Deltek

Deltek Talent Management

Version 16.1 Release Notes

January 27, 2020

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Contents

Overview

Welcome to Deltek Talent Management Version 16.1 Release Notes. These release notes contain a summary of the following:

- Enhancements
- Software Issues Resolved

Enhancements

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

Note that there are feature controls in this release with the following default settings. Feature settings are enabled on the Features screen (**Administration » Global Settings » System Administration » Features**).

Module	Feature Name	Location	Default Setting
Core HR	Self-Service	**Administration »** Global Settings **»** System Administration **» Features »** Select Group from **Select a Group** drop-down **» CoreHR » Self Service**	Off
Learning	Include Employee ID	**Core » Quick Search: Employees**	Off
Learning	Include Employee National Identifier	**Core » Quick Search: Employees**	Off
Recruiting	Offers eSignature	**Administration »** Global Settings **»** System Administration **» Features » Recruiting » Offer » eSignature**	On

Recruiting

Candidate Unsubscribe Option

Candidates now have the option to unsubscribe to campaigns if they do not want to receive campaign notifications. Clicking the Unsubscribe link in the campaign emails provides the candidate the following options:

- **Opt out of current campaign**
- **Opt out of current and future campaign**

Once confirmed, a confirmation message is displayed and the unsubscribed information is recorded on the transaction log.

The unsubscribe option is set by adding the [campaign_unsubscribe_link] standard merge code to the TRM Letter Templates Category (**Administration » Global Settings » System Administration » Notification Events » TRM » Campaign Launched » Templates**).

Offer Letter – Job Code Merge Code

The job code now displays in offer letters for approval. The job code detail is pulled through a merge code [offer_job_code], which can be added in the Offers Notification Events (**Administration » Global**

Settings » System Administration » Notification Events » Offers) and Letter Templates in the Offer category (**Libraries » Letter Templates**).

Configure Individual Onboarding Task to Include Attachments

Administrators can now configure individually onboarding tasks that need or require attachments to complete. This feature is enabled by selecting the **Required** check box on the Onboarding Task Management screen (**Administration » Recruiting » Onboarding » Task Management » Onboarding Tasks**.

Summary Display of Talent Pools and Candidates Selected

Campaign creators and owners can now view the summary of selected talent pools and candidates when creating or editing campaigns. A new **Add Recipients** button has been added for selecting talent pools and candidates, with a modal window that allows multi-selection and provides a summary list of selected recipients. An **Add More Recipient** button is also available for adding more recipients.

TRM Campaigns Added to Resume Dashboard Information Tab

A TRM Campaigns section now displays on the Information tab of the Resume Dashboard (**Recruiting » Candidates » Active Candidates » Resume Dashboard » Information**). The campaign name is linked when a user has access to it, which when clicked, will display the Campaign Details screen.

Offers eSignature Feature Setting Options

Customers can now enable or disable eSignature on Offers, as necessary, through the **Offers eSignature** check box under the Offer section of Recruiting feature (**Administration » Global Settings » System Administration » Features » Offer » eSignature**).

National Identifier: Mask NIC for Mauritius

The National Identity Card (NIC) value for Mauritius can now be masked when sent through email. The NIC value is masked by selecting the **Yes** value option under General section of System Settings (**Administration » Global Settings » System Administration » System Settings » General**).

Performance

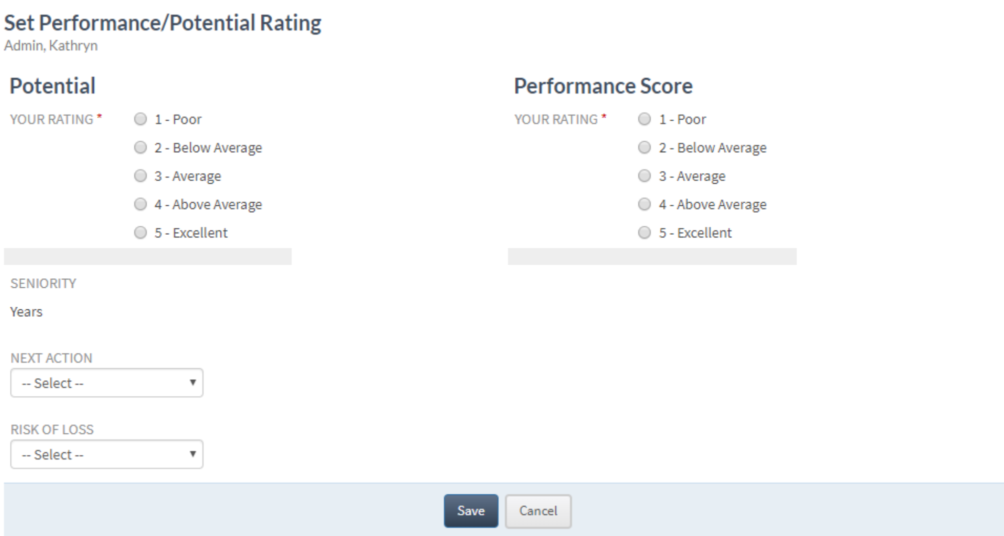
New System Setting Option: 9 Box Performance Content Choice

The 9 Box Performance Content Choice System setting (**Administration icon » Global Settings » System Administration » System Settings**) gives administrators the choice between two ways to populate 9 box content:

- **Populate 9 box from Appraisal Score:** 9 box content will be pulled from employee's Appraisal Score information,
- **Populate 9 box from Manual Score:** 9 box content will be pulled from manual scores set using the **Set Performance/Potential Rating** option, available from an employee's Action menu on the My Employees screen.

Set Performance/Potential Rating Option Allows Managers to Manually Rate Employee Performance

Managers can manually rate an employee's performance, outside of the Appraisal process, in the Set Performance/Potential Rating dialog (**My Employees » My Employees » Actions menu » Set Performance/Potential Rating**). The Set Performance/Potential Rating option is available from the Actions menu on both the Development and the Performance tab. The rating options available in the Performance Score column of the Set Performance/Potential Rating dialog are determined by the scale selected by an Administrator as the System Overall Scale. An Administrator sets this option on the Scales screen (**Administration icon » Global Settings » Your Organization » Scales).**



Continuous Feedback Session Creators Can Now Edit Session Details

Continuous Feedback Session creators can now edit all session details such as Date, Meeting Reason, and Progress, for a session that has already been submitted.

If a manager creates the session, that manager can edit the session details at any time, until the session is marked Completed. In this scenario, employee(s) on the session cannot edit the session at any time, whether the session is Pending, Accepted, or Completed.

If an employee creates the session, that employee can edit the details of the session at any time, until the session is marked Completed. The manager on this session can also edit the session details.

New Continuous Feedback Tab on Project Team Screen

Project Owners or Leads and Project Team members now have access to a new Continuous Feedback tab on the Project Team screen. Options available when creating the session are the same as those available when creating Continuous Feedback Sessions from within the Performance module, including the reason for the meeting, meeting date and time, and participants to include in the meeting. However, the default participants added when creating the meeting from Project Teams are the Project Team Lead and the team member(s).

- **Project Owners:/Team Leads/Administrators:** To access the tab, click **My Employees » Project Teams » Click the name of a Project Team for which you are the lead » Click the Continuous Feedback tab**. On this tab Team Leads can filter the sessions shown by date and by including only completed sessions. They can create Continuous Feedback sessions for each of the members of the team by clicking the plus icon for that team member, entering details about the session, and clicking **Submit**. Administrators can also create sessions for each of the members of the team, acting on behalf of the Team Lead.

- **Employees/Team Members:** To access the tab, click **Career Center » Project Teams » Click the name of a Project Team you belong to » Click the Continuous Feedback tab**. Any member of a team can create a new session on the Project Teams screen of a project for which they are a member by clicking the **Create New Session** button, entering details about the session, and clicking **Submit**. The default participants of the session will be the team member adding the session and the Project Team Lead (not the employee's manager).

In addition, the tab previously titled Performance (**My Employees » Project Teams » Click the name of a Project Team for which you are the lead » Performance**), where Project Leads could launch Project Appraisals and 360 Appraisals, has been renamed **Appraisals**.

Appropriate Manager Now Receives Level 2 Approval

The appropriate manager now receives the Level 2 approval during project appraisals and standard appraisals:

- **Project Appraisals:** For project appraisals, the project owner's manager receives the Level 2 approval, rather than the employee's Level 2 manager.
- **Standard Appraisals:** For standard appraisals, the appraisal manager's manager receives the Level 2 approval, rather than the employee's Level 2 manager.

Edit Performance Appraisal Workflow Prior to Assessment Phase

Administrators can make changes to an Appraisal Workflow prior to the appraisal moving to the Assessment phase. This allows administrators to catch errors and make changes post launch. The process for editing an Appraisal Workflow post launch is the same as editing an appraisal before launching, but when changes are made post launch, all appraisals that have not yet moved to the Assessment phase will be updated in a batch process at the end of the day. If you have configured multiple Assessment phases, edits must be made prior to the first Assessment phase.

A new Bulk Appraisals Administration section, Batch Appraisal Workflow Update (**Administration » Performance » Appraisals » Appraisal Administration » Bulk Appraisal Actions**), has also been added to assist with this feature. In this section, Administrators can view details, such as status, related to workflow updates.

Bulk Reassign Appraisals Feature

The Bulk Reassign Appraisals feature allows an administrator to reassign a group of appraisals to another manager. Users with access to Appraisal Administration have a new button, **Reassign Appraisals**, which is available on the Appraisal Administration screen (**Administration » Performance » Appraisals » Appraisal Administration**). On the Reassign Appraisals screen, administrators can filter appraisals by Manager or by Workflow.

After an appraisal has been reassigned, a New Appraisal Manager notification is sent to the newly assigned appraisal manager.

Assign Weight to Goals When Added Via Appraisals

The process of adding goals via the Appraisal feature has been re-designed to mimic the process of adding competencies. This improves the method for assigning weight across selected goals. When a user with permissions to add goals in an Appraisal clicks on a goal tab within an Appraisal, the user will see a **Manage Goals** button. When the user clicks this button the Manage Goals dialog opens, where the user can move available goals to the Selected Goal area on the right. Weights are automatically distributed among all selected goals, and can be adjusted, as necessary. To add a new goal, the user would click the **Add Goal** button and use the options on the Add Goal form to add the goal via import or by entering information on the form and clicking **Submit**. Goals added this way will automatically be added to the Selected Items column on the right side of the Manage Goals dialog and weights will be automatically distributed among all selected goals, and can be adjusted as necessary.

Learning

New Associative Learning Requirements Functionality

Managers, Learning Managers, and Administrators now have the ability to assign associative learning requirements to employees based on the associations of the learning requirement's Objective, such as Job Family, Job Roles, etc.).

The Learning module determines the Objective based on the **Course Type** and **Course ID** selected for the associative learning requirement. When the criteria is met, the Learning module automatically generates related tasks, such as classes and courses for the matched employees to complete within a given deadline.

This enhancement adds a new **Associative** value to the **Type** field in the following screens:

- Manage Learning Requirements (**Learning » Learning Requirements**) filter criteria
- View Learning Requirement (**Learning » Learning Requirements » View**)

Managers, Learning Managers, and Administrators receive system alerts when a deadline is approaching that has not yet been met.

This functionality is available only if the **Learning Requirements** feature is enabled under **Administration » Global Settings » Features**.

Combined Search for Courses and Curricula: Navigation and Usability Changes

This enhancement introduces a new, combined Learning Search screen (**Learning » Learning Search**) that replaces Course Search and View Curricula. It also enhances the look and feel and functionality of the search results to provide you with useful, at-a-glance information about courses, classes, and curricula from a single screen.

By default, the Learning Search screen displays all courses and curricula available to your user profile. You can use the **Filter** option to find specific items.

Learning Search Sections

The new screen is divided into two sections: the **Courses** section and the **Curricula** section. For each section, you can opt to sort the contents by name alphabetically in ascending or descending order. Previously, you could only view course content and curriculum content separately via the Courses Search screen or the View Curricula screen.

Course Pull-Tab

For Instructor-Lead courses, the Courses section includes pull-tabs for each listed course. Clicking the pull-tab expands the course to reveal the table of classes associated with the course, along with class schedule, status, and enrollment capacity details. From this expanded view, you can also perform **Actions** such as enrolling yourself or enrolling your direct reports to a specific class. For E-Learning and Read and Sign courses, the Courses section provides a quick view of the course details.

Condensed Curriculum View

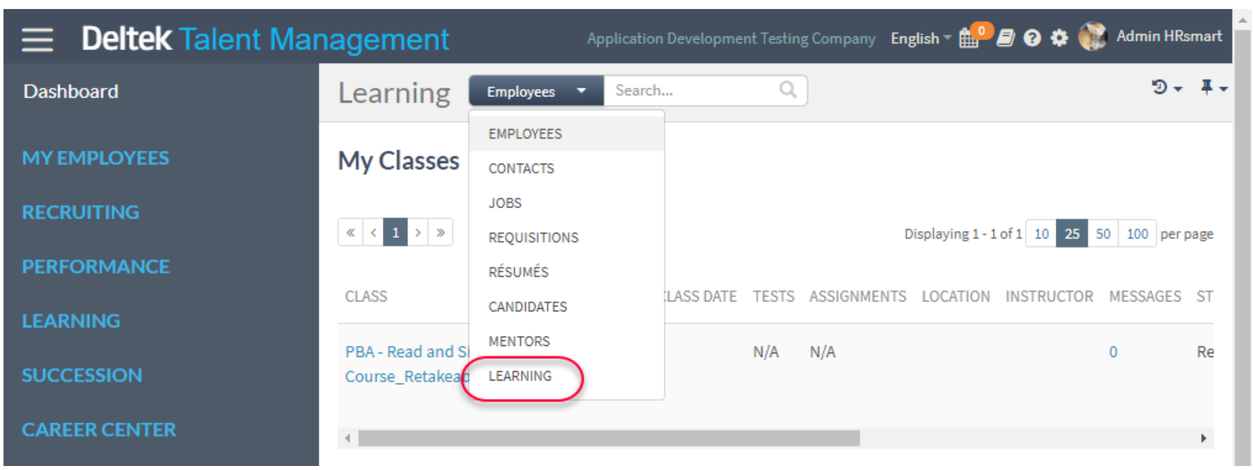
The Curricula section gives you easy access to course and class information**,** as well as enrollment options. It displays the same information contained in the old View Curricula screen, with the following changes:

- **Action** button: This allows you to quickly **Request Enrollment** for yourself, **Enroll Students**, or **Add New Learning Requirements** to the curriculum.
- Collapsible **Course** subsection: From here, you can view all the courses associated with the curriculum.

  For Instructor-Lead courses, each listed course has a pull-tab that expands to reveal a table of classes offered. The table includes class details such as schedule, status, and enrollment capacity. You also have access to **Actions**, which allow you to enroll yourself or your direct reports to a class – all without navigating away from the Learning Search screen. For E-Learning and Read and Sign courses, the Courses subsection provides a quick view of the course details.

Global Search Drop Down Menu

The **Courses** option has been replaced with **Learning**. Selecting **Learning** as your global search option launches the Learning Search screen.



New Learning Menu Structure and Order

This enhancement streamlines the menu navigation structure of the Learning module. From the Navigation Bar, the Learning menu now displays the following options:

- Learning Search (New!)
- Learning Profile
- Classes Enrolled In
- Classes Instructing
- Class Schedule
- Learning Requirements

- Training Wish List
- Tuition Assistance
- External Learning

This simplified structure flattens the navigation tree, making it easier for you to move between screens within the Learning module from the Navigation Bar.

The following menu options have been removed:

- My Learning
- Courses & Classes
- Curricula

The following screens have been removed and replaced by the Learning Search screen:

- Search Courses screen (previously Learning » Courses & Classes » Search Courses)
- View Curricula screen (previously Learning » Curricula » View Curricula).

Enrollment From the Curriculum Profile Screen

With the removal of the View Curricula screen in this release, curriculum enrollment options are now moved to the Curriculum Profile screen.

This enhancement adds the following buttons to the Curriculum Profile screen:

- **Request Enrollment** – This button does not display if the student is already awaiting approval for enrollment into the curriculum or if the student is already an active student in the curriculum.
- **Drop Curriculum** – This button displays only if the student is enrolled in or awaiting approval for enrollment into the curriculum.

Core HR

All Changes Made to Total Talent Profile Display on History Tab

In addition to Effective Dated fields, all changes made to the profile on the Employee Summary Pane, Personal and Contacts tab, and Employment Details tab, will display on the History tab. The following changes were made to enable this enhancement:

- The Job Attribute field was renamed Attribute
- Additional fields from the Personal and Contacts tab and the Employment Details tab were added to the drop-down list of attributes on which a user can filter History results.
- The Effective Date and Reason for Change columns will be blank for all fields that are not Effective Dated enabled.

Additional Security Added to Ensure TTP Data Remains Confidential

To ensure that a user’s Total Talent Profile data remains confidential, DTM grants access to information by role, as follows:

- **All TTP Users:** Can view details on the Preferences tab and Employee Summary Pane.
- **Employees**: Can view all details for which an administrator has granted access rights on their own Total Talent Profile.

- **Manager:** Can view all details for which an administrator has granted access for employees who are in the managers reporting chain.
- **Core HR Administrator:** Can view all details for which an administrator has granted access for all TTP employees.
- **HR Business Partner:** Can view all details for which an administrator has granted access for only the employees assigned to the HRBP.
- **Matrix Manager**: Can view all details for which an administrator has granted access for only the employees assigned to the Matrix Manager.

New Self Service Tab added to Total Talent Profile

The Self Service tab displays items submitted in the new Self Service area. Items displayed depend on your role:

- **Employees:** Can view all items the employee has submitted in the Employee Self Service area.
- **Manager:** When viewing a direct or indirect reports profile, a manager sees all items the manager has submitted for the selected employee in the Manager Self Service area.
- **Core HR Administrator**: Can view all items submitted by employees and managers in the Employee and/or Manager Self Service area.
- The following columns display on the Self-Service Tab:
  - Employee Name: On Manager's view only
  - Job Attribute
  - Previous Value
  - New Value
  - Effective Date
  - Reason
  - Date of Change.

New Self-Service Features Control Access to the Self-Service Options for Core HR Users

The Self-Service feature allows users and managers to edit the Total Talent Profile, and allows the appropriate users to approve these changes. When enabling this feature (**Administration icon »** Global Settings **»** System Administration **» Features »** Select Group from **Select a Group** drop-down **» CoreHR » Self Service)**, several options are available:

- **Self-Service Approval:** This feature controls access to the Self-Service approval options available on the My Employees menu. When this feature is enabled, users in the group for which the option is enabled (Core HR Administrators) will see an Approvals option on the My Employees menu (My Employees » Approvals). These additional features are available under Self-Service Approval:
  - **Act on Self-Service Approvers Behalf:** Selecting this option allows members of the group for which the feature is enabled (Core HR Administrators) the ability to act on behalf of another Self-Service approver.

  - **Rejection Note:** This feature requires the approvers to write a reason for rejection when rejecting an employee or manager initiated Self-Service change that requires approval.
- **Self-Service Configuration:** This feature gives Core HR Administrators access to configure the sections that Employees can edit on their own profile (for example Contact Information), and that Managers can edit on their direct reports' profiles. Note that an employee or manager must also belong to a group with View access rights to the sections they are being granted access to edit.

  (**Administration icon »** Global Settings **»** System Administration **» Features » Select a Group** field **»Total Talent Profile**)

  - **Personal & Contact Details Tab**
    - View Contact Information
    - View Personal Information
    - View Compensation Information
    - View Hire and Termination Information
    - View Job Information
    - View Professional Information
  - **Employment Details Tab**
    - View Vet, Citizenship and Passport Information

Self-Service section of My Pending Approvals Screen

A new Self-Service section displays on the My Pending Approvals screen, to those licensing Core HR. Core HR Administrators can use this section to approve Total Talent Profile Self-Service changes. Important details about Self-Service Approval:

- The My Pending Approvals screen with this new section enabled (for those licensing Core HR) is accessible from the Performance menu and from the My Employees menu (**My Employees » Approvals**).
- Users will receive notifications when an approval is required from them, which includes a link to the My Pending Approvals screen.

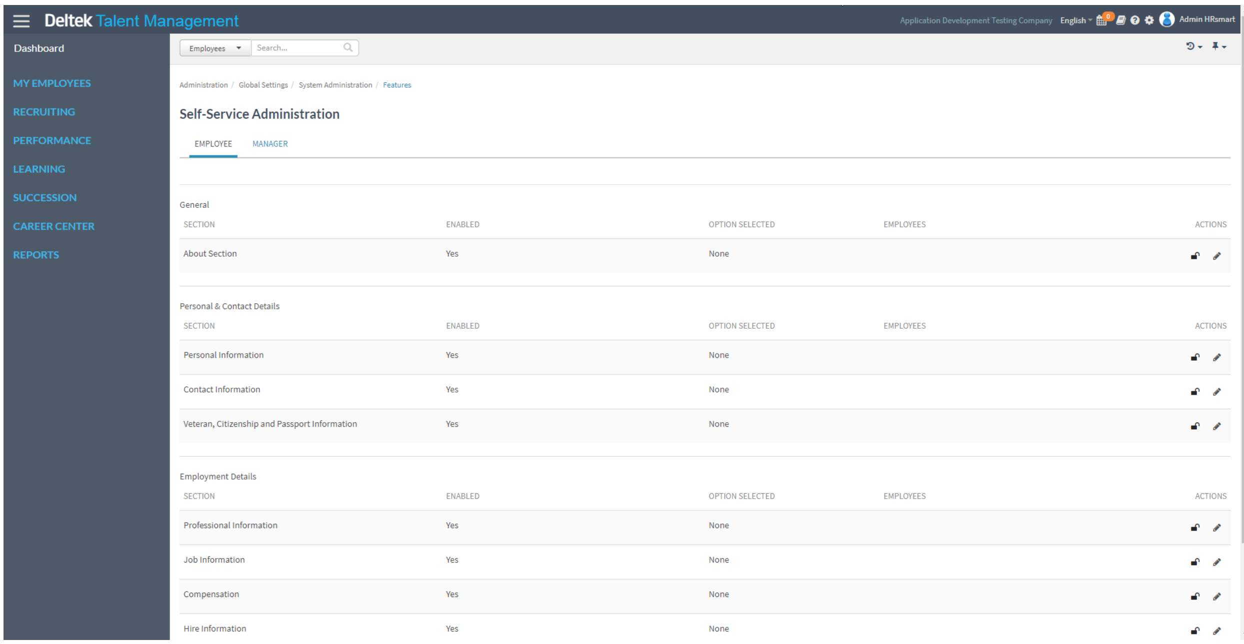
The following information about changes that require approval is included in the Self-Service section:

- **Employee Name:** The name of the employee's profile for which the change was made
- **Job Attribute:** The item that was changed.
- **Previous Value:** The previous value before the change.
- **New Value:** The new value after the change.
- **Effective Date:** The effective date for the change to take place, if applicable.
- **Reason for Change:** The reason for the change.
- **Date of Change:** The date the change was made.
- **User:** The name of the user who made the change. This will be either the profile owner, or that employee's manager.
- **Available Actions:** From the Actions menu, approvers can approve, reject, and depending on whether the **Rejection Note** option was enabled by a Core HR Administrator, approvers may be required to add a note about the reason for the rejection. Approvers also have the option to check

the items in the Self-Service section and select one of the Bulk Actions: **Approval all selected** or **Reject all selected**.

New Self-Service Administration Screen

A new Self-Service Administration screen (**Administration icon » Core HR » Self-Service**) allows Core HR Administrators to configure what aspects of the Total Talent Profile an employee and/or manager can edit.



The screen contains two tabs: Employee and Manager, and each tab contains the following columns:

- **Section**: The name of the Total Talent Profile Section.
- **Enabled**: Whether or not this section is enabled for editing by the Employee or Manager.
- **Option Selected**: The Self-Service Configuration option selected for this section: No Approval/Notification, Notification Only, or Approval Required.
- **Employees**: This column lists the number of employees involved in the approval and/or notification process for this section.
- **Actions Available**: On both the Employee and Manager tab, the following actions are available for each section:
  - **Enable/Disable**: An administrator configures whether the section can be edited by clicking the Enable or Disable icon in the Actions column.
  - **Edit**: Clicking the Edit icon opens the Edit dialog, where an administrator can configure the Self-Service Configuration options for each section. Options include:
    - **No Approval/Notification**: Select this option and click Submit to enable changes to be made without notification to or approval from other parties.
    - **Notification Only**: Select this option and click **Next**, then select the users who should receive an email notification when changes are made, and click **Submit**.
    - **Approval Required**: Select this option and click Next, then select Approval Chain(s) and Approvers, based on approval chain type, managerial level, or individually, by

name. If necessary, click **Next** to order the selected approvers in the approval chain. When finished, click **Submit**.

On both the Employee and Manager tabs, the following sections are available for an administrator to enable editing and configure notification and approval options:

- General
  - About Section
- Personal & Contact Details
  - Personal Information
  - Contact Information
  - Veteran, Citizenship and Passport Information
- Employment Details:
  - Professional Information
  - Job Information
  - Compensation
  - Hire Information
  - Termination Information

Pending Self-Service Approvals Section Gives Administrators Ability to Reassign Pending Self-Service Approvals

A new Pending Self-Service Approvals option displays on the Reassign Pending Items screen, for employees who were offboarded with self-service actions still pending. Administrators can reassign Pending Self-Service Approvals to another user. Options that display in the Pending Self Service Approvals Section include:

- **Employee Name:** The name of the employee's profile for which the change was made
- **Job Attribute:** The item that was changed.
- **Previous Value:** The previous value before the change.
- **New Value:** The new value after the change.
- **Effective Date:** The effective date for the change to take place, if applicable.
- **Reason:** The reason for the change.
- **Date of Change:** The date the change was made.
- **User:** The name of the user who made the change. This will be either the profile owner, or that employee's manager.

Notifications Sent When Changes Are Made to Total Talent Profile

Core HR Administrator can configure DTM to require notifications and/or approvals when employees or managers make changes to a Total Talent Profile (**Administration >> Core HR >> Self-Service >> Click the Edit icon for a section >> select notification/approval options**). The following notification(s) will be sent to the employees selected during configuration:

- **If Approval Required is Selected:** When DTM is configured to require approvals of changes to the Total Talent Profile, the employee or manager who made the change will receive an email notification when the change(s) are approved or rejected, and additional approvers will receive a notification when an action is required.

- **Approved:** The notification will indicate, "Employee Information Change Has Been Approved."

  Sample

  Employee Information Change Has Been Approved

  Body

  Dear [recipient_full_name],

  An employee information change for [employee_full_name] has been approved by [approver_full_name]. Approval comments:

  If you'd like to view the change, click link below:

  [action_url]

  Thank you,

  [company_name]

  SMS Version

  [employee_full_name]'s information change has been approved. To view details, visit: [action_url]

- **Rejected:** The notification will indicate, "Employee Information Change Has Been Rejected."

  Sample

  Employee Information Change Has Been Rejected

  Body

  Dear [recipient_full_name],

  An information change for [employee_full_name] has been rejected by [approver_full_name]. Rejection comments:

  Please view the change and resubmit it if desired by clicking on the action link below:

  [action_url]

  [company_name]

  SMS Version

  [employee_full_name]'s information change has been rejected. To view details, visit: [action_url]

- **Notice of Approval Needed:** If a user is next in an approval process, the notification will indicate "Employee Information Update Approval Needed."

  Sample

  Employee Information Update Approval Needed

  Body

Dear [recipient_full_name],

You are the next approver on an employee information update for [employee_full_name]. You may approve or reject the change by clicking on the following action link:

[action_url]

Date Change Submitted:

Date Change Effective:

Thank you.

SMS Version

[employee_full_name]'s information update is awaiting your approval: [action_url]

- **If Notification Only Is Selected:** When DTM is configured to require that certain employees receive notifications when changes are made to the Total Talent Profile, the employees selected during configuration will receive an email notification when changes are made.

  Sample

  Employee Information Change Has Been Submitted

  Body

  Dear [recipient_full_name],

  An employee information change for [employee_full_name] has been submitted. No action is required at this time.

  If you'd like to view the change, click link below:

  [action_url]

  Thank you,

  [company_name]

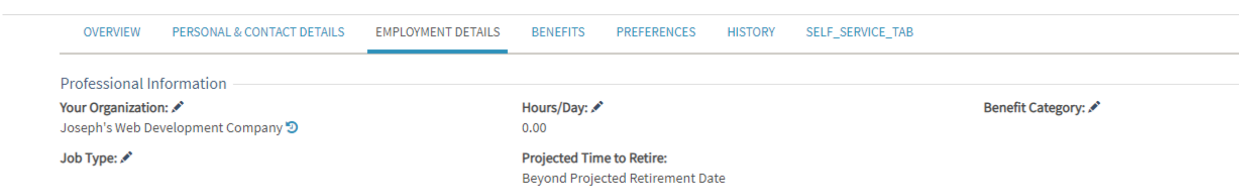
  SMS Version

  [employee_full_name]'s information change has been submitted. To view details, visit: [action_url]

Managers and Employees Can Now Edit Total Talent Profile, Based on Configurations Set by Core HR Administrators

To ensure Total Talent Profiles remain up-to-date and accurate, managers and employees can now edit certain sections and fields on their profiles, or the profiles of their direct reports. Core HR Administrators configure who has access to edit the Total Talent Profile, and which sections and fields are editable.

When a Core HR Administrator has enabled the ability for an employee to edit his profile or for a manager to edit her direct reports' profiles, a pencil icon will display to the right of a field that has been enabled for editing.



Improved Internal Job History Handling for Effective Dated Fields

We have enhanced the way job history is handled for effective dated fields. To properly support effective dating of employee work information, the location of the following effective dated fields was changed in a previous release in the database schema, however there are many locations within DTM that still attempt to retrieve the information from their original locations. The code has now been fully updated to retrieve effective dated information from the proper location.

The following fields are affected by this change:

- **Termination Date**
- **Supervisor**
- **Location**
- **Job Title**
- **HR Organization**
- **Hire Date**
- **Annual Rate/Pay Rate**

Added Component 2 to EE0 1 Report

Changes have been made to the EE01 Report to show total hours worked and salary information in a separate table, as this information is now mandatory for Component 2 of the EEO-1 report. DTM does not currently calculate pay or track total hours worked, so data will not be populated into this second table, but blank fields have been added to the report so users can add data manually, as needed.

Core Framework

New Display Filter on the Job Profiles Screen

A new **Show Only** filter has been added to the Job Profiles screen (**Administration » Global Settings » Your Organization » Job Profiles**). This allows administrators to filter the displayed job list according to **All** jobs, **Active** jobs, and **Inactive** jobs.

New Ability to Import and Export Custom Language Tokens

Administrators can now export custom language translations and perform bulk import of custom language token translations and via the Languages screen (**Administration » Global Settings » System Administration » Languages**).

In the **Actions** column, a new **Export Customized Tokens** option has been added, allowing administrators to export custom tokens into a .CSV file.

In addition, under **More Options**, a new **Import** option has been added. Clicking **Import** leads to new Import Language Token Translations screen, which contains a sample CSV file for administrators to use as a template as they upload their consolidated list of custom tokens.

Help Resources Update

This enhancement removes the **Instructions on this Page** option from the **Help Resources** menu of the main Deltek Toolbar. Page instruction content is now integrated into the new Deltek Talent Management online help system (? **» Help Resources » Help on this Page**).

If you leverage the Help functionality to provide customized instructions to your company's users and include the Instructions on this Page content in your customized instructions, please save the content to an FAQ or internal document before the DTM 16.1 Release is applied.

The **Video Library** screen (? **» Help Resources » Video Library**) now links to the Learning Aids page of the new online help system. Along with online help, you can use learning aids such as click-thrus, click-guides, and videos to explore Talent Management features.

Language Installation Improvement

Installing a language on the Add Language screen (**Administration » Global Settings » System Administration » Languages » Add Language**) has been simplified. Administrators now only need to complete the following fields to install a language:

- **Language**: This drop-down list contains all available languages to be installed.
- **Language Name**: This text field determines the language display name in Talent Management.

New License File Screen

Administrators can now have an at-a-glance view of their company's Talent Management license file information.

The new License File screen (**Administration » Global Settings » System Administration » License File**) displays the following information:

- **Licensed Products:** This lists the Deltek products that your company is licensed to use.
- **Licensed Features:** This lists the Talent Management features that are activated for your company.
- **Licensed Languages:** This lists the Languages that are activated for your company.
- **User License Counts:** This displays the number of **Available**, **Active**, **Inactive**, and **Total** user licenses for your company.

Updated UK Location Options

The options for the **States/Provinces** field for the United Kingdom has been updated to comply with ISO 3166 Second Level Subdivisions standards, as determined by the International Organization for Standardization (ISO).

Updated US Location Options

The following states have been added as options for the **States/Provinces** field for the United States:

- **Armed Forces:** Uses the **AE** abbreviation.
- **Armed Forces Pacific**: Uses the **AP** abbreviation.
- **Armed Forces America:** Uses the **AA** abbreviation.

Easier Identification of Logged In User (1094237)

The Deltek Talent Management main Toolbar now displays the name and photo of the currently-logged-in user. This makes it easier to identify whether the correct user is logged in, particularly for companies that have users who share devices.

Upload Improvements

Administrators can now include Start Date and Hire Date information when uploading users in bulk on the Upload User File screen (**Administration » Global Settings » Your Organization » Users » Upload User File**) by populating the following new columns:

- position_hire_date
- position_start_date

Please use the **Sample User Upload Template File** provided on the screen to ensure that you are using the latest CSV template.

User Search Improvements

This enhancement grants users the ability to use the Employee ID number and the National Identifier Number (such the Social Security number or any application national identifier for your company) as criteria when searching for employees.

For Administrators, this introduces the following new options to the **Core » Quick Search: Employees » Include Employee ID** section of the Features screen (**Administration » Global Settings » Features**):

- **Include Employee ID:** This allows users from the selected Group to use the **Employee ID** as search criteria when searching for **Employees** on the Quick Search tool bar.
- **Include Employee National Identifier:** This allows users from the selected Group to use the **National Identifier ID** number as search criteria when searching for **Employees** on the Quick Search tool bar.

Also for Administrators, this adds the following filter options on the Users screen (**Administration » Global Settings » Your Organization » Users**):

- **Search Employee by ID**
- **Search Employee by NI**

User Management Features Improvement

This enhancement streamlines the **Core » Limited User Management** option of the Features screen (**Administration » Global Settings » System Administration » Features**)

The feature is now renamed to **Core » User Management**, and has the following sub-options:

- **Add User:** This feature provides administrators access to add new users and to edit existing users. Previously, the ability to add and edit users were assigned to two separate feature options.
- **Bulk Upload Users:** This feature allows users to upload new users in bulk and allows administrators to edit bulk uploaded users on the Users screen (**Administration » Global Settings » Your Organization » Users**).

These sub-options replace **User Management** and **User Management Transfer** under the old **Limited User Management** feature.

API and SOA

New Fields Added to Employee Personal Details API and Search Employee Details API

This enhancement adds the following new APIs, allowing Talent Management to import data that includes the new Core HR fields:

- Create and Update Employee Personal Details API
- Update Employee Work Details API

It also adds the following fields to the search criteria for the Get Employee Personal Details API and the Get Employee Work Details API:

- user_deactivated
- org_level_id
- location_id

Improved API Handling to Support Effective Dating

The following APIs have been updated to support effective dating for key employment information. This improves date handling by allowing Talent Management to store historical information and future dated changes. This is allows an audit trail of all changes, such as who made the change, when was it made, the reason for the change, and when will it be effective:

- Search User
- Create User
- Update User
- Terminate User
- Unterminate User
- Get New Hires
- Create Position
- Reassign Position
- Search Positions
- Offboard Employee
- Search Job History
- Get New Hires
- Get Position By Position Code
- Empty Position
- Get Recently Closed Appraisals
- Bulk Manage Positions

Software Issues Resolved

Recruiting

Requisition Status Reverting to Draft

Deltek Defect Number: 707106

Description: Upon hiring a successful candidate, some requisitions were automatically changed to **Draft** Status instead of **Hired** or **Closed**.

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

Inconsistent Results on the Search Résumés Screen

Deltek Defect Number: 1012035

Description: Running a search using the **With at Least One of the Following** keyword criteria on the Search Résumés screen (**Recruiting » Résumés » Search Résumés**) generated inconsistent results.

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

Onboarding Form Display Issues

Deltek Defect Number: 1053472

Description: Completed onboarding forms displayed field values containing unexpected symbols and characters.

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

Custom Field Not Filtering Searches

Deltek Defect Number: 1103401

Description: Using a **Yes/No** custom field as a search parameter when searching for resumes resulted in incorrect results if you selected **No**.

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

Zip/Postal Code Character Limit Bypassed in Resume Form

Deltek Defect Number: 1164519

Description: Users were able to save Zip/Postal code values that exceeded five characters on the Resume Creation wizard.

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

Incorrect Menu Path Displayed on the Onboarding Tasks and Onboarding Queue Screens

Deltek Defect Number: 1199254

Description: The menu path displayed on the upper-right corner of the screen did not refresh when you navigated to the Onboarding Tasks (**Recruiting » Onboarding » Onboarding Tasks**) and Onboarding

Queue (**Recruiting » Onboarding » Onboarding Queue**) screens. Instead, the screen displayed the menu path of the previous screen you had accessed.

Customers Impacted: This affected clients who use the Onboarding functionality module.

Job Opportunity Notification Issue

Deltek Defect Number: 1180770

Description: Job Referral candidates who applied to a job posting with the **Apply Settings** in the **Employee Referral Program** set to **No** received a Job Opportunity Notification upon submission of their applications.

Customers Impacted: This affected clients who do not use the Employee Referral Program functionality.

Incorrect Alert Display on the Main Dashboard

Deltek Defect Number: 1199254

Description: Instead of displaying the full campaign name, **Unfinished** or **Draft** TRM campaigns displayed as "**_unfinished**" on the Alerts section of the Main Dashboard.

Customers Impacted: This affected clients who use TRM campaigns.

Performance

Score Update Issue

Deltek Defect Number: 1070189

Description: The overall score did not reflect the edits you made to an appraisal score. This occurred after you changed an appraisal score to **N/A** and then saved the changes.

Customers Impacted: This affected clients who use appraisals with an N/A scale.

Phase Weights Not Applied to Overall Score

Deltek Defect Number: 1138644

Description: When scoring an appraisal that contained two assessment phases, the overall score did not include the weight of first assessment phase, only the latest score from the second assessment phase.

Customers Impacted: This affected managers who use the Appraisal functionality.

Overlapping Score Chart Text Labels

Deltek Defect Number: 1150319 and 1206189

Description: When viewing a Scale-type appraisal score chart, the text labels overlapped and were not legible. This occurred if the scale used long text descriptions.

Customers Impacted: This affected employees, managers, and appraiser groups.

Goal Visibility Not Defaulting to *Private*

Deltek Defect Number: 1168326

Description: Setting the Goal Visibility default to **Private** did not automatically select the **Private** check box when manually adding goals to appraisals.

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

Score Type Displayed All Options

Deltek Defect Number: 1173215

Description: Even if a specific score type, such as **Scale** for example**,** was already selected in Step 6 (Configuration) of the Workflow, all score options still displayed in the drop-down list field when adding Goals.

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

Ability to Access Disabled Functionality

Deltek Defect Number: 1179679

Description: Vendors were able to create new goals on the Employee Referral and Continuous Feedback screens even though the Performance module was disabled for the Vendor group.

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

Error When Attempting to Complete Unfinished Workflow

Deltek Defect Number: 1205703

Description: Attempting to complete an unfinished workflow on the Workflows screen (**Administration » Appraisals » Performance » Workflow**) resulted in the following error message: “Exception caught in AppCore: The requested property includeEmployeeGoalMetrics is not supported."

Customers Impacted: This affected administrators who manage Performance workflows.

Learning

Error When Accessing the Classes Screen

Deltek Defect Number: 1207380

Description: You encountered the following error message when trying to access the Classes screen: “An error has occurred while trying to access this page. Please contact your system administrator, and include the error details listed below. We’re sorry, but the system could not complete your request at this time. This error has been logged and will be investigated by our support team.” This occurred even though your user account has full access to the Learning module.

Customers Impacted: This affected users of the Learning module.

Error When Replying to Class Message That Contained an Apostrophe

Deltek Defect Number: 1204466

Description: Replying to a message on the Class Profile screen resulted in the following error message: “Error: Unable to save your message.“ This occurred if the content of the message included an apostrophe (**’**).

Customers Impacted: This affected users of the Learning module.

Reporting Tool

Report Import Error

Deltek Defect Number: 1082393

Description: Trying to import a report on the Deltek Reporting Tool resulted in the following error message: “Error in line 1, character 2: 'SELECT' expected but ';' was found.” This occurred when the data object name contained a **Forward Slash** (**/**) character.

Customers Impacted: This affected clients who use the Deltek Reporting Tool.

Core Framework

TTP Image Display Issue

Deltek Defect Number: 1164324

Description: Profile images on the Total Talent Profile screen (**Your Account » Total Talent Profile**) did not display with the correct dimensions and appeared stretched out.

Customers Impacted: This affected all clients.

No Longer Able to Add Non-ISO-3166 Country Codes

Deltek Defect Number: 1176358

Description: Administrators were able to add and edit the **Country** field on the Select Lists Management screen (**Administration » Global Settings » System Administration » Drop-Down and Multi-Select Lists**) and save values that did not comply with ISO-3166 standards.

Customers Impacted: This affected clients who edit Country listings on the Select Lists Management screen.

Incorrect Hire/Start Dates Reflected When Uploading Users in Bulk

Deltek Defect Number: 1181080

Description: User records that were added via the Bulk Upload Users screen (**Administration » Global Settings » Your Organization » Users » Upload User File**) reflected the **Bulk Upload Date** as the users’ **Start Date** and **Hire Date**.

Customers Impacted: This affected clients who use the Bulk Upload Users functionality.API and SOA

National Identifier Error Log On User Import

Deltek Defect Number: 1221529

Description: Importing user files that contained National Identifier information resulted in the following error message: “SOA Error returned for function add_user_national_identifier. Error message: The National identifier for the user : 2578 already exist and does not match what is specified.. Error code: 5.1.0.2.”

Customers Impacted: This affects clients who use the API integrations functionality.

Appendix A: For Additional Information

Deltek Support Center

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

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

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

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

Access Deltek Support Center

To access the Deltek Support Center:

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

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

About Deltek

Better software means better projects. Deltek 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