Deltek

# Deltek Talent Management Recruiting 16.2

## User Guide

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# Contents

# Recruiting User Overview

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

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

## Recruiting Menu Choices

From the Recruiting menu, you choose the Recruiting area where you want to work.

### Requisitions

| Menu Choice | Description |
|---|---|
| **Create a Requisition** | This screen provides a step-by-step wizard to walk you through the requisition creation process. |
| **Manage Requisitions** | This screen displays a table that lists all requisitions assigned to you and your team. You can manage all aspects of the requisitions from this screen |
| **Approvals** | This screen shows all pending approvals that await review for requisitions, offers, and appraisals. |

### Applicants

| Menu Choice | Description |
|---|---|
| **New Résumé Submissions** | This screen lets you create and manage résumés. |

### Candidates

| Menu Choice | Description |
|---|---|
| **Active Candidates** | This screen displays all active candidates that you and your team are working with. |
| **Search Candidates** | This screen lets you search for applicants and candidates. |
| **Assessments** | This screen displays all assessments that have been initiated, when it was initiated, who was the provider, what package was selected, and its status. |

### Résumés

| Menu Choices | Description |
|---|---|
| **Search Résumés** | This screen allows the generation of a résumé search using one or more criteria. |
| **View Newest Résumés** | This screen displays résumés that were entered by an applicant or recruiter within a specified number of days. |
| **Résumés Search Agent** | This screen lets you save your résumé search criteria as a search agent. |
| **Pools** | The screen displays a list of all the current pool categories and allows you to create new pools. |
| **Add a Résumé** | This screen lets you add résumés to the database. |
| **Bulk Upload** | This screen lets you upload résumés in bulk to the database. |
| **DOI Recruiter Submissions** | This screen lets administrators and recruiters view accounts that a recruiter has uploaded, which are still pending acceptance by a candidate. |

**Contacts**

| Menu Choices | Description |
|---|---|
| **Add Contacts** | This screen lets you add contacts to the database. |
| **Manage Contacts** | This screen displays all the contacts entered into the database and lets you perform bulk actions. |

**Monster**

| Menu Choices | Description |
|---|---|
| **Search Monster** | This screen lets you search and import résumés from the Monster.Com résumé database if your company purchased the Monster integration feature. |
| **Power Résumé Search** | This screen lets you run a power search from the Monster.Com résumé database if your company purchased the Monster integration feature, |
| **Monster Cloud Search** | This search feature lets you search the Monster.Com database. Unlike Classic Search, Boolean operators do not work on the Monster Cloud Search screen. |
| **Monster Cloud Analytics** | This screen allows you to use Monster.Com's Cloud Search function to view and analyze your talent pools, plan for talent pipelines, and model individual talent profiles. |

### Career Builder

| Menu Choices | Description |
|---|---|
| **Search CareerBuilder** | This screen lets you search and import résumés from the CareerBuilder.Com résumé database if your company purchased the CareerBuilder integration feature |

### Offers

| Menu Choices | Description |
|---|---|
| **Offers** | This screen displays all the offers you have extended to candidates. |
| **Approvals** | This screen displays all pending approvals that await review for both requisitions, offers, and appraisals. |

### Hires

| Menu Choices | Description |
|---|---|
| **Recent Hires** | This screen provides easy access to your new hires. By default, the screen displays employees who were hired within the last 30 days. |

### Onboarding

| Menu Choices | Description |
|---|---|
| **Onboarding Queue** | This screen displays newly-hired employees who are currently in the onboarding process. |

### Talent Relationship Management (TRM)

| Menu Choices | Description |
|---|---|
| Talent Relationship Management (TRM) | If enabled, this menu allows you to create and manage TRM Campaigns. |

## Recruiting Workflow

A recruiting workflow is an engine that runs the entire job posting-to-hire process.

These workflows are created by the site administrator. This section explains how they affect your recruiting process.

### Processes

| Process | Details |
|---|---|
| **Job Posting Process** | When you create a requisition, the form you complete is designated in the workflow. If multiple workflows are used and different forms |

| Process | Details |
|---|---|
| | are designated in other workflows, you may be presented with different forms when you create requisitions.<br>If an approval chain is required, the workflow can dictate what that will be or allow the recruiting user to select approvers.<br>When a requisition changes, status is something that the workflow can also control. |
| **Job Seeker Application Process** | When job seekers apply to a job posting, the form they complete and the steps in the application process are all defined in the workflow. |
| **Candidate Status Selection Process** | The application stages or **Status** that you set for candidates, such as **Phone Screen** or **Interview**, are also designated in the workflow. You can see these on the candidate's Résumé Dashboard on the Workbench tab in both the **Statuses** and **Recruiting Workflow** sections.<br>Also, tasks can be assigned to specific candidate statuses. For example, the **Select an Interview Form** task can be assigned to the **Interview** status. When you put the candidate into that status, this task will appear for you under the **Tasks** section in the Résumé Dashboard. When a candidate is extended an offer, the **Initiate the Offer Management Process** task is often assigned to the **Offer Extended** status. These tasks provide quick links that allow you to take the necessary action. |
| **Automated Processes** | It is possible to set the workflow to automatically perform certain things based on actions taken or based on outcomes to an event. It can be set up so that when a candidate is put into a declined status, the system automatically sends him a letter. It's also possible for someone to be notified when a candidate is placed into a particular status. It's important to know what all of the automated actions are to limit duplicated efforts. See your Site Administrator for this information. |
| **Job Offer Process** | The offer details form you complete when issuing a job offer is designated in the workflow. Also, the approval chain can be defined as well as the actual offer letter used when you initiate the offer to a candidate. |
| **Onboarding Process** | The forms and documents used during the onboarding process can be designated in the workflow, as well as the ability to allow the recruiting user to add more documents or skip sections entirely. |

## Main Dashboard

This is the Home screen, or the screen that displays after you log on to Deltek Talent.

The dashboard contains the following sections:

- **Alerts:** This section appears as a red-highlighted box on your screen. Its purpose is to alert you of any outstanding items that require your action and to call your attention to important notifications. Alerts appear on the Main Dashboard only if you have action items or if notifications are available. Otherwise, you will not see this section on your screen.
- **Widgets:** These are tables and graphs containing summary data. Each user can add widgets to the Dashboard and reorder them as desired. The available selection of widgets depend on both the role of the user within the organization and on what features have been enabled for the user.

## Manage Your Widgets

Follow these steps to add, edit, and delete widgets.

**To add, edit, and delete widgets:**

1. From the Main Menu Ribbon, click , then click **Get More Widgets**.
2. In the Dashboard Widget Administration screen, select a widget from the **Select Widget from List** drop-down list, and click **Preview Widget**.
3. In the **Widget Preview** section, click either **Add to Left Side** or **Add to Right Side** to indicate where in the screen you want to position the widget.

   If the widget has multiple columns and spans the width of the screen, then you can only select **Add to Left Side**.
4. Repeat steps 1–3 until you have added all the widgets that you need.
5. After you added your widgets, you can go back to the Main Dashboard to rearrange them in the order you want.

   If you want to move a widget to another location on the Dashboard, left-click and hold, and then drag the box to the desired location.
6. You can edit any widget on the dashboard by clicking  to change the settings.
7. To remove a widget, click .

## Recruiting Widgets

The following lists the widgets that are related to Recruiting.

The options on your screen may vary depending on your role within the organization and the features your company purchased or enabled.

**Widgets**

| Widget Name | Description |
|---|---|
| **Activity Since Last Login** | This widget lists the activities that took place since the last time you logged on to Deltek Talent Management. Click the value in the **Count** column to view the management page for that activity. |

| Widget Name | Description |
|---|---|
| | <ul><li>**# of New Résumés Submissions to My Requisitions**: This indicates how many résumés have been submitted against your requisitions.</li><li>**# of New Passive Résumés Created**: This indicates how many résumés entered into the system were not submitted against any requisitions.</li><li>**# of Interview Invitation Responses**: This indicates the number of responses you received from candidates to whom you sent an interview request.</li><li>**Offers Accepted/Rejected by Candidates**: This indicates the number of responses from candidates who received your offers.</li><li>**Requisitions Approved/Rejected**: This indicates the number of requisitions that have been approved or rejected.</li></ul> |
| **Candidates by Source** | This widget displays the number of candidates according to referral source. The counter is updated in real time.<br>Use the date range to filter this information. The initial display shows the last 30 days.<br>Click the pie section to view individuals from that source. |
| **Candidates by Status** | This widget displays the number of candidates by their current **Status**, for example: **Phone Screen**, **1st Interview**, or **Offers Extended**. The counter is updated in real time.<br>Use the date range to filter this information. The initial display shows the last 30 days.<br>Click the pie section to view individuals in that status. |
| **Mini-Calendar** | This widget displays the current month and highlights any days for which you have scheduled events.<br>Click the day to view that date in the main calendar. |
| **My ATS Averages (last 30 Days)** | This widget displays your averages for actions or activities taken over the last 30 days. |
| **My Activity** | This widget displays your activity as well as the total activity of your division and shows the counter for each action in the selected date range. By default, the initial display shows all data in that activity type.<br>The counter is updated in real time.<br>Click the value in the **Mine** column to view the management page for that activity. |

| Widget Name | Description |
|---|---|
| **My Candidates** | This widget displays the most recent candidates for your requisitions. The list is chronologically arranged according to the **Last Status** » **Change** date. |
| **My New Résumé/CV Submissions** | This widget displays the most recent résumés that are attached to your requisitions. The list is chronologically arranged according to application date. |
| **My New Résumés and Candidate Pipeline** | This widget displays a cumulative view of all the submitted résumés and candidates for requisitions created from a particular job profile.<br>Click the value to view the listing.<br>This widget is available only if your company has enabled the Hourly Module. |
| **Onboarding Status** | This widget displays an overview of the onboarding status of new hires. It can also display new hires that have not had onboarding initiated yet for them. |
| **Onboarding Tasks** | This widget displays a list of onboarding forms that require your action. The widget displays a maximum of five tasks, listed in chronological order based on the earliest due date. If there are more than five tasks, clicking **View All** displays the complete list. Alternatively, clicking lets you customize the display. |
| **Quick Job Posting** | This widget gives you a quick method to post jobs and create requisitions.<br>If information was specified in the job profile, for example, the job type, then that selection will show and cannot be changed.<br>If there are additional required fields on the requisition form, then a modal window is displayed after you click **Post a Job Opening** to allow for those required fields to be completed.<br>This widget is available only if the Hourly Module is enabled. |
| **Recent Requisitions** | This widget displays the requisitions assigned to you, with a counter indicating the number of new résumés submitted and the number of candidates currently attached to them. |
| **Requisitions by Status** | This widget displays the number of requisitions by their current **Status**, for example, **Pending Approval**, **Open**, or **Filled**.<br>Click the chart section to view the requisitions in that status. This initial display shows the last 30 days. |
| **Search Requisitions** | This widget allows you to use keywords to search for requisitions according to requisition number, job title, and/or description. |
| **Search Candidates** | This widget allows you to search for a candidate by name or email. |

| Widget Name | Description |
|---|---|
| **Search Résumés** | This widget allows you to search for résumés using keywords, first name, last name, and/or email.<br>If your company has the Office of Federal Contract Compliance Programs (OFCCP) compliance feature enabled, then you must first select a requisition to search against. |

# Résumé Dashboard

The Résumé Dashboard contains a variety of information, editing options, and actions where you can easily assess and manage the applicant's progress in the recruitment process.

## Display the Résumé Dashboard

Follow these steps to display the Résumé Dashboard.

**To access the Résumé Dashboard:**

1. Click an applicant's name anywhere in the Recruiting module.

   Clicking an applicant's name anywhere in the Recruiting module displays that individual's Résumé Dashboard. The dashboard gives you easy access to applicant information, allows you to take a variety of actions relating to the applicant, and provides you an activity view of the applicant's progress in the recruitment process.

2. Click the 

button to download a copy of files uploaded by the candidate during the application process.

   For internal candidates, the Résumé Dashboard displays employee ID information next to the applicant's name if the **Display Employee ID on Résumé Dashboard** option is selected on the System Settings screen (**Administration** » **Global Settings** » **System Administration** » **System Settings**).

## Contents of the Résumé Dashboard

The Résumé Dashboard contains the Résumé Badge, where an applicant's contact information is displayed, and a number of tabs, from where you assess and manage an applicant's progress in the recruitment process.

### Résumé Badge

This section of the dashboard displays the applicant's contact information.

Here, you can also edit contact information, print a variety of information, and view the Total Talent Profile record.

The **Selected Requisition** drop-down list includes all the jobs that the individual applied for, as well as the jobs that a recruiter has applied for on behalf of the applicant. Select from the drop-down list to view the applicant's status and activity for that requisition. This includes the version of the résumé that the applicant used when applying for the job.

### Résumé Scroll

This section of the Résumé Dashboard allows you to scroll to the next or the previous applicant if you accessed the résumé from an applicant listing.

It also indicates how many applicants there are on the list.

### Duplicate Résumé Detected

This indicator appears when the system detects possible résumé duplicates.

Click the **Duplicate Résumé Detected** button to view the résumés that Deltek Talent has flagged as possible duplicates. The pop-up window that appears also indicates the following:

- Résumé source, such as **Recruiter Uploaded** or **External**
- Name of the person who added the résumé
- Date the résumé was added
- Date the résumé was last updated

## Tabs of the Résumé Dashboard

The Résumé Dashboard is organized into tabs that contain a variety of information, editing options, and actions where you can easily assess and manage the applicant's progress in the recruitment process.

The tabs on your screen may vary depending on your role within the organization and the features your company purchased or enabled.

### Résumé Profile Tab

This tab provides a summary view of the résumé.

| Section<br>e<br>c<br>t<br>i<br>o<br>n | Description |
|---|---|
| **Applied To** | This section displays the applicant's requisition submission history.<br>Click **Status** to view the Workbench details where you can manage the candidate's progress through the application process.<br>Click **View Details** to see more information, including the answers given to the screening questionnaire.<br>Select the check box next to the applicant's name and click **Remove Candidate from Requisition** to reject a candidate. You must provide a rejection reason in order to complete the process. |

| Section | Description |
|---|---|
| **Route this Résumé** | This section allows you to route the candidate for processing by other users or, if DTM is configured to route résumés as PDF attachments, to other email recipients. You can also include a comment to send along with the résumés.<br>Select the **Request Feedback** check box to request recipients to provide feedback on the applicant. Deltek Talent will send you a notification when recipients submit their feedback.<br>You can also view feedback under the Information tab. |
| **Score Résumé** | This section allows you to score the résumé/CV. On the scale rating, select the radio button that most closely matches your opinion of the résumé. Enter your comments in the **Notes** text field. |
| **Résumé** | This section displays the version of the résumé that the applicant used to apply for the job.<br>If you see the **View Newest Résumé** button on your screen, this indicates that the applicant updated their résumé. Click the button to view the most recent version.<br>Click to perform the following actions.<br>▪ **View Newest Résumé** — Select this to view the latest version of the applicant's résumé. This action is enabled only if Deltek Talent detects that there is a new version dated after the candidate's application date.<br>▪ **Download Formatted Résumé** — Select this to download the applicant's résumé in PDF format.<br>▪ **Matching Jobs**: Select this to find jobs postings that match the keywords in the résumé.<br>▪ **Matching Résumés:** Select this to find résumés in the database that match keywords in the applicant's résumé.<br>▪ **Update Résumé**: Select this to update the applicant's résumé. This creates a new copy of the résumé that reflects the edits you made. It does not overwrite any existing résumé.<br>▪ **Add a Résumé for a Job Seeker**: This action appears when an applicant created a job seeker account but did not upload a résumé. Select this to add a résumé on behalf of the applicant. |

### Actions Tab

This tab allows you to select actions that will move the candidate to the next phase of the recruitment process.

| Section | Description |
|---|---|
| **Add to Requisition** | This section allows you to attach the individual to a requisition as a candidate. |
| **Send a Letter** | This section allows you to send a letter to the applicant.<br>Click the **View** icon to view the letter template or click the **Edit** icon to edit the template.<br>Click the **Request Return Receipt** check box to request a read receipt notification when the applicant views your email. |
| **Invite Job Seeker to Apply** | This section allows you to send an email to candidates inviting them to submit their résumé to a requisition.<br>In the **Select a Requisition** field, make your selection from the drop-down list. Then, choose your template in the **Select a Letter Template** field.<br>Click to view the letter template or click to edit the template.<br>The candidate is then sent an email with a link to view the job details and apply if desired. |
| **Add to Pool** | This section allows you to place the selected individual into a candidate pool. |
| **Secondary Application** | This section allows you to send another form that contains additional questions to the candidate as part of the application process.<br>This section also displays the completed form sent in response by the applicant. |
| **Background Check** | This section allows you to order a background check request and view the results. This section is available only if your company purchased the Background Check feature. |
| **Assessments** | This section allows you to send out an assessment invitation to candidates and view any assessment results. This section is available only if your company purchased the Assessment feature. |
| **Reminders** | This section lists any reminders you have created. It also allows you to add new reminders. |
| **Suggest Deletion** | This section allows you to request that a résumé be deleted from the database. Triggering a deletion request only flags the résumé for removal and does not actually delete the résumé. Your company's site administrator will have to take action in order to permanently delete the résumé from the database. |

### Vendor Actions Tab

This tab displays on a Résumé Dashboard only if a vendor submits a résumé to a hiring order.

| Section | Description |
|---|---|
| **Accept/Reject Candidate** | This section allows you to accept or reject the candidate.<br>Click **Accept** to add the individual as a candidate. Click **Reject** to remove the individual from the requisition. The action that you select is displayed in the **Historical View** of that requisition.<br>In both instances, Deltek Talent will send an email notification to the vendor and the action is documented in the Transaction Log. |
| **Send Feedback** | This section allows you to send comments or feedback, which are then sent to the vendor via email. |

### Information Tab

This tab displays additional information pertaining to the applicant.

| Section | Description |
|---|---|
| **View Feedback** | This section allows you view any submitted feedback and provide your own feedback on the applicant. |
| **Employment Tax Credit Eligibility** | This section appears only if your company uses the Tax Credit Integration feature. This section reflects the status of the tax credit screening process and allows you to send an email request to applicants inviting them to complete the tax credit screening questionnaire.<br>Click **Print all forms** to generate a list of documents that the provider flagged as “Required” in order to process the tax credit. The documents may be prepopulated with the necessary details. |
| **Social Profiles** | This section allows you to search for the applicant’s profiles in social media sites such as Facebook, LinkedIn, or Twitter.<br>You can either click the **Search for profile…** link to generate a query on those social media sites directly. Alternatively, you can enter the URL of the applicant’s profile manually.<br>After you save the URL information, the **Search for profile…** link changes into a **View Profile** link, with an option to edit if necessary.<br>Click **View Profile** to launch the applicant’s profile on that social media network in a separate browser window. |
| **Diversity Data** | This section allows you to enter visual survey information and view diversity information about the applicant. |
| **Interview Results** | This section displays any interview forms that the applicant has completed. You can also use this section to complete the interview form on behalf of the applicant. |

| Section | Description |
|---|---|
| | The option to enter interview results displays only if the **Status** of the applicant already reached the Candidate stage or further.<br>Use the options in the **Action** column to **Edit** and **View** completed interview forms. The **Date Modified** column captures the timestamp whenever changes are made to an interview form. The **Updated By** column tracks the user ID that initially completed the interview form and the user ID that subsequently changed the interview form. |
| **References** | This section allows you to log information received from the applicant's job references and indicate the score provided by those references. |
| **Cover Letter** | This section displays the applicant's cover letter, if provided. |
| **Résumé Attachments** | This section allows you to view attachments or add a new one. To add an attachment, click **Browse** to find the file, and then click **Add Attachment**. You can also download resume attachments in bulk by clicking **Download Resume Attachments**.<br>Both file size limit and number of resume attachments can be defined through System Settings (**Administration** » **Global Settings** » **System Administration** » **System Settings** » **Resumes**). |
| **Correspondences** | This section lists all correspondences made with the applicant. It also includes any auto-generated notifications issued by Deltek Talent. Letters that are flagged as Confidential will not be hyperlinked. |
| **Competencies** | This section lists the applicant's competencies. |
| **Skills** | This section lists the applicant's skills. |
| **Certifications** | This section lists both the external and internal certifications of the job seeker. |
| **View Log** | This section logs the names of the users in your company who viewed the résumé. |
| **TRM Campaign** | This section logs the TRM Campaign that the applicant received. If the TRM Campaign is hyperlinked, you can view the Campaign Details screen by clicking the link. |

### Transaction Log Tab

This tab displays activities or transactions made against the applicant record.

| Section | Description |
|---|---|
| **Add Notes** | This section allows you to add a note or a comment.<br>Select the **Private** check box to make comments visible to you only. |
| **Transaction Log** | This section displays all the activities taken on an individual, such as routing the résumé, changing the candidate's status, or any notes entered by yourself or other users in your company. |

| Section | Description |
|---|---|
| | Use the **Search Log** field to search for transactions by keywords, date ranges, user names, or status.<br>Select the **Show Only My Activities** check box to display only your transactions. Select the **Show Only Today** check box to display activity for the current day only. |

### Workbench Tab

This tab allows you to manage and track all the steps the individual goes through during the recruitment process.

| Section | Description |
|---|---|
| **Statuses** | This section records the candidate's progress in the recruitment process.<br>You can change the status by selecting a new value from the **Change Status** drop-down list. The statuses available here may be limited to those specified by a system administrator when configuring the Recruiting workflow.<br>If you select a **Hire** or **Decline** status, you must complete additional fields in order to save. See Change Candidate Status. |
| **Schedule an Interview** | This section allows you to send an email inviting the applicant to a face-to-face interview or a phone screen. This option is available only if the applicant has already reached **Candidate** status or further.<br>See Invite to Interview. |
| **Checklist** | This section shows the steps in the recruitment process that the applicant completed or skipped. |
| **Recruiting Workflows** | This section displays all the steps in the recruitment process as dictated by the Recruiting Workflow. See Recruiting Workflow. |
| **Tasks** | This section displays any step in the process that requires action as dictated by the Recruiting Workflow. See Recruiting Workflow. |

## Calendar

Deltek Talent features two types of calendars.

- Mini Calendar widget that you can place on your dashboard
- My Calendar, which is the main calendar application that holds your upcoming events, appointments, reminders, and training schedules

# Mini Calendar

The Mini Calendar is a widget that you can place on your Dashboard. It displays the current month, highlighting days on which you have events scheduled.

This includes all manually created and auto-generated events, regardless of the module in which they were created.
Click any date in the calendar to view your calendar events for that date.

## Display the Mini Calendar Widget

Steps you can follow to display the mini calendar widget.

**To access the mini calendar widget:**

Click .

You must have already added the Mini Calendar as a widget for it to appear on your Main Dashboard. For more information on how to add widgets to your Dashboard, see Manage Your Widgets.

# My Calendar

My Calendar is the main calendar application that holds your upcoming events, appointments, reminders, and training schedules.

## Display My Calendar

Steps to display My Calendar.

**To access My Calendar:**

1. On the toolbar, click » **My Calendar**.
2. Alternatively, click any date in the Mini Calendar widget.
   This redirects you to the My Calendar screen.

## Contents of My Calendar

The contents of My Calendar displays on several tabs.

The days on which you have events are highlighted. This includes all manually created and auto-generated events, regardless of the module in which they were created.

**My Calendar Tabs**

The screen contains the following tabs.

| Tab | Description |
|---|---|
| **Year** | This tab displays your events for the current calendar year.<br>The counter next to each month indicates the number of activities that you have for that month. Click the counter to expand the view and display the list of events. From there, click the event title to view the details. |
| **Month** | This tab displays your events for the current month. The days on which you have an event show the name and time of the event. Click the day to expand the view and display the list of events for that day. From there, click the event title to view the details. |
| **Week** | This tab displays your events for the current week. The days on which you have an event show the name and time of the event. Click the event title to view the details. |
| **Day** | This tab displays your events for the day and highlights the hours that contain events. |
| **Add Event** | This tab allows you to easily create an event or reminder. For more information on how to add events, see Add a New Event. |
| **Pending Interviews** | This tab displays events relating to interviews and steps in the screening process for job applicants. |

## Quick Access Tools

On the right-hand side of the My Calendar screen are quick access tools to help you navigate your calendar more quickly.

- **Add Calendar For**: This allows you to manage your calendar sharing options.
- **Go To Date**: This allows you to easily jump to a specific date and view your appointments.

## Procedures of My Calendar

There are several procedures you can perform from My Calendar, such as sharing and viewing calendars, removing employees, adding various types of events, viewing events, and exporting data to external calendars.

### Share Calendars

You can share your calendar with other employees within your organization.

**To share your calendar:**

1. From the toolbar, click  » **Personalization**.
2. Under **Calendar** » **Share Calendar**, select **Yes**, and click **Submit**.

### View Calendars

You can view the calendar of other employees within your organization.

**To view the calendar of other employees within your organization:**

1. From the toolbar, click » **My Calendar**.
2. Under **Add Calendar For**, click **Select Employees**, and search for the employee.
3. In the search results listing, select the check box next to the employee name.
   You can select more than one name.

   > **Attention:** If you cannot find the person you are looking for, that means they have not shared their calendar.

4. Click **Add All Selected**, and under **Current Selection**, click **Confirm Selection**.
5. After you have added the employee, their name will appear color-coded in the **Add Calendar For** section.
   If you want to select a different color for that person, click and make your color selection. Each employee's event will appear in your calendar in that color.

### Remove an Employee from a Calendar

You can remove an employee from your calendar view.

**To remove an employee from your calendar view:**

1. From the toolbar, click » **My Calendar**.
2. Under **Add Calendar For**, click next to the name of the employee that you want to remove.

### Add an Event to a Calendar

You can add a new event, task, or reminder.

**To add a new event, task, or reminder:**

1. Click the **Add Event** tab on the My Calendar screen, and complete the relevant fields in the form.
2. Enter information in the following fields:

| Field | Description |
|---|---|
| **Event Name** | Enter an event name. |
| **Completed** | Check to mark the event completed. |
| **Type** | Select one of the following event types: |

| Field | Description |
|---|---|
| | ■ **Task:**<br>■ **Event:**<br>■ **Reminder:**<br>■ **Interview:** For instructions on adding an interview see Create a Single Event Interview, Create a Schedule Slot Interview, or Create a Group Event Interview.<br><br>**Note:** After you have added the **Interview** event type, you can use it to send email invitations to candidates who have reached the interview phase of the recruitment process. For instructions on how to invite candidates to an interview, see Invite to Interview.<br><br>When you invite candidates to an interview, they will have the option to accept or reject the invitation. Deltek Talent will automatically send you an email notification of the candidate's decision. |
| **Date** | Select a date for the event. |
| **From** | Select the start time. |
| **To** | Select the end time. |
| **Add another Date** | Click this button to add another date for this event. |
| **Event Color Code** | Select a color to assign to this event in the calendar. |
| **Location** | Enter a location. |
| **Notificaiton** | If you want to receive a reminder for this event, select one of the following options from the **Notification** drop-down list:<br>■ **None:** Select this to send no notification of this event.<br>■ **E-mail**: Select this to receive the notification via email.<br>■ **Pop Up Window** (if on site): Select this to see a notification on the Main Dashboard each time you log in |

| Field | Description |
|---|---|
| **Keep Event Private** | Select the **Keep Event Private** check box, if you do not want the event displayed to others even if your calendar is shared. |
| **Event Description** | Enter a short description of the event, task or reminder. |
| **Attachments** | To attach a file to this event, select from either the Document Library List, and/or upload a document by selecting a file, entering an attachment name and description, selecting who to share the attachment with and clicking **Save**. |
| **Share this event with** | To share this event with others, select a team from the list provided and/or use the **Select an employee** button to search for users. To select more than one team, hold down the **Ctrl** key when you select multiple teams. When you have selected all the teams needed, click on the plus icon to add selected teams.<br>To remove users, click on the **Select an employee** button and delete the individuals from the Current Selection listing. To remove a team, hold down the **Ctrl** key and click on the desired team. When you have selected all the Teams to remove, click on the delete icon to remove the team(s). |

3. Click **Save** when finished.

### Create a Single Event Interview

You can schedule a traditional interview for a single candidate.

This allows you to set the date and time span for the interview. The recipients of the interview invitation will receive a notification that they are expected to be present for the entire length of the event.

**To create a Single Event interview:**

1. Enter the **Event Name** and click the **Completed** check box, if applicable .
2. In the **Type** drop-down field, select **Interview**.
3. Select **Single Event** as the **Interview Type**.
4. Click to select, or enter a value in the **Date** field.
5. In the **From** and **to** fields, set the time.
6. Add multiple Single Event dates by clicking **Add Another Date** and repeating steps 4 and 5.

> **Attention:** Multiple day events will not sync correctly if you use the automatic MS Outlook Sync Utility to sync your events. This is because Outlook does not support this advanced feature. You can still export each individual block/day to Microsoft Outlook by clicking the **Outlook** button for each event.

If you want to set an **Event Color Code**, click and make your selection.

7. Set a **Location**, if applicable.
8. If you want to receive a reminder, select one of the following options in the **Notification** drop-down list:
   - **E-mail**: Select this to receive the notification via email.
   - **Pop Up Window (if on site)**: Select this to set a notification to display when you log on to Deltek Talent.
9. Select the **Keep Event Private** check box, if you do not want the event displayed to others even if your calendar is shared.
10. In the **Event Description** field, enter a description for the event.
11. Include attachments, if applicable.

    You can attach a file from either the Document Library List or you can upload a document from your desktop or network. If you select a document from the list and upload a document, both are added to the event.
12. Share the event with other employees, if applicable.

    To share this event with others, select a team from the **Teams** list field and/or click **Select an employee** to search for users.

    To select more than one Team, press and hold the **Ctrl** key when you select multiple Teams. When you have selected all the Teams needed, click .

    To remove users, click **Select an employee** and delete the individuals from the **Current Selection** listing. To remove a Team, press and hold the **Ctrl** key and click on the desired Team. When you have selected all the Teams to remove, click .
13. Click **Save**.

### Create a Scheduled Slot Interview

You can schedule multiple interviews within a span of time using designated time slots.

Each candidate will be asked to select a specific time slot. Once a time slot is chosen by a candidate, it will no longer appear for other candidates to select.

- Deltek Talent automatically populates the **Available Slots** field after you enter parameters in the **Slot Length** field and in the **From** and **to** time range fields.
- Deltek Talent also automatically updates the **Claimed Slots** field once a candidate has chosen a timeslot.

**To create a Scheduled Slot interview:**

1. Enter the **Event Name**, and click the **Completed** check box, if applicable.

2. In the **Type** drop-down field, select **Interview**.
3. Select **Scheduled Slots** as the **Interview Type**.
4. In the **Slot Length** field, make your selection from the drop-down list and set the time range in the **From** and **to** fields.

   Slot lengths range from 10 minutes to 4 hours.

   The **Claimed Slots** field and the **Available Slots** field will be automatically updated.
5. Click to select, or enter a value in the **Date** field.
6. In the **From** and **to** fields, set the time.
7. Add multiple Schedule Slot dates by clicking **Add Another Date** and repeating steps 5 and 6.

   > **Attention:** Multiple day events will not sync correctly if you use the automatic MS Outlook Sync Utility to sync your events. This is because Outlook does not support this advanced feature. You can still export each individual block/day to Microsoft Outlook by clicking the **Outlook** button for each event.

   If you want to set an **Event Color Code**, click and make your selection.
8. Set a **Location**, if applicable.
9. If you want to receive a reminder, select one of the following options in the **Notification** drop-down list:
   - **E-mail:** Select this to receive the notification via email.
   - **Pop Up Window (if on site):** Select this to set a notification to display when you log on to Deltek Talent.
10. Select the **Keep Event Private** check box, if you do not want the event displayed to others even if your calendar is shared.
11. In the **Event Description** field, enter a description for the event.
12. Include attachments, if applicable.

    You can attach a file from either the Document Library List or you can upload a document from your desktop or network. If you select a document from the list and upload a document, both are added to the event.
13. Share the event with other employees, if applicable.

    To share this event with others, select a team from the **Teams** list field and/or click **Select an employee** to search for users.

    To select more than one Team, press and hold the **Ctrl** key when you select multiple Teams. When you have selected all the Teams needed, click .

    To remove users, click **Select an employee** and delete the individuals from the **Current Selection** listing. To remove a Team, press and hold the **Ctrl** key and click on the desired Team. When you have selected all the Teams to remove, click .
14. Click **Save**.

### Create a Group Event Interview

You can create a group event to allow multiple candidates to come in for an interview anytime within a specific timeframe.

**To Create a group event interview:**

1. Enter the **Event Name**, and click the **Completed** check box, if applicable.
2. In the **Type** drop-down field, select **Interview**.
3. Select **Group Event** as the **Interview Type**.
4. Click to select, or enter a value in the **Date** field.
5. In the **From** and **to** fields, set the time.
6. Use the **Max. # of attendees** field to limit the number of people who can participate in the group event.
7. Add multiple Group Event dates by clicking **Add Another Date** and repeating steps 5 and 6.

   > **Attention:** Multiple day events will not sync correctly if you use the automatic MS Outlook Sync Utility to sync your events. This is because Outlook does not support this advanced feature. You can still export each individual block/day to Microsoft Outlook by clicking the **Outlook** button for each event.

   If you want to set an **Event Color Code**, click and make your selection.
8. Set a **Location**, if applicable.
9. If you want to receive a reminder, select one of the following options in the **Notification** drop-down list:
   - **E-mail:** Select this to receive the notification via email.
   - **Pop Up Window (if on site):** Select this to set a notification to display when you log on to Deltek Talent.
10. Select the **Keep Event Private** check box, if you do not want the event displayed to others even if your calendar is shared.
11. In the **Event Description** field, enter a description for the event.
12. Include attachments, if applicable.

    You can attach a file from either the Document Library List or you can upload a document from your desktop or network. If you select a document from the list and upload a document, both are added to the event.
13. Share the event with other employees, if applicable.

    To share this event with others, select a team from the **Teams** list field and/or click **Select an employee** to search for users.

    To select more than one Team, press and hold the **Ctrl** key when you select multiple Teams. When you have selected all the Teams needed, click .

To remove users, click **Select an employee** and delete the individuals from the **Current Selection** listing. To remove a Team, press and hold the **Ctrl** key and click on the desired Team. When you have selected all the Teams to remove, click ✖ .

14. Click **Save**.

### View Events

Each event displayed in the calendar is linked to a detailed view of that event.

To view calendar events, click the hyperlink. There may also be other actions, such as **Edit**,**Delete**, and **Export Calendar Event**.

### Export to an External Calendar

You can export calendar events to Google, Yahoo, MSLive (Beta), MS Outlook, or any calendar application that makes use of the .ics format.

**To export calendar events:**

1. On a Calendar Event, click the **Export Calendar Event** drop-down menu.
2. Select your preferred external calendar application.
3. Follow the third-party calendar application prompts.

# Requisitions

Requisitions, also called jobs in Deltek Talent, can be created, managed, and translated.

## Create a Requisition (Post a Job)

You can create requisitions three ways.

- Quick Job Posting widget
- Create Requisition screen
- Copy a Requisition screen

**Note:** The terms “requisition” and “job” are used interchangeably.

After you create the requisition, the following occur depending on the workflow and your permission level.

| Action/Condition | What to Expect |
|---|---|
| **If you routed the requisition to other users for completion, then…** | Those users will receive an email informing them that action is required.<br>You will see in the **My Drafts** section of the Create Requisitions screen that you have routed this requisition. |

| Action/Condition | What to Expect |
|---|---|
| | Those users will see in their **My Drafts** section and also on the Manage Requisitions screen via the Quick Filter option, **Routed to Me**, that you routed the requisition to them. |
| **If the Workflow requires an approval process, then...** | The designated approvers will receive an email indicating the requisition name and the creation date.<br>You will receive an email notifying you of the disposition, regardless of whether the requisition is approved or rejected.<br>You may be allowed to resubmit a rejected requisition, if a provision to do so is designated in the workflow. You can resubmit requisitions via the Manage Requisitions screen and selecting **Pending Review/Rejected** in the **Quick Filter** options. If the workflow does not allow resubmissions, then you have to create a new requisition. |
| **If no approvals are necessary, then…** | The job is automatically posted. Depending on the **Status** of the requisition, it then becomes visible to external job seekers or available only to employees. You can manage the requisition and view its activity on the Manage Requisitions screen. |

## Post a Job Using the Quick Job Posting Widget

You can create a requisition using the Quick Job Posting Widget.

**To access the Quick Job Posting widget:**

1. From the Main Menu Ribbon, click .
2. In the Main Dashboard, click **Quick Job Posting**.

   You must have already added the Quick Job Posting widget on your Main Dashboard. If you have not done so, see Manage Your Widgets.

   The Quick Job Posting Widget allows you to quickly post requisitions. This widget is available only if the Hourly Portal is enabled for your company and displays only the job profiles that are designated for the Hourly Portal.

   You will notice that if you use this widget, you need not enter any additional options to complete the job posting. This is because the selection of job profiles on the drop-down list are already pre-configured by your company's system administrator. It is designed to help you recruit candidates who can quickly fill the gaps in your company's headcount.
3. Make your selection for each of the displayed fields. All fields are required, but pay particular attention to the following.

   | Field | Description |
   |---|---|
   | **Location Group** | The drop-down list contains only locations for which you are responsible. |
   | **Location** | The drop-down list contains only locations for which you are responsible. The bundle association by location is based on the |

| Field | Description |
|---|---|
| | requisition's primary location. When there are multiple locations associated with a bundle, as long as the locations match, the association will be triggered. |
| **Apply In-Person** | Select this check box if you want job seekers to apply in person. Of the fields in the widget, only this is optional. |

If details, such as the **Job Type**, are specified for the job profile, then those details are displayed within the widget and cannot be changed.

4. Click **Post a Job Opening**. This button is enabled only after you populate all the required fields in the row.
5. If a pop-up screen displays notifying you that there are remaining fields that must be populated, enter information in these fields. Otherwise, the job is posted.

   You can manage the newly created requisition and view its activity on the Manage Requisitions screen. For more information on this screen, see Manage Requisitions.

## Post a Job Using the Requisition Creation Wizard

One method for posting a job is to use the Requisition Creation Wizard.

**To post a job using the Requisition Creation Wizard:**

1. On the Main Menu Ribbon, click **Recruiting**.
2. **Under Requisitions**, click **Create Requisition**.

   Follow the step-by-step wizard to walk you through the requisition creation process.

   The number of steps is defined by the workflow.

   The form on this screen contains details from either the job profile or the template, depending on the option you chose in previous steps. Review and complete all the required fields or any additional fields as needed.

   The Create Requisition screen allows you to post a new job using the Job Profile Library, a template, or a previously saved draft.

   > **Note:** The options that are available to you may vary depending on your role within the organization and the features your company purchased or enabled.

### Job Profile Library Method

The options you select refine the **Job Titles** listing.

The selections you make determine what Recruiting workflow Deltek Talent will use to expedite the creation process. It also defines the entire application-to-hire process.

*Create Requisitions from the Job Profile Library*

One method to create a requisition is to use the Job Profile Library.

**To create requisitions from the Job Profile Library:**

1. On the Main Menu, click **Recruiting** » **Requisitions** » **Create Requisition**.
2. **Select Associations Step:** This screen contains required fields and optional fields. Complete the fields as necessary, but pay close attention to the following.

| Field | Description |
|---|---|
| **Organizational Unit** | Select the appropriate company from the drop-down list. This activates additional business unit levels for you to select as appropriate. Doing this refines the locations, job families, and job titles that are available in the succeeding fields.<br>If you see the **(All levels are required)** annotation, then you must select the final organizational level of the branch that you selected. This means that, if in the **Organizational Unit** field you select a company that has three levels beneath it, you must select values for those levels; you cannot simply select the parent organization level. For example, if Company ABC has two divisions, each division has four branches, and one of those branches has a business unit (or sub-level), then you must select values up to the business unit sub-level. |
| **Job Type** | Select an option from the drop-down list. |
| **Location** | Select an option from the drop-down list. |
| **Job Family** | Select an option from the drop-down list. |
| **Job Title** | Select the appropriate title from the drop-down list. The list of options is populated based on the job profiles maintained by your company's site administrator. It is important that you populate this field so that the system can automatically populate fields such as **Description**, **Responsibilities**, **Skills**, **Competencies**, and **Salary Grade** on the requisition form.<br>The behavior of the Job Title filter depends on your company's configuration settings, which controls whether the job titles displayed in the drop-down list is filtered according to the lowest organizational level identified on the job profile. By default, the options are filtered according to the first organizational level. |

3. If none of the job titles in the drop-down list meet your needs, click **Create a New Job Profile** to create the appropriate job profile.

> **Note:** You will not see the **Create a New Job Profile** link if you do not have the access rights to add job profiles.

4. Select the **Show only Job Titles marked for Hourly Portal(s)** check box if you want the **Job Title** field to list only those marked as applicable to the Hourly Portal.
5. As Associations are selected, the **Matching Workflow Found** field will populate with the appropriate Workflow. Click the workflow name to view the details and confirm that it is the one you need.
6. Click **Continue**.
   This takes you to the Define Requisitions Step.
7. **Define Requisitions Step:** Some of the fields on this screen are automatically populated based on either the job profile or the template that you selected in the Select Associations Step.

   Review and complete all the required fields or any additional fields as needed, but pay close attention to the following required fields.

| Field | Description |
|---|---|
| **Job Description** | Enter the description. You can format text using **Bold** or **Italics**. You can also create bulleted lists or use a specific font.<br>To format the text, highlight the desired content and click the appropriate option from the tool bar menu. |
| **Job Requirements** | Enter the requirements. You can format text using **Bold** or **Italics**. You can also create bulleted lists or use a specific font.<br>To format the text, highlight the desired content and click the appropriate option from the tool bar menu. |
| **Locations** | Select the location from the drop-down list. The values in the drop-down list are the active locations created by the site administrator and is determined by what you selected in the **Organization Unit** field. |
| **Enter a Location** | Add ad hoc locations, if necessary. To do so, select the **Country**, then **State or Province**, **City**, and finally the **Zip/ Postal Code**, and click ✚ .<br>Continue adding locations if you need more than one. However, the ability to enter ad hoc locations may be not available if your user account does not have the permissions to do so. |
| **Selected Location(s)** | Set the **Primary** location. This applies only if you added more than one location. The primary location is always displayed first. If the job is cross-posted, then this becomes the default location. |

8. Additional sections may appear on the form. Complete the fields as needed.

| Section | Description |
|---|---|
| **Front End Requisition Posting Options** | In this section, choose the Front End to which the requisition will be posted. “Front End” refers to an external job seeker portal. |

| Section | Description |
|---|---|
| | This section displays only if your organization purchased the Multiple Front End Portals integration feature. |
| **Route To** | In this section, select the name to whom you want to route requisitions for completion. |
| **Requisition Status Changes** | In this section, set status change options.<br>When you create a new requisition, the **Status defined in Workflow** field denotes what the status will be after the requisition has been posted or given final approval.<br>To change the status, select a new status from the **Change Status** drop-down list and enter any comments in the **Comments** field, if needed.<br>If the status should change on a specific date and time, enter those details in the fields provided.<br>The **Scheduled Status Changes** section reflects any status changes that were scheduled, by whom, when the change will take place, and any comments entered. Scheduled items can be edited or deleted.<br>Deltek Talent runs an hourly cycle to process any scheduled changes.<br>Things to remember pertaining to status changes:<br>▪ When you create a **Template Only** requisition, the section to schedule requisition status changes is not displayed.<br>▪ When you copy a requisition, any scheduled status changes information is also copied.<br>▪ If the requisition is still pending approval, then the requisition's status change does not take effect.<br>▪ If final approval is reached after the **Scheduled Status Change** date, then the status changes to what is defined in the workflow.<br>▪ When you edit a requisition, the Edit Mode screen displays the **Current Status** rather than the **Status** defined in Workflow. |
| **Employee Referral Program (ERS)** | In this section, select the **Referral Program (ERP)** check box if the requisition is eligible for referral bonuses. |
| **Evergreen** | In this section, "evergreen" is defined as an ongoing or sourcing requisition.<br>Selecting the **Evergreen** check box sets the **# of Hires Needed** field to hidden. |

| Section | Description |
| --- | --- |
| | This enables the **Show Only Evergreens** filter on the Manage Requisitions screen. Use this filter to track evergreen requisitions.<br>This enables the **Exclude Evergreens** option on many reports. Use this option to exclude evergreen requisitions in report results. |
| **Translation Visibility** | In this section, select the appropriate **Translation Visibility** from the drop-down list to restrict the visibility of job postings from job seekers if no translation is available for the applicant's selected language.<br>For example, an applicant viewing a job posting in French then changes the language setting to **Spanish**. If Spanish translation is not available for that job, then the screen displays the following message: "We're sorry, but this job is not available in the language you selected." |
| **Notifications** | In this section, you can view and manage the notifications that are automatically sent to applicants. Click the section heading to expand the section.<br>Recipients of email notifications do not have to be Deltek Talent users.<br>If your user account does not have permissions to edit content in this section, then you can only view what has been defined in the workflow. |
| **Job Seeker Should Apply Online** | In this section, you can disable the **Apply Online** option and enter an alternate method if the **Allow Alternate Application Method** check box is selected in the Recruiting workflow.<br>The **Job Seeker Should Apply Online** check box is selected by default. If you unselect this check box, then the **Enter Alternate Apply Method** field displays, allowing you to indicate an alternate application method.<br>If you enter an alternate application method, then the Job Details screen will display that method instead of the **Apply Online** button. |

9. After you have completed the relevant fields, click one of the following buttons.

| Button | Description |
| --- | --- |
| Previous | Click this to return to the previous screen and edit your selections. |
| Save as Draft | Click this to save your current selections as a draft record in your **My Drafts** section of the Create Requisitions screen. |

| Button | Description |
| --- | --- |
| › Next | Click this to proceed to the next step in the wizard. The number of steps in the wizard is defined by the recruiting workflow used by the job profile. |

The next step is the Select Approver(s) Step.

10. **Select Approver(s) Step:** If the workflow requires an approval chain, then you may need to complete this step. Review and complete all the required fields or any additional fields as needed, but pay close attention to the following required fields:

    - **Available Approval Chains**: Depending on the workflow, an **Approval Chain** may have been associated with the requisition. If so, the individuals designated as approvers are automatically part of the approval process and listed as **Default Approvers**.

      Use this field to add new members from an existing approval chain.

      Select the chain from the **Available Approval Chains** drop-down list and click **Select**. The members of the selected chain are then displayed in the **Select Approver(s)** section.

    - **Approval Chain Type**: Select **Serial** to make the chain follow a specific sequence or select **Parallel** so approvers can approve in any sequence.

11. To add more approvers, click **Internal Approvers** to select approvers from the **User** list, or enter **External Approvers** email addresses in the text box provided.

    Enter multiple addresses separated by a comma or one address per line.

12. After you complete the relevant fields, click **Previous**, **Save as Draft**, or **Next**.
    The next step is the Approval Order Step.

13. **Approval Order Step:** This step allows you to change the approval sequence among the selected approvers.

    To reorder the sequence, drag and drop the name to the correct position.

14. After you have completed the relevant fields, click **Previous**, **Save as Draft**, or **Next**.
    The next step is the Screening Options Step.

15. The Screening Options step allows you to select a screening questionnaire for internal and external applicants, as well as set additional assessment options, if applicable. You can either select two separate questionnaires for External Job Seekers and Internal Employees or the same one for both. After a Screening Questionnaire has been assigned to a Requisition, a checkmark will appear in the "SQ" column on the Manage Requisitions screen. On this step you can do the following:

    - Locate the questionnaire from the list, then click the title of the questionnaire to view the content and confirm that it is what you need.

    - Select one or more radio button, Internal and/or External to associate the questionnaire with the appropriate applicant type.

16. If your company purchased the Assessment Integration feature, then you will see the **Assessment** section on the screen.

This section displays assessment packages that your company purchased from assessment providers. Some providers allow you to attach more than one assessment. The instructions that follow are for a multiple assessment option.

From the **Assessment Category** drop-down list, select the initial assessment, then click the name of the questionnaire to view its details.

Select how many more assessments are needed. Doing so activates that number of additional drop-down list fields.

From each **Assessment Category** drop-down list, select the appropriate assessment.

17. After you complete the assessment categories, click **Previous**, **Save as Draft**, or **Next**. The next step is the Attachments Step.
18. **Attachments Step:** You can attach documents to a requisition.

    On this screen are the following tabs.

| Tab | Description |
|---|---|
| **Upload** | Click this tab to upload a document. |
| **Select from Document Library** | Click this tab to select a file from the Document Library. The list of available documents from the Document Library includes only the files shared to your user group or are set to **Public**. |

In the **Shared document(s) with** field, set who has access to the file attachment by selecting any of the following: **Internal Job Seekers**, **External Job Seekers**, or **Approvers**.

The attached files appear on the Job Details screen as hyperlinks for applicants to view.

19. Review your selections, then click **Previous**, **Save as Draft**, or **Next**.
20. **Preview Step:** This is the last step in the Requisition Creation Wizard.

    Here, you can preview the details of the requisition as they will appear to the approver, the external applicant, and the internal applicant. To change any of the details, click **Edit**.

> **Note:** If you did not select any approvers in the Select Approver(s) step, then the screen will not display the Approver tab.

If you translated the requisition into languages other than English, you can preview the translation under the **Requisition Details Preview** section. For translation instructions, see Translate a Requisition into Different Languages.

21. Review your selections, then click **Previous**, **Save as Draft**, or **Next**.

### Global or Personal Template Method

A template is a predefined requisition.

It contains a lot of the information in the requisition form so that all you need to do is complete the remaining fields. There are two types of templates available:

- **Global Templates** to which all users have access; and
- **My Templates** that can be accessed only by the person who created them.

*Create a Requisition Using a Template*

You can use a global template, or a template or draft saved only for you, to save time when creating a requisition.

**To create a requisition using a template:**

1. On the Main Menu Ribbon, click **Recruiting** » **Requisitions** » **Create Requisition**.
   This takes you to the Select Associations Step.
2. **Select Associations Step:** Scroll down the page to the **Use a Template to create a New Requisition** section, and in either the **Global Templates** section or the **My Templates** section, select from the templates listed on the screen.
3. In the Actions column, click .
   This takes you to the Define Requisition Step.
4. Continue with the steps detailed in the Job Profile Library Method, beginning with Step 7.

### Creating a Requisition from a Draft

The My Drafts section of the Create Requisition screen contains any drafts you created as well as any requisitions that are routed to you.

Depending on your permissions to post requisitions, you may be required to have another user complete the requisition before it can be sent for approval. It may also occur that another user requires your involvement in order to complete a requisition.

If your organization uses requisition routing as part of the approval process, then any requisition routed to you also appears in your **My Drafts** bucket, along with a notation indicating who sent it and when. Any requisitions that you route to other users are also displayed under **My Drafts**, along with a notation indicating the recipient and the routing date.

*Create a Requisition from a Draft*

You can use save incomplete requisitions as drafts, then return later to finalize a requisition by completing the draft.

**To finalize a draft requisition:**

1. On the Main Menu Ribbon, click **Recruiting** » **Requisitions** » **Create Requisition**.
   This takes you to the Select Associations Step.
2. Scroll down the page to the **My Drafts** section and select from the templates listed on the screen.
3. In the Actions column, click .
   This takes you to the Define Requisition Step.
4. Continue the steps detailed in the Job Profile Library Method, beginning with Step 7.

### Posting a Job by Copying an Existing Requisition

Follow these steps to post a job by copying an existing requisition.

This is a quick way to create a new requisition. This feature allows you to copy almost all the details from an existing job, but gives you the flexibility to add details or change values that were copied from the original job posting.

#### Copy a Requisition

One method for creating a requisition is to copy an existing requisition.

**To copy a requisition:**

1. On the Main Menu Ribbon, click **Recruiting** » **Requisitions** » **Manage Requisition.**
2. Locate the requisition that you want to copy, and click ⚙▾ » **Copy**.

   This takes you to the Define Requisition Step.
3. Continue the steps detailed in the Job Profile Library Method, beginning with Step 2.

   > **Note:** Trying to copy a workflow that has a deactivated workflow or job profile will result in an error message, which will prevent you from copying the requisition.

## Translating a Requisition into Different Languages

You have the option to translate the requisition into other languages if more than one language is installed on your system.

However, you will not see translation options in any of the drop-down lists or multiple select fields in the requisition form. This is because those values are managed by the site administrator and should have been translated when they were first entered into Deltek Talent by the site administrator. When you review the requisition in the Preview Step and notice that there are missing translations in any of the drop-down lists or multiple select fields, please contact your site administrator, not Deltek Talent client services.

### Translate a Requisition

You can translate a requisition to as many previously installed languages as you need.

**To translate a requisition:**

1. By each input field that requires text entry, click 🌐 to launch the Alternate Translations window. This allows you to translate the content of the field into all the languages installed in your system.
2. Under **Select which language(s) to translate the requisition**, click your desired language. This section displays only the languages that are installed for your company. Each language that you select appears as a separate input tab.

In the input box, enter your translation for each language. You can resize the input box by clicking and dragging the bottom right corner.

3. You can also use text formatting styles such as **Bold** or **Italics**. You can also create bulleted lists or use a specific font. To format the text, highlight the desired content and click the appropriate option from the tool bar menu.
4. After you have completed entering each translation, click **Close Window**.

   If the translation is complete, an indicator appears beside the Translation Mode icon.

   If the translation is not complete, an indicator displays beside the Translation Mode icon.

   > **Note:** You must complete the translations for required fields before you can submit the form and create the requisition. Optional fields will appear empty to the job seeker if you do not provide translations.

## Manage Requisitions

The Manage Requisitions screen displays a table that lists all requisitions assigned to you and your team.

You can manage all aspects of the requisitions from this screen.

### Display the Manage Requisitions Screen

Steps you can follow to display the Manage Requisitions screen.

**To access the Manage Requisitions screen:**

On the Main Menu, click**Recruiting** » **Requisitions** » **Manage Requisitions.**

### Contents of the Manage Requisitions Screen

The requisitions that display by default are those that bear the **Status** selected in the **Manage Requisitions Default Filter For Statuses** system setting, which is managed by your company's System Administrator.

**Columns**

| Column | Description |
|---|---|
| **Action Indicator** | The Filter icon indicates whether specific actions were taken against the requisition or if the requisition requires your attention. This column can be expanded or collapsed by clicking Filter . |
| **Modified** | This is the date the requisition was last modified. |
| **Posted** | This is the date the requisition was posted (or final approval given). |
| **Division** | This is the organizational unit selected. |

| Column | Description |
|---|---|
| **Job Code** | This is the Job Code of the Job Profile. |
| **Req. #** | This is the individual requisition number |
| **Job Title** | This is the title of the job. |
| **Location** | This is the location or locations indicated for the job. The bundle association by location is based on the requisition's primary location. When there are multiple locations associated with a bundle, as long as the locations match, the association will be triggered. |
| **Vacancies** | This is populated from the **# of Hires Needed** field. As new employees are hired, this number will decrease. |
| **Views** | This is the number of views the job has received on your career center. The number does not include the views from job boards to which it has been cross-posted. |
| **New Résumés** | This is the number of applicants that have yet to be dispositioned (marked as a Candidate, removed). The number includes both screened-in and screened-out applicants. |
| **Candidates** | This is the number of active candidates. |
| **Status** | This is the current posting status. Click on the Status to select a new stats. |
| **Team** | This lists the team(s) assigned to the requisition. |
| **Recruiter** | This is the person assigned as the recruiter. |
| **HM** | This is the person assigned as the hiring manager. |
| **Incomplete Apps** | This displays the number of individuals who did not complete the application process. Clicking on the value in this column launches the View Incomplete Applications screen, which contains the applicants listing filtered by the requisition. |

### Action Indicator Codes

The codes in the **Action Indicator** columns are as follows:

| Action Indicator Code | Description |
|---|---|
| **F** | Featured. A check mark under this column indicates that the job requisition is marked as a featured job. |
| **SQ** | Screening Questionnaires. A check mark under this column indicates that a screening questionnaire is assigned to **I** (internal) and/or **E** (external) applicants.<br>Click the check mark to view the questionnaire. |

| Action Indicator Code | Description |
|---|---|
| | An X mark under this column indicates that the questionnaire has been deleted from the requisition. |
| **CP** | Cross-Post. A check mark under this column indicates that the requisition has been cross-posted.<br>Click the check mark to view the boards where the job post has been sent and also to select additional boards for cross posting. |
| **SM** | Social Media Sharing. A check mark under this column indicates that the requisition was shared on LinkedIn, Facebook, or Twitter by either yourself or another user.<br>Click the check mark to view the social media sites where the requisition was shared. |
| **VHO** | Vendor Hiring Order. A check mark under this column indicates that a hiring order was issued to vendors.<br>Click the check mark to view the hiring order details and to view the vendors to whom the requisition was issued. |
| **ER** | Employee Referral. A check mark under this column indicates that the requisition has been sent to the Employee Referral System (ERS) and approved. An X mark indicates that the requisition is pending approval to appear in the ERS. An X mark also indicates that an award plan needs to be created for the requisition. |
| **A** | Assessment. A check mark under this column indicates that an assessment is attached to the requisition. |
| **K** | Kiosk. A check mark under this column indicates that the requisition has been posted to a kiosk. |

### Actions

The actions that are available in the drop-down list options for the **Actions** column are as follows.

| Action | Description |
|---|---|
| **Edit** | This allows you to edit requisition details. |
| **Print or Email Job Details** | This action allows you to print, email, or download requisition details in PDF format. |
| **Copy** | This will create an exact copy of the requisition. |
| **Flag Job as "Featured"** | This action allows you to flag a job as "Featured" to job seekers. When you select this action, the job is given priority placement on the job search results performed by job seekers. The job is marked with a star and shown first in the list with a different color background. |

| Action | Description |
|---|---|
| **Refresh Posting Date** | This action sets to today's date the **Date Opened** field that is displayed to the job seeker. This affects only your external and internal career centers. It does not affect the posted date on any job boards that the requisition has been cross-posted to or any dates used in reports.<br>The **Refreshed Date** column that can be displayed on Manage Requisitions screen that shows the date when the job was refreshed. |
| **Cross-post this Job** | This action allows you to cross post the requisition to external job boards. |
| **Social Media Sharing** | This action allows you to send the job to Facebook, Twitter, or as a status update to LinkedIn. |
| **Screening Questionnaires** | This action allows you to add or manage screening questionnaires. |
| **Add a Résumé** | This action allows you to add a résumé to the selected requisition. You then have the option to invite the person to apply to the requisition or mark the applicant as a candidate. |
| **Cloud Talent Search** | This action give you quick access to performing a Monster Cloud search. Click this to open the Cloud search form, with several details pre-populated from the requisition, such as the job title, primary location, and requisition codes. This also sets the requisition as pre-selected if the Office of Federal Contract Compliance Programs (OFCCP) search requirement is enabled.<br>This action displays only if your company purchased the Monster integration feature. |
| **Find Matching Résumés** | This action allows you to find résumés in the database that match the details of the requisition.<br>This action displays only if your company purchased the Monster integration feature. |
| **Find Matching Employees** | This action allows you to find employees in the database that match the details of the requisition.<br>This action displays only if your company purchased the Monster integration feature. |
| **Notes & Transaction Log** | This action allows you to view or add notes to the requisition. It also allows you to view the change history. |
| **Add Attachments** | This action allows you to add or view attachments. |
| **Send to Referral Program** | This action allows you to send the job to your Referral System. |
| **Send Job To kiosks** | This action redirects you to the screen where particular kiosks could be chosen and then send job to those kiosks. |
| **Issue Vendor Hiring Order** | This action allows you to issue a Vendor Hiring Order to one or more vendors. |

## Edit Requisition

You can edit requisition details as needed.

**To edit requisition details:**

1. On the Manage Requisitions screen, click the **More Options** icon and select **Edit**.
2. Edit the details of the requisition and click **Save Changes** once finished.

## Print or Email Job Details

You can print, download, or send through email the requisition details.

**To print, download, or email job details:**

1. On the Manage Requisitions screen, click the **More Options** icon and select **Print or Email Job Details**.
2. Select the corresponding check box for the details you want to include in the output.

   Alternatively, you can click **Check All External Job Seeker Fields** or **Check All Internal Job Seeker Fields** to select their corresponding details to include in your output.
3. Click **Preview** to display the job details.
4. On the **Action** drop-down menu, select **E-mail**, **Download**, or **Print** to perform the action.

   > **Note:** If you select E-mail, you must select internal users or enter external user's email address before proceeding to the next step.
5. Click **Go**.

## Screening Questionnaires Library

The Screening Questionnaires Library holds all the questionnaires that have been previously created and saved into the Library.

### Actions

On this screen, you can perform the following actions.

| Action | Description |
|---|---|
| **Edit** | Select this to show the questionnaire in an editable form where changes can be made and saved. |
| **Copy** | Select this to quickly create a new questionnaire. |
| **Activate/ Deactivate** | Select this to change the status of the questionnaire. An open lock icon means that the questionnaire is available will appear as an option for in drop-down lists. A closed lock indicates that the |

| Action | Description |
| --- | --- |
| | questionnaire is inactive and will not appear as an option in drop-down lists.. |
| **Delete** | Questionnaires cannot be deleted once they have been used. |

## Cross Post a Job

The cross-posting engine allows you to easily post requisitions to popular external job boards with one click.

**You can cross-post requisitions using the following methods:**

- By selecting the **Cross Post This Job** action in the Manage Requisitions screen.
- By cross-posting jobs from the requisition creation wizard. This is available only if your company purchased the Monster Integration feature.

**To cross-post a job on the Manage Requisitions screen:**

1. Locate the row of the requisition that you want to cross post and click ⋮ » **Cross-Post this Job**.
2. The Crossposting Settings screen displays. The following recruiter contact information fields are automatically populated, based on the external job board account details configured by your company's administrator. However, you can change the default value in the following fields, if necessary, and Deltek Talent will apply the new recruiter contact information to that specific requisition only:
    - **Contact Email**
    - **Contact Address**
    - **Contact City**
    - **Contact State**
    - **Contact Zip**
    - **Contact Country**
    - **Contact Phone**
3. The **Job URL** field contains the URL that Deltek Talent will use for all the external job boards that you select for cross posting. This field is pre-populated, but you can overwrite the URL and redirect job seekers to a different site.
4. To overwrite the default job URL, complete the following steps:
    a) In the **Use Default System apply URL** field, select **No**.
    b) In the **Job URL** field, enter your preferred URL.
5. The available external job boards that you can select for cross-posting are located at the bottom half of the screen. Select the check box next to the name of the external job board that you want to use for cross-posting.

> **Note:** The selection of job boards that are available to you is managed by your company's system administrator.

6. Complete the relevant fields for each job board that you want to use for cross-posting. The fields for each individual job board can vary. However, the following fields are standard:
   - **Account** – This field displays the user ID used for cross-posting.
   - **End Date** – This indicates the date the job post expires. Click to select the date.

   > **Note:** If your company is configured to use Monster accounts for cross-posting, you will notice a selection of options that are unique to Monster. For example, when you select a value in the Account field, Deltek Talent performs a real-time check of the inventory that is associated with Monster account that you selected and displays the information in the Available Inventory section. This real-time inventory refresh feature gives you a clear view of the remaining cross-posting credits that are available for you to use. It also functions as a guide for additional job posting settings that you can select, such as in the following fields:
   > - **Auto-Refresh**
   > - **Credit Duration**

   > **Note:**

7. Click **Submit** to cross post the requisition in the external job boards that you have selected. Deltek Talent displays validation messages from the various job boards to confirm that the cross-posting process is successful. The validation message also includes a Monster ID if you cross posted to Monster. If cross-posting is not successful, then the validation message will indicate any blank mandatory fields or any incorrectly-populated fields that prevented cross-posting.

   > **Note:** If your company is configured to use Monster and CareerBuilder accounts for cross-posting, you have the option to overwrite the default URL indicated in the Job URL field.

## Share to Social Media

You can share a job to LinkedIn, Facebook, or Twitter.

You must log into your social media account to be able to share a job post.

**To share a job in social media:**

1. On the Manage Requisitions screen, click the **More Options** icon and select **Social Media Sharing**.
2. Click the social media platform you want to use to share the job.

## Add a Resume

You can add a resume to a requisition.

**To add a resume:**

1. On the Manage Requisitions screen, click the **More Options** icon and select **Add a Resume**.
2. Fill out the **Add a Resume** fields or click **Upload Resume**.
3. Click **Continue**.
4. Complete the Resume Profile Creation steps.

## View or Add Notes

You can view or add notes to a requisition through the **Notes & Transaction Log** screen, which also displays the requisition's change history.

**To view or display the notes:**

1. On the Manage Requisitions screen, click the **More Options** icon and select **Notes & Transaction Log**.
2. To add a note, enter your notes into the **Notes** text field and click **Add**.

   **Note:** To set your note to private, click the **Private** check box.

## Send to Referral Program

If a requisition has been assigned an award plan (**Administration** » **Recruiting** » **Manage Award Plans by Requisitions**), you can send a job to referral program.

**To add an award:**

1. On the Manage Requisitions screen, click the **More Options** icon and select **Send to Referral Program**.
2. On the **Award Plan** screen, select from the **Available Awards**, **Status**, and **Scope**.
3. Click **Add Award**.

## View Referral Posting

You can view the details of the available awards for a requisition.

**To view a requisition's available awards:**

On the Manage Requisitions screen, click the **More Options** icon and select **View Referral Posting**.

## Send Job to Kiosk

You can send a job to a kiosk, a job seeker portal which has its own URL.

**To send a job to a kiosk:**

1. On the Manage Requisitions screen, click the **More Options** icon and select **Send to Kiosk**.
2. Click a kiosk from the Available Kiosks to highlight it, and then click the forward arrow to add it.

   To remove a selected kiosk, click it to highlight it, and then click the back arrow.
3. Click **Save**.

## Issue Vendor Hiring Order

You can issue a Vendor Hiring Order to one or more vendors for help in finding candidates for a position.

**To issue a Vendor Hiring Order:**

1. On the Manage Requisitions screen, click the **More Options** icon and select **Issue Vendor Hiring Order**.
2. Fill out the hiring order details and click **Submit**.

   To edit an existing Vendor Hiring Order, click the **Edit** button, edit the hiring order details, and click **Submit**.

### Manage Hiring Orders

Vendors use this screen to view the hiring orders that have been issued to the logged in vendor, and to search for résumés, add resumes, and send feedback to recruiters.

**Contents**

| Field | Description |
|---|---|
| **REQ #** | This is the individual requisition name or number. |
| **Job Title** | This is the name of the job. Click the name to view the hiring order details for this job. |
| **Posted** | This is the date the requisition was posted (or final approval given). |
| **Date Issued** | This is the date the hiring order was issued. |
| **Needed** | This is the number of requisitions needed for this position. |

| Field | Description |
|---|---|
| **Pending Submission** | This number indicates how many résumés have been added to the hiring order *but not yet submitted* to the recruiter. |
| **Accepted** | This indicates how many of the submitted résumés have been accepted by the recruiter. The count will appear as a ratio. For example: 3/4 indicates that 3 résumés out of the 4 submitted have been *accepted*. The other one may have been rejected or perhaps the recruiter has not yet made a decision. |
| **Status** | This is the current posting status. |
| **Recruiter** | This is the person assigned as the recruiter. |
| **Search for Résumés** | Click the Search for Résumé icon. This opens the Résumé search screen. |
| **Add a Résumé** | Click the Add a Résumé icon to add a résumé. After it's been added, it will be placed in the **Pending Submission** status. |
| **Send Feedback to Recruiter** | Click the Send Feedback to Recruiter icon to send a message to the recruiter who issued the hiring order. |

### Edit Vendor Hiring Order

You can edit an existing Vendor Hiring Order to help in finding candidates for a position.

**To edit a Vendor Hiring Order:**

1. On the Manage Requisitions screen, click the **Expand** icon to display the VHO column of the listed requisitions.

   If a Vendor Hiring Order has been issued, a check mark displays on the VHO column.
2. Click the **Hiring Order Issued** icon to open the hiring order details.
3. Click the **Edit** icon.
4. Fill out the hiring order details and click **Submit**.

### Manage Vendor Candidates

You can manage the list of résumés submitted by the vendor for the hiring order using the Manage Vendor Candidates screen. You can accept or reject them in bulk from this screen.

**To manage vendor candidates:**

Select the check box for a candidate, and then select **Accept vendor candidate** or **Reject vendor candidate**, and then enter your comment on the **Comment** field.

If accepted, the résumé is added as an applicant. If rejected, the résumé is removed from the requisition and displays in the **Historical View** for that requisition. In both instances, a notification is sent to the vendor and the action is documented in the **Transaction Log**.

### Pending Submission to Recruiter Screen

This screen displays resumes added for the selected Hiring Order, and pending submission to the recruiter.

**Contents**

| Field | Description |
|---|---|
| **Name** | This is the applicant's name. |
| **Description** | This is a short description. |
| **Location** | This is the location of the candidate. |
| **Salary** | This is the salary preference of the candidate. |
| **Relocation** | This indicates whether or not the candidate is willing to relocate. |
| **Actions** | Select one of these actions:<br>▪ Submit to recruiter for consideration<br>▪ This action will send the selected résumés to your e-mail in PDF format. (Delivery time is dependent on the number of résumés selected and the overall file size).<br>▪ Remove from this hiring order |
| **Continue** | Click to take the action selected. |

### Candidates Submitted Screen

Use this screen to view the candidates submitted to the Hiring Order, and to take actions such as removing candidates or inviting candidates to an interview.

**Contents**

Access this screen by clicking a link in the **Accepted** column on the Manage Hiring Orders screen (**Recruiting** » **Requisitions** » **Hiring Orders**.

| Field | Description |
|---|---|
| **Name** | This is the applicant's name. |

| Field | Description |
|---|---|
| **Status** | This indicates the current status of the applicant or candidate. |
| **Description** | This displays the description entered by the applicant or job seeker on the résumé profile or application form. |
| **Location** | The candidate's location, as entered on the resume profile or application. |
| **Recruiter** | This indicates the name of the recruiter working with the candidate. |
| **Date Sent** | Date the candidate was submitted to the recruiter for the hiring order. |
| **Date Accepted** | The date the candidate was accepted, if applicable. |
| **Date Rejected** | The date the candidate was rejected by the recruiter, if applicable. |
| **Actions** | There are two actions you can perform from this screen:<br>▪ **Remove as candidate:** Remove one or more individuals from consideration if they have not been accepted by the recruiter. To do this, select the candidates to remove and select **Remove as Candidate** from the Action drop-down.<br>▪ **Invite to Interview:** For candidates who have been accepted by the recruiter, to move them to the next step in the process, select the box next to their name and select **Invite to Interview:** from the Action drop-down. |
| **Continue** | After selecting candidates and the action to take, click **Continue**. |
| | |
| | |

*Invite to Interview*

Vendors use this screen to schedule an interview for candidates accepted by a recruiter.

**Contents**

| Field | Description |
|---|---|
| **Event Name** | Select the calendar event from the drop-down, or click the plus icon to schedule the interview event in your calendar. |

| Field | Description |
|---|---|
| **Select a Letter Template** | Select the letter to send to the candidate. To view the letter, click the View icon. To edit the letter, click the Edit icon. Any edits you make are to this letter only, not to the template. |
| **Candidates to Invite** | The candidate(s) you selected on the previous screen display here. To remove a candidate, click the x next to the name. |
| **Invite** | When you are finished making edits and selections, click **Invite**. |

## Requisition Status

Though the workflow or the requisition form itself can determine the status of a requisition, you can also change the status manually at any time during the recruiting process.

However, if the recruiter changes the status to a value that is not defined in the workflow, then the workflow will no longer be able to alter the status. So for example, the recruiter sets the requisition's status to **On Hold** and that status is not defined in the workflow, then the requisition will remain in **On Hold** status indefinitely until someone manually changes it.

### Change Requisition Status

You can follow this set of steps to change a requisition status manually.

**To change the status:**

1. In the **Status** column, click the status of the requisition that you want to update**.**
2. In the **Change Status** field, select the new status from the drop-down list

   > **Note:** If you change the status to Closed, Filled, Internal, Pending, or Suspended, and you check the **Check box to notify vendor(s) this action has been taken** option, then an email notification is sent to any vendor assigned to the requisition.

3. If you want the status to change on a specific date and time, complete the date and time values in the **Make status change effective** field.
4. Click **Update**.

   Deltek Talent Management keeps track of the change history and displays it in the Status History table. Changes scheduled for a future date or time appear in the Scheduled Status Changes table.

## Reassign the Recruiting Manager, Hiring Manager or Team

You can follow this set of steps to reassign a job to another recruiter, hiring manager or team.

**To reassign the requisition:**

1. To change the recruiter, click the name that you want to change in the **Recruiter** column.

2. In the **Change Recruiter to** field, select the new name from the drop-down list, then click **Update**.
3. To change the hiring manager, click the name that you want to change in the **HM** column.
4. In the **Change Hiring Manager to** field, select the new name from the drop-down list, and click **Update**.
5. To change the team, click the name of the team that you want to change in the **Team** column.
6. In the **Change Team to** field, click the new team in the multi-select list box.

   You can select more than one team. To do so, hold down the **Shift** key and click the team names that you want to select, then click **Update**.

   Each of the newly-assigned individuals will receive an email notification informing them of their new assignments.

## Approvals

Use this screen to view all Pending Approvals that are waiting for review for Requisitions and Offers if using the Recruiting module and Appraisals if using the Performance module.

This screen displays pending approvals for requisitions, offers, and performance appraisals if:

- You are set as an approver, regardless of where the item is in the approval chain; or
- You have permissions to view all of these items even though you are not an approver.

The Appraisals and Offers section appears only if you use the Performance Management system.

Also, depending on how you accessed the screen, the corresponding section will be expanded by default and the other sections collapsed. For example, if you come to the page via **Recruiting** » **Requisitions** » **Approvals**, then the Requisitions section will be expanded.

### Display the Approvals Screen

This screen displays pending approvals for requisitions, offers, and performance appraisals.

**To access the Approvals screen]:**

On the Main Menu, click **Recruiting** » **Requisitions** » **Approvals**.

### Personalize and Filter Approvals

You can personalize the Manage Requisitions screen to display only those columns that you find relevant.

**To refine the displayed requisitions, complete the following steps.**

1. Click **Filter**.
2. Enter values in the following fields, as applicable.

| Field | Description |
|---|---|
| **Section to search** | In this field, select from the following. You can make more than one selection:<br>▪ **Requisitions**<br>▪ **Offers**<br>▪ **Appraisals**<br>Selecting **Requisitions** or **Offers** in this filter criteria brings up the following subfilters:<br>▪ **Requisition Title**<br>▪ **Req #**<br>▪ **Candidate Name**<br>Selecting **Appraisals** in this filter criteria brings up the following subfilters:<br>▪ **Employee**<br>▪ **Job Title**<br>▪ **Manager**<br>▪ **Show only Appraisals Assigned to me** |
| **Include History** | Select this check box if you want to include the timestamp of all previous approvals. |
| **Organizational Unit** | In this field, select the specific organization unit, if necessary. |
| **Approvers** | In this field, click **Add** to select specific individuals to include the list of approvers, if necessary. |

3. Click **Clear Filter** to reset your view to the default listing.

## Approve Requisitions

Follow these steps to approve or reject requisitions.

**To approve or reject requisitions:**

1. Click the title of the requisition to view the details, then click **Return**.
2. In the **Members** column, click **Members**. This expands the column to reveal the names of the designated approvers and the approval type.
3. In the Actions column, column, click **Approve this Requisition** or **Reject this Requisition**:
4. You can also perform actions in bulk by clicking the check box next to the items that you want to select, then in the **Bulk Actions** field at the end of the table, select either **Approve all selected** or **Reject all selected**.

## My Pending Approvals Screen

View and manage approvals that are awaiting your attention, including those associated with appraisals, offers, requisitions, and changes made by your direct reports to their Total Talent Profile.

From this screen, view approvals that are awaiting your attention, including those associated with appraisals, offers, requisitions, and changes that an employee has made to the Total Talent Profile, which require approval. On this screen you can perform actions, such as approving and rejecting these items.

> **Note:** You can approve or reject an appraisal on this screen. If you reject it, the appraisal automatically moves back to the Assessment phase, meaning that all appraisers must re-enter their appraisals and all signers must re-enter their signatures.

### Contents of the My Pending Approvals Screen

Depending on the modules you are using, view and approve requisitions, offers, appraisals, and self-service items that direct reports have updated on their Total Talent Profiles.

**Requisitions**

Requisitions display to those using the Recruiting module.

| Column | Description |
|---|---|
| **Division** | The business unit to which the requisition belongs |
| **Job Code** | The job code associated with the requisition |
| **Req #** | Requisition number |
| **Requisition** | Click the link to view details about the requisition. |
| **Date Created** | The date the requisition was created |
| **Recruiter** | The name of the recruiter managing the requisition |
| **HM** | The hiring manager |
| **Attachments** | The number of documents attached to the requisition |
| **Members** | This field displays the number of members of the requisition approval process, and lists each member's name. |
| **Actions** | Use this field to approve or reject the requisition and, depending on your privileges, to do the following:<br>▪ Click **Add/view Attachments** to view any attachments to the requisition.<br>▪ Click **Edit Requisition** to modify the requisition.<br>▪ Click **Add/View Notes & Transactions**. |

### Offers

Offers display to those using the Recruiting module.

| Column | Description |
|---|---|
| **Candidate** | Click on the name of the individual being offered a position to view the résumé. |
| **Offer Date** | The date the offer was made official |
| **Division** | The business unit offering employment |
| **Job Code** | The job code signifying the job being offered |
| **Req #** | Requisition number |
| **Requisition** | Click the link to view details of the requisition tied to this job |
| **On behalf of** | This field displays the name of the employee's manager. |
| **Initiated by** | The name of the individual who began the offer process |
| **Members** | This field displays the number of members of the approval process, and lists each member's name. |
| **Actions** | Use this field to approve, reject, or view the offer. |

### Appraisals

Appraisals display to those using the Performance module.

| Column | Description |
|---|---|
| **Division** | This field displays the business unit to which the employee belongs. |
| **Employee** | This field displays the employee's name. Click the name to display the employee's Total Talent Profile. |
| **Job Title** | This field displays the name of the employee's job. |
| **Appraisal** | This field displays the name of the appraisal (for example, Copywriter or Project Manager) that is being used to evaluate this employee. |
| **System Calculated Rating** | This field displays the Overall Rating, which is calculated based on the scores entered by the raters for all competencies, skills and goals in the appraisal. |
| **Manager Override Rating** | Depending on your organization's settings, a manager may be able to override the automatically calculated Overall Rating. The manager enters a different value on the Summary tab of the appraisal during the Review phase. |
| **Manager** | This field displays the name of the employee's manager. |
| **Members** | This field displays the number of members of the approval process, and lists each member's name. |
| **Actions** | Use this field to approve or reject the appraisal. |

### Self-Service

The Self-Service section displays items that a direct report has edited in the Total Talent Profile, for Core HR Administrators using the Core HR module.

| Column | Description |
|---|---|
| **Employee** | The name of the employee who made the change. Click the name to display the employee's Total Talent Profile. |
| **Attribute** | The name of the field or attribute that was changed. |
| **Previous Value** | The value that was entered for the attribute prior to the change. |
| **New Value** | The change the employee made to this attribute that requires your approval. |
| **Effective** | The date the change will become effective. |
| **Reason for change** | The reason the employee gave for the change. |
| **User** | This field displays the name of the employee's manager. |
| **Members** | This field displays the number of members of the approval process, and lists each member's name. |
| **Actions** | Use this field to approve or reject the changes to the Total Talent Profile fields. |

### Bulk Actions and Buttons

The following bulk actions and button actions are available on this screen.

| Action | Description |
|---|---|
| **Bulk Actions** | Check each requisition, offer and appraisal you want to approve or reject and select the appropriate radio button:<br>▪ **Approve all selected:**Check each requisition, offer, appraisal, and self-service item you want to approve and click this button to approve all at once.<br>▪ **Reject all selected:**Check each requisition, offer, appraisal, and self-service item you want to reject and click this button to reject all at once. |
| **View All Pending Approvals** | Click this button to see a list of any approvals that are awaiting your attention, including those associated with appraisals. The screen also displays approvals associated with requisitions and offers.. |
| **Approval History** | Click this button to display a listing of all of the approvals in which you have participated. |

## All Pending Approvals

This screen displays all the approvals for requisitions, offers, and performance appraisals that you are either set as an approver to review regardless of where the item is in the approval chain, or you have permissions to view all of these items even though you are not an approver.

From this screen, view approvals that are awaiting your attention, including those associated with appraisals, offers, requisitions, and changes that an employee has made to the Total Talent Profile, which require approval. On this screen you can perform actions, such as approving and rejecting these items.

> **Note:** You can approve or reject an appraisal on this screen. If you reject it, the appraisal automatically moves back to the Assessment phase, meaning that all appraisers must re-enter their appraisals and all signers must re-enter their signatures.

### Contents of the All Pending Approvals Screen

View details on all pending approvals you have permission to review.

**Requisitions**

Requisitions display to those using the Recruiting module.

| Column | Description |
|---|---|
| **Division** | The business unit to which the requisition belongs |
| **Job Code** | The job code associated with the requisition |
| **Req #** | Requisition number |
| **Requisition** | Click the link to view details about the requisition. |
| **Date Created** | The date the requisition was created |
| **Recruiter** | The name of the recruiter managing the requisition |
| **HM** | The hiring manager |
| **Attachments** | The number of documents attached to the requisition |
| **Members** | This field displays the number of members of the requisition approval process, and lists each member's name. |
| **Actions** | Use this field to approve or reject the requisition. |

**Offers**

Offers display to those using the Recruiting module.

| Column | Description |
|---|---|
| **Candidate** | Click on the name of the individual being offered a position to view the résumé. |

| Column | Description |
|---|---|
| **Offer Date** | The date the offer was made official |
| **Division** | The business unit offering employment |
| **Job Code** | The job code signifying the job being offered |
| **Req #** | Requisition number |
| **Requisition** | Click the link to view details of the requisition tied to this job |
| **On behalf of** | This field displays the name of the employee's manager. |
| **Initiated by** | The name of the individual who began the offer process |
| **Members** | This field displays the number of members of the approval process, and lists each member's name. |
| **Actions** | Use this field to approve, reject, or view the offer. |

### Appraisals

Appraisals display to those using the Performance module.

| Column | Description |
|---|---|
| **Division** | This field displays the business unit to which the employee belongs. |
| **Employee** | This field displays the employee's name. Click the name to display the employee's Total Talent Profile. |
| **Job Title** | This field displays the name of the employee's job. |
| **Appraisal** | This field displays the name of the appraisal (for example, Copywriter or Project Manager) that is being used to evaluate this employee. |
| **System Calculated Rating** | This field displays the Overall Rating, which is calculated based on the scores entered by the raters for all competencies, skills and goals in the appraisal. |
| **Manager Override Rating** | Depending on your organization's settings, a manager may be able to override the automatically calculated Overall Rating. The manager enters a different value on the Summary tab of the appraisal during the Review phase. |
| **Manager** | This field displays the name of the employee's manager. |
| **Members** | This field displays the number of members of the approval process, and lists each member's name. |
| **Actions** | Use this field to approve or reject the appraisal. |

### Self-Service

The Self-Service section displays items that a direct report has edited in the Total Talent Profile, for Core HR Administrators using the Core HR module.

| Column | Description |
|---|---|
| **Employee** | The name of the employee who made the change. Click the name to display the employee’s Total Talent Profile. |
| **Attribute** | The name of the field or attribute that was changed. |
| **Previous Value** | The value that was entered for the attribute prior to the change. |
| **New Value** | The change the employee made to this attribute that requires your approval. |
| **Effective** | The date the change will become effective. |
| **Reason for change** | The reason the employee gave for the change. |
| **User** | This field displays the name of the employee’s manager. |
| **Members** | This field displays the number of members of the approval process, and lists each member's name. |
| **Actions** | Use this field to approve or reject the changes to the Total Talent Profile fields. |

### Bulk Actions and Buttons

The following bulk actions and button actions are available on this screen.

| Action | Description |
|---|---|
| **Bulk Actions** | Check each requisition, offer and appraisal you want to approve or reject and select the appropriate radio button:<br>▪ **Approve all selected:**Check each requisition, offer, appraisal, and self-service item you want to approve and click this button to approve all at once.<br>▪ **Reject all selected:**Check each requisition, offer, appraisal, or self-service item you want to reject and click this button to reject all at once. |
| **Pending Approvals** | Click this button to see a list of any approvals that are awaiting your attention, including those associated with appraisals. The screen also displays approvals associated with requisitions and offers. |
| **Approval History** | Click this button to display a listing of all of the approvals in which you have participated. |
| **Submit** | Select the requisitions, offers, and appraisals to approve and click **Submit**. |

## Approval History

Use this screen to view the list of approved and rejected requisitions.

This screen allows you view all the approvals where you have been involved in the process. Depending on the modules you use, this may include Requisitions, Offers, Appraisals, and Self-Service items.

### Contents of the Approval History Screen

View all approvals in which you have been involved in the process. Depending on the modules you use, this may include Requisitions, Offers, Appraisals, and Self-Service items.

**Requisitions**
Requisitions display to those using the Recruiting module.

| Column | Description |
|---|---|
| **Job Title** | Click this link to view details about the selected requisition. |
| **Date Created** | The date the requisition was created |
| **Approval Status** | A status to indicate where the approval is in the process, such as In Progress, Approved, or Declined |
| **Final Approval Date** | The date the requisition has been approved by all members in the workflow. |
| **My Action** | The last action taken by the logged in user, such as Approved |
| **Comments** | Additional information or notes associated with the requisition |

**Offers**
Offers display to those using the Recruiting module.

| Column | Description |
|---|---|
| **Candidate** | Click on the name of the individual being offered a position to view the résumé. |
| **Req #** | The date the offer was made official |
| **Offer Details** | Click to view offer details, such as salary and offer letter. |
| **Date Created** | The date the job offer was initiated |
| **Approval Status** | A status to indicate where the approval is in the process, such as In Progress, Approved, or Declined |
| **Final Approval Date** | The date the job offer was approved by all members of the workflow |
| **My Action** | The last action taken by the logged in user, such as Approved. |
| **My Approval Date** | The date the currently logged in user approved the offer |

| Column | Description |
|---|---|
| **Comments** | Additional information or notes associated with the offer |

### Appraisals

Details of all appraisals in which you have participated as an approver display in this grid. Appraisals display to those using the Performance module.

### Self-Service

Details of all self-service changes in which you have participated as an approver display in this grid. Self-Service items display to those using the Core HR module.

| Column | Description |
|---|---|
| **Employee** | The name of the employee who made the change. Click the name to display the employee's Total Talent Profile. |
| **Attribute** | The name of the field or attribute that was changed. |
| **Previous Value** | The value that was entered for the attribute prior to the change. |
| **New Value** | The change the employee made to this attribute that required your approval. |
| **Effective** | The date the change will become effective. |
| **Reason for change** | The reason the employee gave for the change. |
| **User** | The name of the employee's manager. |
| **Final Approval Date** | The date the change was approved by all members of the workflow |
| **My Action** | The last action taken by the logged in user, such as Approved |
| **My Approval Date** | The date the currently logged in user approved the offer |

### Buttons

The following bulk actions and button actions are available on this screen.

| Action | Description |
|---|---|
| **Pending Approvals** | Click this button to see a list of any approvals that are awaiting your attention, including those associated with appraisals. The screen also displays approvals associated with requisitions and offers. |
| **View All Pending Approvals** | Click this button to display a listing of all pending approvals you have permission to review. |

# Applicants

This menu allows you to view the latest résumés/CVs submitted against a job posting.

## New Résumé Submissions Screen

Any new résumé that was submitted to a job but has not been reviewed, such as if it was moved into **Candidate** status or removed from consideration, is considered **New**.

By default, Deltek Talent Management places in the **Screened-In** category those applicants that either screened-in via the Screening Questionnaire and those who were not asked to complete a questionnaire. Applicants who did not pass the questionnaire are placed in the **Screened-Out** category.

There are several ways to view your new applicants:

- New Résumé Submissions screen
- New Résumés column on the Manage Requisitions screen
- My New Résumé Submissions widget
- My New Résumés and Candidate Pipeline widget

## Display the New Résumé Submissions Screen

There are several ways to view your new applicants.

**To view résumés using the New Résumé Submissions screen, complete the following steps:**

1. **Click Recruiting » Applicants » New Résumé Submissions.**

**To view new résumés using the Manage Requisitions screen, complete the following steps:**

1. **Click Recruiting » Requisitions » Manage Requisitions**
2. **Locate the requisition that you want to view, and click the value in the New Résumés column.**

**To view new résumés using the My New Résumé Submissions widget, complete the following steps:**

1. **From the Main Menu click Dashboard.**

2. **Scroll down until you find the My New Résumé Submissions widget. You must have already added the My New Résumé Submissions widget on your Main Dashboard. If you have not done so, see** **Manage Your Widgets****.**

## Contents of the New Résumé Submissions Screen

This screen displays the following columns. The options on your screen may vary depending on your role within the organization and the features your company purchased or enabled.

**Contents**

| Field | Description |
|---|---|
| **Name** | This is the applicant's name. |
| **Description** | This displays the description entered by the applicant or job seeker on the résumé profile or application form. |
| **Type** | This indicates whether the job seeker is an Internal or External applicant. |
| **FE** | This stands for Former Employee. This column uses the icon to identify applicants that were previously employed by your company.<br><br>Click to view the following the applicant's separation details and all previously held positions within your company, including the corresponding dates. |
| **H** | This stands for Hire Eligibility. It is based on the answer selected by the recruiter in the Eligible for Re-Hire or Eligible for Hire question during off-boarding or termination process, or when a recruiter dispositions a candidate to change the Status of that candidate's application.<br>You may see one of the following flags in this column, depending on the hire eligibility type. Click the flag to view the details.<br>▪ : This indicates that the applicant is eligible for re-hire/hire.<br>▪ : This indicates that the applicant is not eligible for re-hire/hire. There is a setting that can enforce the flag of not eligible for hire. If this setting is switched on, you will not be able to hire someone with this flag.<br>▪ : This indicates that the applicant is eligible for re-hire/hire, but on a conditional basis.<br><br>In the Details screen, you can remove the Hire Eligibility flag by selecting the **Remove this flag** check box. |
| **Screening** | This reflects the score the applicant earned when he or she completed the screening questionnaire. Click the value in the column to view the questions and the job seeker's answers. |

| Field | Description |
|---|---|
| **Scorecard** | This is the applicant's average score compiled from several sources. The points typically include the following:<br>▪ Résumé score and the references rating given by a user;<br>▪ Score on the screening questionnaire (if any);<br>▪ Score on an assessment (if any).<br>Click the value in this column to view the scoring details. |
| **Date Available** | This indicates the date the applicant is available to start work. |
| **City** | This is the applicant's city of residence. |
| **ST/PR** | This is the applicant's state or province of residence. |
| **Zip/Postal Code** | This is the applicant's zip or postal code. |
| **Country** | This is the applicant's country of residence. |
| **Applied** | This is the date the job seeker applied for the job. |
| **Salary** | This is the applicant's desired compensation amount. |
| **Source** | This is the applicant's referral source. |
| **Relocate** | This indicates the applicant's willingness to relocate. |
| **Years Total Relevant Experience** | This indicates the applicant's total number of years of working experience relevant to the job post. |
| **Highest Education Attained** | This indicates the applicant's highest education level attainment. |
| **Proximity** | This displays the distance of the applicant's residence from the job location. You can see this column only when the Hourly module is enabled. |
| **WSA** | This stands for Work Schedule Availability. It displays when the preferred work schedule that the applicants indicated job seeker in their application form. Click the value in the column to view the details. **All** indicates that the applicant has no preferred schedule and can be assigned to any shift |

| Field | Description |
|---|---|
| | schedule. You can see this column only when the Hourly module is enabled. |
| **Viewed** | This indicates whether or not you have viewed the résumé anywhere in the system. |
| **Status** | This indicates the current status of the applicant or candidate. |
| **Veteran** | This indicates that the applicant completed the **Veteran** section of the job application form. While there are several options for the applicant to select when indicating veteran status, this column will reflect only **Y** or **N**.<br>▪ **Y** indicates that the applicant selected one of the veteran status options listed on the requisition form.<br>▪ **N** indicates that the applicant selected N/A as the veteran status. |
| **Attachments** | Click the button from this column to download files uploaded by the applicant during the application process. |
| **Assessments** | If your company integrated assessment modules, then you will see an **Assessment Score** column. This column is dynamic and displays the number of assessments assigned to the requisition - for example, if only one assessment is tied to the requisition, then the screen displays one column.<br>If the column contains a value, then you can sort the list in ascending or descending order. Click the value in the column to redirect your view to the assessment provider's site. |
| **Background Checking** | If your company purchased background checking modules, then you will see a Background Checking section, which contains options for you to request background check for applicants and view the results.<br>You can apply filters to the Background Checking screen in order to view a specific set of candidates, using the following search criteria:<br>▪ **Subject Name**: Single word entries in this field will return matching records from either the **First Name** field or the **Last Name** field. Multiple-word entries are treated as a phrase and will return records that exactly match the values you entered.<br>▪ **Status**: You can select more than one value in this multi-select field.<br>▪ **Result**: You can include a specific result keyword, if necessary.<br>▪ **Date Initiated From**: Leaving this field blank instructs the filter to include results from the earliest entry date in the database to the date specified in the **Date Initiated To** field. |

| Field | Description |
|---|---|
| | ▪ **Date Initiated To**: Leaving this this field blank instructs the filter to include results from the date specified in the **Date Initiated From** field to today's date.<br>▪ **Last Updated From**: Leaving this field blank instructs the filter to include results from the earliest entry date in the database to the date specified in the **Last Updated To** field.<br>▪ **Last Updated To**: Leaving this field blank instructs the filter to include results from the date specified in the **Last Updated From** field to today's date. |

## Personalize and Filter Résumé Listings

Follow these steps to personalize the New Résumé Submissions screen and display only those columns that you find relevant.

**To personalize the columns on the New Résumé Submissions screen, complete the following steps:**

1. **Click . This takes you to the Personalize Recruiting Settings screen.**
2. **Under New Résumé Submissions, select or clear the check boxes next to the Items listed on the screen as desired. You can change these selections at any time.**
3. **Click Submit to save your changes.**

**To refine the displayed résumé listing, complete the following steps:**

1. **Click Filter. The options that you will see will vary depending on the features that are enabled for your company or user profile.**
2. **You can either select one of the following Quick Filter options:**
   - **View Screened-Out**
   - **View Screened-In**
   - **More Options » Historical View**
3. **Or, make your selection from the available drop-down lists, then click Filter:**
   - **First Name**
   - **Middle Name**
   - **Last Name**
   - **Applied From**
   - **Applied To**
   - **Candidate Status**
   - **Referral Source**
   - **Proximity**

**To sort the New Résumé Submissions listing, complete the following steps:**

1. **Decide on the column that you want to use as the primary sort criteria and click the title of that column. The Sort By section displays above the New Résumé Submissions table.**
2. **Click the title of any of the other columns that you want to use as the sorting criteria. As you click on the titles, they also appear in the Sort By section.**
3. **Rearrange the order of the titles in the Sort By section to change the priority order of displayed.**

## Perform Bulk Actions

Follow these steps to perform bulk actions and edit multiple résumés at once.

**To perform a bulk action, complete the following steps:**

1. On the New Résumé Submissions table, select applicants by clicking in the check box in the first column, next to their names.
2. From the **Select an Action** drop-down list at the bottom of the table, select one of the following actions:

| Option | Description |
|---|---|
| **Mark as Candidate** | Use this to move individuals forward in the hiring process. See Active Candidates. |
| **Remove from List** | Use this to remove applicants from list of new résumés and mark them as declined for this requisition.<br>Using this action does not remove the résumé from the requisition or the résumé database. The résumé is still accessible via the **Historical View**.<br>Deltek Talent Management will present you with a list of rejection reasons to select from. See complete details under Remove As Candidate. |
| **Move to Another Requisition** | Use this to disposition individuals from the current requisition and place them onto another requisition under a specific **Status**. |
| **Copy to Another Requisition** | Use this to copy the individuals from the current requisition to another requisition. |
| **Send a Letter** | Use this to send an email to the selected applicants. |
| **Send a Printable Batch** | Use this to send the selected résumés to your email in PDF format. |

| Option | Description |
|---|---|
| **Compare Selected Candidates** | Use this to select and compare candidates. This generates a table that displays the assessment score, current job title, location, relocation preference, and salary preference of each selected candidate, if available.<br>If the selection includes internal candidates, then the comparison table also displays the employee's last appraisal rating. However, your organization must have the Deltek Talent Performance module enabled. |
| **Send Secondary Application** | Use this to send the selected individuals another form with additional questions. |
| **Add to Pool** | Use this to place the selected individuals into a candidate pool. |
| **Route Résumés** | Use this to route the candidate for processing by other users or, if DTM is configured to route résumés as PDF attachments, to other email recipients. You can also include a comment to send along with the résumés. |
| **Invite to Complete Tax Screening Questionnaire** | Use this to invite all non-internal applicants to complete the tax credit screening section of the requisition form if they did not provide that information during the application process.<br>The U.S. government tax credit is not applicable to internal applications because they are classified as current Employees. Thus, this option will not appear for them even if your company purchased the tax credit screening add-on. |
| **Request Background Check** | Use this to send a request to your company's background check provider to initiate the background check process for the selected individuals.<br>You will not see this option if your company did not purchase background checking integration. |
| **Request Assessment Request Assessment** | Use this to send a request to your company's assessment provider to initiate the assessment process for the selected individuals.<br>You will not see this option if your company did not purchase assessment integration. |
| **Bulk Download of Resume Attachments** | Use this to download résumé and attachments in bulk.<br>Both file size limit and number of résumé attachments can be defined through System Settings (**Administration Global Settings System Administration System Settings Résumés**). The maximum allowed value for Résumé Attachment File Size Limit is 262144000 bytes. |

## Historical View

This view displays the list of applicants who were dispositioned from the requisition in some manner, whether hired or declined.

**Contents**

| Field | Description |
|---|---|
| **Name** | This is the applicant's name. |
| **Type** | This indicates whether the job seeker is an Internal or External applicant. |
| **Status** | This indicates the current status of the applicant or candidate. |
| **Last Activity** | This indicates the last activity/action taken on the candidate. |
| **Screening** | This reflects the score the applicant earned when he or she completed the screening questionnaire. Click the value in the column to view the questions and the job seeker's answers. |
| **Applied** | This is the date the job seeker applied for the job. |
| **Description** | This displays the description entered by the applicant or job seeker on the résumé profile or application form. |
| **City** | This is the applicant's city of residence. |
| **ST/PR** | This is the applicant's state or province of residence. |
| **Zip/Postal Code** | This is the applicant's zip or postal code. |
| **Country** | This is the applicant's country of residence. |
| **Salary** | This is the applicant's desired compensation amount. |
| **Recruiter** | This indicates the name of the recruiter working with the candidate. |
| **Source** | This is the applicant's referral source. |
| **Scorecard** | This is the applicant's average score compiled from several sources. The points typically include the following:<br>▪ Résumé score and the references rating given by a user; |

| Field | Description |
|---|---|
| | ▪ Score on the screening questionnaire (if any);<br>▪ Score on an assessment (if any).<br>Click the value in this column to view the scoring details. |
| **Rejection Reason** | If applicable, this indicates the reason why the application was declined for the position. |
| **Years Total Relevant Experience** | This indicates the applicant's total number of years of working experience relevant to the job post. |
| **Highest Education Attained** | This indicates the applicant's highest education level attainment. |
| **Date Available** | This indicates the date the applicant is available to start work. |
| **Proximity** | This displays the distance of the applicant's residence from the job location. You can see this column only when the Hourly module is enabled. |
| **WSA** | This stands for Work Schedule Availability. It displays when the preferred work schedule that the applicants indicated job seeker in their application form. Click the value in the column to view the details. **All** indicates that the applicant has no preferred schedule and can be assigned to any shift schedule. You can see this column only when the Hourly module is enabled. |
| **FE** | This stands for Former Employee. This column uses the icon to identify applicants that were previously employed by your company.<br><br>Click to view the following the applicant's separation details and all previously held positions within your company, including the corresponding dates. |
| **H** | This stands for Hire Eligibility. It is based on the answer selected by the recruiter in the Eligible for Re-Hire or Eligible for Hire question during off-boarding or termination process, or when a recruiter dispositions a candidate to change the Status of that candidate's application.<br>You may see one of the following flags in this column, depending on the hire eligibility type. Click the flag to view the details.<br>▪ : This indicates that the applicant is eligible for re-hire/hire.<br>▪ : This indicates that the applicant is not eligible for re-hire/hire. There is a setting that can enforce the flag of not eligible for hire. If this setting is switched on, you will not be able to hire someone with this flag. |

| Field | Description |
|---|---|
| | ▪ ⚠: This indicates that the applicant is eligible for re-hire/hire, but on a conditional basis.<br>In the Details screen, you can remove the Hire Eligibility flag by selecting the **Remove this flag** check box. |
| **Viewed** | This indicates whether or not you have viewed the résumé anywhere in the system. |

### Perform Bulk Actions on the History View Screen

Follow these steps to perform bulk actions and edit multiple résumés at once.

**To perform a bulk action:**

1. On the New Résumé Submissions table, select applicants by clicking in the check box in the first column, next to their names.
2. From the **Select an Action** drop-down list at the bottom of the table, select one of the following actions:

| Option | Description |
|---|---|
| **Copy to Another Requisition** | Use this to copy the individuals from the current requisition to another requisition. |
| **Send a Letter** | **Send a Letter** |
| **Send a Printable Batch** | Use this to send the selected résumés to your email in PDF format. |
| **Add to Pool** | Use this to place the selected individuals into a candidate pool. |
| **Route Résumés** | Use this to route the candidate for processing by other users or, if DTM is configured to route résumés as PDF attachments, to other email recipients. You can also include a comment to send along with the résumés. |

## Candidates

This menu allows you to manage and disposition candidates.

# Active Candidates Screen

Use this screen to display all the active candidates that you and your team, if applicable, are working with.

The candidate statuses that are considered **Active** is managed by your company's site administrator in the System Settings area.

**Contents**

| Field | Description |
|---|---|
| **Name** | This is the applicant's name. |
| **Type** | This indicates whether the job seeker is an Internal or External applicant. |
| **Status** | This indicates the current status of the applicant or candidate. |
| **Last Activity** | This indicates the last activity/action taken on the candidate. |
| **Screening** | This reflects the score the applicant earned when he or she completed the screening questionnaire. Click the value in the column to view the questions and the job seeker's answers. |
| **Applied** | This is the date the job seeker applied for the job. |
| **Description** | This displays the description entered by the applicant or job seeker on the résumé profile or application form. |
| **City** | This is the applicant's city of residence. |
| **ST/PR** | This is the applicant's state or province of residence. |
| **Zip/Postal Code** | This is the applicant's zip or postal code. |
| **Country** | This is the applicant's country of residence. |
| **Salary** | This is the applicant's desired compensation amount. |
| **Recruiter** | This indicates the name of the recruiter working with the candidate. |
| **Source** | This is the applicant's referral source. |
| **Scorecard** | This is the applicant's average score compiled from several sources. The points typically include the following: |

| Field | Description |
|---|---|
| | ▪ Résumé score and the references rating given by a user;<br>▪ Score on the screening questionnaire (if any);<br>▪ Score on an assessment (if any).<br>Click the value in this column to view the scoring details. |
| **Rejection Reason** | If applicable, this indicates the reason why the application was declined for the position. |
| **Years Total Relevant Experience** | This indicates the applicant's total number of years of working experience relevant to the job post. |
| **Highest Education Attained** | This indicates the applicant's highest education level attainment. |
| **Date Available** | This indicates the date the applicant is available to start work. |
| **Proximity** | This displays the distance of the applicant's residence from the job location. You can see this column only when the Hourly module is enabled. |
| **WSA** | This stands for Work Schedule Availability. It displays when the preferred work schedule that the applicants indicated job seeker in their application form. Click the value in the column to view the details. **All** indicates that the applicant has no preferred schedule and can be assigned to any shift schedule. You can see this column only when the Hourly module is enabled. |
| **FE** | This stands for Former Employee. This column uses the icon to identify applicants that were previously employed by your company.<br>Click to view the following the applicant's separation details and all previously held positions within your company, including the corresponding dates. |
| **H** | This stands for Hire Eligibility. It is based on the answer selected by the recruiter in the Eligible for Re-Hire or Eligible for Hire question during off-boarding or termination process, or when a recruiter dispositions a candidate to change the Status of that candidate's application.<br>You may see one of the following flags in this column, depending on the hire eligibility type. Click the flag to view the details.<br>▪ : This indicates that the applicant is eligible for re-hire/hire. |

| Field | Description |
|---|---|
| | ▪ : This indicates that the applicant is not eligible for re-hire/hire. There is a setting that can enforce the flag of not eligible for hire. If this setting is switched on, you will not be able to hire someone with this flag.<br>▪ : This indicates that the applicant is eligible for re-hire/hire, but on a conditional basis.<br>In the Details screen, you can remove the Hire Eligibility flag by selecting the **Remove this flag** check box. |
| **Viewed** | This indicates whether or not you have viewed the résumé anywhere in the system. |
| **Attachments** | Click the button from this column to download files uploaded by the applicant during the application process. |
| **Assessments** | If your company integrated assessment modules, then you will see an **Assessment Score** column. This column is dynamic and displays the number of assessments assigned to the requisition - for example, if only one assessment is tied to the requisition, then the screen displays one column.<br>If the column contains a value, then you can sort the list in ascending or descending order. Click the value in the column to redirect your view to the assessment provider's site. |
| **Background Checking** | If your company purchased background checking modules, then you will see a Background Checking section, which contains options for you to request background check for applicants and view the results.<br>You can apply filters to the Background Checking screen in order to view a specific set of candidates, using the following search criteria:<br>▪ **Subject Name**: Single word entries in this field will return matching records from either the **First Name** field or the **Last Name** field. Multiple-word entries are treated as a phrase and will return records that exactly match the values you entered.<br>▪ **Status**: You can select more than one value in this multi-select field.<br>▪ **Result**: You can include a specific result keyword, if necessary.<br>▪ **Date Initiated From**: Leaving this field blank instructs the filter to include results from the earliest entry date in the database to the date specified in the **Date Initiated To** field.<br>▪ **Date Initiated To**: Leaving this this field blank instructs the filter to include results from the date specified in the **Date Initiated From** field to today’s date. |

| Field | Description |
|---|---|
| | ▪ **Last Updated From**: Leaving this field blank instructs the filter to include results from the earliest entry date in the database to the date specified in the **Last Updated To** field.<br>▪ **Last Updated To**: Leaving this field blank instructs the filter to include results from the date specified in the **Last Updated From** field to today's date. |

## Display the Active Candidates Screen

Follow these steps to view the Active Candidates Screen.

**To display active candidates:**

Click **Recruiting** » **Candidates** » **Active Candidates**.

### View Active Candidates for a Requisition

You can view the active candidates for a particular requisition to specify the scope of your filter.

**To view the active candidates for a requisition:**

1. Click **Recruiting** » **Candidates** » **Active Candidates**.
2. On the Active Candidates screen, on the **Select Job** drop-down menu, select the requisition and click **Go**.

### New Résumé Submissions Screen

Any new résumé that was submitted to a job but has not been reviewed, such as if it was moved into **Candidate** status or removed from consideration, is considered **New**.

By default, Deltek Talent Management places in the **Screened-In** category those applicants that either screened-in via the Screening Questionnaire and those who were not asked to complete a questionnaire. Applicants who did not pass the questionnaire are placed in the **Screened-Out** category.
There are several ways to view your new applicants:

- New Résumé Submissions screen
- New Résumés column on the Manage Requisitions screen
- My New Résumé Submissions widget
- My New Résumés and Candidate Pipeline widget

## Personalize and Filter Requisition Settings

Follow these steps to personalize the Active Candidates screen and display only those columns that you find relevant.

**To personalize the columns on the New Résumé Submissions screen, complete the following steps:**

1. **Click . This takes you to the Personalize Recruiting Settings screen.**
2. **Under Candidate Listing, select or clear the check boxes next to the Items listed on the screen as desired. You can change these selections at any time.**
3. **Click Submit to save your changes.**

**To refine the displayed résumé listing, complete the following steps:**

1. **Click Filter.**
2. **Enter your filter selection from the following fields:**
   - **First Name**
   - **Middle Name**
   - **Last Name**
   - **Applied From**
   - **Applied To**
   - **Candidate Status**
   - **Referral Source**
   - **Proximity**
3. **Click the Filter button.**
4. **Click Clear Filter to reset your view to the default listing.**

**To sort the New Résumé Submissions listing, complete the following steps:**

1. **Decide on the column that you want to use as the primary sort criteria and click the title of that column. The Sort By section displays above the New Résumé Submissions table.**
2. **Click the title of any of the other columns that you want to use as the sorting criteria. As you click on the titles, they also appear in the Sort By section.**
3. **Rearrange the order of the titles in the Sort By section to change the priority order of displayed.**

## Perform Bulk Actions on the Active Candidates Screen

Follow these steps to perform bulk actions and edit multiple active candidates at once.

**All the candidates that you selected are dispositioned based on the selections that you have made using the Bulk Action feature.**

**If you selected inline disposition reasons for a particular candidate, then Deltek Talent will execute your options using those reasons.**

**If the selected an individual for bulk action by accident and inline status changes were selected, the inline options will be ignored and the candidate will be dispositioned using the options selected in the Bulk Action.**

**To perform a bulk action, complete the following steps:**

1. On the Active Candidates table, select applicants by clicking in the check box in the first column, next to their names.
2. From the **Select an Action** drop-down list at the bottom of the table, select one of the following actions:

| Option | Description |
|---|---|
| **Change Status** | Use this to change the status of candidates, moving them to the next step in the recruitment process. If you selected this action proceed to Change Candidate Status. |
| **Remove as Candidate** | Use this to remove applicants from the requisition. If you selected this action, proceed to Remove As Candidate. |
| **Invite to Interview** | Use this to generate invitation notices to all selected candidates. If you selected this action, proceed to Invite to Interview. |
| **Move to Another Requisition** | Use this to disposition individuals from the current requisition and place them onto another requisition under a specific **Status**. |
| **Copy to Another Requisition** | Use this to copy the individuals from the current requisition to another requisition. |
| **Send a Letter** | Use this to send an email to the selected applicants. |
| **Send a Printable Batch** | Use this to send the selected résumés to your email in PDF format. |
| **Compare Selected Candidates** | Use this to select and compare candidates. This generates a table that displays the assessment score, current job title, location, relocation preference, and salary preference of each selected candidate, if available.<br>If the selection includes internal candidates, then the comparison table also displays the employee's last appraisal rating. However, your organization must have the Deltek Talent Performance module enabled. |
| **Send Secondary Application** | Use this to send the selected individuals another form with additional questions. |

| Option | Description |
|---|---|
| **Add to Pool** | Use this to place the selected individuals into a candidate pool. |
| **Route Résumés** | Use this to route the candidate for processing by other users or, if DTM is configured to route résumés as PDF attachments, to other email recipients. You can also include a comment to send along with the résumés. |
| **Invite to Complete Tax Screening Questionnaire** | Use this to invite all non-internal applicants to complete the tax credit screening section of the requisition form if they did not provide that information during the application process.<br>The U.S. government tax credit is not applicable to internal applications because they are classified as current Employees. Thus, this option will not appear for them even if your company purchased the tax credit screening add-on. |
| **Request Background Check** | Use this to send a request to your company's background check provider to initiate the background check process for the selected individuals.<br>You will not see this option if your company did not purchase background checking integration. |
| **Request Assessment** | Use this to send a request to your company's assessment provider to initiate the assessment process for the selected individuals.<br>You will not see this option if your company did not purchase assessment integration. |

### Change Active Candidate Status

Use this screen to change the status of candidates, moving them to the next step in the recruitment process. This screen is accessible on the Onboarding Queue, Search Candidates, or Active Candidates screen.

**You can disposition candidates one at a time, but the most useful feature of this screen is it allows you to disposition multiple candidates all at once and still select a different status for each candidate.**

**To change candidate status, complete the following steps:**

1. In the **Status** column, select from the values in the drop-down list.
2. If you selected **Hired** in the **Status** column, then you must also complete the following additional fields:
   a) In the **Select Position** field, select from the drop-down list, or click to add a new position, if necessary.
   b) In the **Salary** field, enter the amount.
   c) In the **Hire Date** field, select the date.

   d) In the **Start Date** field, select the date.

3. In the **Letter** column, select from the drop-down list the letter template to send the candidate.
   - Click to view the template.
   - Click to edit the template.

   > **Note:** Changes you make here modify this letter only, not the letter template.

4. In the **Comments** column, enter your comments about the status change, if applicable. These comments are saved in the candidate's transaction logs.
5. Repeat steps 1-4 for each candidate.
6. Click **Submit**. This executes all the options that you selected for each individual candidate. Each candidate also receives the appropriate letter notification, depending on your selection.
7. Alternatively, if you want to set the same values for multiple candidates, scroll down to the bottom of the Change Candidate Status screen, and in the **Change Status to** field, select the appropriate values from the drop-down list.
8. In the **Letter** field, select a template from the drop-down list.
   - Click to view the template.
   - Click to edit the template.

   > **Note:** Changes you make here modify this letter only, not the letter template.

9. In the **Comments** field, enter your comments about the status change, if applicable. These comments are saved in each candidate's transaction logs.
10. Click **Submit**. This executes the options that you selected for all the candidates in the Change Status Action screen. Each candidate also receives the letter notification that you selected.

    The screen then displays a confirmation message, giving you the opportunity to process any candidates that have been hired for onboarding. Click the **Recent Hires** link to expedite the onboarding process. This message will not disappear as the regular success message does. It will remain on the screen until an action is taken.

    If you don't take the action of onboarding at this time, you can access the new hires and complete the action from the Recent Hires screen.

    > **Note:** The Forced Disposition Upon Hire feature makes it mandatory for recruiters to disposition any remaining candidates in the requisition before they can complete the hiring process and set the **Status** of qualified candidates to **Hired**.
    >
    > If enabled, Deltek Talent will look at the number of hires needed for the requisition. When it detects that the requisition has at least one hire and you then attempt to hire another candidate, it will prompt you to disposition all the other candidates associated with the requisition before you can change the **Status** of the candidate to **Hired**.

> After you disposition the remaining candidates, the Résumé Dashboard displays. And you can then complete the **Hire** action.

### Remove as Candidate

Use this screen to remove candidates individually or in bulk from the requisition.

**To remove applicants from the list of candidates, complete the following steps:**

1. In the **Select A Rejection Reason** column, select the **Primary Rejection Reason** from the drop-down list.
2. Depending on your primary rejection reason, the screen may display a **Secondary Rejection Reason** field. If applicable, select the secondary reason from the drop-down list.
3. In the **Not Eligible for Hire** column, select the check box to mark the candidate with this flag, if applicable.
4. In the **Letter** column, select from the drop-down list the letter template to send the candidate.
   - Click to view the template.
   - Click to edit the template.
5. In the **Comments** field, enter your comments, if applicable.
6. Repeat steps 1-5 for each candidate.
7. Click **Remove**. This executes all the options that you selected for each individual candidate. Each candidate also receives the appropriate letter notification, depending on your selection.
8. Alternatively, if you want the same set the same values for multiple candidates, scroll down to the bottom of the **Remove As Candidate** screen, and in the **Primary Rejection Reason** field, select the appropriate values from the drop-down list.
9. Depending on your primary rejection reason, the screen may display a **Secondary Rejection Reason** field. If applicable, select the secondary reason from the drop-down list.
10. Select the **Not Eligible for Hire** check box if the candidates should be marked with this flag.
11. In the **Letter** field, select a template from the drop-down list.
    - Click to view the template.
    - Click to edit the template.
12. In the **Comments** field, enter your comments, if applicable.
13. Click **Remove**. This executes the options that you selected for all the candidates in the Remove As Candidate screen. Each candidate also receives the letter notification that you selected.

### Invite to Interview

Use this screen to send an email invitation to the selected active applicants.

**To issue interview invitations, complete the following steps:**

1. In the **Event Name** drop-down list, select an event. You must have already created the event in order to see it in the drop-down list. If you have not yet created the event, click and follow the steps in the Add an Event to a Calendar section of this document.
2. In the **Select a Letter Template** drop-down list, select the letter template to send the candidates.
   - Click to view the template.
   - Click to edit the template.
3. In the Candidates to invite section, check the names and click to remove any candidates who should not be included in the bulk interview invitation.
4. Click **Invite**.

## Candidate Comparison Screen

Use this screen to compare the selected applicants using metrics such as the last performance rating (if applicable), competency gap, skills gap, location, and relocation and salary preferences.

**Contents**

In addition to comparing candidates on this screen, you can also select one or more applicants and perform the following actions from this screen:

- **Add as a Candidate to this Requisition**: Click this option to add the selected résumés as candidates to the job displayed at the top of the screen. This option is only available on the New Résumé Submissions screens.
- **Invite to Submit Résumé to Requisition**: Click this option to add the selected résumés as candidates to the job displayed at the top of the screen. This option is only available on the New Résumé Submissions screens.
- **Remove from List**: Select this option toremove the job seeker from this list and mark them declined for this requisition. Selecting this option does not remove the résumé from the requisition or the résumé database. Talent Management presents you with a list of rejection reasons to select from. This option is only available on the New Résumé Submissions screens.
- **Change Status**: Select this option to change candidate status individually, or in bulk for all selected candidates. This option is available only on the Active Candidates screen.
- **Remove as Candidate**: Select this option to quickly disposition candidates from the requisition. This option is available only on the Active Candidates screen.
- **Send a Letter:** Select this option to send a letter to the selected applicants from this list.
- **Send me a Printable Batch**: Select this option to send the selected résumés to your email in PDF format

| Field | Description |
| --- | --- |
| **Name** | This is the applicant's name. The incumbent applicant, if any exists, is marked with a star icon. |
| **Type** | This indicates whether the job seeker is an Internal or External applicant. |
| **Last Performance Rating** | The performance score displays, if available. |
| **Current Job** | The name of the currently held position. |
| **Competency Gap** | Click **Show Details** to expand the columns to include additional information for each competency. Click **Hide Details** to collapse the columns. |
| **Skills Gap** | Click **Show Details** to expand the columns to include additional information for each skill held by the candidate. Click **Hide Details** to collapse the columns. |
| **Location** | This is the location or locations indicated for the job. |
| **Preferences** | This indicates the candidate's preferences as far as willingness to relocate and salary. |
| **Submit** | If no incumbent exists, after you select candidates and then select**Compare Selected Candidates**, you are asked to select the incumbents for comparison. The screen lists the Name, Last Performance Rating, Company Tenure and Position Tenure for each of the applicants you selected. Check the box next to each applicant you want to mark as an incumbent when you perform the comparison. Select **Submit** when finished. |

## Search Candidates Screen

Use this screen to search for candidates.

**To search for candidates, complete the following steps:**

> **Note: This does not search the entire résumé database, only applicants that are attached to a requisition.**

1. Click **Recruiting** » **Candidates** » **Search Candidates**.

   > **Note:** You can also access this New Search screen, or the Edit Search screen from the Search Results screen. After running a search, click the **New Search** button to run a new search, or click the **Edit This Search** button to open the Search Candidates screen with all your previous settings saved. Modify just those you wish to change, then run the search again.

2. Select the appropriate values for the following search criteria.

| Option | Description |
|---|---|
| **Name (all or partial)** | Enter the applicant's name, whether in full or partial. |
| **Email (all or partial)** | Enter the applicant's email address, whether in full or partial. |
| **Job Title** | Select the job title from this drop-down list. You can select more than one value. |
| **Status** | Select the status title from this drop-down list. You can select more than one value. |
| **Referral Source** | Select the referral source from this drop-down list. You can select more than one value. |
| **Shift Schedule (Hourly)** | Select the schedule from this drop-down list. |
| **Search with WSA should contain** | Select one of the following options for WSA (Work Schedule Availability):<br>▪ All shifts selected (exact match)<br>▪ Any shift selected<br>Then, provide the date range using the **From** and **To** fields. |
| **Former Employees** | Select this check box to limit your search to candidates who are former employees. |
| **Exclude** | Select one of the following check boxes to indicate which candidates to exclude:<br>▪ Not Eligible for Re-hire<br>▪ Eligible for Re-hire (Conditional)<br>▪ Not Eligible for Hire |
| **Viewed** | Select one of the following:<br>▪ All<br>▪ Viewed Only<br>▪ Not Viewed Yet |

Add more search variables to narrow down your search results. Use fewer criteria options if you want to broaden your search results

## Display the Search Candidates Screens

Follow the steps to view each of these Search Candidates screens.

### Display the Search Candidates Screen

The Search Candidates Screen is accessible from the Recruiting menu on the Navigation Pane or by clicking the **New Search** button on the Search Candidates Results screen.

**To display the Search Candidates screen:**

On the Main Menu, click**Recruiting** » **Candidates** » **Search Candidates.**

You can also access this screen by clicking the **New Search** button on the Search Candidates Results screen.

### Display the Search Candidates Results Screen

The Search Candidates Results Screen displays the results of your search.

**To display the Search Candidates Results screen:**

1. Select **Candidates** from the Search function at the top of any screen.
2. Enter a full or partial name or email address in the **Search** field, or to return all candidates, leave the filed blank. Click the Search icon to run the search.

### Display the Edit Search Candidates Screen

The Edit Search Candidates Screen is accessible on the Search Candidates Results screen

**To display the Edit Search Candidates screen:**

On the Search Results screen, which displays after running a search, click the **Edit This Search** button.

## Search Candidates Results Screen

The search results screen displays a table with the following columns.

**Contents**

| Field | Description |
|---|---|
| **Type** | This indicates whether the job seeker is an Internal or External applicant. |
| **FE** | This stands for Former Employee. This column uses the icon to identify applicants that were previously employed by your company.<br><br>Click to view the following the applicant's separation details and all previously held positions within your company, including the corresponding dates. |
| **Name** | This is the applicant's name. |

| Field | Description |
|---|---|
| **H** | This stands for Hire Eligibility. It is based on the answer selected by the recruiter in the Eligible for Re-Hire or Eligible for Hire question during off-boarding or termination process, or when a recruiter dispositions a candidate to change the Status of that candidate's application.<br>You may see one of the following flags in this column, depending on the hire eligibility type. Click the flag to view the details.<br>▪ : This indicates that the applicant is eligible for re-hire/hire.<br>▪ : This indicates that the applicant is not eligible for re-hire/hire. There is a setting that can enforce the flag of not eligible for hire. If this setting is switched on, you will not be able to hire someone with this flag.<br>▪ : This indicates that the applicant is eligible for re-hire/hire, but on a conditional basis.<br>In the Details screen, you can remove the Hire Eligibility flag by selecting the **Remove this flag** check box. |
| **Viewed** | This indicates whether or not you have viewed the résumé anywhere in the system. |
| **WSA** | This stands for Work Schedule Availability. It displays when the preferred work schedule that the applicants indicated job seeker in their application form. Click the value in the column to view the details. **All** indicates that the applicant has no preferred schedule and can be assigned to any shift schedule. You can see this column only when the Hourly module is enabled. |
| **Job Title** | This is the name of the job position applied for by the applicant or candidate. |
| **Status** | This indicates the current status of the applicant or candidate. |
| **Referral Source** | This is the candidate's referral source. |
| **Created** | This is the date the requisition was created. |
| **Last Modified** | This indicates the last activity/action taken on the candidate. |
| **Attachments** | Click the button from this column to download files uploaded by the applicant during the application process. |
| **New Search** | Click to start a new search. |
| **Edit this Search** | Click to open the Search Candidates screen with all the search settings from your previous search saved. Modify the options you want to change and click **Search** at the bottom of the screen to run a search. |

## Perform Bulk Actions

From the search results screen, you can perform bulk actions to edit multiple candidates at once.

**To perform a bulk action, complete the following steps:**

1. Select applicants by clicking in the check box in the first column, next to their names, or click the check box to next to the **Type** header to select all results.
2. From the **Select** drop-down list at the bottom of the table, select one of the following actions:

| Option | Description |
|---|---|
| **Change Status** | Use this to change the status of candidates, moving them to the next step in the recruitment process. If you selected this action proceed to Change Candidate Status. |
| **Remove as Candidate** | Use this to remove applicants from the requisition. If you selected this action, proceed to Remove As Candidate. |
| **Invite to Interview** | Use this to generate invitation notices to all selected candidates. If you selected this action, proceed to Invite to Interview. |
| **Send a Letter** | Use this to send an email to the selected applicants. |
| **Send a Printable Batch** | Use this to send the selected résumés to your email in PDF format. |
| **Send Secondary Application** | Use this to send the selected individuals another form with additional questions. |
| **Add to Pool** | Use this to place the selected individuals into a candidate pool. |
| **Route Résumés** | Use this to route the candidate for processing by other users or, if DTM is configured to route résumés as PDF attachments, to other email recipients. You can also include a comment to send along with the résumés. |
| **Bulk Download resume attachments** | Use this to download all résumé attachments associated with the selected candidates.<br>Both file size limit and number of résumé attachments can be defined through System Settings (**Administration** » **Global Settings** » **System Administration** » **System Settings** » **Résumés**). The maximum allowed value for Résumé Attachment File Size Limit is 262144000 bytes. |

### Change Active Candidate Status

Use this screen to change the status of candidates, moving them to the next step in the recruitment process. This screen is accessible on the Onboarding Queue, Search Candidates, or Active Candidates screen.

**You can disposition candidates one at a time, but the most useful feature of this screen is it allows you to disposition multiple candidates all at once and still select a different status for each candidate.**

**To change candidate status, complete the following steps:**

1. In the **Status** column, select from the values in the drop-down list.
2. If you selected **Hired** in the **Status** column, then you must also complete the following additional fields:
   a) In the **Select Position** field, select from the drop-down list, or click to add a new position, if necessary.
   b) In the **Salary** field, enter the amount.
   c) In the **Hire Date** field, select the date.
   d) In the **Start Date** field, select the date.
3. In the **Letter** column, select from the drop-down list the letter template to send the candidate.
   - Click to view the template.
   - Click to edit the template.

   **Note:** Changes you make here modify this letter only, not the letter template.
4. In the **Comments** column, enter your comments about the status change, if applicable. These comments are saved in the candidate's transaction logs.
5. Repeat steps 1-4 for each candidate.
6. Click **Submit**. This executes all the options that you selected for each individual candidate. Each candidate also receives the appropriate letter notification, depending on your selection.
7. Alternatively, if you want to set the same values for multiple candidates, scroll down to the bottom of the Change Candidate Status screen, and in the **Change Status to** field, select the appropriate values from the drop-down list.
8. In the **Letter** field, select a template from the drop-down list.
   - Click to view the template.
   - Click to edit the template.

   **Note:** Changes you make here modify this letter only, not the letter template.
9. In the **Comments** field, enter your comments about the status change, if applicable. These comments are saved in each candidate's transaction logs.

10. Click **Submit**. This executes the options that you selected for all the candidates in the Change Status Action screen. Each candidate also receives the letter notification that you selected.

    The screen then displays a confirmation message, giving you the opportunity to process any candidates that have been hired for onboarding. Click the **Recent Hires** link to expedite the onboarding process. This message will not disappear as the regular success message does. It will remain on the screen until an action is taken.

    If you don't take the action of onboarding at this time, you can access the new hires and complete the action from the Recent Hires screen.

    > **Note:** The Forced Disposition Upon Hire feature makes it mandatory for recruiters to disposition any remaining candidates in the requisition before they can complete the hiring process and set the **Status** of qualified candidates to **Hired**.
    >
    > If enabled, Deltek Talent will look at the number of hires needed for the requisition. When it detects that the requisition has at least one hire and you then attempt to hire another candidate, it will prompt you to disposition all the other candidates associated with the requisition before you can change the **Status** of the candidate to **Hired**.
    >
    > After you disposition the remaining candidates, the Résumé Dashboard displays. And you can then complete the **Hire** action.

### Remove as Candidate

Use this screen to remove candidates individually or in bulk from the requisition.

**To remove applicants from the list of candidates, complete the following steps:**

1. In the **Select A Rejection Reason** column, select the **Primary Rejection Reason** from the drop-down list.
2. Depending on your primary rejection reason, the screen may display a **Secondary Rejection Reason** field. If applicable, select the secondary reason from the drop-down list.
3. In the **Not Eligible for Hire** column, select the check box to mark the candidate with this flag, if applicable.
4. In the **Letter** column, select from the drop-down list the letter template to send the candidate.
   - Click  to view the template.
   - Click  to edit the template.
5. In the **Comments** field, enter your comments, if applicable.
6. Repeat steps 1-5 for each candidate.
7. Click **Remove**. This executes all the options that you selected for each individual candidate. Each candidate also receives the appropriate letter notification, depending on your selection.

8. Alternatively, if you want the same set the same values for multiple candidates, scroll down to the bottom of the **Remove As Candidate** screen, and in the **Primary Rejection Reason** field, select the appropriate values from the drop-down list.
9. Depending on your primary rejection reason, the screen may display a **Secondary Rejection Reason** field. If applicable, select the secondary reason from the drop-down list.
10. Select the **Not Eligible for Hire** check box if the candidates should be marked with this flag.
11. In the **Letter** field, select a template from the drop-down list.
    - Click to view the template.
    - Click to edit the template.
12. In the **Comments** field, enter your comments, if applicable.
13. Click **Remove**. This executes the options that you selected for all the candidates in the Remove As Candidate screen. Each candidate also receives the letter notification that you selected.

### Invite to Interview

Use this screen to send an email invitation to the selected active applicants.

**To issue interview invitations, complete the following steps:**

1. In the **Event Name** drop-down list, select an event. You must have already created the event in order to see it in the drop-down list. If you have not yet created the event, click and follow the steps in the Add an Event to a Calendar section of this document.
2. In the **Select a Letter Template** drop-down list, select the letter template to send the candidates.
    - Click to view the template.
    - Click to edit the template.
3. In the Candidates to invite section, check the names and click to remove any candidates who should not be included in the bulk interview invitation.
4. Click **Invite**.

### Send a Letter

This bulk action allows you to send an email to the selected active applicants.

**To send a letter, complete the following steps:**

1. In the **Select a Letter Template** field, select from the drop-down list the letter template to send the candidate.
2. Click to view the template.
3. Click to edit the template.

4. Select the **Add company logo to the top of the first page of each résumé** check box to insert your company logo in the auto-generated email, and click **Go**.

## Résumés

Use this menu to search for résumés that meet your required job qualifications.

In this menu, you can also manage résumés as they are entered into Deltek Talent and create pools where you can stored résumés for future use.

The options that you see on your screen depends on the modules your company is using as well as the permissions that have been enabled for the Group(s) to which you belong.

### Search Résumés Screen

This screen allows you to generate a search using one or more criteria. You can save the search criteria as a Résumé Search Agent and let your résumé agents do the searching for you.

**When a new résumé is submitted that contains your agent criteria, that résumé will be sent directly to you.**

**Note: Your company's system administrator is responsible for configuring the fields in the search form and the columns on the results screen.**

**To search for résumés:**

1. On the Search Candidates screen, select the appropriate values for the search criteria fields, but pay particular attention to the following.

| Option | Description |
|---|---|
| **Requisition** | If you want to search only those applicants and/or candidates attached to a specific requisition, select the requisition name(s) from the multi-select field.<br>Doing so targets the search to only those requisitions, instead of the entire résumé database. |
| **Boolean Search Terms** | Use boolean search functions to customize your search string, such as the following:<br>▪ **+**: Prepend the keyword with this qualifier to indicate that the word must be included in the search results.<br>▪ **-**: Prepend the keyword with this qualifier to indicate an undesirable word, which must not be included in the search results.<br>▪ **AND**: Use this operator to indicate that all the keywords you entered must be present in the search results.<br>▪ **OR**: Use this operator to indicate that any of the keywords you entered can be present in the search results. |

| Option | Description |
|---|---|
| | ▪ **NOT**: Use this operator to exclude the keywords you entered from the search results.<br>Use a comma to separate keywords (for example: `+programming`, `-accounting`, `AND responsible`, `OR hardworking`, `NOT sales`). |
| **OFCCP** | If your company is a government contractor and/or has enabled the Office of Federal Contract Compliance Programs (OFCCP) tracking setting, you are required to select a requisition first in order to search the résumé database.<br>You must also provide the OFCCP ID and any data management technique details. Any value entered in these fields are tracked and displayed in the Résumé Search Details OFCCP report.<br>You can bypass selecting a requisition if you need to run a general search. However, that setting must be enabled for you by your company's system administrator. Deltek Talent will still track all the search data and will also make a notation that a general search was performed. |

Any matching résumé is listed in tables for **Conceptual**, **Internal**, and **External** matches, depending on your system's setup.

2. On the Search Results table, click a person's name to access the Résumé Dashboard. Any criteria used to search for the individual, such as keywords, are highlighted in the résumé information.
3. Click the **Activity** icon to view the applicant's activity details, if any.
4. Click the button from the Attachments column download files uploaded by the candidate during the application process.

## Personalize and Filter Résumé Search Results

You can personalize the Search Résumé Results screen to display only those columns that you find relevant.

**To personalize the columns on the Search Résumés screen, complete the following steps:**

1. Click .
2. Under **Résumé Search Results**, select and unselect the check boxes next to the Items listed on the screen as desired. You can change these selections at any time.
3. Click **Submit** to save your changes.

## Perform Bulk Actions

You can perform bulk actions to edit multiple active candidates at once.

**To perform a bulk action, complete the following steps:**

1. On the Résumé Search Results screen, flag applicants for bulk action by selecting the check box in the first column, next to their names.
2. In the **Select an Action** drop-down list at the bottom of the table, select one of the following actions, and click **Go**:

| Option | Description |
|---|---|
| **Compare Selected Candidates** | Use this to select and compare candidates. This generates a table that displays the assessment score, current job title, location, relocation preference, and salary preference of each selected candidate, if available.<br>If the selection includes internal candidates, then the comparison table also displays the employee's last appraisal rating. However, your organization must have the Deltek Talent Performance module enabled. |
| **Send a Letter** | Use this to send an email to the selected applicants. |
| **Send Me a Printable Batch** | Use this to send the selected résumés to your email in PDF format. |
| **Invite to Submit Résumé to Requisition** | Use this to invite the selected individuals to their résumé to a particular requisition. Each selected individual will receive an email with a link to the requisition. |
| **Invite to Submit Résumé to Requisition** | Use this to invite the selected individuals to their résumé to a particular requisition. Each selected individual will receive an email with a link to the requisition. |
| **Route Résumés** | Use this to route the candidate for processing by other users or, if DTM is configured to route résumés as PDF attachments, to other email recipients. You can also include a comment to send along with the résumés. |
| **Add to Pool** | Use this to place the selected individuals into a candidate pool. |
| **Save as Résumé Agent** | Use this to save the search criteria as a Résumé Agent. This appears at the bottom of the search results page. A new screen appears, which allows you to perform the following:<br>▪ Enter the name of the Agent |

| Option | Description |
|---|---|
| | ▪ Set the Résumé Search Agent as **Active** or **Inactive**<br>▪ Select the email form. [See Résumé Search Agents] |
| **Associate this search agent to a pool** | Use this drop-down list field to associate the search agent from the selection of résumé pools to which you have access. This field displays when you select the bulk action Save as Résumé Agent while creating a new search agent. |
| **Résumés Created After** | Use this date field to further narrow down the pool of résumés based on the selected date to the current date. Leaving this field blank instructs the search agent to include résumés from the earliest entry in the database to the current date.<br>This field displays only after you select a pool from the **Associate this search agent to a pool** drop-down list field. |

### Compare Selected Candidates

You can do a comparison of the individuals you selected from the previous list. A variety of information will be displayed including last performance rating (if applicable), competency gap, skills gap, location, and preferences.

When performing a candidate comparison against an incumbent employee, the incumbent is denoted by a **Star** icon.

To view the details of the Competency and Skills gaps, click **Show Details** under the **Competency Gap** column or the **Skills Gap** column.

**Actions**

| Field | Description |
|---|---|
| **Apply to Job** | Use this to add the selected résumés as candidates to the job shown above the table. |
| **Remove from List** | Use this to remove applicants from list of new résumé and mark them as declined for this requisition.<br>Using this action does not remove the résumé from the requisition or the résumé database. The résumé is still accessible via the **Historical View**.<br>Deltek Talent Management will present you with a list of rejection reasons to select from. See complete details under Remove As Candidate. |
| **Change Status** | Use this to change the status or disposition all those selected. This option is available only on the Active Candidates screen. |
| **Send a Letter** | Use this to send an email to the selected applicants/job seekers. |

| Field | Description |
|---|---|
| **Send a Printable Batch** | Use this to send the selected résumés to your email in PDF format. |
| **Request Assessment** | Use this to send a request to your company's assessment provider to initiate the assessment process for the selected individuals.<br>You will not see this option if your company did not purchase assessment integration. |

## View Incomplete Applications

Use this screen to display applicants who started the job application but did not complete the application process.

**To display the View Incomplete Applications screen, complete the following steps:**

1. Click **Recruiting** » **Résumés** » **Search Résumés**.
2. Click the **View Incomplete Applications** button.
3. Use the available search criteria to target your results. The results listing displays information about the applicant, the job title, and at what step in the process did the applicant stop.
4. Use the **Send a Letter** bulk action to send an email to one or more of individuals in the list.

## View Job Seekers Without a Résumé

Use this screen to display all applicants who created a job seeker account but did not complete the application/résumé profile form.

**To view the list of job seekers, complete the following steps:**

1. Click **Recruiting** » **Résumés** » **Search Résumés**
2. Click the **View Job Seekers Without a Résumé** button.
3. If necessary, refine the displayed résumé listing:
   a) Click **Filter** at the top of the screen. The options that appear vary depending on the features that are enabled for your company or user profile.
   b) Enter the values in the following fields:
      - **First Name**
      - **Last Name**
      - **E-mail**
      - **Account Created From**
      - **Account Created To**

- **Referral Source**

4. Click the **Filter** button.
5. Click the **Send a Letter bulk** action if you want to send an email to one or more of individuals in the list.
6. Click the name of the applicant if you want to view the Résumé Dashboard. However, the information that you can see on the dashboard is limited to the details that were completed when the applicant created the job seeker account.
7. Click **Edit** if you want to update the applicant's account information and/or enter the résumé details manually. After you have completed the required fields on this form, Deltek Talent will consider the applicant information complete and the individual will no longer appear in the Job Seekers Without a Résumé table.

## View Newest Résumés Screen

Use this screen to view a list of the résumés that were entered by an applicant or recruiter within a specified number of days.

**This list includes passive résumés as well as those that applied to a specific requisition. By default, the screen displays the résumé entered within the last 24 hours.**

**To specify the date range, complete the following steps::**

1. Click **Recruiting** » **Résumés** » **View Newest Résumés**.
2. Enter a number in the **Number of Days** field.
3. On the search results screen, click a person's name to access the Résumé Dashboard.

## Résumé Search Agents Screen

Use this screen to save your résumé search criteria as a search agent. You can manage these agents on the same screen as the private résumé database using the Résumés Search Agents screen.

If any new résumés matching the criteria are found, you will receive an email notification that includes a link to view that résumé.

The Résumé Search Agents screen displays a table with the following columns.

**Contents**

| Field | Description |
| --- | --- |
| **Search Agent Name** | This column displays the name you gave the search agent. Click the name to view the criteria. |
| **Active** | This column indicates whether the agent is active or inactive. |
| **Delivery Method** | This column indicates how notification of matching résumés are delivered. The default method is **Email**, but you have the option to switch to **RSS**. |

| Field | Description |
|---|---|
| **Delivery Frequency** | This column indicates how often the agent will run. |
| **Résumés Created After** | This is an editable field that allows you to select résumés that were created after an indicated date. Click to select the date. |
| **Next Run Date** | This column shows the date of when the agent is scheduled to run next. |
| **Date Created** | This column displays the date when the agent was created. |
| **Associated Pool** | This column displays the résumé pool associated with the search agent, if any. From here, you can also click to disassociate the pool from the search agent. |
| **Action** | This column contains the actions that are available to you on this screen. |

**Actions**

On the Actions column are the following options.

| Field | Description |
|---|---|
| **Run Agent Manually** | Select this to manually run the search agent. |
| **Activate/Deactivate** | Select this to set the search agent to Active or Inactive. |
| **Delete** | Select this to delete the agent. |

**Personalized Settings**

In the Personalized Settings section, you can specify the format of agent email notifications and indicate conditions for automatic deactivation of saved résumé search agents.

## Create an Agent

You can create new search agents by saving the résumé search criteria that you have selected.

**To create an agent, complete the following steps:**

> **Note: If your company purchased access to the Monster.com Résumé Database, then you have the option to create search agents for Monster résumés.**

1. On the Search Resumes Results screen, dcroll to the bottom and, click **Save as Résumé Agent** in the drop-down field.
2. Select the **Active** check box.

3. In the **Select Frequency of Scheduled Run** field, select whether the agent runs **Daily**, **Weekly**, **Bi-weekly**, **Monthly**, or **Never**.
4. Read and accept the acknowledgement statement, then click **Save**.

## Pooled Résumés Screen

This screen displays résumé pools created by other recruiters in your company in addition to your own.

The Pools feature is ideal for grouping individuals based on skill set or for serving as a holding folder for upcoming job postings.

The screen displays a list of all the current pool categories and includes an option to create new pools. It is divided into the Public Pools section and the Private Pools section, with the following columns for each of the sections:

**Contents**

| Field | Description |
|---|---|
| **Team** | This displays the associated team, if any. This is available for Private Pools only. |
| **Owner** | This is the creator of the pool. |
| **Search Agent** | This displays the list of associated Search Agents. From here, you can also click to disassociate the Search Agent from the pool. |
| **PQ** | Pool Questionnaire. A icon in this column indicates that a pool has a pool questionnaire. |
| **Actions** | This column has the following new available functions:<br>▪ **Edit** — This is enabled only when the logged in user has access rights to the pool.<br>▪ Delete — This is enabled only under the following conditions:<br>    ▪ When there are no job seekers added to the pool and the logged in user is the pool creator; or<br>    ▪ When there are no job seekers added to the pool and the Administer Talent Pool feature is enabled for a specific user group. |

## Create a Résumé Pool

Follow these steps to create résumé pools that group individuals based on skill set or for serving as a holding folder for upcoming job postings.

**To create a résumé pool, complete the following steps:**

1. Enter a name into the **Pool Category Name** field.
2. If you want to limit the visibility of the pool to selected indviduals only, complete the following.
   a) Select the **Make this Private** check box.
   b) Make your selection from the **Team** drop-down list.
3. Click **Create/Edit Questionnaire** if you want to create a single questionnaire for the résumé pool. This launches the Create/Edit Question window, which we will discuss in a separate section below. If you don't need to create a questionnaire now, skip to Step 4.
4. Click **Create**.

## Pool Questionnaires

You can create a single questionnaire for the résumé pool.

The Create/Edit Question window contains the following sections:

**Contents**

| Field | Description |
|---|---|
| **Questions** | This section displays the list of questions that you have created for the selected pooled résumé in a table. |
| **Add a New Question** | This section contains the form that allows you to add new questions for the selected pooled résumé. As you click the **Add** button, the new questions you create are added to a table in the Questions section of the Create/Edit Question window. |

### Create Pool Questionnaires

Use this window to add questions for the selected pooled résumé.

**To create questions for the pool questionnaire, complete the following steps:**

1. Click **Recruiting** » **Résumés** » **Pools**.
2. Click the **Create/Edit Questionnaire** button.
3. In the Type field, select from the following options:
   - **Single Line**
   - **Multiple Choice, Single Answer**

- **Radio Button**

> **Note:** If you selected **Multiple Choice, Single Answer** or **Radio Button** in Step 2, you must provide multiple responses for the question and will have to repeat Steps 3-6 for the number of responses required.

Each response you add is listed in a table on the Options Section of the window where you can perform the following actions:

- Move options up the list
- Move options down the list
- Edit options
- Delete options

4. Type the question in the **Question** field. This is a free-format text field.
5. In the **Instructions** field, indicate special instructions, if applicable.
6. Select the **Mark as required** check box to flag the question as mandatory.
7. Click **Add**.

### View Job Seekers in a Pool

From the Pooled Résumés screen, click the number in the **Job Seekers** column to view the listing of all the job seekers that are currently in that Pool.

**Contents**

| Field | Description |
|---|---|
| **FE** | This stands for Former Employee. This column uses the icon to identify applicants that were previously employed by your company.<br><br>Click to view the following the applicant's separation details and all previously held positions within your company, including the corresponding dates. |
| **FE** | This stands for Former Employee. This column uses the icon to identify applicants that were previously employed by your company.<br><br>Click to view the following the applicant's separation details and all previously held positions within your company, including the corresponding dates. |
| **Name** | This is the applicant's name. |
| **H** | This stands for Hire Eligibility. It is based on the answer selected by the recruiter in the Eligible for Re-Hire or Eligible for Hire question during off-boarding or termination process, or when a recruiter dispositions a candidate to change the Status of that candidate's application. |

| Field | Description |
|---|---|
| | You may see one of the following flags in this column, depending on the hire eligibility type. Click the flag to view the details.<br>▪ : This indicates that the applicant is eligible for re-hire/hire.<br>▪ : This indicates that the applicant is not eligible for re-hire/hire. There is a setting that can enforce the flag of not eligible for hire. If this setting is switched on, you will not be able to hire someone with this flag.<br>▪ : This indicates that the applicant is eligible for re-hire/hire, but on a conditional basis.<br>In the Details screen, you can remove the Hire Eligibility flag by selecting the **Remove this flag** check box. |
| **Description** | This displays the description entered by the applicant or job seeker on the résumé profile or application form. |
| **Location** | This indicates the city, state or province of the job seeker |
| **Desired Compensation** | This displays the amount entered by the applicant on the résumé profile or application form. |
| **Relo?** | This displays the job seeker’s willingness to relocate and picks up the value entered by the applicant on the résumé profile or application. |
| **Created** | This displays the date the résumé was entered into the system |
| **Last Modified** | The displays the date the résumé was last modified |
| **Action** | This contains options that are available to you for the selected job seeker.<br>▪ **Activity:** Select this to view the activity history of that job seeker. It lists all the requisitions the applicant applied to as well as the applicant’s current status. |

### Perform Bulk Actions on the Pooled Résumés Screen

You can perform bulk actions and edit multiple job seekers at once.

**Contents**

| Field | Description |
|---|---|
| **Remove from Pool** | Select this to remove job seekers from the pool. |
| **Compare Selected** | Select this to compare one or more job seekers from the list. |

| Field | Description |
|---|---|
| **Send a Letter** | Use this to send an email to the selected applicants/job seekers. |
| **Send Me a Printable Batch** | Use this to send the selected résumés to your email in PDF format. |
| **Invite to Submit Résumé to Requisition** | Select this to invite one or more job seekers to submit his/her résumé to a particular Requisition. |
| **Add as a Candidate to this Requisition** | Select this to attach one or more job seekers to a particular requisition in the Candidate status. |
| **Route Résumés** | Use this to route the candidate for processing by other users or, if DTM is configured to route résumés as PDF attachments, to other email recipients. You can also include a comment to send along with the résumés. |
| **Add to Another Pool** | Select this to place one or more job seekers into a specific pool. |

*Compare Selected Candidates*

You can do a comparison of the individuals you selected from the previous list. A variety of information will be displayed including last performance rating (if applicable), competency gap, skills gap, location, and preferences.

When performing a candidate comparison against an incumbent employee, the incumbent is denoted by a **Star** icon.

To view the details of the Competency and Skills gaps, click **Show Details** under the **Competency Gap** column or the **Skills Gap** column.

**Actions**

| Field | Description |
|---|---|
| **Apply to Job** | Use this to add the selected résumés as candidates to the job shown above the table. |
| **Remove from List** | Use this to remove applicants from list of new résumé and mark them as declined for this requisition.<br>Using this action does not remove the résumé from the requisition or the résumé database. The résumé is still accessible via the **Historical View**.<br>Deltek Talent Management will present you with a list of rejection reasons to select from. See complete details under Remove As Candidate. |

| Field | Description |
|---|---|
| **Change Status** | Use this to change the status or disposition all those selected. This option is available only on the Active Candidates screen. |
| **Send a Letter** | Use this to send an email to the selected applicants/job seekers. |
| **Send a Printable Batch** | Use this to send the selected résumés to your email in PDF format. |
| **Request Assessment** | Use this to send a request to your company's assessment provider to initiate the assessment process for the selected individuals.<br>You will not see this option if your company did not purchase assessment integration. |

### Personalize and Filter Pooled Résumés

You can personalize the screen to display only specific résumés.

**To filter pooled résumés and customize the listing displayed on the screen, complete the following steps**

1. Click **Filter**.
2. Enter your filter selections from the following fields:
   - **Limit Job Seekers**: This limits the listing to job seekers who fall under either one of the following categories:
     - With Answers
     - Without Answers
   - Single Line type questions have two filter fields:
     - Contains (the following text)
     - WITHOUT the following (text)
3. Click the **Filter** button.

## Add a Résumé Screen

Use this screen screen to upload a résumé to the database, or to add an account manually by filling the fields on this screen. Your user account must have the necessary access rights in order to use this function and upload résumés.

**If you don't have a résumé/CV for this seeker, you can manually enter information in the fields on the screen, then submit this form as is.**

> **Important: If you enter a job seeker this way, the job seeker will not appear in searches and will only be accessible from the View Job Seekers Without a Résumé/CVscreen.**

**To upload a resume, complete the following steps:**

1. Click **Recruiting** » **Résumés** » **Add a Résumé**.
2. Click the **Upload Résumé** button.
3. In the **This résumé is written in** field, select the correct language.
4. In the **Find the résumé** field, click **Browse** to locate the résumé file.
5. Double click the filename, or select it and click **Open**.
6. Click **Continue**.
7. In the**Additional Actions**drop-down list, select one of the following additional steps if necessary, and click **Continue**.

| Option | Description |
|---|---|
| **Enter Résumé** | Select this to proceed to the Enter Résumé screen and upload a résumé file. |
| **Invite to Submit Résumé to Requisition** | Use this to invite the selected individuals to their résumé to a particular requisition. Each selected individual will receive an email with a link to the requisition. |
| **Add as a Candidate to this Requisition** | Select this to add the job seeker to an active requisition. |

## Manually Add Résumé Details

If you don't have a résumé/CV for this seeker, you can manually enter information in the fields on the screen, then submit this form as is.

**If you enter a job seeker this way, the job seeker will not appear in searches and will only be accessible from the View Job Seekers Without a Résumé/CVscreen.**

**To manually enter contact information for a job seeker, complete the following steps:**

1. On the Add a Résumé screen, enter information in the following fields.

| Option | Description |
|---|---|
| **First Name** | Enter the job seeker's first name. |
| **Middle Name** | Enter the job seeker's middle name. |
| **Last Name** | Enter the job seeker's last name. |
| **Referral Source** | Select the referral source from the drop-down list. |

| Option | Description |
|---|---|
| **Address One** | Enter the job seeker's address. |
| **Country** | Enter the country of residence. |
| **ST/PR** | Enter the job seeker's state or province. |
| **City** | Enter the city |
| **Zip/Postal Code** | Enter the postal code. |
| **Front End(s)** | Select the Front End to associate with this job seeker's information. |
| **SSN** | Enter the job seeker's social security number. |
| **Mobile Phone Number** | Enter the mobile phone number. |
| **E-mail** | Enter the job seeker's email address. |
| **Confirm E-mail** | Retype the email address to confirm it. |

2. In the **Additional Actions** drop-down list, select one of the following additional steps if necessary, and click **Continue**.

| Option | Description |
|---|---|
| **Enter Résumé** | Select this to proceed to the Enter Résumé screen and upload a résumé file. |
| **Invite to Submit Résumé to Requisition** | Select this to send an email invitation to the job seeker to submit an application to an active requisition |
| **Add as a Candidate to this Requisition** | Select this to add the job seeker to an active requisition. |

## Bulk Upload Screen

Use this screen to upload résumés in bulk if the information for the résumé has been stored in a .CSV file.

**To [insert task]:**

1. To upload résumés in bulk, complete the following step:
2. Click **Recruiting** » **Résumés** » **Bulk Upload**.
3. If you have not yet created a CSV file, open a spreadsheet application, such as Microsoft Excel and use the following column headings:
   - Email
   - Password
   - first_name
   - last_name
   - middle_initial
   - Suffix
   - Address1
   - Address2
   - City
   - State
   - Zip
   - Country
   - Phone1
   - Phone2
   - Description
   - Résumé/CV
4. Save the spreadsheet with a .csv extension.
5. On the Bulk Upload Upload screen, click **Browse** to locate the file.
6. In the file search screen, double click or select the file name and click **Open**.
7. Click **Upload File**.
8. Click **Please review the batch uploaded résumé/CVs before adding them to the system** link to ensure that the information uploads correctly.
9. For each row, click **Accept**, **Edit**, or **Delete**.
10. Alternatively, you can scroll down to the bottom of the screen and click **Accept** or **Reject** to disposition all the rows in the list.
11. Click **Submit** to complete the upload process.

## DOI Recruiter Submissions Screen

Use this screen to view accounts that a recruiter has uploaded, which are still pending acceptance by a candidate.

**To display the DOI Recruiter Submissions screen, complete the following steps:**

Click **Recruiting** » **Résumés** » **DOI Recruiter**.

### Contents of the DOI Recruiter Submissions Screen

The DOI Recruiter Submissions screen contains the following information.

**Contents**

| Field | Description |
|---|---|
| **Job Seeker Name** | The name of candidates who have not yet completed the acceptance of an upload. |
| **Creator** | The name of the person who uploaded the résumé. A recruiter will see only his or her name. An administrator can select a name from a list of recruiters with invitations to candidates still pending. |
| **Date Created** | The date the résumé was uploaded. |

# Contacts

Use this menu to manage contacts.

A Contact is an individual who is not flagged as Candidate. Contacts can be manually entered or imported from the Sheila Graco Associates (SGA) Executive Tracker, if applicable.

## Add a Contact Screen

Use this screen to add contacts to the database.

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

1. Click **Recruiting** » **Contacts** » **Add Contact**.
2. Complete the form provided to add a new contact.

   At this initial stage, you are required to enter only the first name, the last name, and either the email address or the phone number. However, Deltek recommends that you enter as much information as are available.

## Import from Facebook

Importing contacts from your Facebook profile is easy with the Facebook integration feature.

**To import contacts from Facebook, complete the following steps:**

1. On the Add a Contact screen, click the **Import from Facebook** button. This launches Facebook's login page in a new browser window.
2. On the Add a Contact screen, the fields are automatically populated with your Facebook login information. Click **Allow**.
3. If the fields are not automatically populated, enter your Facebook login information, then click the **Allow**.
4. Refresh the Manage My Contacts screen to see your Facebook contacts in the listing.

## Import Contacts

You can import contacts information stored in your computer.

**The files must be saved as .CSV files to upload. During the import process, Deltek Talent will allow you to pick the columns from the CSV file and relate them to system columns so that the contact information are parsed correctly.**

**Required columns that are needed to upload are the First Name, Last Name, Email Address, and Source.**

**Download the sample_contacts_upload.csv sample file provided on the Import Contacts screen and use it as a guide.**

**To import contacts, complete the following steps:**

1. In the Upload CSV File field, click **Browse**.
2. Locate the file in your computer, then click **Open**.
3. Click **Upload**.
4. Map the imported fields against Deltek Talent system fields. The rows in the **File Content** column pertain to the information located in the upload file, so for example, your file contains a **First Name** column, in the **File Content** column, you will see the **First Name** row.
   a) In the **Contact Info** column, click the drop-down list and select **First Name**.
   b) Repeat step 4.a for every row in the **File Content** column. If a row does not have a logical match in the **Contact Information** column, leave it in the default value of **None**.
5. After you correctly match all **File Content** columns, select the **Check to ignore the first row because it is a header row** check box if your file has a header row.
6. Click **Import Contact List**. Your contacts will now be shown on the Manage Contacts page.
7. Refresh the Manage My Contacts screen to see your imported contacts in the listing.

## Manage Contacts Screen

Use this screen to display all the contacts entered into the database.

The screen allows you to perform the following actions.

**Actions**

| Field | Description |
|---|---|
| **Edit** | Use this action to edit the contact details. |
| **Email** | Use this action to automatically launch your default email application and send an email addressed to the contact. |
| **Send a letter** | Use this action to select a letter template. |
| **Add résumé & attach to a requisition** | Use this action to add a résumé file on behalf of the contact and attach the contact as a candidate in a requisition. Valid file formats include .doc, .docx, .wpd, .rtf, .txt, HTML, and text-based PDF. |
| **Delete** | Use this action to delete the contact from the database. |

**Bulk Actions**

You can also perform the following bulk actions.

| Field | Description |
|---|---|
| **Send a letter** | Use this bulk action to send a letter to a group of contacts. |
| **Remove Contact from this List** | Use this action to remove selected contacts from the Contacts list. |
| **Add as Candidate** | Use this action to attach a contact to a requisition. Deltek Talent then flags the contact as a Candidate. |

# Monster

The cross-posting engine enables you to easily post requisitions to popular external job boards with one click.

The cross-posting reports feature gives recruiters, administrators, and executives a view of the external job posting activity of the recruiting team. For information on cross-posting reports, see Appendix D: Cross-Posting Reports.

## Search Monster Screen

This screen lets you search and import résumés from the Monster.Com résumé database if your company purchased the Monster integration feature.

**If your company purchased the Monster integration feature, you can search and import résumés from the Monster.Com résumé database.**

> **Note: If your company enabled the Office of Federal Contract Compliance Programs OFCCP tracking feature, you must first select a requisition before you can search the résumé database.**

> **Note: Résumés from the Monster Diversity Board have a Diversity flag indicated in the résumé view. Persons who indicated veteran status on Monster have a Veteran flag indicated in the résumé view.**

**To perform a classic Monster search:**

1. Click **Recruiting** » **Monster** » **Search Monster**.
2. On the search form, you can set the search results listing to sort according to the following criteria:

| Option | Description |
|---|---|
| **Date** | Select this to sort results according to the date the résumé was created on Monster. |
| **Location** | Select this to sort results according to location proximity. This option appears only if you entered a zip code and radius in the Search by Location section of the search form. |
| **Keyword Relevance** | Select this to sort results according to keyword relevance. |

3. To view a résumé, click the name in the **Résumé** column.

> **Note:** Each click counts as a **View** and will subtract from the number of views that your company purchased.
> In addition, the viewed résumé is saved from Monster into Deltek Talent.

### Bulk Import Monster Search Results

You can import more than one résumé at a time from the Monster Search Results list.

**To import résumés in bulk, complete the following steps:**

1. On the Monster Search Results screen, select the check box next to the name that you want to import.

2. Scroll to the bottom of the screen and click **Import Selected Résumés**.
3. After the résumés are imported into Deltek Talent, a pop-up screen displays with the following additional bulk actions:
   - Send a Printable Batch
   - Route the Résumés
   - Add as a Candidate to a Requisition

   > **Note:** If DTM is configured in System Settings to route résumés as a Link to Résumé Dashboard instead of as as a PDF attachment, then the Route the Résumés option is not visible.
4. Select the check box next to the résumé name, then select the action, and click **Submit**.

### Save as Résumé Search Agent

You can save your Monster.com search criteria as a search agent.

You can manage these agents on the same screen as the private résumé database using the **Recruiting** » **Résumés** » **Résumés Search Agents** screen.

## Monster Power Résumé Search Screen

This screen lets you run a power search from the Monster.Com résumé database if your company purchased the Monster integration feature.

**To run a Power Résumé Search:**

1. Click **Recruiting** » **Monster** » **Power Résumé Search**.
2. Complete the fields in the search form.
   On the Search Results Screen, you will see a score scale. This indicates how closely the candidate matches your search criteria as compared to other candidates in the résumé database.

   A summary of top skills displays for each candidate, along with total years of experience information for each skill.

   Some of the skills may be flagged with green dots. These dots indicate that the skill matches one or more of the keywords that you entered as search criteria.
3. Click the candidate's name or résumé title to view a résumé.
4. If needed, narrow down your search further by adding, removing, or revising the search criteria on the left sidebar.

# Monster Cloud Search Screen

This search feature lets you search the Monster.Com database.

> **Note: Unlike on the Search Monster screen, Boolean operators do not work on the Monster Cloud Search screen.**

**To perform a Monster Cloud Search:**

1. Click **Recruiting** » **Monster** » **Monster Cloud Search**.
2. Enter your search criteria in the search form, but pay particular attention to the following search criteria.

| Option | Description |
|---|---|
| **Job Title** | Enter the title. As a general rule, make the **Job Title** field broader and then use the **Skills/Keywords** field to narrow down the focus.<br>If there are no job titles in the database that exactly match the value that you entered, then the search engine will use keywords to find an exact match. |
| **Years of Experience** | Enter the minimum number of years required for the position. Populating this field does not exclude candidates. It simply factors in years of experience information into the ranking of the candidates. If skill level or salary is a concern, then this is an excellent criteria to use in your query. |
| **Location** | Enter the location in this free-form field. This gives you the flexibility to enter location information, along with a proximity radius.<br>This field accepts county, city, state, zip codes, and area code information. It also accepts abbreviations and colloquial terminology, such as **Bay Area**, for example. |
| **Skills/Keyword** | Enter additional keywords. This field helps you to hone in on candidates who have a specific skill set.<br>Enclose keywords or keyword phrases in quotation marks to set them as required. This ensures that only résumé that contain those specific words are displayed in the search results screen. |
| **Résumés Updated** | Enter a date range if you want to limit your search results to a specific time frame. |

## Advanced Search Options

Follow these tips to maximize the search options on the Monster Cloud Search screen.

Use the Top Schools Feature. In the **School** section of the search form, type **Top** to see the top schools in the location that you selected.
Use the type-ahead feature to capture variations of school names.

### Best Practices for Efficient Search Flow

Note the following to maximize search flow efficiency on the Monster Cloud Search screen.

To ensure that you generate the best possible results, keep in mind the following:

- During the first pass of the search process, go broad and wide. Start with a generic title and just a few skills/keywords.
- Review the results and flag potential candidates.
- View the **Candidate Detail** of each potential candidate, and group the résumés.
- Once you have organized résumés into groups, click **Advanced Search Options**.
- Consider using more specific or less specific keywords, depending on whether the search results listing returned too many or too few candidates.
- To broaden your search, clear the **Job Title** field.
- Select the desired candidates and import them into your system

## Monster Cloud Analytics Screen

This screen allows you to use Monster.Com's Cloud Search function to view and analyze your talent pools, plan for talent pipelines, and model individual talent profiles.

**To generate a Monster Cloud Analytics report:**

1. Click **Recruiting** » **Monster** » **Monster Cloud Analytics**.
2. Select the appropriate values in the following drop-down lists:
   - **Select database**
   - **Select Country**
   - **Select Report Type**
   - **Select a requisition**
3. Click **Run**.
   The results screen displays a tabbed view of the different report types. The report type that you selected initially is displayed with graphical data on top of the screen. A tabular listing is displayed below the graph.
4. Use the Sidebar Search feature to refine the results.
5. Save, email, print, or download the report as needed.

# Career Builder

If your company purchased the CareerBuilder integration feature, you can search and import résumés from the CareerBuilder.Com résumé database.

The cross-posting engine enables you to easily search and post requisitions to popular external job boards, such as CareerBuilder, with one click.

**Note:** If your company enabled the Office of Federal Contract Compliance Programs OFCCP tracking feature, you must first select a requisition before you can search the résumé database.

The cross-posting reports feature gives recruiters, administrators, and executives a view of the external job posting activity of the recruiting team. For information on cross-posting reports, see Appendix C: Cross-Posting Reports

## Search CareerBuilder Screen

If your company purchased the CareerBuilder integration feature, you can search and import résumés from the CareerBuilder.Com résumé database.

**If your company purchased the CareerBuilder integration feature, you can search and import résumés from the CareerBuilder.Com résumé database.**

**To perform a CareerBuilder search:**

1. Click **Recruiting** » **CareerBuilder** » **Search CareerBuilder**.
2. Complete the fields in the search form, then click **Search**.
   The results page will display all those individuals that met the criteria you entered.
3. Click the individual's name to save the résumé into Deltek Talent.
4. Click **Import Résumé** to add résumés to your company's database.

# Offers

This menu allows you to view and manage the offers you have extended to candidates, the approvers for each offer (if any), and each offer's current status.

You may have the option to act on behalf of the candidate. If so, options to approve or reject the offer will appear in this menu.

## My Offers Screen

Use this screen to view all the offers you have extended to candidates.

The My Offers screen displays a table with the following columns.

**Contents**

| Field | Description |
|---|---|
| **Date Created** | This column indicates the date when the offer was created. |
| **Candidate** | This column indicates the candidate’s name. |
| **Req #** | This column displays the requisition ID information. |

| Field | Description |
| --- | --- |
| **HM** | This column displays the hiring manager’s name. |
| **Offer Status** | This column indicates the status of the offer. Depending on your user access rights, you may have the option to act on behalf of the candidate. If so, options to approve ( ) or reject ( ) the offer display in this column. |
| **Relationship** | This column indicates the relationship between you and the recipient of the offer. |
| **Approvers** | This column displays the names of the approvers are and the date when action, if any, were taken. Click the **Approvers** icon to expand the list. |
| **Onboarding** | Initiated This column displays the date when the onboarding process was initiated. |
| **Actions** | This contains the available options for offer.<br>▪ **Offer Details**: Select this action to view the details of the offer.<br>▪ **Print to PDF Document**: Select this action to print the offer letter in PDF format.<br>▪ **Resubmit**: Select this action to resubmit an offer, if the initial offer was rejected.<br>▪ **Archive**: Select this to archive the offer after the candidate has already accepted the offer.<br>▪ **Onboarding Details**: Select this to initiate the onboarding process or view the Onboarding Details screen. This action appears only after the hiring process is complete. |

**Buttons**

| Field | Description |
| --- | --- |
| **Include Archived Offers** | Click this to view all archived offers. |
| **View Everyone's Offers** | Click this to view offers made by employees who report directly to you. |

## Filter the Displayed Offers

You can filter the screen to display only specific offers.

**To [insert task]:**

1. Click **Recruiting** » **Offers** » **Offers**.
2. Click **Filter**.
3. Enter your filter selections using the following fields:

- **First Name**: Use this to filter offers based on a full or partial search of candidate first names.
- **Middle Name**: Use this to filter offers based on a full or partial search of candidate middle names.
- **Last Name**: Use this to filter offers based on a full or partial search of candidate last names.
- Date Offer Created
  - **From**: Leaving this date field blank instructs the filter to include results from the earliest entry date in the database to the date specified in the **To** field.
  - **To**: Leaving this field blank instructs the filter to include results from the date specified in the **From** field to today's date.
- **Show only those pending Initiate Onboarding action**: Select this check box to instruct the filter to display only offers where the onboarding processes have not yet been initiated.
- **Req #**: Use this to filter offers according to full or partial requisition ID number matches.
- **HM**: Use this to filter offers according to the assigned hiring manager.
- **Job Title**: Use this to filter offers according to full or partial job title matches.
- **Offer Status**: Select one or more values from this multi-select field.

4. Click the **Filter** button.
5. Click **Click Here** to reset your view to the default listing.

## Create Offers

Follow these steps to create offers.

**To create offers:**

1. Click **Recruiting** » **Candidates** » **Active Candidates**.
2. In the **Select Job** field, either type a keyword or select from the drop-down list options, then click **Go**.
3. Click the name of the Candidate for whom you would like to create an offer.
4. Click **Workbench**, then click **Extend an Offer**.

   > **Note:** The **Status** that triggers the **Extend an Offer** action depends on the Recruiting workflow. However, it is commonly triggered by the **Offer Extended** status.

5. **Step 1: Define Offer**. This step allows you to define the offer and benefits that the candidate will receive upon acceptance of the offer.

   a) Enter the appropriate values in the following fields:

   - **Salary Type**

- **Currency Type**
- **Start Date**

b) Complete any remaining required fields, and click **Next**.

6. **Step 2: Select Offer Letter**. In the **Offer Letter** field, select the email template.

   a) Click to view a copy of the letter that will be sent to the candidate.

   b) Click to display the Edit Letter Template window that you can use to edit the letter. While in the Edit Letter Template window, you can click **Available Merge Codes** to view any additional merge codes that you may need.

   c) Select whether the Deltek Talent will send the candidate the actual offer letter in an email or only an offer notification that an offer was extended.

7. **Step 3: Select Approvers**. In this step, you will see a list of approvers that were assigned at the Workflow level. You will also have options to select an approval chain or add internal and/or external approvers.

   a) Select **Available Approval Chains**, if needed.

   b) In the **Type** field, select one of the following:

   - **Serial**: This approval chain type follows a specific order. In the pop-up window, rearrange the approvers by dragging and dropping the rows into the appropriate order.
   - **Parallel**: This approval type allows approvals to happen concurrently, so no specific order needs to be defined.

   c) Click **Internal Approvers** to add any additional internal approvers, if necessary.

   d) In the **Enter External Approvers** text field, add the email of any external approvers, if necessary. Separate each email address by entering it in a new line.

8. Click **Submit** to send the offer.

## Approvals

Use this screen to view all Pending Approvals that are waiting for review for Requisitions and Offers if using the Recruiting module and Appraisals if using the Performance module.

This screen displays pending approvals for requisitions, offers, and performance appraisals if:

- You are set as an approver, regardless of where the item is in the approval chain; or
- You have permissions to view all of these items even though you are not an approver.

The Appraisals and Offers section appears only if you use the Performance Management system.

Also, depending on how you accessed the screen, the corresponding section will be expanded by default and the other sections collapsed. For example, if you come to the page via **Recruiting** » **Requisitions** » **Approvals**, then the Requisitions section will be expanded.

### Personalize and Filter Approvals

You can personalize the Manage Requisitions screen to display only those columns that you find relevant.

**To refine the displayed requisitions, complete the following steps.**

1. Click **Filter**.
2. Enter values in the following fields, as applicable.

| Field | Description |
|---|---|
| **Section to search** | In this field, select from the following. You can make more than one selection:<br>▪ **Requisitions**<br>▪ **Offers**<br>▪ **Appraisals**<br>Selecting **Requisitions** or **Offers** in this filter criteria brings up the following subfilters:<br>▪ **Requisition Title**<br>▪ **Req #**<br>▪ **Candidate Name**<br>Selecting **Appraisals** in this filter criteria brings up the following subfilters:<br>▪ **Employee**<br>▪ **Job Title**<br>▪ **Manager**<br>▪ **Show only Appraisals Assigned to me** |
| **Include History** | Select this check box if you want to include the timestamp of all previous approvals. |
| **Organizational Unit** | In this field, select the specific organization unit, if necessary. |
| **Approvers** | In this field, click **Add** to select specific individuals to include the list of approvers, if necessary. |

3. Click **Clear Filter** to reset your view to the default listing.

## Hires

This menu displays newly-hired employees who are currently in the onboarding process.

## Recent Hires Screen

Use this screen to view your new hires. By default, the screen displays employees who were hired within the last 30 days. Use the filter to refine the listing if needed..

The Recent Hires screen displays a table with the following columns.

**Contents**

| Field | Description |
|---|---|
| **Filter** | Click **Filter** to expand a list of fields to search on to narrow the list of recent hires. |
| **Onboarding Initiated** | This column displays either the date that onboarding was initiated or the value Not Started if the onboarding process is not yet initiated. |
| **Actions** | This column contains the available options for the new employee.<br>▪ **Update date(s)**: Select this to update any changes you entered in the employee's hire date or start date information.<br>▪ **Enter Cost per Hire details**: Select this to enter cost per hire details.<br>▪ **Initiate Onboarding**: Select this to initiate the onboarding process or access the onboarding details for this employee.<br>▪ **Enroll in New Hire Curriculum**: Select this to enroll the employee in the New Hire Curriculum. This is available if you organization uses the Deltek Talent Learning module. |

### Perform Bulk Actions on the Recent Hires Screen

You can perform bulk actions by scrolling to the bottom of the screen and selecting one of the following options.

**Contents**

| Field | Description |
|---|---|
| **Update Date(s) Entered Above** | Select this to enter the **Hire Date** and **Start Date** for one or more employees. |
| **Send a Letter** | Select this to send an email to one or more employees. |
| **Send Me a Printable Batch** | Use this to send the selected résumés to your email in PDF format. |

# Onboarding

The Onboarding feature consists of two screens, the Onboarding Tasks screen and the Active Onboarding screen.

## Onboarding Tasks

This screen displays the onboarding tasks assigned to the currently logged in user.

### Display the Onboarding Tasks Screen

You can follow this set of steps to display the Onboarding Tasks screen.

**To access the Onboarding Tasks Screen:**

On the Main Menu, click**Recruiting** » **Onboarding** » **Onboarding Tasks.**

### Contents of the Onboarding Tasks Screen

This screen displays the onboarding tasks that you are assigned to complete.

**Columns**

The Onboarding Tasks screen displays a table with the following columns.

| Column | Description |
|---|---|
| **Task** | This displays any onboarding form that requires action from the user. |
| **Due Date** | This date is calculated based on the new hire's start date and the **Due** timeframe selected for that onboarding form.<br>An **Overdue** flag marks incomplete tasks that have exceeded the due date. |
| **Name** | This indicates the name of the new hire who is being processed for onboarding. |
| **Req #** | This displays the requisition number. |
| **Job Title** | This indicates the title of the job. |
| **Location Name** | This is the location or locations indicated for the job. |
| **Start Date** | This indicates the new hire's start date. |
| **Completed** | This contains a **Complete** action button to launch the onboarding form, if the task is still pending. Otherwise, this displays the completion date. |

# Active Onboarding

The Active Onboarding screen displays those new hires who are currently in the Onboarding process.

## Display the Active Onboarding Screen

You can follow this set of steps to access the Active Onboarding screen.

**To access the Active Onboarding screen:**

On the Main Menu, click**Recruiting** » **Onboarding** » **Onboarding Queue.**

## Contents of the Active Onboarding Screen

This screen displays newly-hired employees who are currently in the onboarding process. Use the filter to refine the listing if needed.

**Columns**

The Onboarding Queue screen displays a table with the following columns.

| Column | Description |
|---|---|
| **FE** | Former Employee |
| **New Hire** | Employee name |
| **H** | If the employee is a former employee, this column indicates whether or not the candidate is eligible to be re-hired. Options are eligible, not eligible, conditional. |
| **Hire Date** | This displays the hiring date if a candidate has been hired, and this will be blank if not. |
| **Job Code** | This displays the job code. |
| **Req #** | This displays the requisition number. |
| **Job Title** | This indicates the title of the job. |
| **HM** | This displays the hiring manager |
| **Date Initiated** | This shows the date the onboarding process was started. |
| **Onboarding Status** | This column displays a graphic illustrating the newly-hired employee’s progress, along with a document completion checklist. |
| **# of Documents** | This column displays the number of documents and forms included in the newly-hired employee’s onboarding packet. |
| **Completed Documents** | This column displays the number of documents and forms that the newly-hired employee has completed to date.<br>Deltek Talent notifies you by email whenever the newly-hired employee completes all the documents the onboarding checklist. |

| Column | Description |
|---|---|
| **Date Completed** | This shows the date the onboarding process was complete. |
| **Actions** | This column displays the available actions pertaining to the newly-hired employee's onboarding process. |

**Actions**

The **Actions** column contains the following actions.

| Action | Description |
|---|---|
| **View Onboarding Details** | Select this to access the newly-hired employee's onboarding details.<br>This opens the |
| **Print All Onboarding Documents** | Select this to print the newly-hired employee's onboarding document packet. |

## Onboarding Details

This screen allows you to complete, view, and/or route completed documents as well as add more documents to the onboarding packet if needed.

### Display the Onboarding Details Screen

You can follow this set of steps to access the Onboarding Details screen.

If the **Edit Completed Onboarding** feature is enabled for your user group, you can edit completed onboarding forms from this screen.

**To access the Onboarding Details screen:**

1. On the Main Menu, click**Recruiting** » **Onboarding** » **Onboarding Queue.**
2. From the Active Onboarding screen, in the**Actions** column, click .

### Contents of the Onboarding Details Screen

The Onboarding Details screen contains the following sections.

**Documents Section**

This section of the Onboarding Details screen displays a table with the following columns.

| Column | Description |
|---|---|
| **Name** | The name of the document that was sent to the candidate. |
| **Type** | The type of document sent, for example Form or Document. |

| Column | Description |
|---|---|
| **Due Date** | The date the form must be completed. |
| **Date Sent** | The date the document was sent to the new hire. |
| **Completed** | The date the document was completed. |
| **Routing History** | This column displays the dates when a document is sent and to whom.<br>The **Complete on Behalf of Candidate** link in this column allows you to access the document and complete any requested information for the individual. This step can be very useful for candidates that have limited access to the internet.<br>You may also have the option to complete the I-9 Form's Section 2 or 3. See I-9 Form Document Completion. |
| **Route Documents** | This column allows you to route the document to a group of recipients or to a specific email address. |
| **Actions** | This column displays the available options for the document. Click to view the onboarding document. Click to route the document to a group of recipients or to a specific email address. If the **Edit Completed Onboarding** feature is enabled for your user group, click to edit completed onboarding forms. You can also archive duplicate onboarding documents and forms. |

### Dynamic Forms

This section of the Onboarding Details screen lists the forms that the newly-hired employee must complete.

If the **I-9 Form Document Completion** is enabled, you will have the ability to complete Section 2 or 3 of the New Hire's I-9 form.

If Deltek Talent detects that a former employee is being re-hired, then you will see Section 3 rather than Section 2 displayed on this screen.

Click **Complete Section** to launch the I-9 form input screen.

## Archive Duplicate Onboarding Documents

You can archive duplicate Onboarding Documents either individually or in bulk.

**To archive a document:**

1. On the Onboarding Queue screen, click .
2. On the Onboarding Details screen, follow these steps:

| Option | Description |
|---|---|
| **To archive a single document** | Click the **Archive Onboarding Documents & Forms** button under the Actions column. |

| Option | Description |
|---|---|
| **Archive two or more documents** | Select the document check box of the documents you want to archive, and then click **Archive Onboarding Documents & Forms** menu button. |

3. On the Archiving modal window, enter the **Archive Note** or the reason for archiving the document(s).

### Remove as Candidate

You can remove a candidate from the Onboarding Queue screen.

**To remove a candidate:**

1. On the Onboarding Queue screen, select the check box for the candidate of the candidate you want removed.
2. On the **Select** drop-down menu, select **Remove as Candidate**, and then click **Go**.
3. On the Remove from List screen, select a Rejection Reason.
4. Select a letter template and add a comment.
5. Click **Remove**.

### Change Candidate Status

You can change a candidate's status from the Onboarding Queue screen.

**To change a candidate's status:**

1. On the Onboarding Queue screen, select the check box of the candidate whose status you want to change.
2. On the **Select** drop-down menu, select **Change Status**, and then click **Go**.
3. On the Change Candidate Status screen, select the new status, and then click **Submit**.

## Procedures of the Onboarding Details Screen

You can perform several procedures from the Onboarding Details Screen, including adding a document to the Onboarding Checklist, routing documents and forms, initiating the onboarding procees, and archiving sessions.

### Add a Document into the Onboarding Checklist

You can follow this set of steps to add a document into a newly hired employee’s Onboarding checklist.

**To add a document into the newly-hired employee’s Onboarding Checklist:**

1. Click the **Add More Documents** button.

2. Check the box next to each document you want to add. Documents that have already been sent are marked Already Sent.
3. Select the **Due Date** that each document must be completed.
4. Click **Submit**.

   Deltek Talent notifies you by email whenever the newly-hired employee completes all the documents the onboarding checklist.

### Route Onboarding Documents and Forms

You can follow these steps to route onboarding documents and forms.

**To route onboarding documents and forms to selected users:**

1. In the For New Hire section, check the box for each document you want to send or re-send.
2. Click the **Route Onboarding Documents & Forms** button at the bottom of the screen.
3. Enter an external e-mail in the **E-mail** field
4. Select internal recipients from the **Select Recipient** list.
5. Click **Send**.

### Initiate the Onboarding Process

You can follow this set up steps to begin the onboarding process, when a candidate reaches the job offer stage.

On the Workbench tab of the **Recruiting** » **Candidates** » **Active Candidates** » **Résumé Dashboard** screen, you will see an **Initiate Onboarding** button in the **Tasks** section when the candidate reaches the job offer stage.

The status that triggers this action depends on the Recruiting workflow. However, it is commonly triggered by the **Hired** status.

The steps in the process may vary depending on the Recruiting workflow.

**To initiate the onboarding process:**

1. Click **Initiate Onboarding**.
2. **Step 1:** Initiate Process allows you to define training schedules.

   If your company uses the Deltek Talent Learning module, then there will be two additional options.
3. Click **New Hire Class Schedule** to view the class dates and coordinate the new employee’s start date with the new hire training schedule.
4. Select the **Enroll in New Hire Curriculum** check box to enroll the person into the New Hire Curriculum, if your organization has one.
5. If needed, complete other fields under the **Additional Details** section.

   The fields that display in this area vary by company and are set by system administrators.

6. Click **Next**.
7. On **Step 2: Select Documents**, select the forms and documents to include in the newly-hired employee's Onboarding Checklist.

   The **For New Hire** section lists the documents and forms intended for completion by the new hire. The **For Internal Completion** section lists the documents and forms intended for completion by existing users within your company. The items displayed in these two sections are determined by the Recruiting Workflow and/or any bespoke onboarding bundles created by your company's system administrator.
8. Select **Reuse previous I-9 record** to use a rehired employee's previously completed I-9 form.

   This option is available if the employee was rehired within three years from the date the employee previously completed the I-9 Form. If not enabled, the user may complete the I-9 Form anew.
9. Click **Add Ad Hoc Document** to select documents other than the ones listed on the screen.

   This option is available if configured in the Recruiting workflow.
10. Select the **Require a signature check box** for individual items, if necessary.
11. In the **Assign for Completion** column, click **Select** to edit the displayed list of users, if necessary.
12. If there is no pre-set date in the **Due Date** column, click , and select one of the following values:
    - **Due Before**
    - **Due On**
    - **Due After**

    Then, assign the **# of Days** value in order to set a completion deadline for that document or form.
13. Click **Next**.
14. On **Step 3: Select Letter**, select an email template.
15. Click to view a copy of the letter that will be sent to the candidate.
16. Click to modify the letter.
17. Select the **Request Return Receipt** check box, if necessary.
18. Click **Next**.
19. On **Step 4: Select New Hire Notification,** select who will receive a notification that this new hire is coming on board.
20. Click **Add Notification** to select another group and email template to send.
21. Click to view a copy of the email notification that will be sent to the candidate.
22. Click to modify the email notification.
23. Click **Next**.
24. On **Step 5: Review,** review the information you entered and selected.

25. Click **Edit** to enter your changes in the **For New Hires** section, if necessary.
26. Click **Add More Documents** in the **For Internal Completion** section, if necessary.
27. Click **Initiate Onboarding**.

    You can view the newly-hired employee’s progress on the Active Onboarding screen, which you can access by clicking **Recruiting** » **Onboarding** » » **Onboarding Queue**.

### Archive Onboarding Sessions

After a newly-hired employee completes the onboarding process, you can archive the session to trim down your Onboarding Queue to list only those pending onboarding.

Archived newly-hired employees appear in the **View Archive** section of the Onboarding Queue screen.

You can perform bulk actions by scrolling to the bottom of the screen and selecting one of the following options.

| Bulk Action | Description |
| --- | --- |
| **Archive** | Select this to archive the onboarding session of multiple newly-hired employees.<br>You can archive only completed onboarding sessions. |
| **Print All Onboarding Documents** | Select this to print all the onboarding documents for the selected newly-hired employees. |

## E-Verify User Overview

E-Verify is an online employment eligibility verification system. It is operated by the United States Department of Homeland Security (DHS) in partnership with United States Social Security Administration (SSA). E-Verify allows businesses to check if their US- and foreign-born employees are eligible to work in the US.

E-Verify is an Internet-based system that compares information from the employee's Form I-9, Employment Eligibility Verification to the employee's records with the U.S. Department of Homeland Security (DHS) and with the Social Security Administration (SSA) records. The purpose of the E-Verify system is to confirm that the employee is authorized to work in the United States.

## Main Dashboard

When the E-Verify feature is enabled and the user has been given access to create and manage cases, the two options display on the Main Dashboard: **Alerts** and **Widget**.

### Alerts

All open cases display an alert in the top area of the Main Dashboard.

It is very important to E-Verify that cases are closed, so this link will display for each individual until the case is closed. These alerts cannot be hidden. Clicking the link will direct the user to the last completed step in the E-Verify wizard.

### Widgets

This widget is designed to bring the user's attention to cases that need action.

- **Open Cases to be Closed**: This is a count of all the cases that are ready to be closed but have not yet been.
- **Cases with New Updates**: This displays the number of cases that have had a change in case result. These updates come directly from E-Verify and are sent back to the system depending on the situation with a particular case.

Both counts are linked to the **E-Verify** » **View Cases** screen with the filter pre-set to return only those relevant cases.

Deltek highly recommends that all users utilizing E-Verify have this widget added to their Dashboard. If the user has the E-Verify Case Alert Widget feature enabled for his/her Group, then the option to add this widget is available. To add this widget, click **Get More Widgets** from the **Main Dashboard**.

## Accessing E-Verify

Use the E-Verify process to view the current status of a new hire.

**To access the E-Verify interface**

Click **Recruiting** » **Onboarding** and do one of the following:

- Click **Onboarding Queue**.
- Click **Onboarding Tasks**.

#### Onboarding

The action to begin the E-Verify process to view the current status of a new hire is accessible from two screens: **Active Onboarding: New Hire in Process** and **Onboarding Details** for that new hire.

> **Note:** The option to begin the E-Verify process is presented once **all** of the sections on the Form **I**-9 have been completed in the system.

*Active Onboarding*

On this screen, the Verification Status column displays different information based off where the new hire is in the verification process.

- After all sections of the Form **I**-9 are completed, an option to verify the employee displays. Clicking the **Verify employee using E-Verify** link will take the user to the first step in the E-Verify process.

  Under this link is the due date for the verification.

  > **Note:** E-Verify requires that the verification process be initiated no later than the **third business day** after the employee starts work for pay. The system calculates this date based off the new hire's start date entered on the **I**-9.

- After the E-Verify case has been initiated, the new hire's current status in the process displays. The status is linked to the Case Details screen. See Case Details.

*Onboarding Details*

After all the sections for Form **I**-9 are completed, the **Verify employee using E-Verify** link displays on this screen as well as the due date.

### E-Verify Process

Use the E-Verify Process to view the current status of a new hire.

#### E-Verify Cases

The E-Verify screen displays all the cases that the user has initiated or, if the user has permission to view all cases, all will display.

*Display the E-Verify Cases*

Follow these steps to display the E-Verify Cases.

**To display this screen:**

1. Click **Recruiting**.
2. Under **Onboarding**, click **E-Verify** under.

> **Note:** If the user does not have permission to view all cases, there will be no hyperlinks shown on the cases he/she did not create.

*Filtering the Cases Listing*

You can filter the cases listing can be filtered based on certain criteria.

The criteria includes:

- Case Verification Number
- Case Status
- Date Submitted From
- Date Submitted to
- First Name
- Last Name
- Submitted By

Clicking the links in the **Quick Filter** area will filter the list to show only those in the status selected.

The **Verification Status** column will reflect the status E-Verify sends back to the system regarding the verification of that person—whether it's a final status such as "Employment Authorized" or an interim status such as "DHS Verification In Process." This is linked to view the Case Details. See Case Details.

The **Case Status** indicates where that case stands, whether open, needs to be closed, or still in process. See below for the Case Status definitions.

The **Case Number** is hyperlinked to the step in the wizard process where the user left off.

> **Note:** If the hyperlink no longer displays, that means the case has been closed or you do not have access to view it.

*Search Case Status Definitions*

- **Open Cases**: Includes all cases that have not been closed, including those pending action by the Employer or Employee and certain cases with new updates
- **Closed Cases**: Includes all cases that have been initiated by a user and closed cases/ completed in E-Verify
- **Cases In Process**: Includes cases that are pending government action, such as referred cases
- **Cases with New Updates**: Includes cases that have been updated by the government and may require the employer to take action
- **Open Cases to be Closed**: Includes cases that have been completed and are ready to be closed

All closed cases can be archived so that the main listing contains only open cases. To archive, select the box beside the closed case and click **Archive** at the bottom of the table. Archived cases can be accessed via the E-Verify page title menu.

### Creating a Case

An E-Verify case must be created no later than the third business day after the employee starts work for pay.

If the employer learns that the employee has inadvertently failed to create a case by the third business day, the employer should bring itself into compliance immediately by creating a case for the employee.

> **Note:** Do not create a case for an employee hired before the effective date of your memorandum of understanding (MOU).

*Step 1: Initiate E-Verify*

To create a case, click the **Verify employee using E-Verify** link on either Onboarding screens to begin the first step of the E-Verify Wizard.

Step 1 is mainly a review step. The system pulls in the information entered from the Form I-9 and presents it on this step to confirm.

Review this screen carefully to ensure the data is correct before submitting. If there are any discrepancies, click **Cancel**. The Form I-9 will have to be updated with the corrected information and the E-Verify process should be started anew.

- There will be a few instances where there will be input fields on this form. One instance is when the case is created after the third business day from the start date noted on the I-9. E-Verify will require the selection of a reason:
    - Awaiting Social Security Number
    - Technical Problems
    - Audit Revealed that New Hire Was Not Run
    - Federal Contractor with E-Verify Clause verifying an existing employee
    - Other (If this is selected, then the **Other reason** field is required.)

Click **Submit Employee for Verification**, and click **OK** to send the information directly to E-Verify.

Photo Matching

Photo matching occurs while a case is being created in E-Verify.

It prompts users to compare an employee's List A photo document presented for Form I-9 with a photo displayed on the E-Verify screen. This helps ensure that the document provided matches records available to DHS.

The photo matching step happens automatically when you create a case for an employee who has presented a U.S. Passport, Passport Card, Permanent Resident Card (Form I-551), or

Employment Authorization Document (Form I-766) for Form I-9 completion. If the employee's Form I-9 information matches records available to DHS, E-Verify displays the employee's photo from the document presented.

Matching photos is easy—compare the photo displayed by E-Verify to the photo on the employee's actual document or a copy of the employee's document and determine if the photos are reasonably identical. The photos should be identical with only minor variations in shading and detail between the two photos based upon the age and wear of the employee's document and the quality of your computer monitor.

A watermark has been added to the photo displayed in E-Verify to prevent unauthorized use. The photo on the document presented by the employee will not have a watermark. Absence of a watermark on the document photo does not mean that it is not authentic.

Do not compare the photo displayed by E-Verify to the actual employee. Account for minor variations in shading and detail between the two photos, and select **Yes** or **No**. If "No Photo on this Document" displays, select **Yes**.

**Note:** If **No** is selected here, then a DHS Tentative Nonconfirmation will be the result.

After a selection is made, one of the following case results will appear:

- Employment Authorized
- DHS Tentative Nonconfirmation

Each case result requires different actions or steps to continue or close the case.

Verify Information

If the information entered does not immediately match SSA and/or DHS records, the Verify Information screen displays so that you can confirm that the information was entered correctly.

The user may either confirm that the information matches Form I-9 or change the information in certain fields if the information was entered incorrectly.

Initial Case Results

E-Verify checks information entered by the employer against records available to SSA and/or DHS. Once a case is created, a result is displayed.

**Note:** If you make a mistake after creating a case, you must close the case. See Closing a Case.

*Step 2: Verification Results*

Once the user submits the information from Step 1, E-Verify will send back an Initial Case Result in real-time. There are three possible initial case results:

- **Employment Authorized**: The employee's information matched records available to SSA and/or DHS.
- **SSA or DHS Tentative Nonconfirmation (TNC)**: Information does not initially match records available to SSA and/or DHS. Additional action is required.

- **DHS Verification In Process**: This case is referred to DHS for further verification.

### Employment Authorized

Employment Authorized means that the information entered into E-Verify matched records available to SSA and/or DHS and that E-Verify confirmed the employment eligibility of the employee whose information was entered.

However, a case that is Employment Authorized is still considered incomplete until it is closed. See Closing a Case.

Clicking the **View & Print** link from this screen will provide access to the Case Details in PDF format. See Case Details.

### Tentative Nonconfirmation (TNC)

A TNC case result means that the information entered into E-Verify from Form I-9 differs from records available to SSA and/or DHS.

E-Verify identifies the agency associated with the mismatch when the TNC result is provided.

There are two types of TNCs:

- **Social Security Administration (SSA)**: An SSA TNC means that the information entered into E-Verify does not match SSA records.
- **Department of Homeland Security (DHS)**: A DHS TNC means that the information entered into E-Verify does not match records available to DHS.

### DHS Verification In Process

A case result of DHS Verification in Process means that the information did not match records available to DHS.

The case is automatically referred to DHS for further verification. **No action is required by you at this time**. Check E-Verify daily for a response.

DHS will respond to most of these cases within 24 hours, although some responses may take up to three Federal Government working days. After that time, one of the following case results will be returned:

- Employment Authorized
- Tentative Nonconfirmation (TNC)
- DHS Case in Continuance

The user will know that updates have been sent back from E-Verify in a few ways:

- E-Verify Quick Filter: Cases with New Updates will contain a number.
- E-Verify Case Alerts widget: Cases with New Updates will contain a number.

### Interim Case Results

An interim case result requires additional action before E-Verify will provide a final case result and you can complete the verification process.

There are four possible interim case results:

- **SSA or DHS Tentative Nonconfirmation (TNC)**: Information did not match records available to SSA and/or DHS. Additional action is required.
- **Review and Update Employee Data**: Review, update, and resubmit the employee's Form I-9 information.
- **DHS Verification In Process**: This case is referred to DHS for further verification.
- **SSA or DHS Case in Continuance**: The employee visited an SSA field office or contacted DHS, but more time is needed to determine a final case result.

SSA Tentative Nonconfirmation (SSA TNC)

An "SSA Tentative Nonconfirmation (TNC)" results when the information submitted in E-Verify does not initially match SSA records.

An SSA TNC does not necessarily mean that the employee is not authorized to work in the United States; however, additional action is required.

An SSA TNC case result may occur because the employee's:

- Citizenship or immigration status was not updated with SSA
- Name change was not reported to SSA
- Name, Social Security number, or date of birth is incorrect in SSA records
- SSA record contains another type of mismatch
- Information was not entered correctly by the employer

When this result is returned, the system displays what reason E-Verify has identified. The employee must be promptly notified of this result. The user must click **Notify Employee** on this screen to proceed to the next step in the process.

After clicking **Notify Employee**, the Notify Employee of TNC screen provides the details on doing so.

From the **Notice/Referral Letter** drop-down list, the user must select a language for the **Further Action Notice**, and click **View & Print**. This will launch the document in PDF format and details what both the employer and employee need to do next.

After following the directions on this screen, the user must then select the **Confirm Employee Notification** check box to indicate that he has notified the employee of this E-Verify result. After doing so, click **Continue**.

> **Note:** The languages that the forms are available in are those that E-Verify provides. These are not reflective of what languages the company has installed in the system.

Once notified, the employee must then choose to either contest or not contest the case result. The user has to enter the employee's decision in the system.

After clicking **Continue** from the Notify Employee of TNC screen, this screen records the employee's decision to contest or not. From this screen, the user will most likely click **Save &**

**Return Later**. When the user gets the answer from the employee, he can access this step in the wizard from the E-Verify View Cases screen.

Clicking Continue on this screen means that the employee is contesting the TNC. The next screen will provide a referral notice that the employee needs to take with him to the SSA office.

> **Note:** If the employee chooses to contest an SSA TNC, it means that the employee must visit an SSA field office within eight Federal Government working days to resolve the TNC.

After clicking **Continue**, the Refer Employee screen displays. On the screen, the user has the option to reprint the Further Action Notice if needed and generate the **Referral Date Confirmation** form that the employee needs.

The user must select the language for the **Referral Date Confirmation** letter, and click **View & Print**. This will launch the document in PDF format and details what both the employer and employee need to do next.

> **Note:** The languages that the forms are available in are those that E-Verify provides. These are not reflective of what languages the company has installed in the system.

Clicking **Continue** from that screen will route the user back to the main E-Verify page.

SSA has 10 Federal Government working days to update the case result in E-Verify. A case referred to SSA is updated with one the following results:

- Employment Authorized
- SSA Final Nonconfirmation
- SSA Case In Continuance
- DHS Verification In Process
- Review And Update Employee Data

Each case result requires different actions or steps to continue or close the case.

DHS Tentative Nonconfirmation (TNC)

A "DHS Tentative Nonconfirmation (TNC)" results when the information submitted in E-Verify does not initially match records available to DHS.

A DHS TNC does not necessarily mean that the employee is not authorized to work in the United States; however, additional action is required to resolve the TNC.

A DHS TNC case result occurs because the employee's:

- Name, Alien number, I-94 number and/or foreign passport number are incorrect in DHS records
- U.S. Passport, Passport Card, driver's license, foreign passport or state ID card information could not be verified
- Information was not updated in the employee's DHS records
- Citizenship or immigration status changed
- Record contains another type of error

- Information was not entered correctly by the employer

When this result is returned, the system will display what reason E-Verify has identified. The employee must be notified of this result. The user needs to click **Notify Employee** from this screen.

After clicking **Notify Employee**, the next screen provides the details on doing so.

From the **Notice/Referral Letter** drop-down list, the user must select a language for the **Further Action Notice**, and click **View & Print**. This will launch the document in PDF format and details what both the employer and employee need to do next.

After following the directions on this screen, the user must then select the **Confirm Employee Notification** check the box to indicate that he has notified the employee of this E-Verify result. After doing so, click **Continue**.

> **Note:** The languages that the forms are available in are those that E-Verify provides. These are not reflective of what languages the company has installed in the system.

Once notified, the employee must then choose to either contest or not contest the case result. The user has to enter the employee's decision in the system.

After clicking **Continue** from the Notify Employee of TNC screen, this screen records the employee's decision to contest or not. From this screen, the user will most likely click **Save & Return Later**. When the user gets the answer from the employee, he can access this step in the wizard from the E-Verify View Cases screen.

Clicking Continue on this screen means that the employee is contesting the TNC. The next screen will provide a referral notice that the employee needs to take with him to the DHS office.

> **Note:** When an employee chooses to contest a DHS TNC, the employee is responsible for contacting DHS within eight Federal Government workdays.

On this screen, the user will have the option to reprint the Further Action Notice if needed and generate the **Referral Date Confirmation** form that the employee needs.

The user must select the language for the **Referral Date Confirmation** letter, and click **View & Print**. This will launch the document in PDF format and details what both the employer and employee need to do next.

> **Note:** The languages that the forms are available in are those that E-Verify provides. These are not reflective of what languages the company has installed in the system.

Clicking **Continue** from that screen will route the user back to the main E-Verify page.

After 10 Federal Government working days, E-Verify will provide one of the following case results:

- Employment Authorized
- DHS Final Nonconfirmation
- DHS Case In Continuance
- DHS No Show

Each case result requires different actions or steps to continue or close the case.

Review and Update Employee Data

In some instances, a case result of Review and Update Employee Data occurs, and you will receive a prompt to review and update the employee's information.

This means that SSA found a discrepancy in the information it received in the E-Verify referral.

This case result occurs for reasons including typographical errors and/or incorrect information provided on Form I-9.

Review the accuracy of the information provided on Form I-9 with the employee. If the employee made a mistake on the form, correct and update. If necessary, modify the employee's information in the fields displayed on screen.

**Warning:** You may update a case one time. Ensure that the changes are correct before updating the case.

A case that is resubmitted to SSA is updated with one of the following case results:

- Employment Authorized
- DHS Verification In Process
- DHS Tentative Nonconfirmation (TNC)
- SA Final Nonconfirmation

Each case result requires different actions or steps to continue the case.

SSA/DHS In Continuance

An SSA or DHS Case in Continuance indicates that the employee has visited an SSA field office and/or contacted DHS, but more time is needed to determine a final case result.

The reason SSA or DHS needs more time varies with each situation.

The user will know that updates have been sent back from E-Verify in a few ways:

- E-Verify Quick Filter: Cases with New Updates will contain a number
- E-Verify Case Alerts widget: Cases with New Updates will contain a number

Once SSA or DHS has updated E-Verify, one of the following case results displays:

- For DHS Case In Continuance:
  - Employment Authorized
  - DHS Final Nonconfirmation
- For SSA Case In Continuance:
  - Employment Authorized
  - SSA Final Nonconfirmation
  - Review And Update Employee Data
  - DHS Verification In Process

Each case result requires different actions or steps to continue or close the case.

Duplicate Case

A duplicate case displays for a case that contains the same Social Security number of a previous case entered by you or another user of the same employer account.

A duplicate case can occur for several reasons and does not necessarily mean that you should close the new case. There may be instances when you need to create a new case for the same employee, such as in the case of a rehire or if the previous case contains incorrect information. You should review the situation and decide whether to continue with the case.

After submitting the case to E-Verify in Step 1, any duplicates found will display immediately in Step 2.

On this screen, you will need to select an option in the **Continue E-Verify duplicate case process** field or click **Close Case** if it's appropriate to do so.

If you select the **With changes to the details submitted** option, the next screen displays a form to make the necessary changes.

Click **Continue** after you made the changes.

If you select the **Without changing the details submitted** option, the next screen displays a list of statements from which to select.

If you selected **Save & Return Later** to a duplicate case, those will have a Verification Status of **E-Verify Duplicate Case** displayed in the View Cases listing.

To continue the case, click the **Case Number**. To view the Case Details, click the **Verification Status**.

*Final Case Results*

To complete the E-Verify process, every case must receive a final case result and then be closed.

There are four results possible:

- **Employment Authorized**: The employee's information matched records available to SSA and/or DHS.
- **SSA or DHS Final Nonconfirmation**: E-Verify cannot verify an employee's employment eligibility after the employee has visited SSA or contacted DHS.
- **DHS No Show**: The employee did not contact DHS within eight Federal Government working days.
- **Error: Close Case and Resubmit**: This case cannot continue because the expiration date entered for the employee's U.S. Passport, Passport Card, or driver's license is incorrect. This case must be resubmitted in E-Verify.

Employment Authorized

"Employment Authorized" means that the information entered into E-Verify matched records available to SSA and/or DHS and that E-Verify confirmed the employment eligibility of the employee whose information was entered.

SSA or DHS Final Nonconfirmation

An “SSA or DHS Final Nonconfirmation” case result is received when E-Verify cannot verify an employee’s employment eligibility after an employee has visited a SSA field office or contacted DHS during the TNC referral process.

After an “SSA or DHS Final Nonconfirmation” has been provided, you must close the case.

The employer may terminate employment based on a case result of “SSA or DHS Final Nonconfirmation” with no civil or criminal liability as noted in Article A, Section **II**, paragraph 8 – Responsibilities of the Employer in MOU.

DHS No Show

A “DHS No Show” indicates that the employee did not contact DHS within eight Federal Government working days.

A “DHS No Show” case result is considered a Final Nonconfirmation. A Final Nonconfirmation means that the case must be closed in E-Verify.

An employer may terminate employment based on a case result of ”DHS No Show” with no civil or criminal liability as noted in Article **II**, Section C, paragraph 6 – Responsibilities of the Employer in the MOU.

Error: Close Case and Resubmit

If the expiration date you entered for the employee’s U.S. Passport, Passport Card, or driver’s license is incorrect, E-Verify prompts an “Error: Close Case and Resubmit” case result and you will not be able to continue the case.

Because document information for a case that has already been submitted cannot be changed, you must close this case and create a new one with correct information. Select the closure statement option **The case is invalid because the data entered is incorrect**, and close this case. Now you can create a new case for this employee using the correct document expiration date.

> **Note:** This does not mean that the employee is not authorized to work. E-Verify will confirm the employment eligibility of this employee once you create a new case and enter the correct document expiration date.

### Closing a Case

To properly complete the E-Verify process, employers must close every case created in E-Verify.

*Step 3: Close Case*

There are 11 possible case closure statements.

To assist you in making the correct choice and to reduce the number of options, E-Verify requires you to state whether the employee is still employed. Select the appropriate answer, and click **Continue**.

Then, select one of the case closure statements and click **Continue**.

**Note:** E-Verify will present only those statements that are relevant to each case.

Record the Case Number on the employee's Form I-9, or print the Case Details and file it with the employee's Form I-9.

Click **View & Print** to access the Case Details in PDF. Then, click **Finish** to complete the closing process.

*Case Closure Statements*

There are 11 possible case closure statements.

E-verify presents only those relevant to the current case.

**The employee continues to work for the employer after receiving an Employment Authorized result.**

E-Verify has verified that the employee is eligible to work in the United States and the employee continues to work for the employer.

**The employee continues to work for the employer after receiving a Final Nonconfirmation result.**

E-Verify cannot verify that this employee is authorized to work in the United States. The employee had contested the tentative nonconfirmation (TNC), but was unable to resolve it. The employer chooses to exercise its legal right to allow the employee to continue to work.

**The employee continues to work for the employer after receiving a No Show result.**

E-Verify cannot verify that this employee is authorized to work in the United States. The employee had contested the tentative nonconfirmation (TNC), but did not take action to resolve it. The employer chooses to exercise its legal right to allow the employee to continue to work.

**The employee continues to work for the employer after choosing not to contest a Tentative Nonconfirmation.**

E-Verify cannot verify that this employee is authorized to work in the United States. The employee chose not to contest the tentative nonconfirmation. The employer chooses to exercise its legal right to allow the employee to continue to work.

**The employee was terminated by the employer for receiving a Final Nonconfirmation result.**

E-Verify cannot verify that this employee is authorized to work in the United States. The employee had contested the tentative nonconfirmation, but was unable to resolve it. The employer terminated the employee because of the final nonconfirmation result.

**The employee was terminated by the employer for receiving a No Show result.**

E-Verify cannot verify that this employee is authorized to work in the United States. The employee had contested the tentative nonconfirmation (TNC), but did not take action to resolve it. The employer terminated the employee because of the No Show result.

**The employee was terminated by the employer for choosing not to contest a Tentative Nonconfirmation.**

E-Verify cannot verify that this employee is authorized to work in the United States. The employee chose not to contest the tentative nonconfirmation (TNC). The employer terminated the employee because the employee chose not to contest the TNC.

**The employee voluntarily quit working for the employer.**

The employee chose to stop working for the employer.

**The employee was terminated by the employer for reasons other than E-Verify.**

The employer terminated the employee for reasons unrelated to E-Verify.

**The case is invalid because another case with the same data already exists.**

An E-Verify case with the same data was already created for this employee. This is a duplicate case.

> **Note:** If a case is closed as invalid, it does not void the case or change the case result. A case closed as invalid will still display the last case result even though it has been closed.

**The case is invalid because the data entered is incorrect.**

The data entered for this employee was not correct.

> **Note:** If a case is closed as invalid, it does not void the case or change the case result. A case closed as invalid will still display the last case result even though it has been closed.

#### Case Details

This screen provides all the details of the E-verify Case in one, easy-to-view format.

- To print the Case Details, click **View & Print**. The output will be in PDF format.
- To return to the E-Verify wizard, click the linked **Case Number**. The user will be taken to the last completed step in the process.

  > **Note:** If the Case Number is not linked, that means either the Case has been closed or the user does not have permission to access it.

### Acronyms

There are several acronyms used within the E-Verify feature:

- SSA: Social Security Administration
- DHS: Department of Homeland Security
- DOS: Department of State
- TNC: Tentative Nonconfirmation

- FNC: Final Nonconfirmation
- SVS: Status Verification System

### E-Verify Resources

This screen provides links to the E-Verify site and to additional E-Verify information.

- E-Verify's web site: http://www.uscis.gov/e-verify
- E-Verify's user guide for their online system and program: http://www.uscis.gov/sites/default/files/USCIS/Verification/E-Verify/E-Verify_Native_Documents/E-Verify%20Manuals%20and%20Guides/EVerify_User_Manual_Employer.pdf
- Reports in E-Verify: https://e-verify.uscis.gov/emp/ReportSelector.aspx (Access to this page requires you to log using your E-Verify credentials.)

## Create TRM Campaign

The Create Campaign screen allows you to create, schedule and send campaigns to specific candidates.

**The Create Campaign process consists of three steps:**

- **Step 1: Campaign Details**
- **Step 2: Campaign Scheduling**
- **Step 3: Campaign Preview**

**You can also create a campaign through the Create Campaign button on the Manage Campaign screen.**

**To create a TRM Campaign:**

Click **Recruiting** » **Talent Relationship Management (TRM)** » **Create Campaign**.

### Complete Step 1: Campaign Details

You can specify your campaign name and description, including the recipients of your campaign through Step 1: Campaign Details.

**To complete your Campaign Details:**

1. Enter the **Campaign Name** and **Campaign Description**.
2. Use the **Filter** options to select your Recipients.

   You may also include other employees through CC and BCC options by using the applicable **Select Employees** button.
3. Click **Next** to continue to **Step 2: Campaign Scheduling**, or click **Finish Later** to save your campaign.

## Complete Step 2: Campaign Scheduling

You can schedule your campaign through Step 2: Campaign Scheduling.

**To schedule your campaign:**

1. On the **Letter Template** drop-down field, select the letter template you are using for the campaign.

   **Note:** The Letter Template (**Global** or **Personal**) must be created on the Letter Templates page (**Libraries** » **Letter Templates**) with the **Category** set to **TRM**.

2. On the **Recurrence** drop-down field, select the frequency of your campaign.
3. On **Start Date** field, specify your campaign's start date.
4. On **End Date** field, specify your campaign's end date.
5. Click **Next** to continue to **Step 3: Campaign Preview**, or click **Finish Later** to save a draft of your campaign.

   **Note:** If you select the **Send Campaign Now** button the campaign will be sent on the same day of publication. The **Send Campaign Now** button works for up to 50 unique recipients only.

## Complete Step 3: Campaign Preview

You can review the details of your campaign before publishing it through Step 3: Campaign Preview.

**To display the campaign preview:**

1. Review the details of your campaign:
   - **Campaign Name**
   - **Campaign Description**
   - **Summary**
   - **Email Template**
2. After reviewing your campaign information, you can use the following options:

| Option | Description |
|---|---|
| **Publish** | Click to publish the campaign as scheduled. Once the campaign is published, a notification is sent to the campaign owner.<br>If **Send Campaign Now** check box is selected, the recipients will automatically receive an email based on the letter template selected on Step 2 of Create Campaign wizard. Otherwise, the recipients will receive an email on the start date specified in the campaign. |

| Option | Description |
|---|---|
| **Finish Later** | Click to save a draft of the campaign. |
| **Edit** | Click to edit the campaign. |
| **Select Test Campaign Recipients** | Click to test your campaign on selected recipients. |
| **Finish** | Click to save the campaign under My Created Campaigns section. This button displays only when **Send Campaign Now** check box is cleared. |

## Select Test Campaign Recipients

Aside from the **Step 3: Campaign Preview**, wherein you can review your campaign information, you can also test your campaign before publishing it.

**To test your campaign:**

1. On **Step 3: Campaign Preview**, click **Select Test Campaign Recipients**.
   The **Select Test Campaign Recipients** pop-up window will display.
2. In the **Search** field, enter the first name, last name, or email of the recipient.
3. In the **Manager** field, select the Manager, and then click **Search**.
4. Under search **Results** section, select the recipients for the test campaign and click **Add All Selected.**
5. Click **Confirm Selection.**

# Manage TRM Campaign

You can manage all the campaigns you have published, created, and drafted through the Manage Campaign screen of Talent Relationship Management (TRM) menu. You can also create a campaign from this screen through the **Create Campaign** button.

**To manage a campaign:**

Go to **Recruiting** » **Talent Relationship Management (TRM)** » **Manage Campaign**.

## Contents of Manage Campaign Screen

The Manage Campaign Screen displays your campaign sections like My Published Campaigns, My Created Campaigns, My Draft Campaigns, and All Active Campaigns for administrators.

## My Published Campaigns Section of Manage Campaigns Screen

The My Published Campaigns section of Manage Campaigns screen displays the following columns:

**Contents**

| Field | Description |
|---|---|
| **Campaign Name** | This shows the name of the campaign. |
| **Campaign Description** | This shows the campaign description. |
| **Recipients** | This shows the number of recipients for the campaign. Click the hyperlinked number to display the Campaign Dashboard screen, which shows the name of subscribed and unsubscribed recipients. |
| **Date Created** | This shows the date the campaign was created. |
| **Frequency** | This shows the campaign frequency. |
| **Start Date** | This shows the start date of the campaign. |
| **End Date** | This shows the end date of the campaign. |
| **Publish Date** | This shows the date the campaign was published. |
| **Last Sent Date** | This shows the date the campaign was last sent. |
| **Actions** | Click the **Deactivate** icon to deactivate the campaign. |

## My Created Campaigns Section of Manage Campaigns Screen

The My Created Campaigns section of Manage Campaigns screen displays the following columns:

**Contents**

| Field | Description |
|---|---|
| **Campaign Name** | This shows the name of the campaign. |
| **Campaign Description** | This shows the campaign description. |

| Field | Description |
|---|---|
| **Recipients** | This shows the number of recipients for the campaign. |
| **Date Created** | This shows the date the campaign was created. |
| **Frequency** | This shows the campaign frequency. |
| **Start Date** | This shows the start date of the campaign. |
| **End Date** | This shows the end date of the campaign. |
| **Actions** | Click either the **Edit Campaign** or **Delete Campaign** icon to edit or delete the campaign, respectively. |

### My Draft Campaigns Section of Manage Campaigns Screen

The My Draft Campaigns section of Manage Campaigns screen displays the following columns:

**Contents**

| Field | Description |
|---|---|
| **Campaign Name** | This shows the name of the campaign. |
| **Campaign Description** | This shows the campaign description. |
| **Recipients** | This shows the number of recipients for the campaign. |
| **Date Created** | This shows the date the campaign was created. |
| **Frequency** | This shows the campaign frequency. |
| **Start Date** | This shows the start date of the campaign. |
| **End Date** | This shows the end date of the campaign. |
| **Actions** | Click either the **Edit Campaign** or the **Delete Campaign** icon to edit or delete the campaign, respectively. |

### All Active Campaigns Section of Manage Campaigns Screen

The All Active Campaigns section of Manage Campaigns screen is available to users with administrator role. It displays the following columns:

**Contents**

| Field | Description |
|---|---|
| **Campaign Name** | This shows the name of the campaign. |
| **Campaign Description** | This shows the campaign description. |
| **Owner** | This shows the name of the campaign owner. |
| **Recipients** | This shows the number of recipients for the campaign. |
| **Date Created** | This shows the date the campaign was created. |
| **Frequency** | This shows the campaign frequency. |
| **Start Date** | This shows the start date of the campaign. |
| **End Date** | This shows the end date of the campaign. |

## Campaign Dashboard Screen

The Campaign Dashboard screen displays the statistics for a campaign, including the number of emails sent out and the number of recipients who unsubscribed.

### Display the Campaign Dashboard Screen

You can view the numbers and names of recipients of your published campaign through the Campaign Dashboard screen.

**To display the Campaign Dashboard screen:**

1. On the left navigation menu, click **Recruiting** » **Talent Relationship Management** » **Manage Campaigns**.
2. In My Published Campaign section, click the hyperlinked **Recipients** number of the campaign.

### Contents of the Campaign Dashboard Screen

The Campaign Dashboard screen displays the campaign name above a **Sent** and **Unsubscribed** counter, along with the following columns.

**Contents**

| Field | Description |
|---|---|
| **Recipients Name** | This shows the recipient's name. You can click the name to view the recipient's Resume Dashboard. |
| **E-Mail** | This shows the recipient's email address. |
| **Last Sent Date** | This shows the date the email campaign was last sent. |
| **Subscribed** | This shows **Yes** or **No**, based on whether the recipient is subscribed or not. |
| **Date Unsubscribed** | This shows the date the recipient has unsubscribed from the campaign. |

# Appendix A: Terminology

The following terms are related to Deltek Talent Management Recruiting.

## Résumé Types

The **Type** column displays on various screens and indicates the type of résumé.

**Type**

| Type | Description |
|---|---|
| **Internal** | This is a current employee. |
| **External** | This is an applicant who applied through your website's career center. |
| **Employee Referral** | This is an external applicant referred by an employee. |
| **Vendor Submitted** | This is an applicant submitted by a vendor. |
| **Contact** | This denotes that the individual was originally added to the database as a contact. |
| **Recruiter Upload** | This is an individual that was added to the system by a user of the Recruiting module. |

# Glossary of Terms

This section provides definitions of commonly used terms used throughout the application.

**Term**

| Term | Definition |
|---|---|
| Badge | This is an area on the page that contains distinctive details about a user and may include a photo, name, job title, or other specifics that are unique to that individual. The dimensions and the content of the badge vary based on where it is shown in the application. |
| Breadcrumbs | This is a navigational aid used in Deltek Talent to allow users to keep track of the access path to a current location within the application. |
| Competency | Competencies are demonstrable skills that one possesses inherently. Competencies include abilities and behaviors, as well as knowledge of the fundamental use of a skill. |
| Contact | This describes a person who is added to the application through the Contacts screen. |
| Dynamic Forms | These are forms created for an organization’s recruiting process, such as a requisition, résumé profile, secondary application, interview, offer, and onboarding. |
| Employee Referral | This is an applicant who was referred by an employee. |
| External Front End | This is the external job seeker's career portal. An organization can have more than one external front end if it is necessary to show different branding for different divisions or company entities. |
| Features | This pertains to an aspect or attribute that can be configured for a group to allow access to different functions within the application. |
| Hiring Order | This is a request submitted to a recruiting agency for assistance in obtaining one or more individuals for a position, whether permanent or contractual, within an organization. |
| Job Family | This is used to categorize Job Profiles. For example, the “I.T.” job family would be useful in sorting those Job Profiles that are technical in nature and use similar job competencies and skills. |
| Onboarding | This is the process of bringing in a newly-hired employee. This includes sending documentation to the employee for review and/or completion, alerting certain individuals of the arrival of the employee, and preparing the employee for what to expect when he or she begins the new job. |
| Passive Job Seeker | This is a passive job seeker who submitted his/her résumé into the system but not applied to a specific requisition. |
| Pool | This is is a user-defined collection of résumés with similar traits, for example: skill sets, job preferences, or education levels. Pools can also be created to house résumés for future consideration. |

| Term | Definition |
|---|---|
| Post Hire Modules | These are modules that deal with an employee's performance, career development, and learning within an organization. These solutions are Deltek Talent Performance, Deltek Talent Development, and Deltek Talent Learning. |
| Recruiting Team | This is a team created to allow a group of individuals to share information regarding requisitions, job seekers, and candidates. Eligibility to be included on a recruiting team is limited to those internal users in the Recruiter or Hiring Manager group. |
| Recruiting Workflow | This provides a means for your company's system administrator to automate many functions of the recruiting process. A recruiting workflow includes form selections, user task suggestions, offer management, onboarding procedures, and more. |
| Screened-In | This is the term used for an applicant who has met or exceeded the minimum point value set in the screening questionnaire associated with the requisition to which they applied. |
| Screened-Out | This is a term used for applicants who have not met the minimum point value set in the screening questionnaire associated with the requisition to which they applied. |
| Total Talent Profile | This is a unique area of the application that provides an employee with a single location to view all of his or her pertinent information. It gives users access to view and update appraisals, career paths, job history, mentoring relationships, project teams, succession plans, and training/ development. |
| Widget | This is a means used to display information and actions pertinent to the user's activity in the system. Widgets are displayed on the Main Dashboard. |

# Appendix B: Libraries

This Appendix lists libraries relevant to Deltek Talent Management Recruiting.

## Screening Questionnaires Library

The Screening Questionnaires Library holds all the questionnaires that have been previously created and saved into the Library.

### Actions

On this screen, you can perform the following actions.

| Action | Description |
|---|---|
| **Edit** | Select this to show the questionnaire in an editable form where changes can be made and saved. |
| **Copy** | Select this to quickly create a new questionnaire. |

| Action | Description |
|---|---|
| **Activate/ Deactivate** | Select this to change the status of the questionnaire. An open lock icon means that the questionnaire is available will appear as an option for in drop-down lists. A closed lock indicates that the questionnaire is inactive and will not appear as an option in drop-down lists.. |
| **Delete** | Questionnaires cannot be deleted once they have been used. |

## Create Screening Questionnaires

Follow these steps to create Screening Questionnaires.

**To create a Questionnaire:**

1. Enter the **Name** and some basic instructions that the job seeker will see at the top of the page while completing the questionnaire.
2. The **Minimum Score Required** field remains empty until you begin entering questions.

   As you enter the answers to each question, Deltek Talent automatically calculates the score range. The **Score Range** indicates the highest possible score. After the system generates the score range, you can then enter in your minimum required score.
3. Select the **Global Questionnaire** check box if you want the questionnaire to be available for everyone to use.

   If you leave the check box unselected, then only you can see and assign this questionnaire to a requisition.
4. Enter tailored **Screened In** and **Screened Out** messages in the appropriate text areas, if necessary.
5. Click **Add/Edit Questions**.
6. Follow the steps in Add Questions to Screening Questionnaires.

## Add Questions to Screening Questionaires

Follow these steps to add questions to a Screening Questionnaire.

**To add questions to a Screening Questionnaire:**

1. Click **Add/Edit Questions** from the Screening Questionnaire.
2. Select the type of question in the **Add New Question** drop-down list.
3. Click **Continue**.

   When creating a questionnaire, you can either enter your own questions, or you can search for previously-created questions from other screening questionnaires and copy selected questions.

## Create Questions by Copying from Existing Questionnaires

These steps show how to create new questions from an existing questionnaire.

**To create Questions by Copying from Existing Questionnaires:**

1. Click **Search Existing Questions**, and on the search screen enter keywords to find the question you need.
2. On the search results screen, select the check box next to each question that you want to copy and click **Add and Close**.

   You can edit the questions after you have added them.

   Any edits made to the questions that were copied into another screening questionnaire do not affect original source questionnaire.

## Create Custom Questions for a Screening Questionnaire

These steps show how to create custom screening questions.

**To create your own customized questions:**

1. In the **Question Type** field, select one of the following types, and click **Next**.

| Question Type | Description |
|---|---|
| **Single Line** | This type displays on the screen in a single text line.<br>Question Example:<br>▪ How long did you work for your previous employer?<br>▪ What is your Security Clearance level, if any?<br>There is a 255 character limit for answers typed in response to this question. |
| **Essay** | This type allows the job seeker to enter text in paragraph form.<br>Question Example:<br>▪ Briefly describe explain why you left your last position.<br>▪ If you answered ‘Yes’ to question #4, please provide a short explanation.<br>▪ Please describe your previous experience with any major retailers<br>There is no character limit for answers typed in response to this question. |
| **Multiple Choice, Single Answer:** | This type displays a list of choices in the form of a single-select drop-down list field. |

| Question Type | Description |
|---|---|
| | This format is ideal for offering many answers but only allowing the user to select one.<br>Question Example:<br>▪ How many exhibits have you participated in so far?<br>▪ How many years of experience do you have in Mechanical Engineering?<br>▪ What is your level of experience with Microsoft Word? |
| **Multiple Choice, Multiple Answers** | This type display a list of choices in the form of a multi-select list box.<br>Question Example:<br>▪ Indicate which of the following programs you have expert status in.<br>▪ Which locations would you consider relocating to? |
| **Radio Buttons** | This type displays answer options as radio buttons. This format is ideal for Yes/No and True/False type questions where the applicant can select only one answer.<br>Question Example:<br>▪ How many years have you been in your current position? |
| **Checkboxes** | This type displays answers as check boxes where the applicant can select all answers that apply. |

2. In the **Question** field, enter your question or instructions that you wish to convey
3. Select the **Mark as required** check box as appropriate.
   Required fields are identified in red font.
4. Click **Submit**.
5. On the main Questionnaire Completion Form screen, enter the answers and values to the question you created.

| Question Type | Description |
|---|---|
| **Single Line** | For this type, you can place a score to specific answers you are looking for.<br>In the **Match Type** you can set one of the following:<br>▪ **Contains**: This instructs the system to look for answers that contain the keywords you indicate.<br>▪ **Exactly Matches**: This instructs the system to look for the exact match for the keywords you indicate. |

| Question Type | Description |
|---|---|
| | Example:<br>The position for this screening questionnaire requires security clearance. The answers we are looking for are assigned a score of 25. We will allow any of those four clearance types. If someone does not have security clearance, we have selected to screen them out, meaning they will fail this screening questionnaire regardless of their remaining answers because this position requires at least one of these clearance types.<br>The **Match Type** chosen for this answer is **Contains** because the job seeker could type in something that might include the word **None**.<br>If the job seeker enters a security clearance type that is not on the list or misspells it, the score given for that answer is **zero**. |
| **Essay** | For this type, if the question is such that you want the job seeker to describe their experience, then you do not need to enter an answer or score for the question.<br>However, if you are looking for some specific keywords, you can enter those and give each a score. For instance, if you value a former employee of a competitor, you can enter the name or names of those companies.<br>Example:<br>We are looking for job seekers that enter any of those names in the **Value** field. The **Match Type** is **Contains** because a job seeker might spell the name **Pier1** instead of **Pier 1** or **Bombay Company** instead of **Bombay**.<br>If the system detects one or more of these keywords in the essay, it will add up the score for each value. If none are entered or the terms are misspelled, then the score given for that answer is **zero**. |
| **Multiple Choice, Single Answer:** | For this type, you can assign a score to specific answers you are looking for. The answers to select from are displayed in a single select drop-down list.<br>Example:<br>we entered different levels of experience and assigned a score to each level. It is preferred that the job seeker is an expert in Microsoft Word, but the position does not require that so we will accept someone with at least intermediate experience. |
| **Multiple Choice, Multiple Answers** | For this type, you can assign a score to specific answers you are looking for. The answers to select from are displayed in a multi-select list field.<br>Example: |

| Question Type | Description |
|---|---|
| | We entered all the Microsoft Office applications the company uses. The job seeker can select as many as desired and the system will score each 25 points. |

6. Using options in the **Actions** column, **Edit** questions and change the position where the questions appear on the form by clicking **Move Up**, **Move Down**, or **Delete**.
7. Enter additional possible answers and corresponding scores in the text fields at the bottom of your question.
8. Click **Edit** to edit the answers. Click **Delete** to remove the answers.
9. Click **Add**.

   After an applicant answers the questionnaire, Deltek Talent will compute the value of the answers and display them in the **Score** or **Screening** column on each page that displays a New Résumé/CV Submitted or Candidate listing. To view the applicant's answers, click the score.

## Documents Library

This page displays any documents uploaded into the Document Library by your company's site administrator and made visible to your user group.

Click **Download** to download the document.

## Letter Templates Library

This library displays all the global templates created by your company's site administrator as well as your personal templates.

Each letter has a **Category** associated with it so that you know when and where the letter template is displayed for use in the system.

For example, letters created with the **Onboarding** type only appear in the drop-down lists for the onboarding process.

To view the template's content, click the letter name.

### Actions

The following actions are available for letter templates.

| Action | Description |
|---|---|
| **Activate/ Deactivate** | Select this to change the status of the letter from **Active** to **Inactive** and vice versa. An open lock icon indicates that the letter will appear as a drop-down list option. A closed lock icon indicates that the letter is inactive and will not appear as a drop-down list option. |
| **Delete** | Select this to delete a letter. Once a letter is used, it cannot be deleted from the database. |

### Create a New Letter

Follow these steps to create a new letter.

**To create a new letter:**

1. Click **Create New Letter**.
2. In the **Letter Type** field, select from the drop-down list.
   A personal letter template is available only to you, while a global letter template can be used by anyone in your company.
3. In the **Category** field, select from the drop-down list.
   The category helps the system determine when and where it should display the letter.
4. In the **Name** field, enter the name.
5. Click **Available Merge Codes** to launch a search screen that allows you to find the appropriate merge code.
   From that window, merge codes can be pushed into the body of the letter when in Edit Mode.
6. You can manage translation options if more than one language is installed in your system.
   Clicking on the language tab and enter your translation.
7. Click **Add attachments** to include file attachments from the Document Library in the letter template.
   Select any branding needed as well as select the recipient list if you want to copy others when the letter is sent.
8. If the attachment that you need is not in the Document Library, click **Browse** to the file in your computer.
9. Click **Upload File** to add the attachment to the Document Library listing.
10. If your company uses images for the letter's header and footer sections, select the **Letter Header Image** from the list.
11. To upload a new image, click the **Add New Image**.
12. Populate the **BCC** and **CC** fields, to include additional recipients whenever the Deltek Talent uses this letter template.

# Appendix C: Cross-Posting Reports

The cross-posting reports feature gives recruiters, administrators, and executives a view of the external job posting activity of the recruiting team.

This includes a number of useful information, such as who has posted how many jobs to which external job boards, how many job applications are received from each job board, and other metrics where you can glean valuable insight on the mileage of your recruitment advertising budget.

## Display Cross-Posting Reports

Follow these steps to display cross-posting reports.

**To access cross-posting reports:**

1. From the Main Menu Ribbon, click **Reports** » **Recruiting**.
2. In the **Cross-Posting** section, select from the following reports:

| Type | Description |
|---|---|
| **Click Tracking Report** | This report gives a per-day breakdown of the number of interested applicants. |
| **Click-Posted Job Status Report** | This report lists all the jobs that have been posted to job boards, the date they initially posted, and the date they stopped posting. |
| **Job Post Count per Recruiter per Site** | This report lists all the recruiters that have posted jobs to job boards and how many jobs they have posted. |
| **Job Post Count per Site** | This report lists all the recruiters that have posted jobs to job boards and how many jobs they have posted per board. |
| **Posted Sites Report** | This report displays information on jobs that have been cross-posted. |
| **Posting Authorization Report** | This report displays details of jobs that are currently cross-posted. |
| **Queueing Report** | This report lists all jobs that have been requested to be cross-posted and errors that were caught in the validation process before the job was sent. |
| **Referring Site Sources per Job** | This report lists individual applicants that applied for jobs and from which board. |
| **Sending Report** | This report lists whenever a job is sent to a job board. |

# 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