

Deltek Talent Management

Version 14.3 Getting Started User Guide

May 26, 2017

While Deltek has attempted to verify that the information in this document is accurate and complete, some typographical or technical errors may exist. The recipient of this document is solely responsible for all decisions relating to or use of the information provided herein.

The information contained in this publication is effective as of the publication date below and is subject to change without notice.

This publication contains proprietary information that is protected by copyright. All rights are reserved. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, or translated into another language, without the prior written consent of Deltek, Inc.

This edition published May 2017.

© Deltek, Inc.

Deltek's software is also protected by copyright law and constitutes valuable confidential and proprietary information of Deltek, Inc. and its licensors. The Deltek software, and all related documentation, is provided for use only in accordance with the terms of the license agreement. Unauthorized reproduction or distribution of the program or any portion thereof could result in severe civil or criminal penalties.

All trademarks are the property of their respective owners.

Contents

User Interface 1

 Main Menu..... 1

 Toolbar Menu 4

 Search 5

 Breadcrumbs 5

 Videos 5

Main Dashboard 7

 Alerts 7

 Widgets 7

Calendar 8

 Share Calendars 8

 Add a New Event..... 8

 Pending Interviews 10

Your Account 11

 Total Talent Profile 11

 Notifications 19

 Account Information 19

 Personalization..... 23

 Org Chart..... 25

Glossary of Terms 26

Appendix A: If You Need Assistance..... 28

 Customer Services 28

 Customer Care Connect Site 28

User Interface

Use the menus and options discussed in this section to access the applications, tools, and libraries provided.

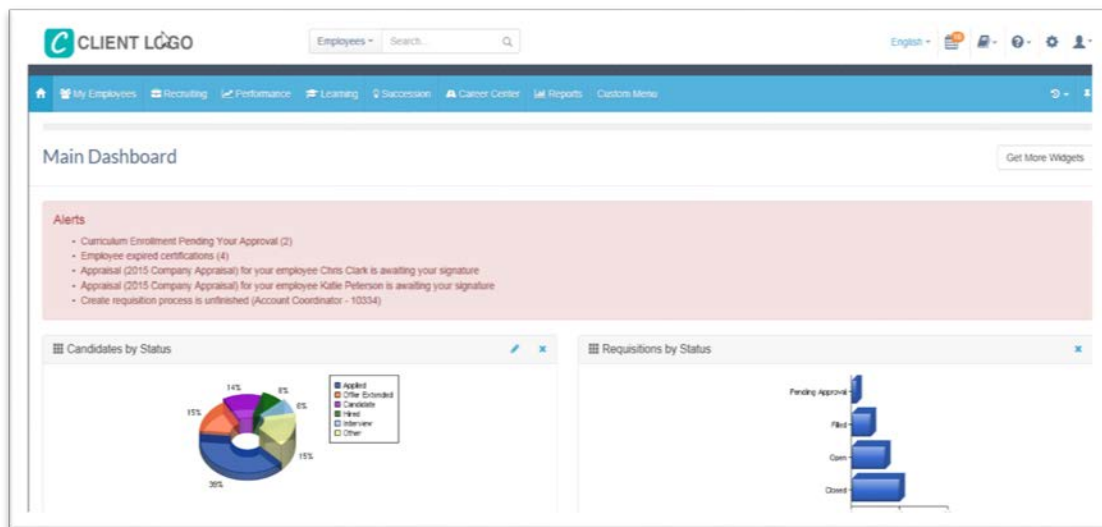


This guide covers all available modules and features, even those that your firm may not have purchased.

Main Menu

The main menu gives you access to the actions and options you use on a daily basis. Click the tab to access the submenu.

Main
Menu
Ribbon



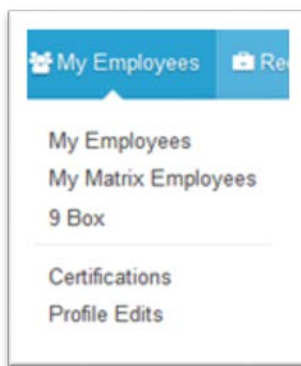
Toolbar



Click this icon to return to the Main Dashboard from any screen.

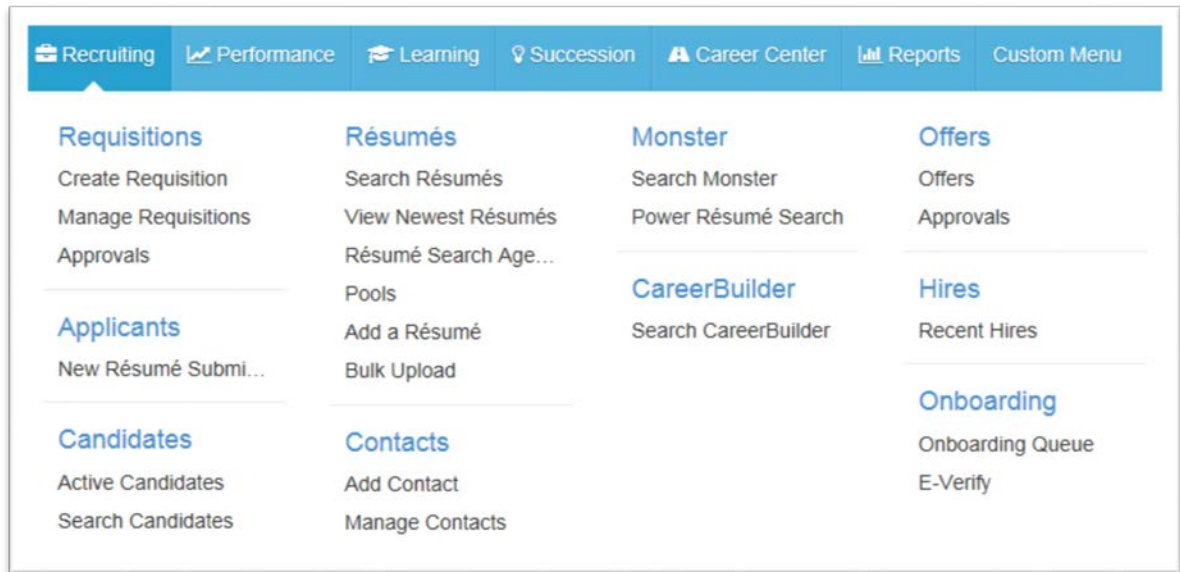
My Employees

Managers use the My Employees tab to access options for appraising and managing their direct and matrix reports.



Recruiting

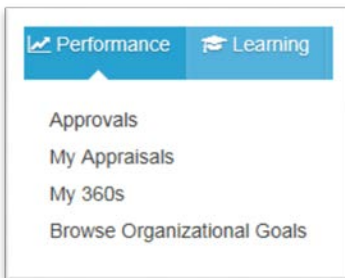
The Recruiting tab includes actions and options for recruiters, hiring managers, HR and administrators.



Access screening questionnaires and letter templates from the toolbar.

Performance

Both managers and employees can use the Performance tab. This tab provides access to appraisal approvals, if applicable, as well as to the employee's own appraisal or 360.



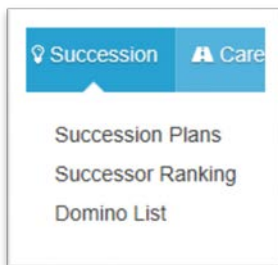
Learning

Options on the Learning tab make it possible for employees to perform learning related functions such as viewing their learning profiles, seeing classes they're enrolled in, and searching for courses. Instructors can also view classes they are teaching.



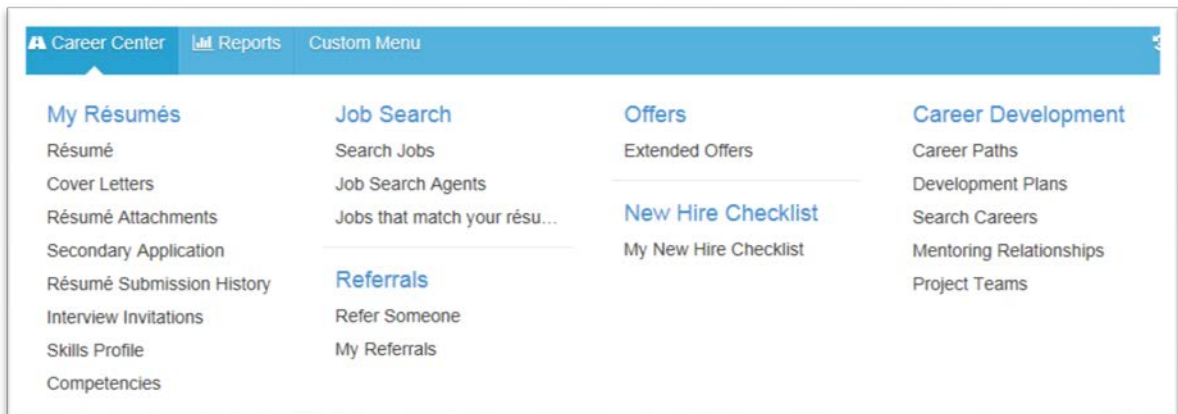
Succession


The Succession tab provides access to succession plans and the domino list.



Career Center

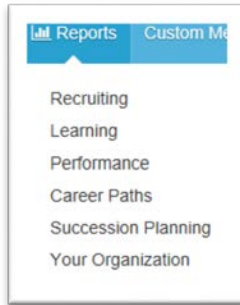
Options on the Career Center allow employees to access all career related options, such as their resume, job searches, referrals, and development plans.



Any items that require the user's attention, such as the completion of an application, are marked with the  icon.

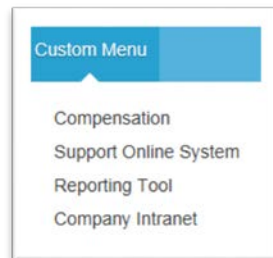
Reports

The Reports tab lists available modules. From there, click an option to view all available reports for that module.



Custom Menu

Options on the Custom menu are determined by your Administrator. These menu options can be frequently visited Web sites for employees (internal or external), or frequently visited Web site pages.



Click this icon to see a listing of your recent history in Deltek Talent Management. Click an item to return to that location.







Click this icon to view, add, or manage your pins. Pins are shortcuts to your favorite or most-often used screens/functions. Click any displayed pin to quickly go to that screen.


Toolbar Menu

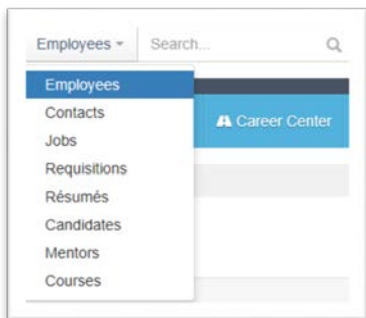
The set of icons in the top right corner is referred to as the toolbar. This menu gives you access to the options and actions that you do not typically perform on a daily basis.

Icon	Action	Description
	Language	Select the language you would like to use.
	Calendar	Click this icon to access your calendar or scheduled events. The number on the calendar icon indicates how many events you have scheduled for the current day, as well as for future dates.

Icon	Action	Description
	Libraries	Click this icon to access the Screening Questionnaires, Documents, Letter Templates, and Learning Library (if you are using the Learning Management System).
	Help Resources	Click this icon to view the quick help for the current page. You can also link to the Video Library, FAQs, and Guides.
	Administration	Click this icon to access the Administration screen, listing all Administration options. This icon only displays if you have Administration privileges.
	Your Account	Click this icon for access to your Total Talent Profile, Notifications, Account Information, Personalization, and the Org Chart. You can also log out of Deltek Talent Management from here.

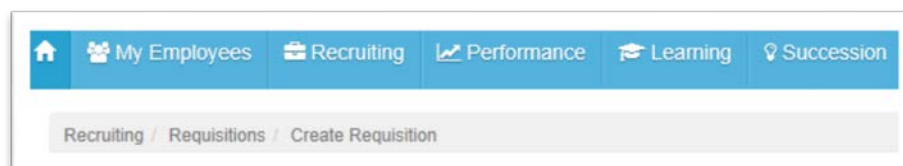
Search

Use the search function to do a quick search of employees, jobs, requisitions, resumes, candidates, mentors, or courses. Enter a name or keyword for which to search. Then press **Enter** or click .




Breadcrumbs

Breadcrumbs display below the main menu, showing where you are in Deltek Talent Management (in other words, the menu options you selected to get to the current screen).



Videos

On the far right side of the breadcrumb ribbon is an icon.

Icon	Action	Description
	Video	This icon displays if an instructional video is available for the current page. Click the icon to watch the video. You must have a recent version of Adobe Flash Player to view the video.

Main Dashboard

The first screen you see when you log on is the Main Dashboard, which has two sections: Alerts and Widgets.

Alerts

The highlighted section displays any important actions or notifications sent to you. The alerts box displays only if you have any pending alerts.

Click the alert link to display the screen on which you need to complete a task.

Widgets




Widgets are the tables and graphs of summary data displayed on the Dashboard. You can add widgets to the Dashboard and order them as you wish. The widgets available to you are based on your role in the organization and the features that your firm uses.

Add Widgets

To add new widgets, complete the following steps:

1. From the right side of the Main Dashboard line, click **Get More Widgets**. The Dashboard Widget Administration screen displays.
2. Select a widget from the **Select Widget from List** drop-down list.
3. Click **Preview Widget** to see what the widget looks like. It displays on the lower half of the screen.
4. Click either **Add to Left Side** or **Add to Right Side** to determine where on the screen to add the widget.

If the widget has multiple columns and spans the width of the screen, **Add to Left Side** is the only option.

5. Repeat steps 2 through 4 to add additional widgets as needed.
6. Return to the Main Dashboard to arrange widgets in the order you want:
 - To move a widget to another place on the Dashboard, place your cursor in the title area of the widget box. The cursor turns into a four-sided arrow icon. Using your mouse, hold the left click down and drag the box to the desired location.
 - For those widgets that can be edited,  displays. Click  to edit the widget.
 - To remove a widget, click .

Calendar



Use My Calendar to display your calendar. You see detailed information for the current week. You can change the display to view by Year, Month, or Day. Access My Calendar from the Calendar drop-down on the toolbar. Also displayed on this drop-down are your upcoming calendar events.



You can also add a Mini-Calendar widget to your dashboard.

Share Calendars

You may have the option to share calendars with other employees.

- To share your calendar with other employees, go to  » **Personalization** and click **Yes** for the **Share Calendar** option.
- To add other employees' calendars to your own, click **Select Employees** in the **Add Calendar For** section on the My Calendar screen. Events for the selected employees will appear in your calendar, color-coded to indicate the person to which they belong. Click  to change the color associated with an employee.
- If you cannot find the person you are looking for, that person hasn't shared his or her calendar.

Add a New Event

To add a new event, complete the following steps:

1. Click **Add Event**.
2. Complete the following fields.

Field	Description
Event Name	Enter a name for this event.
Completed	Select this option if this event has already taken place, or the task has been performed.
Type	Select the event classification: <ul style="list-style-type: none"> ▪ Event ▪ Task ▪ Reminder ▪ Interview
Interview Type	This field displays if you select Interview for the classification Type . Select one of the following interview types:

Field	Description
	<ul style="list-style-type: none"> ▪ Single Event - Select this option if you are scheduling a traditional interview for a single candidate. This option lets you designate a span of time for the interview, with the assumption that the candidate will come for the full length of time specified. ▪ Scheduled Slots - Select this option if you are scheduling multiple interviews within a span of time, using designated time slots. Each candidate will be asked to select a specific time slot. Once a candidate chooses a time slot, the slot no longer appears for other candidates to select. For example, if the event's hours are from 03:00pm to 05:00pm and the slot intervals are 30 minutes, the interview recipients will be able to select any available 30 minute slot in that two hour period. If you selected this interview type, additional fields display: <ul style="list-style-type: none"> ▪ Slot Length - Select the duration of time for each slot. The total number of slots is determined based on the Slot Length, From, and To values entered. ▪ Claimed Slots – Displays the number of interview slots claimed so far. ▪ Available Slots - Displays the number of interview slots still remaining. ▪ Group Event - Select this option if you are allowing multiple candidates to interview anytime during a designated window of time. For example, if the event's hours are from 03:00pm to 05:00pm, the interview recipients will be able to come anytime during those two hours.
Date	Select the date of this event.
From	Select the starting time for the event.
To	Select the ending time for this event.
+ Add Another Date	Click this button to add another date for this event. Once you add an additional date, a Remove Date button displays.

Field	Description
Event Color Code	Click on the color desired for this event in the color window, or enter the desired HTML color code in the field.
Location	Enter the location of the event.
Notification	<p>Notifications occur for the event creators, and those others to whom they shared the event. Select one of the following:</p> <ul style="list-style-type: none"> ▪ None – No reminder occurs for the event. ▪ Email – An email reminder is sent. ▪ Pop Up Window (if on site) – A reminder displays when you log on.
Keep Event Private	Select this option to keep this event private, even if your calendar is shared. It will not be visible to others.
Event Description	Enter a description for the event.
Attachments	
Current Attachments to this Event	Documents currently attached to the event display.
Upload a Document	
File	Click Browse to locate and select a document to attach to this event.
Attachment Name	
Attachment Description	Enter a description for this attachment.
Share attachments	Select to share this attachment with Teams and/or Users .

3. Click **Save** to save this event.

Pending Interviews

Use this tab to view pending interviews. Select an event from the drop-down. The name, requisition, and date invited display for those candidates who accepted the invite for this event. Click a name to view additional details on that candidate.

Your Account




Total Talent Profile

The Total Talent Profile provides you with a single place to view details about your growth and development within the company.

Other users can also view your profile, but some information can only be seen by your manager or other users who have the appropriate permission.

About Tab

This tab displays your overall information.

Field	Description
Photo	This is your photo. You can change it by clicking Update Photo .
Name	This is your name.
Title	This is your job title.
Department	This is the department in which you work.
Manager	This is the manager to whom you report.
Location	This is the office location in which you work.
Status	This is your tax exempt status.
Original Date of Hire	This is the date on which you were hired at the company.
Start Date (Current Position)	This the date on which you started at your current position (title).
Hire Date (Current Position)	This is the date on which you were hired at your current position.
View Organization Chart	Click this link to view the organization chart. The chart defaults to your level in the company, up through the top tier of the company. The chart can also be downloaded to a PDF or printed.
	Your email address
	Your primary telephone number
	Your home address


To update your photo, complete the following steps:

1. Click **Update Photo** below the photo.

2. Browse to the new photo, and click **Submit**.
3. Crop the photo as necessary.
4. Click **Save** to upload the photo.

Profile Tab


This tab shows the following information.

Field	Description
Date of Birth	Your date of birth
Projected Time to Retire	The number of years remaining until you can retire
Mentor	Yes or No displays denoting whether or not you wish to be a mentor. Click Change to update your response.
View Resume	Click this link to view your resume on the Resume Dashboard screen.
 Edit	Click Edit to view or update employee information. Then click Save to verify your date of birth. The Account Information screen displays. View the information or click Edit to make changes.

Preferences Tab

This tab shows your relocation preferences.

Field	Description
Relocation	
Willing to relocate	Yes or No displays to indicate whether or not you are willing to relocate.
Date Available	This is the date you are willing to relocate. If you are not willing to relocate, N/A appears.
Availability Comments	These are any additional notes you made about relocating.
Location Preference	This is the office location to which you would relocate. None displays if you are not willing to relocate.
Relocation Options	
International	If you have indicated that you may be willing to relocate internationally, the countries that you have stated you'd relocate to display. None displays if you've stated you are not willing to relocate internationally.
Domestic	If you have indicated that you may be willing to relocate internationally, the states that you stated you'd relocate to

Field	Description
	display. None displays if you've stated you are not willing to relocate domestically.
Additional Relocation Comments	These are your comments regarding relocation, if any,
Position	
Job Function	This is the type of position you are interested in (for example, Customer Service or Engineering).
Type	This indicates the schedule you want (Full-time, Part-time, Contract, Internship).
Travel	This is the percentage of time you are willing to travel.
Medical Insurances Preference	This is the type of insurance you need (Personal, Family, None).
Special Needs/Considerations	These are your comments regarding any special arrangements that may be needed.
 Edit	Click this button to edit all relocation information for the displayed employee.

Benefits Tab

This tab shows the benefits you were offered for your current position (defined in the **Offer issued for his/her current position**). Benefit information appears here only if the offer was issued to you via Delttek Talent Management.


Feature settings enable the tab to display. Then the individual benefits must be edited and marked to be allowed to show in the tab. Under **Administration » System Administration » Benefits**, there is an option when editing or creating a benefit: **Show on Total Talent Profile**. Only those benefits with this option selected appear on the Benefits tab.



Due to the size of the tab, only 12 benefits show at one time. Click **View All Benefits** to see the complete list.

Appraisal Panel


This section lists and provides links to your current, pending, and past appraisals.





- To view the complete text of the appraisal, click the appraisal name.
- To print the appraisal, click  » **Print Appraisal**.

Career Path Panel

This section displays any **Career Paths** that your manager created for you. You can have more than one career path, but only one career path is active at a time.

- Click the job title to see the details of that career path.

- Click **Show Details** to view details for each position in the career path.
- Click  to access the following additional options.

Icon	Action	Description
	Add to Career Path	Select this option to add a new career path.
	Add to Development Plan	Select this option to add a new development plan.
	View Gap Analysis for Ultimate Job	Select this option to view the gap between your current position and the ultimate goal in the career path. The gap analysis is a comparison of your skills and competencies with those required by the ultimate job. The analysis is incomplete if either you or the job does not have associated skills or competencies.
	View Pending Career Path Jobs	Select this option to view all the jobs that exist for this career path.

Competencies & Skills Panel


This section lists your competencies and skills. Information comes from several sources:

- If you were hired via Deltek Talent Management and entered any skills or competencies as part of the application process.
- If you entered skills or competencies into Deltek Talent Management after you were hired and your manager approved them.

Competencies

This section displays the competencies you've achieved to date. The following information appears.


Field	Description
MANAGE COMPETENCIES	Click to display the Competency Profile screen. From there you can remove a competency.
COMPETENCY NAME	This is the name of the competency.
CATEGORY	This is the type of the competency – Core or Job.
SOURCE	This is the way in which the competency was added to Deltek Talent Management. (For example Self displays if the employee added the competency.)
SCORE	This is the rating for the competency:

Field	Description
	1 – Seldom Meets Expectations 2 – Meets Most Expectations 3 – Meets All Expectations 4 – Exceeds Expectations 5 – Greatly Exceeds Expectations The number of the score displays as a fraction over the total score possible. (For example, a score of 3 is displayed as 3/5.)
APPROVED DATE	This is the date on which the competency was approved. If your manager has not yet approved it, "Awaiting Approval" displays.
DETAILS	These are the details surrounding this competency.
ACTIONS	Click  to edit the selected competency. The Competency Profile displays.

Skills

This section displays the skills you've achieved to date. The following information appears.

Field	Description
MANAGE SKILLS	Click to view the Skills Profile screen. From there you can edit or delete any of your skills.
SKILL NAME	This is the title of the skill.
SKILL CATEGORY	This is the group to which this category belongs: <ul style="list-style-type: none"> Accounting Administrative / Clerical Brand Management Business Development Communication Customer Service Education Engineering Finance Human Resources Information Technology Management

Field	Description
	<ul style="list-style-type: none"> Marketing Medical Organizational Skills Training Transportation
SKILL LEVEL	This is the proficiency of the skill: <ul style="list-style-type: none"> Beginner Intermediate Advanced Expert
SKILL USAGE	This is the number of years you have had this skill: <ul style="list-style-type: none"> 0-1 Years 2-3 Years 3-4 Year 4-5 Years 5-6 Years
SKILL LAST USED	This is the number of years since you have used this skill: <ul style="list-style-type: none"> 0-1 years ago 1-2 years ago 2-3 years ago 3-4 years ago 4-5 years ago 5-7 years ago 7-10 years ago
DATE ADDED	This is the date on which you added this skill to your profile.
DATE UPDATED	This the date on which you last made any changes to this skill
IS ENDORSED	Yes or No displays to indicate whether or not your manager has approved your skills in the Total Talent Profile.
ACTIONS	Click  to update the SKILL LEVEL, SKILL USAGE, or SKILL LAST USED.

Job History Panel

This section has two parts: Internal Job History and External Job History.

The Internal Job History lists positions that you have held since you were hired by your current company.

- Click the job title to view the Job Profile.
- Click **View Details** to see additional information about that position.

The External Job History lists positions that you held before you were hired by your current company. This information comes from two sources:

- The job history on your application form.
- Any employment history that you manually add to the Total Talent Profile.

Click **Add Position** to add a new position to your External Job History.

Mentoring Panel

This section has two parts: Relationship as Mentor and Relationships as Mentee.

If you are designated as a mentor, the Relationship as Mentor section lists the people whom you are mentoring. Click **Change** to change your availability to mentor.

If you are being mentored, the Relationships as Mentee section provides details about your mentor.

Project Teams Panel

This section provides information about the project teams to which you belong, as either a team creator or team member. Project teams are created in **My Employees » Project Teams**.

- Click the team name to see complete details about the team.
- Click **Show Details** link to see the team members and any milestones that the team has achieved.

If you created the project team, you can click  to send an email to all members of the team. The email is sent using your default email application.

Succession Plans Panel




This section has four parts.

Section	Description
Succession Plans on Which the Employee Sits	These are the succession plans in which you are a potential successor for another position in the company.
Potential Successors	This section lists those employees who would be a good fit for your position if you were to be promoted or leave the company. Each employee name links to the employee's Total Talent Profile.
Succession Plans on Which the Employee Participates	These are the succession plans that you own or in which you participate.
Risk of Loss	This section displays only when a manager views the Total Talent Profile of an employee. The Risk of Loss section looks at various factors (active career paths, class attendance,

Section	Description
	performance, tenure, and so on), and calculates the chance (as a percentage) that the employee will leave the company.

Training & Development Panel

This section has four parts.

Section	Description
Development Plans	<p>Development plans are created by a manager for you.</p> <ul style="list-style-type: none"> Click Manage Development Plans to view the details of development plans. Click  to send notifications to your manager when you development plans change. Click Show Details to view plan items and their percentage completed. Click  to update the percentage completed.
Past Development Plans	<p>This section lists any development plans that you completed, including when the development plan started, the target completion date, and the percentage completed. Once a development plan is completed, it cannot be edited.</p> <ul style="list-style-type: none"> Click Manage Development Plans to view the details of development plans. Click Show Details to view plan items and their percentage completed. Click  to update the percentage completed.
Training	<p>This section lists any classes that you are currently taking, any curriculum in which you are enrolled, and your percentage completion for that curriculum. Click the name of the class or curriculum to view details about it.</p>
Education History	<p>This section lists the degrees you have earned.</p> <p>Information comes from two sources:</p> <ul style="list-style-type: none"> If you were hired via Delttek Talent Management and entered education information as part of the application process. If you entered education history into Delttek Talent Management after you were hired.




Notifications

Notifications

This screen lists the notifications sent to you. You can toggle between viewing all the notifications and viewing only those notifications you have specified as acknowledged. Click **View Acknowledged Notifications / View All Notifications** to toggle between the two views.



The method of notification is determined through the **Communication Delivery** option of the Your Account, Personalization menu. Valid options are email, RSS feed, or text message.

Field	Description
Check box	Click one or more check boxes to select the accompanying notification lines to resend, acknowledge, or delete. Then click the Resend Notification , Acknowledge , or Delete buttons at the bottom of the current screen.
Sent	This is the date the notification was sent.
Subject	This is the subject line from the notification email. Click it to see the entire email. You can also Resend Notification, Acknowledge, or Delete from this detailed email page.
Event	This is the event for the notification.
Actions	Click one of the following for the selected notification line: <ul style="list-style-type: none"> Click  to resend the notification to your email. Click  to signify that you got it. Click  to delete the notification completely.

Correspondence


To display the Correspondence screen, click **Correspondence**. This screen lists all of the letters that you have sent to, and received from, the Applicant Tracking module.

- Upon entry, letters you have received display.
- Click **View Sent Letters** to see letters that you have sent. Click **View Received Letters** to see received letters. You can toggle back and forth between these two options.
- Click **Show/Hide Filters** to display search criteria fields that you can use to filter the list of letters displayed.
- Click **More Options » View Archived Letters** to see letters that you have archived.
- Select one or more letters to archive, and click **Archive** on the bottom of the screen.

Account Information

Select this option to view or edit your personal information or information about your account.


Employee Information

Upon selection of the **Account Information** option, Employee information displays. Scroll to view all employee, position, and professional information, or click  at the Employee Information and Professional Information section headings to edit that corresponding data.



Position information cannot be edited; it is display-only.

To edit employee information, complete the following steps:

1. Click  on the Employee Information heading of the Account Information screen.
2. Enter or edit any of the displayed fields, detailed as follows.


Field	Description
Employee Information	
First Name	Enter your first name.
Middle Name	Enter your middle name or initial.
Last Name	Enter your last name.
Employee ID	Enter your company identification number.
Address One	Enter the first line of your home address.
Address Two	Enter the second line of your home address, if any.
Address Three	Enter the third line of your home address, if any.
Country	Select the country in which you live from the drop-down provided.
ST/PR	Enter the state or province in which you live.
Zip/Postal Code	Enter your zip code or Click Select Zip/Postal Code to select available zip codes for the city/state entered.
Date of Birth	Select or enter (in MM/DD/YYYY format) your date of birth.
SSN	Enter your social security number, with or without dashes.
Phone Numbers	Enter any pertinent phone numbers. Enter the number and then in the next field select

Field	Description
	<p>the type of number (such as Home, Pager, and Fax).</p> <p>Click + to add another number. Numbers previously added are displayed.</p>
Preferred Method of Communication	Select your preferred method of communication: E-mail or TXT Message .
Mobile Phone Number	Select the country code for this cell phone, then enter the phone number including the area code.
E-mail	Enter your email address. Then enter it again in the Confirm E-mail field.
About Me	Enter any brief information you'd like attached to your employee record.
Projected Time to Retire	This is the number of years until your retirement, based upon your date of birth.
Mentor	<p>Yes or No displays to denote whether or not you have agreed to mentor another employee.</p> <p>Click Change to change your response. The prompt "Do you wish to be a mentor?" displays. Select Yes or No, then click Submit.</p>
Change Password	Click Change Username/Password to update either your user name or password. See the next section for details.
Position Information (Display-only)	
Organizational Unit	This is the company and department in which you work.
Location	This is the office location where you work.
Hire Date	This is the date on which you were hired.
Status	This is your tax exempt status.
Manager	This is the name of your current manager.
HR Business Partner	This is the name of your Human Resources contact.
Current Position	This is your current title at this company.

Field	Description
Job Start Date	This is the date on which you started your job.
Salary Grade	This is the grade level for this job that is used in determining salary ranges.

3. Click **Save** to save all changes you've made.

To edit professional information, complete the following steps:

1. Click  on the Professional Information heading of the Account Information screen.
2. Enter or edit any of the displayed fields, detailed as follows.

Field	Description
Certifications	Click + to add a new certification or you may edit/delete existing certifications.
Professional Associations	Click + to add a new professional association, or you may edit/delete existing associations.
Extracurricular Activities	Enter any outside of work activities, as desired.
Language(s) Spoken	Enter any additional languages spoken.

Diversity Information

This screen allows you to enter or update your diversity information. Diversity information can be entered in many ways: when the job seeker applies to a job, when the administrator creates him/her as a user, when the new hire is onboarded, or just from this screen.

Completing this screen is optional.

To enter or edit your diversity information, complete the following steps:

1. Click **Account Information » Diversity Information**.
2. Enter or edit any of the displayed fields, detailed as follows.

Field	Description
Gender	Select your gender from the drop-down.
Race	Select the race from the drop-down.
Voluntary Self-Identification of Veteran Status - Protected Veteran Status	Specify whether or not you are a protected veteran. You can also decline to specify yes or no.

Field	Description
Voluntary Self-Identification of Disability - Please select one of the options	Specify whether or not you have a disability. You can also decline to specify yes or no.

3. Click **Submit** to save this information.

Change Username/Password

Use this screen to change the username or password you currently have set up to log in to Deltek Talent.

To change your username, complete the following steps:

1. Click **Account Information » Change Username/Password**.
2. Enter a new username in the **Enter New Username** field.
3. Enter your current password.
4. Click **Submit**.

To change your password, complete the following steps:

1. Click **Account Information » Change Username/Password**.
2. Enter a new password in the **Enter New Password** field. Passwords must be:
 - At least eight characters long
 - Be a mix of upper and lowercase letters
3. Enter the password again in the **Verify New Password** field.
4. Click **Submit**.

Personalization

Use this option to configure settings that suit the way that you work in Deltek Talent Management. When you click **Personalization**, the Personalize System Settings screen displays. .

Click **Submit** after you update your settings. Your changes are effective immediately.





Setting	Purpose
Calendar	
Share Calendar	<p>Select Yes or No to denote whether or not users can view your calendar when they want to share an event with you or add you to an event.</p> <p>For this setting to work, the administrator must enable the Shared Calendar option.</p> <p>Administration » Features (Global Settings, System Administration)</p>

Setting	Purpose
	<ul style="list-style-type: none"> Employee Core Main Calendar Shared Calendar <p>If not enabled, the Share Calendar option does not appear in Personalization (Personalize System Settings).</p>
Calendar Reminders	Select the default delivery method for your calendar reminders: no reminder, an email reminder, or a pop-up message that displays when you log in. You can choose to change this setting when you create a calendar reminder.
Date Format	Select the format of dates in the Talent Management Suite: day first (31/12/2015) or month first (12/31/2015).
Name of Time Zone	Select your preferred time zone. If you live in one time zone but work in another, you can choose which time zone is used for all time sensitive information.
Time Format Setting Name	Select whether times display in 12-hour format (1:30 PM) or 24-hour format (13:30).
General	
Default Pagination Range	Select the number of results displayed in a table whenever a table is used to show details 10, 25, 50, or 100.
Distance Unit	Select whether distances are shown in miles or kilometers.
Preferred Language	Select the language in which Delttek Talent Management is displayed. Only those languages that have been installed by the Site Administrator will show as options.
Résumé Agents - Email Format	<p>Select the format in which you receive e-mail notifications with results from the résumé search agent: in HTML or plain text.</p> <p>This setting displays only if your company uses the Applicant Tracking System.</p>
Résumé Agents - Expiration	Select the number of calendar days after which a résumé search agent will no longer send results: 7, 14, 21, or 28 days.

Setting	Purpose
	This setting displays only if your company uses the Applicant Tracking System.

Communication Delivery

To configure the manner in which you want notifications delivered, click the **Communication Delivery** button. This screen lists the different types of notification formats which may be used. Select the one you'd like to use for each category or area of Deltek Talent Management (for example, Calendar, Jobs).



Delivery Method	Definition
E-MAIL	Select  to receive notifications as emails. This is the default method.
RSS	Select  to receive notifications as RSS feeds. With this method, users receive notifications via a regular feed that they can access using news aggregator software, as opposed to signing up for a mailing list or visiting the web site daily. Once an RSS feed has been selected for a notification, the icon to view the RSS feed () is enabled.
TXT/SMS DELIVERY	Select  to receive notifications as text messages. This option is available only if your company uses the SMS (TXT) notification feature. If you select this option, make sure you're your mobile phone number is entered in your profile.

Org Chart


The **Org Chart** provides a graphical view of your position in the organizational structure. If you have no direct reports, you see only your badge.

By default, the badge shows your name, job title, hire date, the location where you work, and the profile photo that you uploaded via your Total Talent Profile. The Site Administrator can configure the badge to show more or different information. The contents of the badge are also dependent on the Deltek Talent Management modules that your company uses.

If you have direct reports, your badge appears at the top of a chart with your direct reports below.

If a direct report has employees who report to him or her, you click  to drill down to view those employees' information. Click  to drill up.

Successors

Click  to display the Domino List of potential successors and information about each one, including name, job title, current salary, date the employee started in the current position, potential ranking, and risk of loss.

The icon and Domino List display only if your company has implemented the Career Development and Succession Planning module.

Glossary of Terms

Badge

A box of information about a user, including the user's name, job title, hire date, work location, and profile photo. The dimensions and content of the badge vary based on where it is shown in the application.

Breadcrumbs

A navigational aid used to keep track of your current location in Deltek Talent Management.

Competency

Demonstrable skills that one possesses inherently, including abilities and behaviors, as well as knowledge of the fundamental use of a skill.

Dynamic Forms

Forms created for an organization's recruiting process, such as a requisition, résumé profile, secondary application, interview, offer, and onboarding form.

Employee Referral

An applicant who was referred by an employee.

External Front End

The external job seeker's career portal. An organization can have more than one external front end if it is necessary to show different branding for different divisions or company entities.

Features

An aspect or attribute that can be configured for a Group to allow access to different Deltek Talent Management functions.

Hiring Order

A request submitted to a recruiting agency for help finding candidates for a position, either permanent or contract.

Job Family

A term used to categorize Job Profiles. For example, the "I.T." job family could be used to identify Job Profiles that are technical in nature and require similar job competencies and skills.

Onboarding

The process for bringing in a new hire, including sending documentation to the new hire for review and/or completion, alerting certain individuals of the arrival of the new hire, and preparing the employee for what to expect when beginning the new job.

Passive Job Seeker

A job seeker who has submitted a résumé but has not applied to a specific requisition.

Pool

A user-defined collection of résumés with similar traits (for example, skill sets, job preferences, or education levels). Pools can also be created to house résumés for future consideration.

Post Hire Modules

The post-hire modules of the Talent Management Suite are those that address an employee's performance, career development, and learning. These modules are EPM (Employee Performance Management), CDSP (Career Development and Succession Planning), and LMS (Learning Management Solution).

Recruiting Team

A group of individuals who share information about requisitions, job seekers, and candidates. Membership in a recruiting team is limited to those internal users in the Recruiter or Hiring Manager group.

Recruiting Workflow

A means for the administrator to automate many functions of the recruiting process. A recruiting workflow includes form selections, user task suggestions, offer management, onboarding procedures, and more.

Screened-In

The term used for an applicant who has met or exceeded the minimum point value set in the Screening Questionnaire associated with the requisition to which they applied.

Screened-Out

The term used for an applicant who has not met the minimum point value set in the Screening Questionnaire associated with the requisition to which they applied.

Total Talent Profile

An area of the application that provides an employee with a single location to view all of his or her pertinent information. It gives a user access to view and update appraisals, career paths, job history, mentoring relationships, project teams, succession plans, and training/development activities.

Widgets

A means to display information and actions that you use frequently. They are displayed on the Main Dashboard.

Appendix A: If You Need Assistance

If you need assistance installing, implementing, or using Deltek Talent, Deltek makes a wealth of information and expertise readily available to you.

Customer Services

For over 30 years, Deltek has maintained close relationships with client firms, helping with their problems, listening to their needs, and getting to know their individual business environments. A full range of customer services has grown out of this close contact, including the following:

- Extensive self-support options through the Customer Care Connect Web portal.
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training



Find out more about these and other services from the Customer Care Connect site.

Customer Care Connect Site

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

The following are some of the many options that the Customer Care Connect site provides:

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Connect Customer Forums
- 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
- Use Quick Chat to submit a question to a Customer Care analyst online



For more information regarding Deltek Customer Care Connect, refer to the online help available from the Web site.

Access Customer Care Connect

To access the Customer Care Connect site, complete the following steps:

1. Go to <http://support.deltek.com>.
2. Enter your Customer Care Connect **Username** and **Password**.
3. Click **Log In**.



If you do not have a username and password for the Customer Care Connect site, contact your firm's Deltek Talent Administrator.

If you forget your username or password, you can click the **Account Assistance** button on the login screen for help.

A blue geometric graphic consisting of several overlapping triangles and polygons, located in the top-left corner of the page.

Deltek is the leading global provider of enterprise software and information solutions for government contractors, professional services firms and other project- and people-based businesses. For decades, we have delivered actionable insight that empowers our customers to unlock their business potential. 20,000 organizations and millions of users in over 80 countries around the world rely on Deltek to research and identify opportunities, win new business, recruit and develop talent, optimize resources, streamline operations and deliver more profitable projects. Deltek – Know more. Do more.®

deltek.com