note that the only characters which may be used in the URL/domain name of your site are:

- Letters (A–Z/a–z (case insensitive))
- Number (0–9)
- Hyphen/minus sign (-)

Also, please be aware that each site's domain name must be unique. You may be asked to provide a new domain name if your choice is already taken.

Getting Started

Upon deployment of the client site, Administrator role users are assigned and given credentials by the Deltek Implementation Team.

This section provides detailed information for setting up your employees in the User Manager tool. As the SaaS customer administrator, you can create, modify, and disable user accounts using User Manager.

This section also contains information to assist your employees with activating the user accounts using the Self Service tool.

After you have received your Welcome Email, you are ready to begin. Be sure to follow the steps outlined below to ensure that your solution is set up correctly.

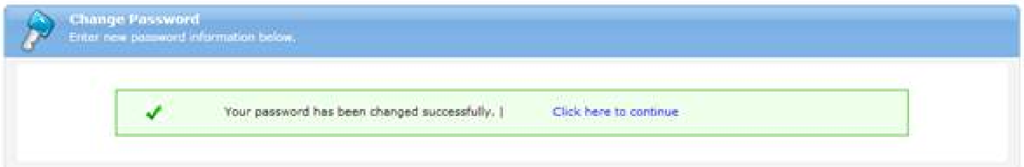
Activate Your SaaS Customer Administrator Account

As the SaaS customer administrator, you will receive your **Username** and temporary **Password** via the Welcome Email and via a separate Password Email.

To activate your user account:

1. Click the **Forgot your password** link.
2. On the Sign in screen (left side of the screen), enter the initial username and password that was provided in your Welcome Email and Password Email.
3. Click **Login** and follow the steps on the screen to activate your account.

   When you get to the screen below in the activation process, you are NOT finished. You must click the **Click here to continue** link to complete the activation process.



Configurator Role

Deltek has expanded its security footprint with the addition of a new Configurator Role.

The configurator role contains access to system settings and feature management. From implementation to day-to-day support, clients will now have direct access to certain configuration features of their Talent environment, allowing them increased flexibility and data security.

Clients going through implementation now have the ability to configure their site with the assistance of our team of expert consultants while keeping client data secure and visible to only the parties that need it. Used in conjunction with the admin role during implementation, clients can get up and running quickly and easily.

For existing customers, when working with Support, this enhancement will generally have no impact in the majority of cases. However, if you contact Support to modify configuration or workflow, you will need to use the configurator user to make those changes.

When Configuration Is Needed

When working with our Services or Support teams, they may need a user to enable the configurator role in order to complete tasks.

If necessary, follow these steps to ensure quicker resolution in these situations:

1. Create a generic user account and assign the configurator role to the user.
2. Keep the user account deactivated during day-to-day operations.
3. When working with Support, you may need to activate and log in as the user so Support can walk through the settings and features with you.

   Once it is resolved, please deactivate the user.

Following the above steps will ensure your data continues to be secure and viewable only to those that have been given access.

If you have questions upon upgrade, please reach out to the Deltek Support team for assistance.

Access Your Applications

After you have activated your account, you can use your username and password to authenticate into each application.

Talent Management

Use your username and password to authenticate into TM.

Your account is deployed with full rights to all licensed TM modules.

If two or more administrator accounts were activated for your company, both administrators are granted full rights to all licensed TM modules.

Your company can have more than one user with full administrator rights to TM. As the SaaS customer administrator for Talent, you can create a new user in TM and assign that user with full Admin rights to the TM application.

> **Note:** If you have any Deltek ERP solution, please reference the SaaS Admin Guide for those products. This guide is specific to Deltek Talent Management only.

Create Accounts for All Users

As the SaaS customer administrator, you have administrator rights to User Manager.

Here, you can create, modify, and disable user accounts for all employees in your company.

Once users have activated their accounts, they can use their username and password to access all TM applications in the cloud.

Add New User

To add a new employee:

1. On the Users screen, click **Add a User**.
2. A form displays containing several sections to set user access levels and to collect user information, job title, location, status, organizational entity, manager, and other related fields.
3. Complete the fields on the form.

   The following details specific sections, fields, and options of the form that require more explanation.

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

Field/Option	Description
User Access Levels	This section is where you select group associations for the new user. Group affiliation determines the areas to which a

Field/Option	Description
	user has access and what functionality is available for the individual to use. At least one group must be selected for a user, but the user can be associated with more than one group. Only those modules enabled by your organization will display. - **Cross Module Groups**: Those listed in this group are available regardless of which modules are enabled. Every employee should be in the **Employee** group regardless of which other Groups they are in (for example, **Manager** or **Recruiter**). - **Recruiting Groups**: These groups have various levels of access to the recruiting module. - **Performance Groups**: These groups have various levels of access to appraisals and performance functionality. Managers automatically have access to complete performance appraisals for their direct reports. - **Development Groups**: The Executive group has access to Succession Planning functionality. - **Learning Groups**: These groups have various levels of access to learning management functionality.
Manager	To assign a manager to an employee, click **Search for Manager**. Clicking the button opens the Search for Manager window. The individual selected as a manager is automatically added to the Manager user group.
Job Title	To place the employee into a job, click **Select Job**. Clicking the link opens the Select Job window that you can use to

Field/Option	Description
	search for a job title. First, search for a job, and then complete the form displayed. When a position is created through the user's profile, the position is added to that Job Profile.
Copy Personal Templates & Notes	This option allows you to copy personal templates (for example, requisitions and letter templates) and notes from the internal user with other users. Clicking **Search for Recipients** opens the Search for Recipients window that you can use to search for employees. Upon submitting the form, the personal templates and notes are copied to the appropriate areas in the application. Since the templates and notes are copied and not shared, if the originator of the personal templates changes any of the documentation, the recipients will not receive an updated copy. This provides the recipient with the ability to personalize the templates and notes for their own use.
Location Responsibility	This section is where you select the locations for which the employee is responsible. When this option is used, the employee will only be able to access the selected locations when creating a requisition. This section will only display if the Recruiting module is enabled.

4. Click **Submit**.

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

   Tip: Auto-Generated Emails

   When you create an account in User Manager, an email is automatically generated and sent to the user. The user must follow the instructions in the email to activate their account.

   The system also sends a copy of each user's activation email to the SaaS customer administrator. If any user is unable to locate the system-generated activation email, you can forward them the copy that you have received.

Editing a User's Record

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

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

  Typically these are Human Resources personnel assigned to verify the appraisal is completed correctly.

Bulk Upload Users

To upload users (employees):

1. On the Users screen, click **Upload User File**.
2. Click the link to download the sample user file, and save the file on your computer.
3. Open the file, and enter the user data.

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

   - **user_login**: Each user in the system requires a unique login.
   - **user_firstname**: First names can contain hyphens, accents, and can be two words (for example, **Mary Jane**). If you receive an error when attempting to upload a user with a special character in the first name, contact your Client Services Account Manager.
   - **user_lastname**: Last names can contain hyphens, accents, and can be two words (for example, **Hyde White**). If you receive an error when attempting to upload a user with a special character in the last name, contact your Client Services Account Manager.
   - **user_email**: Each user in the system requires a unique email address.
   - **user_state**: This is not a required field, but if it is completed, the value in the cell must match an existing state value in the system. If the spelling is not exact, an error occurs.

- **user_country**: This is not a required field, but if it is completed, the value in the cell must match an existing country abbreviation in the system. If the spelling is not exact, an error occurs.
- **user_location**: This is not a required field, but if it is completed, the value in the cell must match an existing location name in the system or an error will occur. If the spelling is not exact, an error occurs.
- **user_org_level:** The company value must match an existing company or division level name in your organizational structure or an error occurs. If the spelling is not exact, an error occurs.
- **job_code**: This is not a required field, but if it is completed, the value in the cell must match an existing job code in the system or an error occurs. If the spelling is not exact, an error occurs.
- **user_status**: This is not a required field, but if it is completed, the value in the cell must match an existing user status (for example, **Exempt**, **Non-Exempt**) in the system or an error occurs. If the spelling is not exact, an error occurs.
- **user_group**: This cell contains the group affiliations to which the internal user must be added. The group name must match an existing group name in the system or an error occurs. To add the user to more than one group, enter a space and the pipe symbol (|) between each group name. If the spelling is not exact, an error occurs.

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

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

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

Configure SPAM Filters

You must make sure that the auto-generated emails are allowed through your company's SPAM filters.

To configure your company's SPAM filters:

White-list the following domains and hosts:

- *.tm.deltek.com
- *.hrsmart.com
- Us-west-smarthost.hrsmart.com
- *.hrdepartment.com

> **Note:** These hosts and domains are owned by Deltek. The above are safe and can be trusted by all TM Cloud customers

Account Creation Form Management

This section provides the ability to configure the account creation form presented to job seekers and users.

In addition, it allows for the requirement of a unique username rather than an email address for account creation. The table grid displays all of the fields available for the account creation form for that specific user type.

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

Set the Options for Account Creation Form Management

To set the options for Account Creation Form Management:

1. In the **Account Creation Form Management** section, select the check box on the row under the Display column to display that field on the form.
2. Select the check box on the row under the Mark Required column to mark that field as one that must be completed by the user.
3. Marking a field as required automatically selects the check box in the Display column.
4. For those fields that are required by the system, the check boxes will automatically be preselected and cannot be changed by the administrator.

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

Maintaining User Accounts

This section details information for maintaining user accounts using User Manager:

- For SaaS customer administrator:
- How to create, modify, and disable user accounts
- How to unlock a user account
- How to reset a user's password
- How to run reports in User Manager
- General User Manager questions

Self Service

The **Self Service** link on your cloud portal enables users to manage their accounts themselves, without having to contact Deltek Support Center.

This tool enables users to reset their password or unlock their account.

Use the **Forgot your Password?** link on your cloud portal and follow the instructions to reset passwords or unlock accounts.

> **Note:** To use the Self Service tool, users must have successfully activated their account.

Manage User Accounts & Passwords in User Manager

When new employees are hired, you must use User Manager to create a new account for the employee.

When employees leave the company, you must disable the employee's account using User Manager.

You can also use User Manager to modify existing users accounts.

Create User Accounts

Please see the steps detailed in the Create Accounts for All Users section of this document.

Modify User Accounts

To modify user accounts:

1. Log on to User Manager.
2. Click **Modify Single User**.
3. On the Modify Single User screen, scroll to select the user, and click **Modify User**.
4. On the Modify User Properties screen , click the General tab.
5. Modify the **Telephone Number** and **E-mail** fields, as needed, and click **Update User**.

Unlock a User Account

If a user has locked their user account while trying to activate their account, the SaaS customer administrator can unlock their account by following the steps below.

After the account has been unlocked, the user can attempt to activate their account again.

To unlock a user account:

1. Log on to User Manager.
2. Click **Unlock Users**.

3. On the Unlock Users screen, enter the name of the employee or click the **Search** button to identify the employee whose account is locked.
4. Select the check box next to the employee whose account is locked and click the **Apply** button.

Disable Deltek Talent Management User Accounts

Disable accounts when an employee leaves the company, or when a consultant has completed a project.

You cannot delete a user account; you can only disable accounts.

To disable accounts:

1. Log on to User Manager using the following link:
   https://adam1.deltekenterprise.com/home.do
2. Click **Modify Single User**.
3. On the Modify Single User screen, scroll to select the user, and click **Modify User**.
4. On the Modify User Properties screen, click the Accounts tab.
5. In the **Account Properties** section, select the **Disable Account** check box.
6. Click **Update User**.

Off-Board an Employee

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

Reset a User’s Password

Use this procedure to reset a user’s password.

To reset a user’s password:

1. Click in upper right-hand corner.
2. In the **Global Settings** » **Your Organization** section, click **Users**.
3. Search for the user.
4. Click for more options for that user, and click **Edit profile**.
5. Click **More Options**, and click **Reset Password**.

Password Requirements

How long does the password stay active?

The password is active for 90 days. Two weeks prior to expiration, the user will receive an auto-email prompting them to reset their password.

What are the Password Requirements?

- Passwords may not contain the user's account name or two consecutive characters that spell parts of the user's full name.
- Passwords must be at least eight characters in length.
- The last 10 passwords cannot be re-used.
- Passwords must contain characters from three of the following four categories:
- English uppercase characters (A through Z)
- English lowercase characters (a through z)
- Base 10 digits (0 through 9)
- Non-alphabetic characters (for example, !, $, #, %)

Can I reuse a password?

You cannot reuse your last 10 passwords.

Talent Management

Set Your Browser to Work with Talent Management

Integrating Talent Management

Integrating Costpoint, Vision, or Maconomy with TM is a simple process. Once you have received your token, you should submit a case through the Customer Support Site.

Deltek Reporting Tool (DRT)

The DRT application contains no reportable data until it has been refreshed.

This refresh has been scheduled to occur nightly and will copy your Talent Management site's data into DRT. It is best to wait until the first refresh has completed before attempting to use the site. The time of the last data refresh will show on the site menu's footer as "Cache Last Updated".

Initially, DRT has no user accounts other than the site administrator. Once the site's data has been refreshed, DRT will have Talent Management's user information and you'll be able to create DRT accounts for the desired users.

User Management

Go to **Administration** » **Users**.

To search for a user, enter the full or partial name, and click the **Search** button.

The action icons for each user allow you to:

- Edit the user's details.
- Remove the user's account.

User Accounts

DRT user accounts are linked to accounts in the TM application, allowing login to DRT using Single Sign-On.

Deactivating a remote user's account in TM will also deactivate their account in DRT.

Note: Any account changes in TM would not take effect in DRT until after the next data refresh.

DRT also has the ability to target report content based on a user's TM id (for example, filtering a report to show only "your" candidates).

A DRT account for a TM user cannot be created until DRT has their information from TM. A user that is new to TM would not be available in DRT until the after the next data refresh.

Access to DRT is granted to TM users through the **Reports Management** feature (or the **Reporting** group).

Adding New Users Automatically

By default, new DRT accounts are created automatically for authenticated TM users.

Manually Adding a New User

To add a new user:

1. Go to **Administration** » **Users**.
2. Click the **Add** button.
3. Locate the TM user.
    a) Select the **Search for User** banner.
    b) Enter search criteria to identify the user.
    c) Click the **Search Remote Users** button.
    d) Select the desired user from the **Search Results** box.
    e) Click the **Load Remote User Data** button, which will populate the form's fields with read-only information.
    f) Verify that the user information looks correct in **Contact and Personal Information**.

4. Select the desired DRT group memberships for the user.

   The default DRT group will already be selected.

   If the user is a member of the Administrator or Configurator groups in TM, those groups will also be selected in DRT and will be read-only.

5. Click **Save**.

Manually-added users will still require the **Reports Management** feature in TM.

Group Management

Go to **Administration** » **Groups**.

System access levels are determined by groups. A user can be a member of one or more groups. Group permissions are cumulative, giving users the combined permissions of all groups they are a member of.

The Reporting Tool initially has the following user groups:

- **Administrators**: This group has full access to manage the system as well as create reports and data objects.
- **Configurator**: This group has access to site configuration tools and settings.
- **IT Security**: This group can manage users and groups only. The members of this group cannot view or create reports.
- **Power Users**: This group has the same access rights as the Administrator group, but cannot manage groups or add users. The members of this group can create data objects, but cannot modify any of the original data objects.
- **Report Consumers**: This user group can run reports that have been shared with them.
- **Report Creators**: This user group can create, view, schedule, and share reports with other staff members.

> **Note:** Administrators and Configurator groups are linked to the TM groups of the same name. Membership in these groups is defined within the TM application.

To search for a group, enter the group name and click **Search**.

The action menu for each group allow you to:

- Set the group as the system default. This is the group that automatically displays in the **Group(s)** field when creating a new user.
- Edit the group's details.
- Remove a group from the system.

Add Groups

The administrator can create additional groups.

To add groups:

1. On the Group Management screen, click **Add**.
2. On the General tab, enter the group **Name** and **Description** that can help properly identify the group.
3. On the Privileges tab, select the **Privilege Category** from the drop-down list.
   This controls the options users can choose from in the system. As you select each privilege category, options within that category are displayed underneath. Select the check box next to privileges that should be available to the group.
4. On the Members tab, select initial user(s) for the group if desired.
5. To find a user, click **Add More Users**.
6. Enter information in the **First Name** and **Last Name** fields, and click the **Search** button. The results display below the fields.
7. Select the check box next to the name in the search results list, and click **Add Selected Users**.
8. Highlight the name of the user, and click **Remove** to remove users from the list.
9. Click **Save**.

Data Objects Management

Go to **Administration** » **Manage Data Objects**.

The Reporting Tool lets you create data objects that can be referenced in other data objects and reports. Those data objects and reports can later on be removed, leaving unused data objects that still display in data object trees.

Data objects that are no longer in use have a **Delete** icon that you can click to remove the object from the data object tree, if your user access privilege includes the ability to manage data objects.

Customization Options

Time Zone

By default, DRT runs in U.S. Central time (America/Chicago), or Eastern time for Canadian clients (Canada/Eastern).

The Default Time Zone setting can be changed in **Administration** » **Settings** » **System**.

Time zone values that are supported by DRT can be determined here: http://www.timezoneconverter.com/cgi-bin/findzone

Date/Time Formatting

Depending on the context, DRT uses various date formats throughout the application.

Changes to these formats can be made in **Administration** » **Settings** » **System**:

- **Short Date Format**: '%Y-%m-%d' (2017-05-01)
- **Long Date Format**: '%b %e, %Y' (May 1, 2017)
- **Short DateTime Format**: '%Y-%m-%d %H:%M:%S %Z' (2017-05-01 13:40:51 PDT)
- **Long DateTime Format**: '%A, %B %e, %Y %l:%M %P %Z' (Monday, May 1, 2017 1:39 pm PDT)
- **Date Picker Format**: 'mm/dd/yyyy' (05/01/2017)

This setting differs from the others as it only supports values of **y**, **m** & **d**. This defines the format of the popup calendar used throughout the application.

DRT uses date formatting variables as defined in PHP: http://php.net/manual/en/function.strftime.php

Date/time formatting within a report is solely defined by the report creator and independent of any application settings.

ODBC Overview

Read only ODBC access to your Deltek Talent Management Cloud database is provided by the Hybrid Data Pipeline ODBC client driver.

Setting up the driver is a simple three-step process:

- **Step One**: Submit the Service Request for ODBC Read Only Access.
- **Step Two**: Install the ODBC Client (either Windows or Linux)
- **Step Three**: Configure the ODBC Client

Step One: Submit the ODBC Read Only Access Service Request

To submit the service request:

1. Your company's SaaS Customer Administrator should reach out to your Customer Success Manager (CSM) to request ODBC access.

   Be sure to provide your public IP address when communicating with your representative.
2. Your CSM will work with you to get the proper paperwork signed and request access set up.
3. Upon completion of this process, Deltek will notify the new account holder via email with the credentials and configuration settings needed to connect to the ODBC service.

   Additionally, the SaaS Administrator will receive a confirmation email when the request is completed.

Step Two: Install the Windows ODBC Client Driver or the Linux ODBC Client

Windows ODBC Client Driver Instructions

Download the Hybrid Data Pipeline Windows ODBC Client Driver

Contact your representative for a link to download the driver.

Your representative will provide you with a link to download the installation files.
The zip file you will download includes the following files:

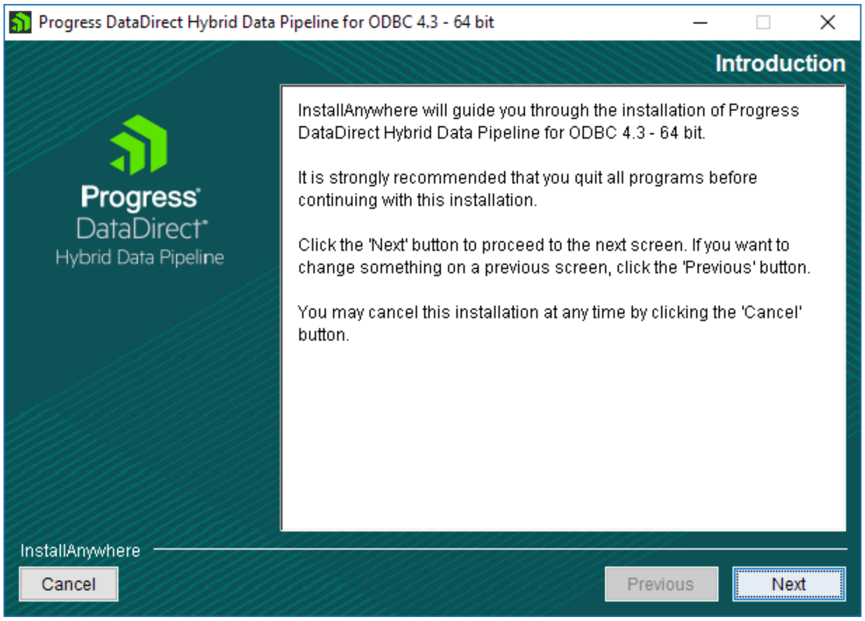
- config.properties
- ddcloud.pem
- ddcloudTrustStore.jks
- OnPremise.properties
- PROGRESS_DATADIRECT_HDP_ODBC_WIN_32.exe
- PROGRESS_DATADIRECT_HDP_ODBC_WIN_64.exe

Install the Hybrid Data Pipeline Windows ODBC Client

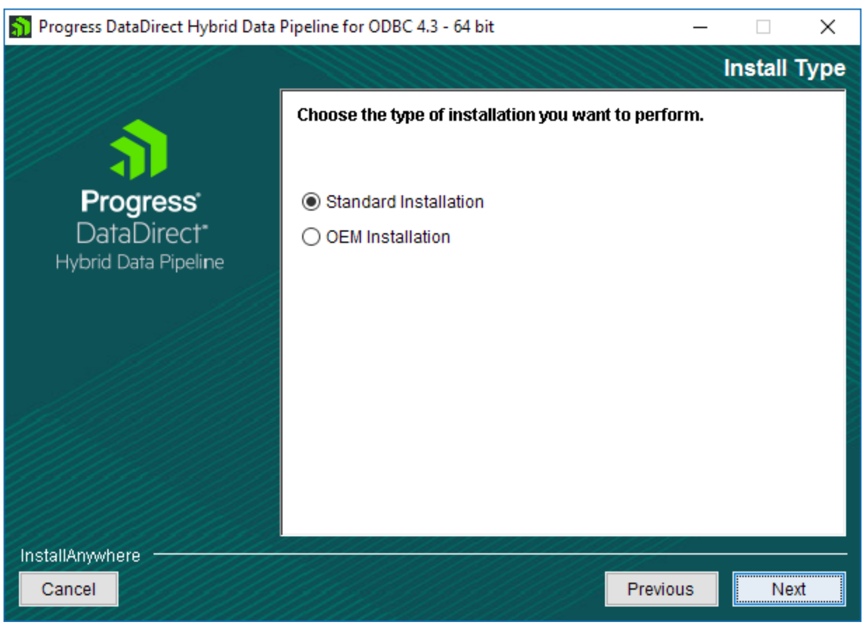
To install the client:

1. Double click **PROGRESS_DATADIRECT_HDP_ODBC_WIN_ XX .exe** to begin the installation.

   Be sure to install the correct architecture of the driver for your specific application, either 32-bit or 64-bit.
2. When the Introduction page of the installation wizard displays, click **Next**.

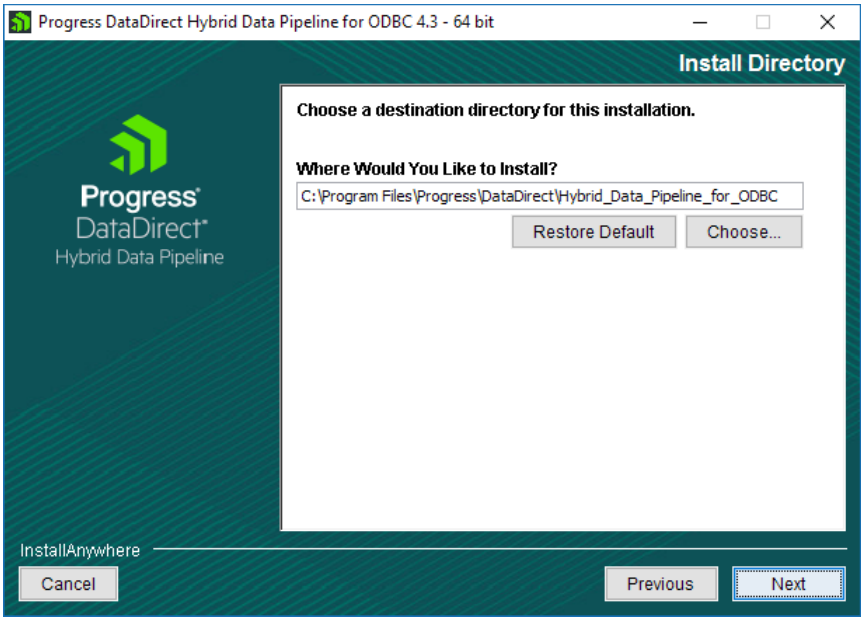


3. On the Install Type page, accept the default selection of **Standard Installation**, and click **Next**.



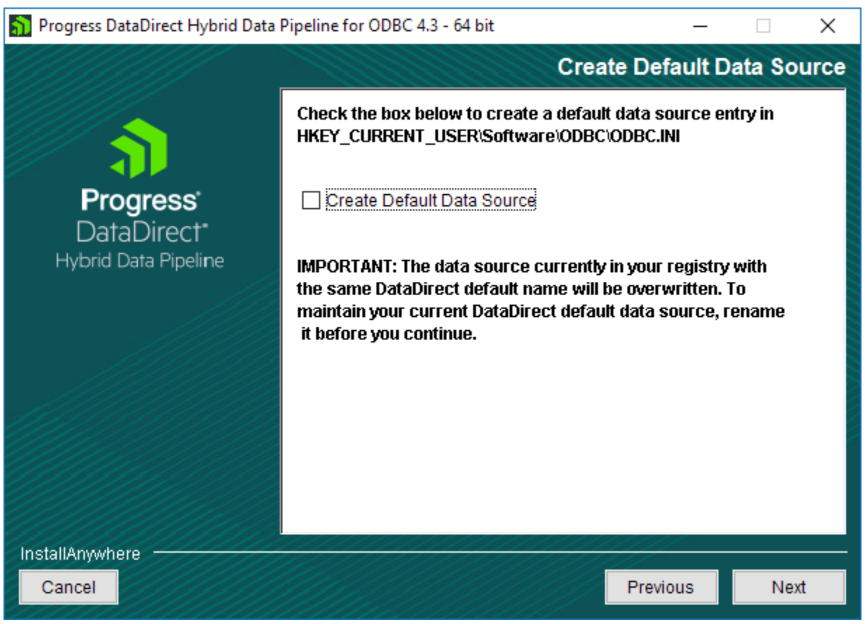
4. On the Install Directory page, accept the default installation path or select your own, and click **Next**.

   Deltek recommends accepting the default installation location.



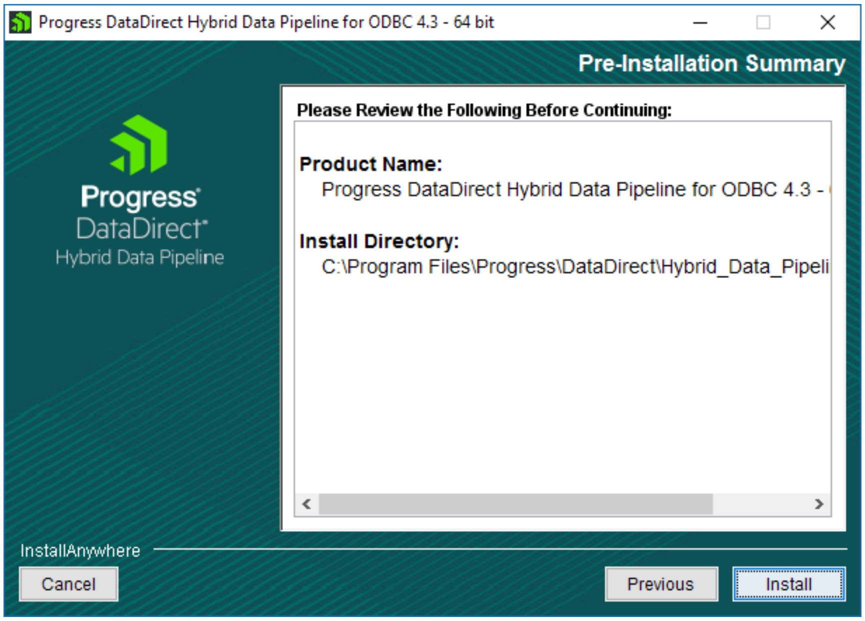
5. On the Create Default Data Source page, ensure the **Created Default Data Source** check box is not selected, and click **Next**.

   The default option is **NOT** to create a default data source.

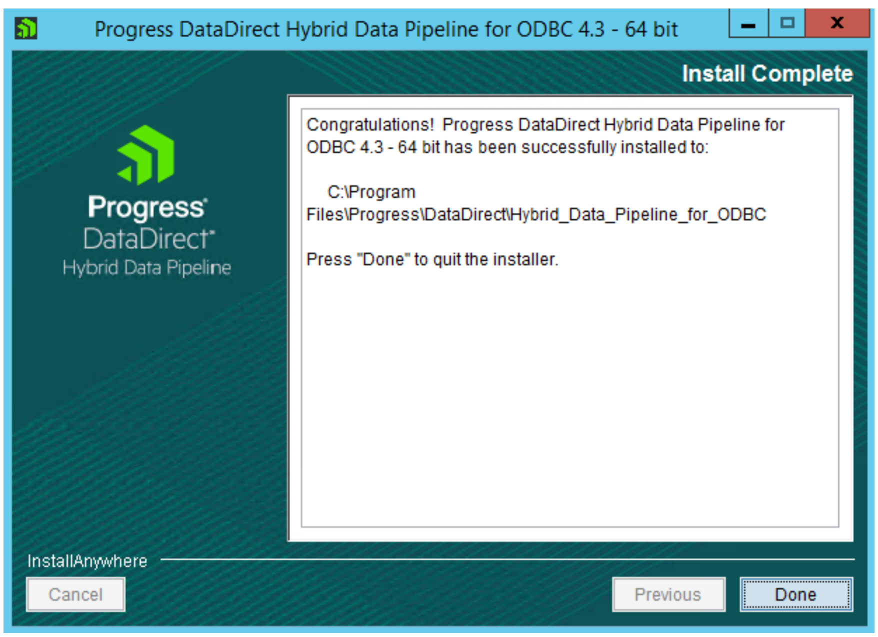


6. On the Pre-Installation Summary page, confirm all information is correct, and click **Install**.

   If any of the information is incorrect, click **Previous** to fix.



7. After the installation is complete, click **Done**.



Linux ODBC Client Driver Instructions

Download the Hybrid Data Pipeline Linux ODBC Client Driver

Contact your representative for a link to download the driver.

Your representative will provide you with a link to download the installation files.

The zip file you will download includes the following files:
The downloaded zip includes the following files:

- config.properties
- ddcloud.pem
- ddcloudTrustStore.jks
- OnPremise.properties
- PROGRESS_DATADIRECT_HDP_ODBC_<VERSION>_LINUX_32.bin
- PROGRESS_DATADIRECT_HDP_ODBC_<VERSION>_LINUX_64.bin

Install the Hybrid Data Pipeline Linux ODBC Client

To install the client:

1. Execute the installer corresponding to the correct architecture: **PROGRESS_DATADIRECT_HDP_ODBC_4.3_LINUX_64.bin**
2. When the Introduction page of the installation wizard displays, click **Next**.
3. On the Install Type page, accept the default selection of **Standard Installation**, and click **Next**.
4. On the Install Directory page, accept the default installation path or select your own, and click **Next**.

   Deltek recommends accepting the default installation location.
5. On the Pre-Installation Summary page, confirm all information is correct, and click **Install**.

   If any of the information is incorrect, click **Previous** to fix.
6. After the installation is complete, click **Done**.

Step Three: Configure ODBC Client

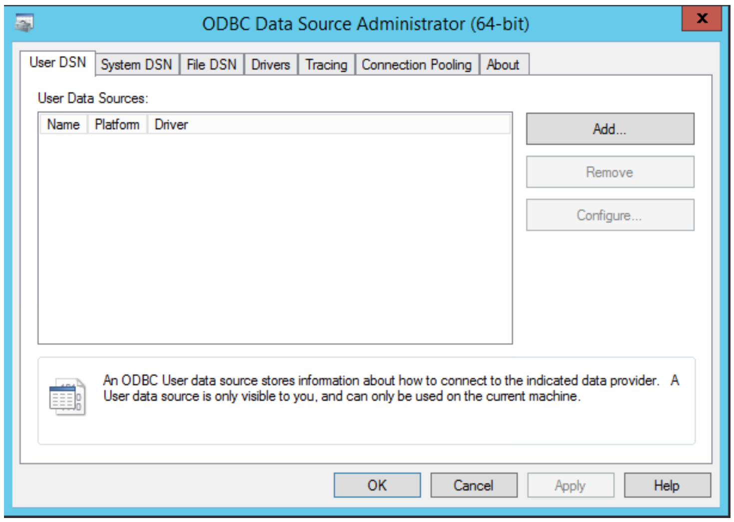
Configure the ODBC Client

To configure the ODBC client:

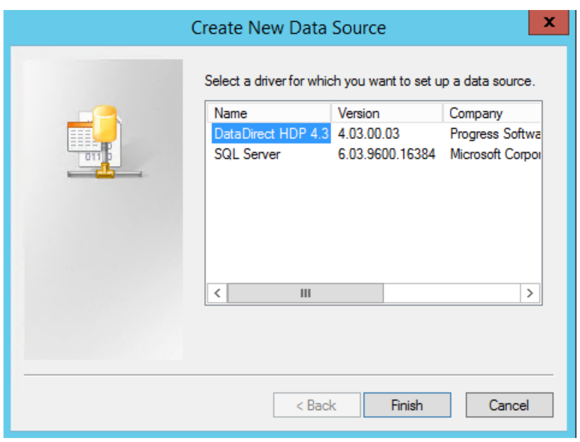
1. Open the ODBC Data Sources Administrator (XX-bit) application in Windows, and click **Add** on the appropriate DSN tab.

   Be sure to open the correct architecture version of ODBC Data Source Administration (XX-bit) based on the architecture version of the driver that was installed; either 32-bit or 64-bit
2. Select the appropriate DSN tab:

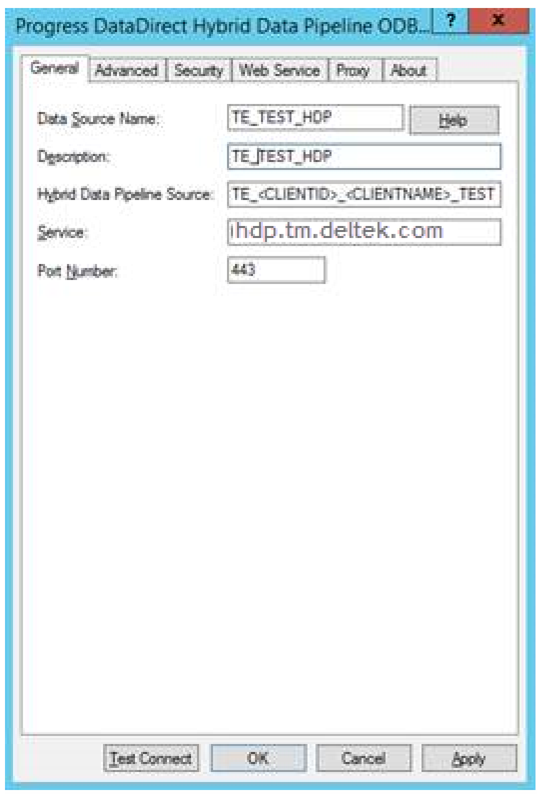
Option	Description
User DSN	Access to this DSN will only be available to the current logged on user (for example, logged onto Windows and using Excel).
System DSN	Access to this DSN will be available to any user that is allowed to authenticate to the Windows machine (for example, the service account used to run a data warehouse application).



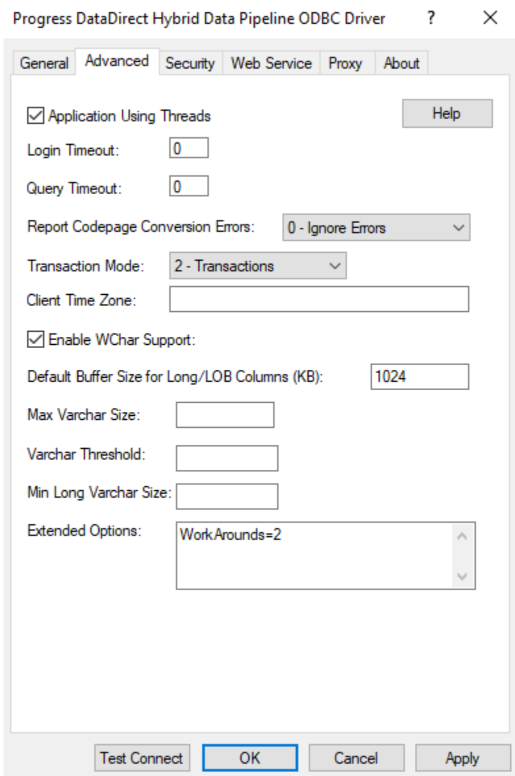
3. When the Create New Data Source dialog box displays, select **DataDirect HDP X.X** from the list of available drivers, and click **Finish**.



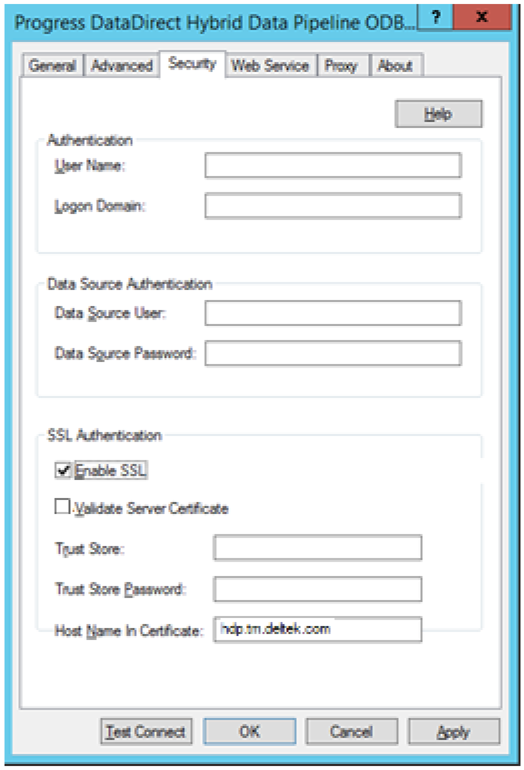
4. On the General tab of the Progress DataDirect Hybrid Data Pipeline ODBC dialog box, provide the following information:

Option	Description
Data Source Name	This information will be provided to you in your service request ticket.
Description	Enter information supplied in your service request ticket. This information is not required, but it may help you identify the ODBC source if you need to edit it in the future.
Hybrid Data Pipeline Source	This information will be provided to you in your service request ticket.
Service	Enter one of the following: ▪ hdp.tm.deltek.com (US) ▪ hdp-ca.tm.deltek.com (Canada) ▪ hdp-eu.tm.deltek.com (Europe) As of this writing, US-only Customers (USO) do not have access to HDP.
Port Number	Enter **443** 

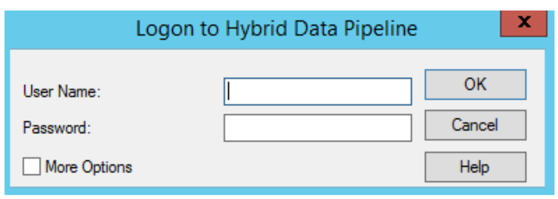
5. Click the Advanced tab, and in the **Extended Options** field, be sure the phrase **WorkArounds=2** displays.

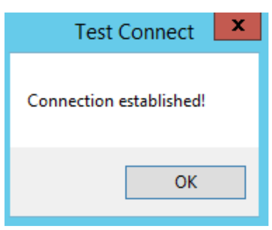


6. Click the Security tab, and do the following:
   a) Select the **Enable SSL** check box in the **SSL Authentication** section.
   b) Clear the **Validate Server Certificate** check box.
   c) In the **Host Name In Certificate** field, enter the appropriate URL, based on your location:
      - hdp.tm.deltek.com (US)
      - hdp-ca.tm.deltek.com (Canada)
      - hdp-eu.tm.deltek.com (Europe)



7. Test the connection by clicking **Test Connect**, entering the username and password provided to you in your service request ticket, and clicking **OK**.





You can now use the configured ODBC driver to connect to the databases.

Frequently Asked Questions

How Do I Change or Add a SaaS Customer Administrator?

If you are currently a SaaS customer administrator and want to add or remove someone as a SaaS customer administrator, you can do this by submitting the SaaS Administrator Change request via a support case on the Deltek Customer Care Support Center site.

No more than three SaaS Customer Administrators can be assigned.

If you are adding a new SaaS Customer Administrator, prior to submitting the SaaS Administrator Change case request to add the SaaS Customer Administrator, you must create the user in User Manager. This will allow the Deltek Cloud Ops team to promote the user to have SaaS Customer Administrator rights.

If all SaaS Administrators have left your organization, an officer from your organization will need to submit, on company letterhead, authorization to change the SaaS customer administrator which can be submitted electronically or via fax.

The authorized letter must contain the following information:

- The name of the previous SaaS customer administrator
- The previous SaaS customer administrator's email address
- The name of the new SaaS customer administrator
- The email address of the new SaaS customer administrator
- Mailing address for the new SaaS customer administrator
- The Name and Office Address of the Company officer initiating the request

Request a Change Electronically

To make the request electronically:

1. Go to **Submit Case**.
2. Select **Support Center** as the **Product**.
3. Select the **Severity Level**.
4. Select **Application** as the **Issue Type**.
5. Enter **SaaS Administrator Change** as the **Summary**.
6. Enter the **Detail** for your request.
7. Attach the authorization letter.
8. Click **Continue** to submit the request.

Request a Change via Fax

To make the request by fax:

1. Complete the request on company letterhead.
2. Send the authorization letter by fax to (339) 469-8970.

Where Do I find System Maintenance Schedules?

Deltek makes every effort to minimize the scheduled maintenance windows of your TM solution. Scheduled maintenance windows are communicated to you several ways to ensure you are always informed and able to plan accordingly.

Regular maintenance windows are scheduled for the first Saturday of the month, from Saturday midnight through Monday midnight, though your site may be down for only a short time or only intermittently during this time.
You should receive an email approximately 5 days before a maintenance window.

How Do I Report an Unplanned Outage?

The SaaS customer administrator should report all unplanned outages to Deltek.

In most cases, Deltek is already aware of the outage and working to resolve it.

Report an Unplanned Outage

Use this procedure to report an unplanned outage that occurs during business hours.

Before reporting the outage to Deltek, the SaaS customer administrator must verify the following:

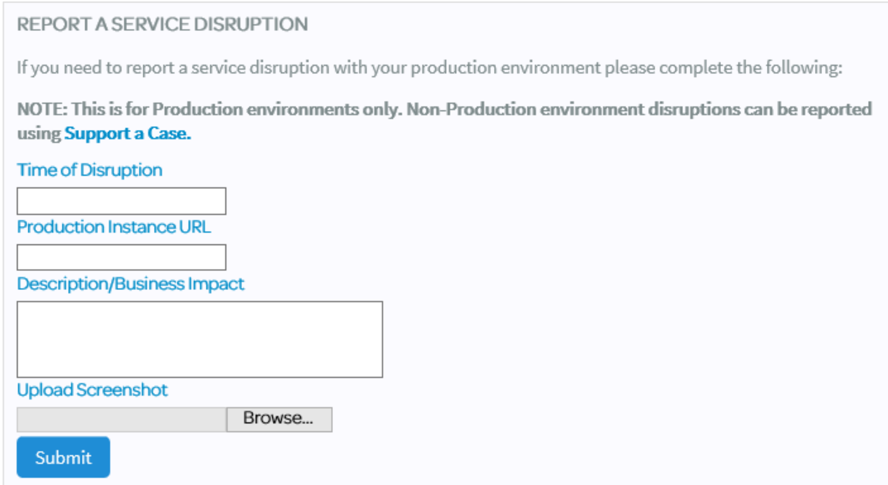
- The Internet connection is still working. A workstation or laptop can bring up www.deltek.com.
- The user is entering the correct password.

To report an unplanned outage:

1. Log in to the support sit, and click **Cloud Solutions**.

2. Locate the Report a Service Disruption.



REPORT A SERVICE DISRUPTION

If you need to report a service disruption with your production environment please complete the following:

NOTE: This is for Production environments only. Non-Production environment disruptions can be reported using Support a Case.

Time of Disruption

Production Instance URL

Description/Business Impact

Upload Screenshot

Browse...

Submit

3. Complete the form and click **Submit**.

Report an Unplanned Outage after Hours

Use this procedure to report an unplanned outage that occurs after business hours.

To report an unplanned outage after hours:

1. Call the Deltek On-Call Support Number 1-888-668-7651.
2. Select option **1**.
3. Provide your Client ID.
4. Explain the issue is an unplanned outage with Deltek TM Cloud.

Alternatively, you can use the Report a Service Disruption form located in your Cloud Solutions.

Should I Bookmark Application Links?

Users should not bookmark the application links; instead, users should always first navigate to their cloud portal and click the application links.

This will ensure the user is accessing the applications via the correct link.

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. www.deltek.com