# Deltek Talent Management

## Version 18.0 Release Notes

**July 1, 2024**

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# Contents

# Overview

Welcome to the Deltek Talent Management Version 18.0 Release Notes. These release notes contain a summary of the following:

- Major New Features
- Enhancements
- Known Issues
- Software Issues Resolved

## Important Note

### Talent Information Center

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

On the TIC page, you can access:

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

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

### Talent Information Center Overview Video:

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

### Documentation Feedback

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

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

# Features

This section includes summaries of the new features included for this release.

## User Interface Redesign

The most recent update of Deltek Talent Management brings a fresh, user-friendly interface designed to simplify navigation and access to all available functions. This update aims to improve user productivity by providing a more streamlined platform and easier navigation while maintaining all existing functionality for a seamless transition and an improved user experience.

The navigation, dashboard, theme, and color scheme have all been updated. This section covers the overall changes to the platform. For more information on how this exciting user interface redesign affects specific modules, please refer to the Enhancements section of these release notes.

### Navigation

The primary components of the navigation system have been redesigned.

- Talent Management now offers dual navigation options through the **Top Navigation** menu and the **Left Navigation** menu. The latest design has been specifically enhanced to work better on the smaller screens of mobile devices. The **Left Navigation** menu is displayed by default. A single click on the active menu on the **Top Navigation** closes the **Left Navigation**. Clicking it again reopens the **Left Navigation** drawer. This adjustment provides a more seamless and user-friendly experience for individuals accessing the platform on their mobile devices.
- The new **Top Navigation** replaces the **Navigation Pane**, moving the navigation from the left side of each page to the top of the screen. This change enables easy access to the primary functional areas and modules of Talent Management from anywhere in the application.
- The **Left Navigation** functions similarly to the legacy **Navigation Pane**. It is located on the upper-left of the screen, but it has been redesigned to have a more modern look. It now adjusts to display selections based on the options you have chosen in the **Top Navigation**.
- The **Left Navigation** also features a new **Sidebar Search**, enabling easy filtering of sub-navigation options by entering the full or partial name of the screen name you need.
- The **Toolbar** at the top of each screen now includes the **Search** utility and the **Favorites** menu, in addition to its existing functions. The **Toolbar** incorporates the functionality that used to be offered on the **Sub-Menu**, which previously contained shortcuts for searching, viewing recent items, and pinning items for display while using the application. Both the **Sub-Menu** and the **Pin** button have been removed with this update.

### Favorites

A new (**Favorites**) menu replaces the **Pin** button on the **Toolbar**. This feature enables you to choose your most frequently used menu items and save them as favorites for quick access.

When you move through the **Left Navigation**, look out for a **Star** icon that appears as you hover over each menu option. By clicking on this star, you can easily add the item to your favorites list. To manage your favorites – be it to view them, access certain items, reorganize, or add more – click **(Favorites) » Manage Favorites** in the **Toolbar**.

## New Dashboard Design

The Dashboard has been completely redesigned to offer improved personalization options, additional employee details, better alerts notification functionality, and an overall refined design.

The dashboard has been updated with several new features and changes.

- **Personalization Enhancements:** A personalized greeting is now displayed in the upper right-hand corner and your company name is now displayed at the lefthand side of the **Top Navigation**.

  A new user profile picture at the upper-left corner to enhances the platform's user-friendliness and personalization. You will see a new **View Profile** button below your user profile picture. Click this button to access your Total Talent Profile (TTP). You can also continue to access your TTP from the **My Profile** dropdown menu on the toolbar in the upper right-hand corner of your screen.

- **Alerts and Announcements:** The **Alerts** button has been updated and relocated to a more prominent location next to the welcome message at the top of the screen. This button will inform you about any alerts that need your attention. Click this button to access the new Alerts section on the left side of the Dashboard, instead of its previous location at the top of the screen. This change makes it easier for you to access your alerts with a new layout that takes up less space but still effectively attracts your attention.

  The News and Announcements section has been repositioned to appear alongside the widgets in the same area of the screen.

## Themes and Dark Mode

The latest update brings a new **Themes** feature and **Dark Mode** to the **Your Account** menu (**Toolbar » Your Account**). This enables you to customize the appearance and color scheme of the Talent Management platform according to your preference.

There are six new themes available: **Blue**, **Purple**, **Pink**, **Red**, **Orange**, **Green**, **Mint**, **Teal**, **Gray**, as well as a **Dark Mode** option. With **Dark Mode**, you can easily switch the display to either **Standard** or **Dark** mode to suit your visual preferences.

# Generative AI Functionality

This release introduces Generative AI integration for Talent Management features through Deltek Dela. Dela, which stands for Deltek Artificial Intelligence, serves as Deltek's digital assistant. Rather than being a standalone AI tool, Dela encompasses all of Deltek's AI capabilities and will be used to describe our AI product features going forward. While each AI technology plays its own role, together they create an intelligent user experience known as Dela.

In this latest update, we have incorporated advanced AI capabilities to enhance the user experience. These AI enhancements streamline and automate repetitive tasks across the Recruiting, Performance and Development, and Learning modules. By harnessing the power of AI, we aim to save you valuable time, enabling you to focus on more strategic aspects of your work while increasing overall efficiency.

This feature is disabled by default, but has been implemented in these five main areas of Talent Management:

- Employee approval scoring comments
- Learning course descriptions
- Learning path descriptions
- Letter templates

- Requisition descriptions

The details for each impacted module are listed below.

## Core Framework

A new **Generative AI** option has been added to the Feature screen (**Administration » Global Settings » System Administration » Features**). This update enables administrators to activate Generative AI capabilities within Talent Management. The feature is disabled by default, but once enabled, it enables administrators to activate Generative AI functionalities in specific key areas:

- **Generative AI for approval scoring comments:** This feature enables Generative AI functionality in the Performance and Development modules.
- **Generative AI for course descriptions in the Learning module:** This feature enables Generative AI functionality in the Learning module.
- **Generative AI for letter templates:** This feature enables Generative AI functionality to create new letter templates.
- **Generative AI for requisition descriptions:** This feature enables the Generative AI functionality in the Recruiting module.

## Learning Module

Generative AI for Learning Paths enables an administrator to generate learning path descriptions by clicking on the **AI Assistant** button in the **Learning Path Description** field on the Add Learning Path screen (**Administration » Learning » Learning Paths » Manage Learning Paths » Create New Learning Path**).

**To generate a learning path description using the AI Assistant:**

1. Enter a descriptive value in the **Title** field.
2. To automatically populate the field with content, click **AI Assistant** in the **Learning Path Description**.

Generative AI is now also available for Course descriptions, enabling an administrator to generate course descriptions by clicking on the **AI Assistant** button in the **Course Description** field when creating new courses or editing existing courses.

**To generate a course description using the AI Assistant:**

1. On the Add Course or Edit Course screen, enter a descriptive value in the **Course Name** field on the Details tab. This step applies to all course types, whether Read & Sign, Instructor-Led, or E-Learning.
2. To automatically populate the field with content, click the Additional Details tab and then click **AI Assistant** in the **Course Description**.

## Performance and Development Modules

When entering comments during Appraisal scoring, users with the **Generative AI for appraisal scoring comments** feature enabled can use AI to help with drafting and revising comments.

With the feature enabled, an **AI Assistant** button displays above every Comment on the Score this Appraisal screen, which you can use to help you write a clear, professional, well-written comment.

**To generate a scoring comment with the AI Assistant:**

1. In the **Comment** field on the Score This Appraisal screen, enter a draft.
   **Tip:** If you are rating yourself, write the draft in first person. If you are rating another employee, write the draft in third person. To save time, keep your draft simple. For example, “I think I deserve a rating of Exceeds Expectations because I have gone above and beyond with my work this quarter.”
2. When finished, click the **AI Assistant** button.

   In the AI Assistant for Scoring Comment dialog box, the AI-generated draft displays in the **Generated Content** field.
3. Modify the result manually or click in the **Prompt** field and click **Generate** to create a new draft. You can also modify the draft in the **Prompt** field and click **Generate** to refine the comment based on the new prompt. Do this as many times as needed until you are satisfied.
4. When satisfied, click **Accept Changes** to transfer the text into the **Comment** field. This will replace any text that you entered there before clicking the **AI Assistan**t button. Click **Close** at any time if you do not want to use the AI suggestions. Note that, if desired, you can still edit the text in the **Comment** field after clicking **Close**.

To use this feature, it must be enabled (**Administration » Global Settings » System Administration » Features » Core » Generative AI for appraisal scoring comments**).

## Recruiting Module

Users with access to creating a requisition can now use the new Generative AI feature to create a requisition description based on **Job Title**, **Location**, and Organization. The Organization used is based on the **Company Name** value in **Administration » Global Settings » System Administration » System Settings » General**.

**To generate a requisition description:**

1. On **Step 2 Define Requisition**, click the **AI Assistant** button at top right of the **Job Description** field.

- Review the generated content or edit the prompt in the modal window to generate another description, and then click **Accept Changes** when finished.

  The generated content is then populated into the **Job Description** field.

# Enhancements

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

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

| Module | Feature Name | Location on the Features Screen | Default Setting |
|---|---|---|---|
| Core | Generative AI (Dela) | **Core » Generative AI**<br>▪ **Generative AI for appraisal scoring comments**<br>▪ **Generative AI for Learning**<br>▪ **Generative AI for Letter Template**<br>▪ **Generative AI for Requisition Description** | Off |
| Core | Single Sign-On (SSO) | **Core » Single Sign-On** | Off |
| Recruiting | Relevancy Score | **Recruiting » Relevancy Score** | On |

## API/SOA

### API Self-Service Portal

Clients who use the API integration feature can now create their own authentication tokens, monitor token expirations, and schedule token rotation. This capability enables clients to set up and manage their integrations, streamlining the process and reducing the need for integration setup support from Deltek Customer Care. As part of an effort to enhance security and improve token management, a single master token per client site for all API usage will be provided.

This enhancement includes the addition of a new API Self-Service portal to the Integrations Setup screen (**Administration » Support Tools » Integrations Setup**) and is accessible only to Configurator user profiles.

If you are a new client, or an existing client setting up API integration for the first time, click **Generate Master Token** to easily generate a master token by completing the following fields.

- **SOA URL:** Enter your SOA Path based on your region (US, CA, EU) in this field. For example, **https://soa-us.tm.deltek.com**, **https://soa-ca.tm.deltek.com**, or **https://soa-eu.tm.deltek.com.**
- **API Access Token:** This is a read-only textbox.
- **Expiration Date:** Select up to a maximum of three months from the current date.
- **Email Address:** Enter the email address to which notifications will be sent. This field is automatically filled with the email address of the currently signed-in administrator.
- **Submit:** Click this button to save the information and generate the master token. After you have generated a master token, this button will change to **Generate Master Token** if the date you have selected on the **Expiration Date** field is within one week from the current date. This change indicates that the token is about to expire.

However, if you are a client with an existing API integration, click **API Self Service**. Here, you can set and manage the **SOA URL** and change the email address that will receive SOA notifications.

## Single Sign-On All-in-One Setup

Single Sign-On (SSO) enables you to use one set of credentials to log in to multiple websites and applications. Administrators can now configure Talent Management as the single sign-on service provider through the Talent Management user interface by enabling the existing global feature **Core » Single Sign-On (SSO)**. Enabling this global feature requires a Configurator user profile and can be accessed on the Features screen (**Administration » Global Settings » System Administration » Features**) via the Global list of features.

Once enabled, a new **Single Sign On All in One Setup** becomes available under the Integrations Setup screen (**Administration » Support Tools » Integrations Setup**).

This feature enables administrators to set up single sign-on (SSO) specifically on the Talent Management side. It applies when Talent Management is the service provider and a third party like Azure, Okta, ADFS, or Google serves as the Identity Provider. Clients will still be required to configure SSO on their Identity Provider's side.

# Core Framework

## Updates to Labels for Custom Menu and Icons

This release includes additional updates to improve user experience and performance. One of these updates involves reducing the character limit for Custom Menu link names to a maximum of 30 characters. This change is intended to prevent issues with text wrapping or justification problems.

In addition, the following icon labels have been refined to improve usability and clarity.

- On the Account Information screen (**Toolbar » My Account Button » Account Information**), hovering over the **Edit** button in the Account Information section now displays the following label: **Edit User Information**.
- On the Resume Attachments screen (**Career Center » My Résumés » Résumé Attachments**), hovering over the **Download** button now displays the following label: **Download <Attachment Filename>**.

## Survey Tool User Interface Updates

In addition to the overall user interface changes to spacing, alignment and design made throughout Talent, we have changed the position of the **Preview** button on Step 2 of the Create Survey process.

## Error Message Functionality

This release improves error management by directing you to the precise field location of an error, rather than redirecting you to the top of the page. This approach streamlines the user experience and saves time.

# Learning

The Learning module has been updated to complement the new design of the Version 18.0 user interface.

The Learning Search screen (**Learning » Learning Search**) has been completely redesigned with a more attractive, modern look that stands out particularly in **Dark Mode** view.

The icons for the different types of courses have been given a complete redesign, making it much easier to distinguish and identify them in the Learning Search table.

| Learning Type | Redesigned Icon |
|---|---|
| Learning Path |  |
| Read & Sign Course |  |
| Instructor-Led Course |  |
| E-Learning Course |  |

In addition to the overall user interface changes made throughout Talent, the following updates have been implemented on the following Learning module screens.

| Screen | Update |
|---|---|
| Courses Screen | ▪ Corrected the **Action** Dropdown Menu overflow in Course index page.<br>▪ Updated and optimized margins and spacing for Filter display results.<br>▪ Removed unnecessary characters and spaces. |
| External Training Screen | ▪ Optimized page margins and spacing. |
| Bulk User Class Enrollment Screen | ▪ Optimized buttons and labels.<br>▪ Corrected pagination, page margins and spacing. |
| Test Template Screen | ▪ Optimized buttons and label font. |

| Screen | Update |
|---|---|
| View Internal Template Screen | ▪ Adjusted page margins. |
| Edit Certification Screen | ▪ The fields on this screen now display in two columns for improved visibility. |
| Classes Instructing Screen | ▪ Optimized **Filter** button size.<br>▪ Corrected pagination and page borders. |
| Library Resources Screen | ▪ Corrected display border for **More Options** menu selection.<br>▪ Renamed the **Return All Resources** button to **Return Selected Resources**. |
| Learning Profile Screen | ▪ Optimized page alignment and headers.<br>▪ Optimized button display. |
| Create/Edit Evaluation Screen | ▪ Optimized date borders.<br>▪ Corrected the ability to change the correct answer for evaluation questions.<br>▪ Optimized spacing and labels for the **Question Type: Keyword** field. |
| Course Profile Screen | ▪ Optimized style for the following buttons: **Enroll**, **Launch E-Learning Course**, **Launch Package Properties Editor**, **Launch**, and **Mark Complete**.<br>▪ Adjusted Read & Sign asset link/filename margins.<br>▪ Corrected row height and spacing in the More Administrative Information section.<br>▪ Optimized style for the **Launch Asset** button for Read & Sign course profiles.<br>▪ Corrected and optimized margins for E-Learning course status labels.<br>▪ Optimized page flow when resizing the page. |
| Training Wishlist Screen | ▪ Optimized page flow when resizing the page.<br>▪ Optimized **Filter** display selection and results.<br>▪ Optimized system response time when adding a new Training Wish List item. |
| Rooms Screen | ▪ Updated **Search** button design. |

| Screen | Update |
| --- | --- |
| | ▪ Applied style and theme to Calendar.<br>▪ Updated format for **Start and End Date** field. |
| Equipment Screen | ▪ Applied style and theme to Calendar.<br>▪ Corrected ability to edit equipment.<br>▪ Optimized margins and spacing for **Contact** field.<br>▪ Realigned icons and menu items. |
| Classes Screen | ▪ Optimized size, border, and font alignment of the menu item selections for the **Action** button.<br>▪ Optimized alignment and spacing for **Filter** buttons.<br>▪ Optimized margins and padding for the menu item selections for the **Action** button in the Class table.<br>▪ Optimized margins and padding for the **Select Instructor**, **Save**, and **Cancel** buttons.<br>▪ The fields on this screen now display in two columns for improved visibility.<br>▪ Applied style and theme to Calendar. |
| Tuition Fee Assistance Screen | ▪ Optimized page design and spacing for tables and buttons.<br>▪ Applied style and theme to the following buttons: **Edit Request**, **Add Attachment**, **Print View**.<br>▪ Optimized margins and headers for the **Comment** field<br>▪ Corrected Calendar Year default value. |
| Class Change Status Screen | ▪ Optimized page design and spacing for checkboxes and field labels. |

# Performance

## My Employees Redesign

We redesigned the My Employees and My Matrix Employees screens with the following changes.

## Tabs and Buttons

The Performance, Development, and Learning buttons are now displayed as tabs at the top left of the My Employees and My Matrix Employees screens. Selecting one of these tabs reveals a series of related buttons beneath it. The content shown in the Employee Ribbon, located to the right of the employee photo, varies based on the selected tab and button. For example, choosing **Performance » Continuous Feedback** shows a list of active Continuous Feedback sessions for each employee. By default, the details for the first employee in the list are expanded, and users can use the **Collapse All** and **Expand All** options to hide or show details for all employees.

Here are the buttons that can display when each tab is selected. The tabs and buttons available depend on the enabled modules and features.

| Tab | Buttons |
|---|---|
| **Performance Tab** | Continuous Feedback, Appraisals, Employee Goals, Recognition, 360s |
| **Development Tab** | Skills and Competencies, Development Plan, Project Teams, Career Path, Succession Plans, Mentoring Relationships |
| **Learning Tab** | Education History, Learning Paths, Certifications, Certification History, Courses, External Training, Courses Watch List/Class Waiting List, Current Recommendations |

## Employee Profile Section Header

The employee name and job title display at the top of each employee profile. Click the name to open the employee's Total Talent Profile and the Job Title to open the Position Profile screen.

## Employee Badge and Ribbon

The badge includes a photo of the employee and information about the employee that is specific to the module selected, for example a performance score on the Performance tab. The Drill-down icon now displays beneath the employee photo on all tabs.

The area to the right of the photo, the Employee Ribbon, displays details about the employee. The details depend on the tab and button selected. For example, if the **Continuous Feedback** button is selected on the Performance tab, details about active continuous feedback sessions display in the Ribbon.

## Performance Tab

We redesigned the Performance tab Actions menu. We moved the drill-down option to the area beneath the employee photo and changed option names to be more user-friendly. Clicking on an option name, such as **Create New CF Session**, opens the appropriate screen in a new browser tab.

The following buttons may be available when the Performance tab is selected. The buttons that display for you depend on the features enabled for your User Group.

| Button | What Displays on the Employee Ribbon When Selected |
|---|---|
| **Continuous Feedback** | A list of Pending and Accepted continuous feedback sessions for each employee, with details such as the status of the session, the scheduled date and time, and the progress toward goals. |

| Button | What Displays on the Employee Ribbon When Selected |
|---|---|
| | This existing feature must be enabled for the logged in User Group to see this tab (**Administration » Global Settings » System Administration » Features » Performance » Continuous Feedback**). |
| **Appraisals** | Current, Pending, and Past appraisals for each employee. Managers can view appraisal details here and perform actions such as printing, scoring, and reassigning an appraisal to a new manager. 360 assessments are not displayed here. 360s display when the 360s button is selected.<br><br>This existing feature must be enabled for the logged in User Group to see this tab (**Administration » Global Settings » System Administration » Features » Performance » Appraisals**). |
| **Employee Goals** | A list of employee goals. This existing feature must be enabled for the logged in User Group to see this tab (**Administration » Global Settings » System Administration » Features » Performance » Goals » Employee Goals**). |
| **Recognition** | Details about recognitions received by each employee.<br><br>This existing feature must be enabled for the logged in User Group to see this tab (**Administration » Global Settings » System Administration » Features » Performance » Employee Recognition » Employee Recognition Page**). |
| **360s** | Details on Current, Pending, and Past 360 assessments. Managers can print and score 360s from this screen.<br><br>This existing feature must be enabled for the logged in User Group to see this tab (**Administration » Global Settings » System Administration » Features » Performance » 360 > 360 Only).** |

### Development Tab

We redesigned the Development tab Actions menu. We moved the drill-down option to the area beneath the employee photo and removed the redundant **View TTP** option. To view the Total Talent Profile of an employee, click the employee's name.

The following buttons may be available when the Development tab is selected. The buttons that display for you depend on the features enabled for your User Group.

| Button | What Displays on the Employee Ribbon When Selected |
|---|---|
| **Skills and Competencies** | A list of Skills and Competencies associated with each employee. Managers can withdraw approval for a competency and endorse or reject suggested skills on this screen. Click **Manage Competencies** to open the employee’s Competency Profile screen in a new browser tab. Click **Manage Skills** to open the employee’s Skills Profile.<br><br>These existing features must be enabled for the logged-in User Group on the features screen (**Administration » Global Settings » System Administration » Features)** to access this tab and the Manage Competencies and Manage Skills buttons: |

| Button | What Displays on the Employee Ribbon When Selected |
|---|---|
| | ▪ **Core » Skills » Skills Profile**<br>▪ **Core » Competency**<br>▪ **Core » Manage Employee Competencies**<br>▪ **Core » Skills » Manage Employee Skills** |
| **Development Plan** | Current and Past development plans associated with each employee, including the plan start date and the date targeted for completion. Managers can view details of plan items on this screen. Click **Manage Development Plans** to open the Development Plans screen in a new browser tab.<br>These existing features must be enabled on the features screen (**Administration » Global Settings » System Administration » Feature**) for the logged in User Group to access this tab. and to view the Past Development Plans section.<br>▪ **Core » Development Plans**<br>▪ **Core » Development Plans » Past Development Plans** |
| **Project Teams** | The project teams to which the employee belongs.<br>This existing feature must be enabled for the logged in User Group to see this tab (**Administration » Global Settings » System Administration » Features » Development » Project Teams**). |
| **Career Path** | Career paths associated with each employee. Managers have access to several actions on this screen, including adding the selected item to a career path or development plan, viewing gap analysis and pending career path jobs, and editing or deleting the item from the career path.<br>This existing feature must be enabled for the logged in User Group to see this tab (**Administration » Global Settings » System Administration » Features » Development » Career Path**). |
| **Succession Plans** | Details about the employee, such as where the employee sits on their path to their ultimate goal, potential successors for their current position, other plans where the employee is a participant, and the risk of loss.<br>This existing feature must be enabled for the logged in User Group to see this tab (**Administration » Global Settings » System Administration » Features » Development » Succession Planning**). |
| **Mentoring Relationships** | Details about the employee's relationship as a mentor and mentee, a clickable arrow to view details on the Mentoring Relationship screen, and a clickable pop-up that displays goals. Managers can approve or reject requests to act as mentor on this screen.<br>This existing feature must be enabled for the logged in User Group to see this tab (**Administration » Global Settings » System Administration » Features » Development » Mentoring**). |

## Learning Tab

We redesigned the Learning tab Actions menu. We moved the drill-down option to the area beneath the employee photo and removed the redundant **View TTP** option. To view the Total Talent Profile of an employee, click the employee's name.

The following buttons may be available when the Learning tab is selected. The buttons that display for you depend on the features enabled for your User Group.

| Button | What Displays on the Employee Ribbon When Selected |
|---|---|
| **Courses** | Lists courses in which the direct report is currently enrolled, and a list of past courses taken. Click the class name to view details.<br>This existing feature must be enabled for the logged in User Group to see this tab (**Administration » Global Settings » System Administration » Features » Learning » Courses**). |
| **Learning Paths** | Lists enrolled and completed learning paths or sets of courses with a common theme or learning objective. Click the learning path name to view details.<br>This existing feature must be enabled for the logged in User Group to see this tab (**Administration » Global Settings » System Administration » Features » Learning » Learning Paths**). |
| **Certifications** | Lists internal and external certifications. Click the certification name to download a copy of the certification. Users with the proper permissions can **Add External Certifications** from this section.<br>This existing feature must be enabled for the logged in User Group to see this tab (**Administration » Global Settings » System Administration » Features » » Learning » Certification » Employee Certification**). |
| **Certification History** | Lists internal and external certifications earned by the employee in the past. Click the certification name to download a copy of the certification.<br>This existing feature must be enabled for the logged in User Group to see this tab (**Administration » Global Settings » System Administration » Features » » Learning » Certification » Employee Certification**). |
| **External Training** | Lists degrees the employee has earned. Managers can acknowledge external training for the employee directly on this screen. To access more actions, access the External Training Screen. (Click **External Training** from the employee's Action menu in the upper right).<br>This existing feature must be enabled for the logged in User Group to see this tab (**Administration » Global Settings » System Administration » Features » Learning » External Training**). |
| **Education History** | Lists past courses taken. Click the class name to view details. Users with the proper permissions can add, or delete a degree, or edit details.<br>This section displays for all users with the Learning module enabled. |

| Button | What Displays on the Employee Ribbon When Selected |
|---|---|
| **Course Watch List/Class Waiting List** | The Course Watch Lists shows courses that you feel might benefit the employee at a later date, or that an employee is interested in taking, if a new class opens. The Class Waiting List shows classes the employee is waiting to be enrolled in. The number indicates the employee's place in the waiting list. Click a link to view course details.<br><br>These existing features must be enabled for the logged in User Group to see this tab (**Administration » Global Settings » System Administration » Features » Learning » Courses** and (**Administration » Global Settings » System Administration » Features » Learning » Classes**). |
| **Current Recommendations** | Lists courses recommended for this direct report.<br><br>This existing feature must be enabled for the logged in User Group to see this tab (**Administration » Global Settings » System Administration » Features » Learning » Course Recommendations**). |

## Performance Module User Interface Updates

In addition to the overall user interface changes made throughout Talent, the following updates have been implemented on the following Performance module screens.

| Screen | Update |
|---|---|
| Bulk Launch and Bulk Close Appraisals Screens | ▪ **Step 1 and Step 2:** Additional column added to Step 1 and Step 2 of these screens to eliminate unnecessary blank space.<br>▪ **Edit:** This button was redesigned and realigned. |
| Send Employees Letter Screen | ▪ **Step 1:** Additional column added to Step 1 of this screen to eliminate unnecessary blank space.<br>▪ **Edit:** This button was redesigned and realigned on the Step 2 screen. |
| Performance Workflow Screen | ▪ **All Steps:** Updated alignment, spacing, and button style across the 11 steps.<br>▪ **Step 4:** Minimized dropdown width.<br>▪ **Step 6:** Made color changes.<br>▪ **Step 7:** Made Input file updates.<br>▪ **Step 10:** Made Schedule field updates.<br>▪ **Step 11:** Additional column added to eliminate unnecessary blank space. |

| Screen | Update |
|---|---|
| Launch Appraisals Screen | ▪ **All Steps:** Updated alignment, spacing, and button style across the steps.<br>▪ **Step 3:** Updated spacing.<br>▪ **Selected Employees:** Employee(s) selected in Project Teams or My Employees before launching an appraisal appear as selected on the Launch Appraisals screen. |
| Score This Appraisal Screen | ▪ **Rating Tips:** Updated alignment and spacing of objects.<br>▪ **Journal Entry Action Buttons:** Updated button outline.<br>▪ **Appraisal Scoring Phase:** The scoring phase is now moved to the next phase without saving.<br>▪ |
| Appraisal Screen Competencies, Skills, and Achievements Tab | ▪ **Competencies Tab**: Updated the spacing and style of buttons and menus.<br>▪ **Skills Tab**: Updated object alignment and spacing.<br>▪ **Achievements Tab**: Updated alignment and spacing of objects, and updated the Action menu design.<br>▪ **Add Achievements Dialog**: Updated spacing.<br>▪ **Appraisal Scoring Phase**: The scoring phase is now moved to the next phase without saving. |
| Employee Recognition Likes and Comments | ▪ **Title and Description Fields:** Updated the style.<br>▪ **Comment Section:** Updated spacing and alignment.<br>▪ **Pointer Icon:** Updated the cursor that displays when hovering over Like/Unlike button to a pointer icon.<br>▪ **Layout and Design:** Optimized spacing and redesigned size of the Comment section. |

| Screen | Update |
| --- | --- |
| Employee Recognition Badges | ▪ **Spacing:** Added a horizontal spacer line between heading and page content.<br>▪ **Badge Management Button:** Updated alignment of Badge Management button when navigating between Employee Recognition tabs. |
| Initiate Cascading Goal Screen | ▪ **Spacing and Borders:** Updated spacing and removed border grids inside section blocks. |
| Appraisal Goal Tab | ▪ **Pending Review:** Updated Pending Review alignment.<br>▪ **Design and Spacing:** Updated button design and Action menu spacing. |
| Continuous Feedback Screen | ▪ **All Tabs:** Updated button alignment and style across tabs. |
| Session Meeting Reasons Screen | ▪ **New Session Meeting Reason Screen**: Added additional column to eliminate unnecessary blank space. |
| Bulk Launch 360 Screen | ▪ **Alignment:** Optimized text and button alignment.<br>▪ **Bulk Launch 360 Dialog:** Optimized the size of the dialog. |
| Reassign Appraisal Screen | ▪ Optimized Spacing |

### Employee Name Added to Skills Profile Screen

To improve the user experience, we added the name of the employee beneath the screen name on the Skills Profile screen. Since the logged-in user, as well as managers and others with permission to manage the employee's skills can access this screen, this addition of the employee name orients the user and makes it clear whose skills profile they are viewing.

## Recruiting

### Feature for Relevancy Score By Groups

A new group-based **Relevancy Score** feature has been added under the Recruiting module (**Administration » Global Settings » System Administration » Features » Recruiting).** The feature, enabled by default except for Employee and Job Seeker groups, enables the display of relevancy score on the following screens/pages:

- **Résumé Dashboard:** When enabled, a match score between a résumé and associated requisition is displayed.
- **Active Candidates:** When enabled, a match score between a résumé and associated requisition is displayed.
- **Résumé Search:** When enabled, a match score between a résumé and associated résumé search criteria is displayed.
- **Job Search:** When enabled, a match score between a résumé and associated requisition search criteria is displayed.

The relevancy score is normalized in percentage and represented with color-coded indicators:

| Color | Normalized Percentage |
|---|---|
| **Red** | 0 – 25 percent |
| **Yellow** | 25 – 75 percent |
| **Green** | 75 – 100 percent |

## 18.0 UI Changes for Recruiting

The user interface elements for the Recruiting module are now updated to help improve user experience and productivity, with some notable changes to the following screens:

| Screen | Updates |
|---|---|
| **Résumé Dashboard** | The Résumé Dashboard now displays more prominent headers, tabs, and buttons. The following changes were also implemented:<br>▪ The previous and next jobseekers in the list, along with the view count of jobseekers is displayed on top.<br>▪ The Selected Requisition is displayed at the right side of the screen.<br>▪ The **Edit**, **Print**, and **Download Résumé Attachments** buttons are now placed beside the candidate's name. |
| **Manage Campaigns** | The **My Published Campaigns**, **My Created Campaigns**, **My Draft Campaign**, and **All Active Campaign** tabs are now displayed horizontally, just above the **Sent** and **Unsubscribed** counter. |
| **My Calendar** | The My Calendar display (**View Calendar » My Calendar)** has been updated and now uses tabs |

| Screen | Updates |
|---|---|
| | to display **Year**, **Month, Week**, **Day**, **Add Event**, **and Pending Interviews**. |
| **Active Candidates** | These screens now use more prominent headers, tabs, and buttons. All updates to alignment, style, and spacing conform with the 18.0 UI redesign to simplify navigation and improve usability. |
| **Create Requisition** | |
| **Manage Requisitions** | |

# Reporting Tool

## Reporting Tool UI/UX and Navigation Conforms to Talent

We have redesigned the Reporting Tool to match the look, feel, and navigation of Talent. The following are small differences between the two interfaces:

- **Global Search:** The Reporting Tool toolbar does not include a global search field.
- **Navigation Pane:** Since the items on the navigation pane are few and easy to find, there is no navigation pane search and no favorites.
- **Create Report:** The **Create Report** button displays on the Main Menu Ribbon along with other menus. Click this button to open the Create a Report Screen.

## Preparations for Upcoming Upgrade to MySQL 8.0

We have made updates to the Reporting Tool to prepare for an upcoming upgrade to MySQL 8.0. This upgrade will happen soon, in a post- 18.0 release. When the upgrade is final, the upgrade will be backwards compatible, and your sites should still work on current servers. Due to changes in MYSQL 8.0, the upgrade will include changes to the GROUP BY statement, but you will not need to change client reports or data objects to accommodate this change when the upgrade happens. Since ASC/DESC is no longer available in MySQL 8.0, the Reporting Tool will ignore ASC/DESC when used in a GROUP BY statement.

# Software Issues Resolved

## Core Framework

### Terminated Users Not Processed Through Expected Termination Procedure

**Deltek Defect Number:** 1969547

**Description:** Terminated Users were not processed via the expected termination process. Instead, they were offboarded, immediately deactivated, and locked out of Talent Management. This occurred when the employee's termination date was on or after the current date and your company did not have the Recruiting module enabled.

## Development

### Employees Removed from 9 Box

**Deltek Defect Number:** 2090991

**Description:** When you set the **9 Box Performance Content Choice** field to **Populate 9 box from Manual Score**, users were removed from the 9 Box if they were not edited on that day.

## Integrations

### Suggest for Deletion Issues With Deleted User Accounts

**Deltek Defect Number:** 2123026

**Description:** When you used the Suggest for Deletion feature, integrations still had the ability to make changes to deleted user accounts. This problem was particularly common with HRIS integrations that store the hua_user_id, which caused users to appear in unexpected states. Before the issue was fixed, the workaround involved updating or removing the hua_user_id for a user when using Suggest for Deletion in Talent Management..

## Performance

### Validation Error When Editing Goals in Appraisals

**Deltek Defect Number:** 2008379

**Description:** When you added and saved a goal in an appraisal without specifying the Goal Score Type, Talent Management allowed it. However, once saved, you were unable to edit the goal due to a validation error.

### Synchronizing Edits: Changes Reflected in Copied Appraisal Goals

**Deltek Defect Number:** 2116084

**Description:** When you made additional changes to the Appraisal Goals, those changes were also applied to the goals on a duplicated Appraisal.

# Recruiting

## "URL Not Found" Error on Cancel Button in Edit Kiosks Page

**Deltek Defect Number:** 1996926

**Description:** Clicking the **Cancel** button on the Edit Kiosks screen (**Administration » Recruiting » Configuration » Kiosks » Edit Kiosks**) resulted in the following error message: "URL not found."

## National Identifier Uniqueness Error for Rehires

**Deltek Defect Number:** 2049548

**Description:** When you onboarded a rehire, an error stating "National Identifier should be unique" displayed. This was due to the function validating the uniqueness of the National Identifier entry not taking the given user ID into account. It was supposed to allow the same entry if it was meant for the same user.

## Inaccurate Count of Onboarding Forms, Documents and Task

**Deltek Defect Number:** 2064410

**Description:** The number indicated for completed onboarding documents, forms, and tasks was inaccurate due to an error in the query. The count excluded archived forms but included completed documents from only active forms.

## Wrong Due Date Displayed

**Deltek Defect Number:** 2071202

**Description:** When you received the Onboarding Task Reminder Notification, it displayed the wrong due date.

# Appendix A: For Additional Information

## Deltek Support Center

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

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

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

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

### Access Deltek Support Center

**To access the Deltek Support Center:**

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

# About Deltek

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