PeopleFluent Talent Management 22.04 Release Notes

Contents

New to PeopleFluent Talent Management

PeopleFluent is pleased to announce the upcoming PeopleFluent Talent Management 22.04 update. This document describes the functionality of these new features, discusses their client impact, and provides detailed information about each. If you have any questions about the enhancements or the new features presented in this document, please contact your PeopleFluent representative.

Document Revision

This section lists the initial publication and any changes or updates that follow.

Table: Revision Information

Revision Information	
Revision Date:	11 March, 2022
Revised Document Version Number:	1.1
Details of Revision:	Added note to Competency Performance Groups section.
Revision Date:	1 March, 2022
Revised Document Version Number:	1.0
Details of Revision:	Initial Publication.

Compensation Features

The features and enhancements described in this section apply to PeopleFluent Compensation. Because this application is configurable per client, new features may affect each implementation differently. For more information about any new feature, and how it can be used in specific implementations, contact a PeopleFluent representative.

These features will be available when the client is upgraded to this version of PeopleFluent Compensation.

Worksheet Budget Calculation Enhancement

Functionality

This enhancement gives Compensation administrators the option to skip the validation step when recalculating budget allocations in Compensation Worksheets if the budget has been calculated or the worksheet published within the last 24 hours. This will save time when publishing small recent changes.

Details

Similar functionality was previously introduced for worksheet publishing; with this update the option is now available when calculating budget allocations.

When the last validation step was less than 24 hours ago, the option to **Skip Validation** now appears when calculating a budget on the worksheet Budget Allocation page.

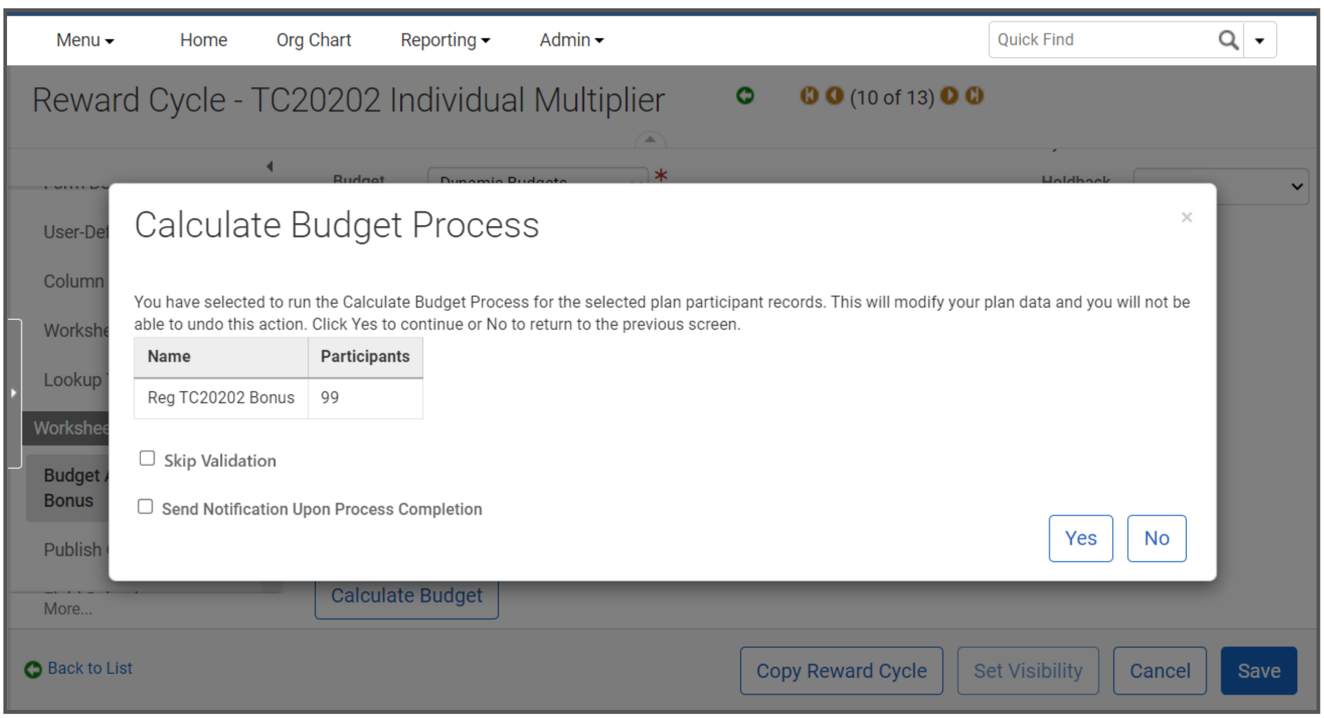


Figure: Skip Validation Option

Validation steps take place when a worksheet is published or when the budget is calculated; if neither of these has occurred within the past 24 hours, the option to skip validation will not appear and validation must occur.

If validation was skipped, a message will appear in the process log.

Performance and Succession Features

The features and enhancements described in this section apply to PeopleFluent Performance and PeopleFluent Succession Management. Because these applications are configurable per client, new features may affect each implementation differently. For more information about any new feature, and how it can be used in specific implementations, contact a PeopleFluent representative.

These features will be available when the client is upgraded to this version of PeopleFluent Performance and PeopleFluent Succession Management.

Competency Performance Groups

Functionality

This enhancement allows Performance administrators to assign competencies to Performance plan participants using Performance Groups.

Details

On the Performance Management Plan configuration page, the Competency Options sub-page allows administrators to select the sources and methods that will be used to assign competencies to participants during the evaluation.

In this update, a new competency source has been added: **Assign competencies associated with the Performance Group**.

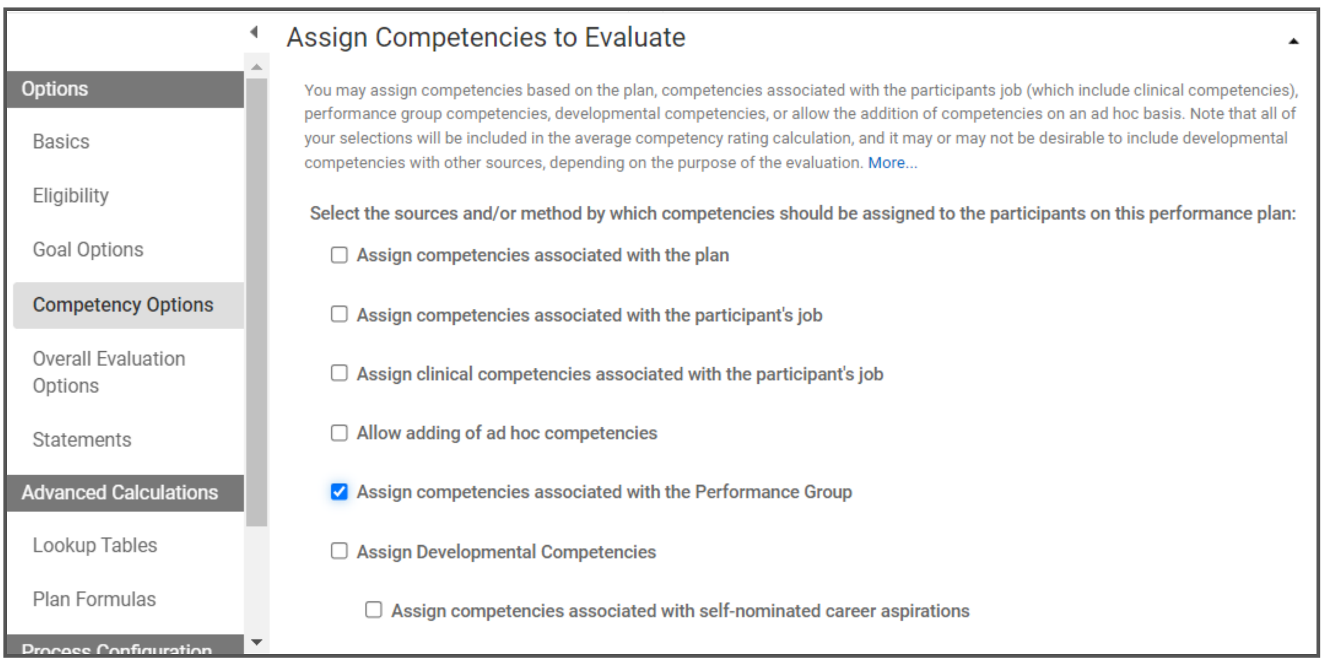


Figure: The New Competency Option

Selecting this option displays a new **Performance Groups** section on the page.

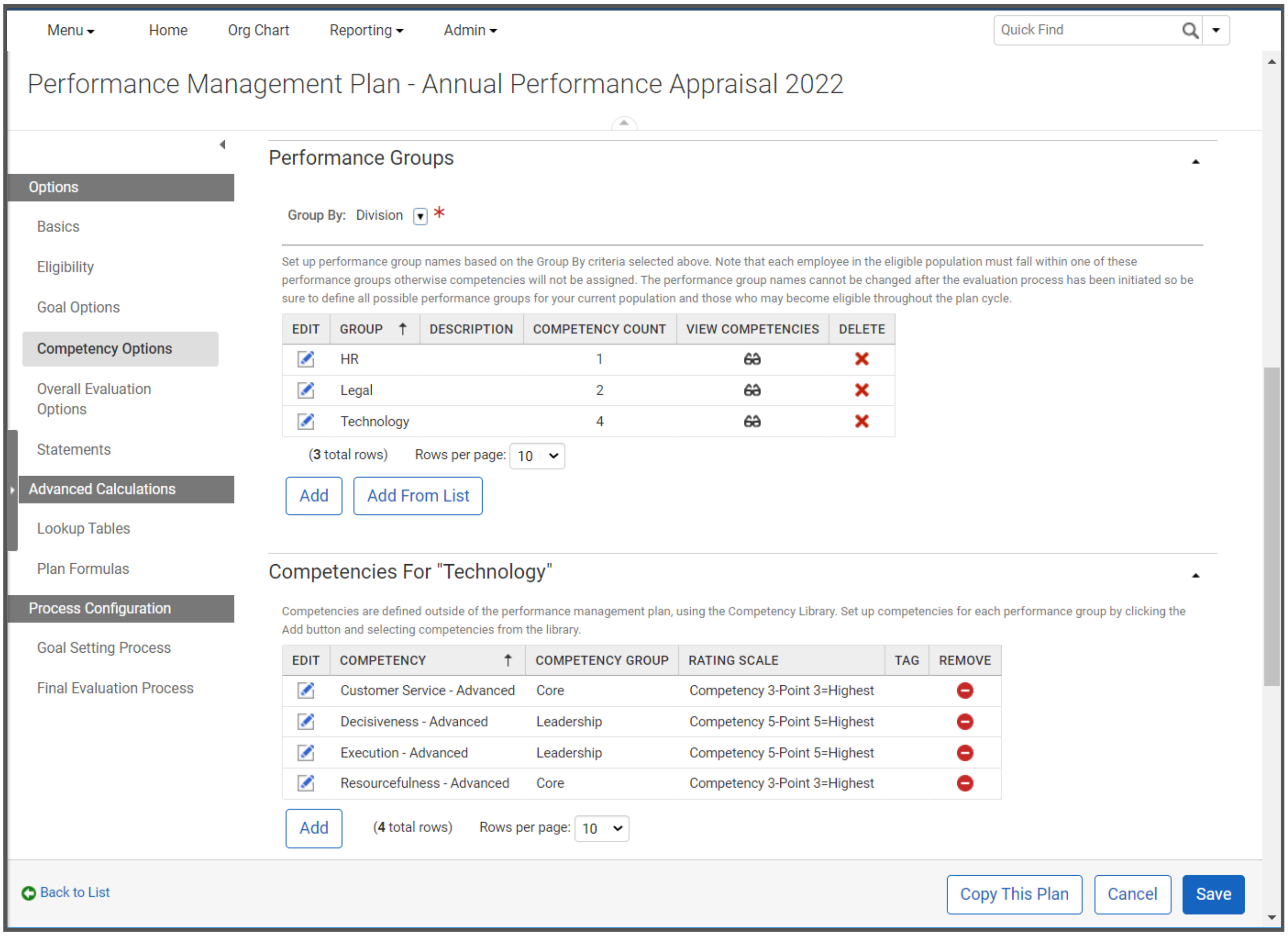


Figure: The New Performance Groups Section

Performance groups are groups of people configured using data maps. The Performance Groups section allows administrators to select performance groups and assign competencies associated with those performance groups.

Performance groups can optionally be created and competencies assigned to performance groups on this page as well, making it easy to assign competencies to the right groups of participants.

> Note: If a competency is assigned from the Performance plan and the same competency is also assigned from a Performance group, the plan version will take precedence over the performance group competency.
> For example, a competency can be assigned through a Performance group and the rating scale could be changed for that competency, but the same competency in the plan list has a different rating scale. In this case, the evaluation will use the competency rating scale configured in the plan competency.
> However, if a competency is assigned through the participant's job and also through a performance group, in that case the performance group version of the competency will take precedence.

Data Processing Scripts

We have added methods and properties to the PeopleFluent Talent Management Pseudo Model so that administrators can add and delete Performance Groups and competencies using data processing scripts.

Sample scripts to illustrate some ways of using this functionality are provided. Scripts are stored on the Data Processing Scripts page: **Primary Navigation Menu > Compensation Administration > Data Setup > Data Processing Scripts**

The following sample scripts are provided to illustrate this functionality:

AddPerfGroupsAndCompetencies: This sample script takes a Performance Plan reference key as a parameter and adds the specified Performance Groups and associated competencies. A data file must be uploaded that passes the Performance Group and Competency SSRK.

DeleteAllCompetencyPerfGroups: This sample script takes a Performance Plan reference key as a parameter and deletes all Performance Groups and competencies from the plan Competency Options page.

Reporting

A new ad hoc report subject, Performance Group Competencies, has been added for validation and reporting purposes.

To access reports, go to **Primary Navigation Menu > Reports > Ad Hoc Reports**.

Competency Percent Rated Enhancement

Functionality

This enhancement gives Performance administrators the ability to display the percentage of competencies that have not yet been rated on a form.

Details

In this update, using a combination of some new user-defined fields and Performance plan formulas, Performance administrators can now display the percentage of competencies that have been rated on the end-user form.

The new user-defined fields are:

- Employee User Defined Number
- Employee User Defined String
- Manager User Defined Number
- Manager User Defined String

These new fields are linked to the Rating field on evaluation forms such that a plan formula can be written to update the field when a competency is rated.

The new fields can be placed in the section zone of evaluation forms and when a formula is written and configured to be triggered in a workflow state, the fields on the form will update immediately when competencies are rated.

Sample Formula

Formulas can be written in a variety of ways, depending on the needs of the business. For example, here is a simple formula to update the rated percent complete:

```
def totalCompetencies =
Participant.getFinalEvaluation().getCompetencies().size();

def ratedCompetencies =
Participant.getFinalEvaluation().getCompetencies().findAll{it->
```

```
it.getMgrRating().rating?.numericValue!=null}.size()

if(ratedCompetencies==null ||  totalCompetencies==null)
return

def percentage= (ratedCompetencies/totalCompetencies)*100;
Participant.getFinalEvaluation().getOverall().mgrUserDefinedFloat=
percentage
Participant.getFinalEvaluation().getOverall().mgrUserDefinedString=
percentage + "%"
```

Competency Tagging

Functionality

This enhancement allows administrators to add tags to competencies in order to group them in Performance workflow states.

Details

In this update, administrators can now add tags to competencies in order to evaluate them in different workflow states. Competency tags are labels added to competencies when adding or editing them.

To do this, go to **Primary Navigation Menu > Talent Management Administration > Site Administration > Competency Management > Competency Libraries**, then click **Edit** next to any library and open the competency group document for the group containing the competency. Then, in the Group Competencies section, click the **Edit** icon for the competency you want to edit.

Competency tags are user-defined and must be unique. Competency tags are added, edited, and selected on the Competency page. Only one tag can be selected for each competency, but a given tag can be added to as many competencies as needed.

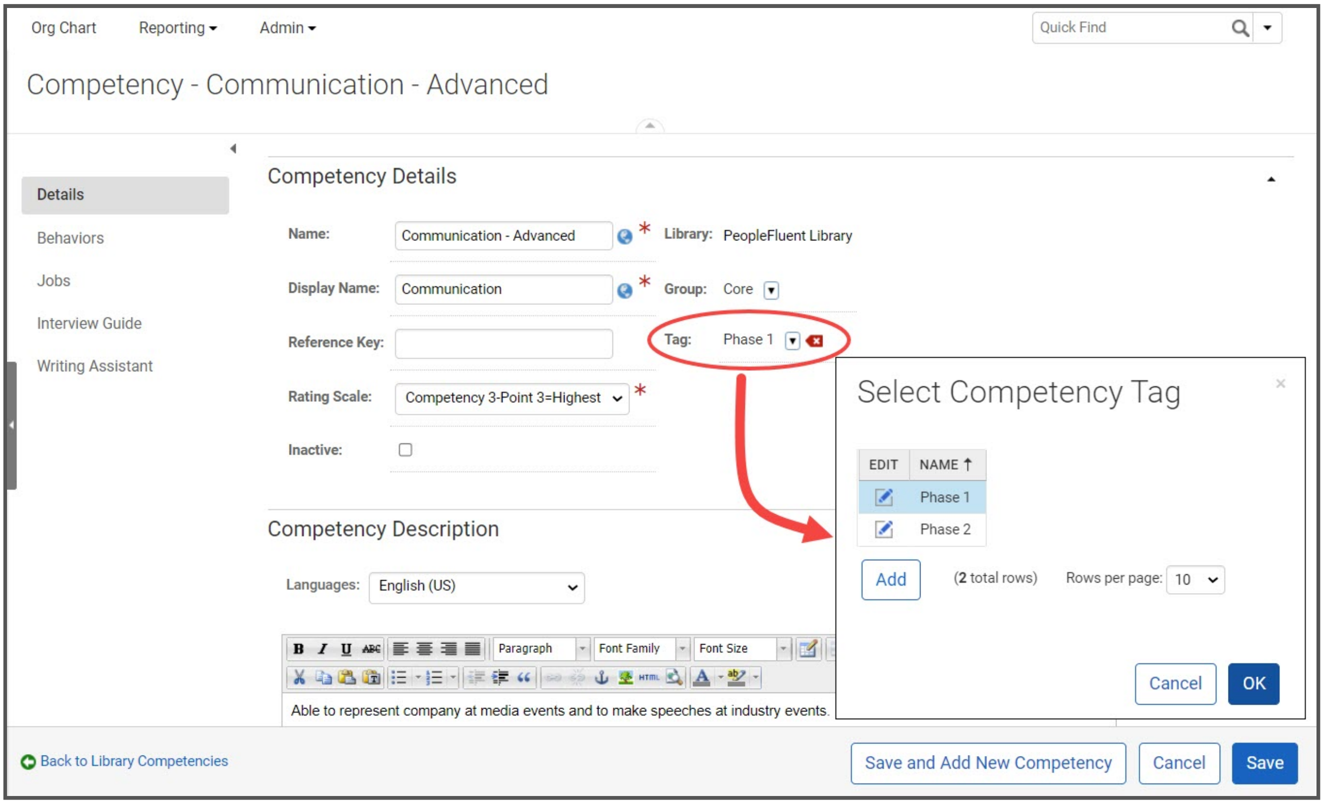


Figure: New Competency Tag Field on the Competency Page

After Competencies are tagged, you can configure Performance evaluation workflow states to display only competencies with certain tags on the end-user forms.

To access the configuration page for a plan, go to **Primary Navigation Menu > Talent Management Administration > Performance Administration > Performance Management > Performance Management Plans**. In the list of plans configured for your site, click the **Edit** icon for the plan you want to configure. Then click an evaluation process, click the wrench icon for the state you want to configure, and select **Edit State Details**.

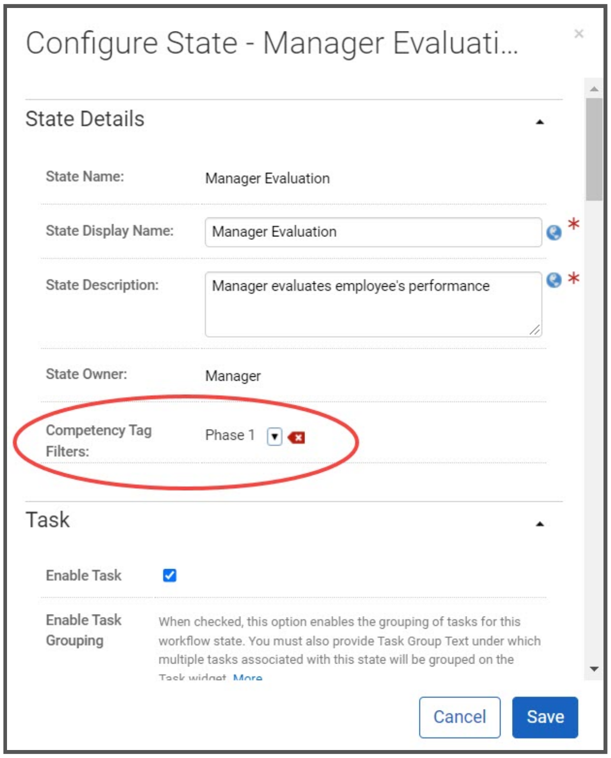


Figure: New Competency Tag Filters Field

You may select one or more competency tags to filter in this workflow state (if no tags are selected, all competencies will be displayed). Once this is done, only competencies with the selected tags will be displayed on the end-user forms. This allows you to evaluate one group of competencies before another group.

For example, in a clinical competency evaluation, some clinical competencies need to be evaluated before others. So the clinical competencies can be tagged with different tags (such as Phase 1 and Phase 2).

One workflow state would be configured to display only Phase 1 competencies, and a later workflow state would be configured to display only Phase 2 competencies, so the Phase 1 competencies would be evaluated in a workflow state before the Phase 2 competencies in a later state.

Keep the following points in mind regarding competency tags:

- Competency tag filtering cannot be used in multirater workflow states.
- The average competency rating displayed on the end-user form is calculated for all rated competencies, not just the displayed ones.
- Tags are not locked during a Performance plan, so be careful when editing tags, as changes are made immediately.

- The Tag field has been added to the pseudomodel Competency and Participant entities for use in formulas.
- You can import competency tags with the Competency API using the new `CompetencyTag` element.

Clinical Workflow State

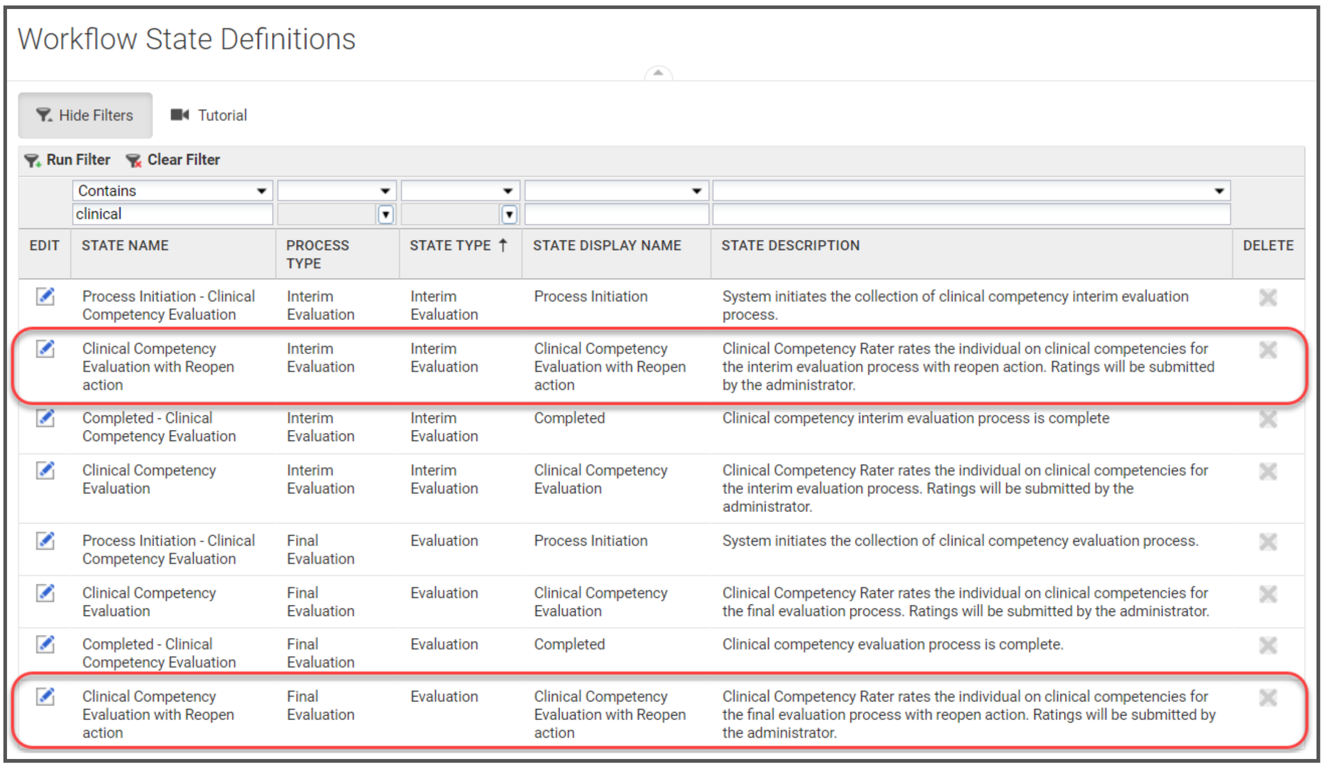
Functionality

This enhancement adds two clinical competency workflow states with reopen actions to the available Performance workflow states.

Details

Previously, the clinical competency evaluation states for interim and final evaluation workflows had only forward-moving actions.

This update adds an interim and a final evaluation clinical competency workflow state that have both forward and reopen actions, allowing administrators to move participants back to the previous state if needed.



Workflow State Definitions

Hide Filters | Tutorial

Run Filter | Clear Filter

Contains: clinical

EDIT	STATE NAME	PROCESS TYPE	STATE TYPE	STATE DISPLAY NAME	STATE DESCRIPTION	DELETE
	Process Initiation - Clinical Competency Evaluation	Interim Evaluation	Interim Evaluation	Process Initiation	System initiates the collection of clinical competency interim evaluation process.	
	Clinical Competency Evaluation with Reopen action	Interim Evaluation	Interim Evaluation	Clinical Competency Evaluation with Reopen action	Clinical Competency Rater rates the individual on clinical competencies for the interim evaluation process with reopen action. Ratings will be submitted by the administrator.	
	Completed - Clinical Competency Evaluation	Interim Evaluation	Interim Evaluation	Completed	Clinical competency interim evaluation process is complete	
	Clinical Competency Evaluation	Interim Evaluation	Interim Evaluation	Clinical Competency Evaluation	Clinical Competency Rater rates the individual on clinical competencies for the interim evaluation process. Ratings will be submitted by the administrator.	
	Process Initiation - Clinical Competency Evaluation	Final Evaluation	Evaluation	Process Initiation	System initiates the collection of clinical competency evaluation process.	
	Clinical Competency Evaluation	Final Evaluation	Evaluation	Clinical Competency Evaluation	Clinical Competency Rater rates the individual on clinical competencies for the final evaluation process. Ratings will be submitted by the administrator.	
	Completed - Clinical Competency Evaluation	Final Evaluation	Evaluation	Completed	Clinical competency evaluation process is complete.	
	Clinical Competency Evaluation with Reopen action	Final Evaluation	Evaluation	Clinical Competency Evaluation with Reopen action	Clinical Competency Rater rates the individual on clinical competencies for the final evaluation process with reopen action. Ratings will be submitted by the administrator.	

Figure: New Clinical Competency Workflow States with Reopen Action

Other than the new reopen action, the new states perform in all respects like the clinical competency evaluation states without the reopen action.

Limit Ad Hoc Competencies to Specific Libraries

Functionality

This enhancement allows administrators to limit the libraries from which end users will be able to select ad hoc competencies.

Details

When ad hoc competencies are enabled in a Performance plan, users are able to select ad hoc competencies from any competency library in the system.

Starting with this update, administrators can now set the specific competency libraries that users will be able to access when selecting ad hoc competencies.

When selecting the option to allow the adding of ad hoc competencies on the performance plan Competency Options configuration page, a new section appears: **Included Competency Libraries**.

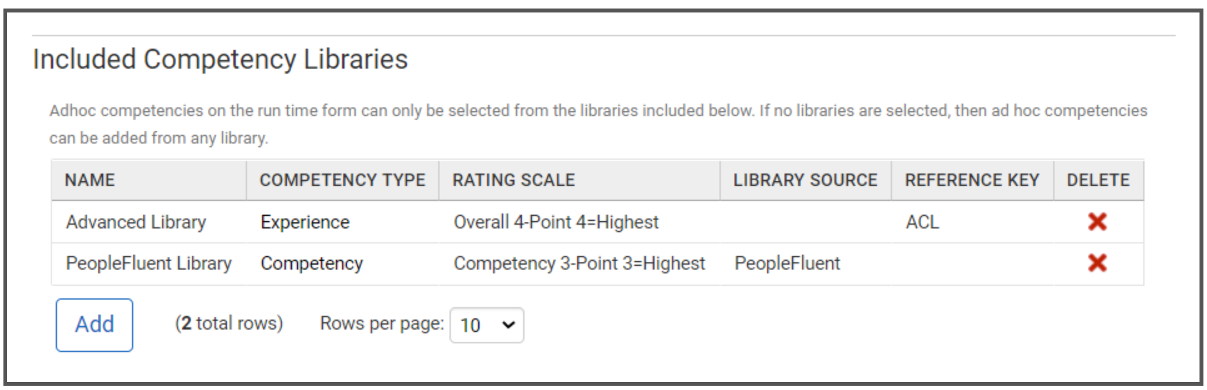


Figure: New Section on the Competency Options Page

When competency libraries are added in this section, end users will only be able to add ad hoc competencies from the specified libraries.

If no libraries are specified in this section, then users will be able to select from all libraries in the system.

Pseudo Model Audit Data

Functionality

This enhancement adds audit trail properties to the Performance competency rating entity in the PeopleFluent Talent Management Pseudo Model.

Details

This update allows Performance administrators to configure performance plan formulas to log competency rating events in the audit log.

To allow for this capability, we have added the `auditTrail` property to the `PerformanceCompetencyRating` entity in the PeopleFluent Talent Management Pseudo Model. Using performance plan formulas and these additions, clients can use audit trail logs in a number of ways.

For example, an administrator can configure a formula to audit the user that edits a specific competency record and write it to a field on the form.

Sample Formula

Below is a sample Performance formula that will write the user that updates a competency rating and the date and time it was updated to two user-defined fields:

```
Participant.getFinalEvaluation().getCompetencies().each { comp ->
   def rating = comp.getMgrRating();
   def latestRatingEvent;
   rating.auditTrail.events.each(){ auditEvent ->
      if(SystemEnum.AuditEventTypes.UPDATE.equals(auditEvent.type)){
         def ratingAuditRecord = auditEvent.auditRecords.find
{auditRecord -> auditRecord.fieldName == 'rating'};
         if(ratingAuditRecord != null){
            if(latestRatingEvent == null){
               latestRatingEvent = auditEvent;
            }else if(auditEvent.eventTime.compareTo
(latestRatingEvent.eventTime) == 1){
               latestRatingEvent = auditEvent;
            }
         }
      }
   }
   if(latestRatingEvent != null){
      if(latestRatingEvent.proxyUser != null){
         rating.userDefined1 = latestRatingEvent.proxyUser.name;
         rating.userDefined2 = latestRatingEvent.eventTime;
      }else{
         rating.userDefined1 = latestRatingEvent.user.name;
         rating.userDefined2 = latestRatingEvent.eventTime;
      }
   }
}
```

Onboarding Features

The features and enhancements described in this section apply to PeopleFluent Onboarding. Because this application is configurable per client, new features may affect each implementation differently. For more information about any new feature, and how it can be used in specific implementations, contact a PeopleFluent representative.

These features will be available when the client is upgraded to this version of PeopleFluent Onboarding.

Onboarding Engagement Wizard Enhancement

Functionality

This enhancement adds the position holder employee ID to the Create New Engagement wizard.

Details

Onboarding engagements can be created by going to **Primary Navigation Menu > Onboarding > Create New Engagement**, which opens the Create New Engagement wizard. In step 1 of the wizard, users select a position holder for the new engagement.

In order to better identify the correct position, with this update the employee ID of the position holder now appears next to the position holder's name.

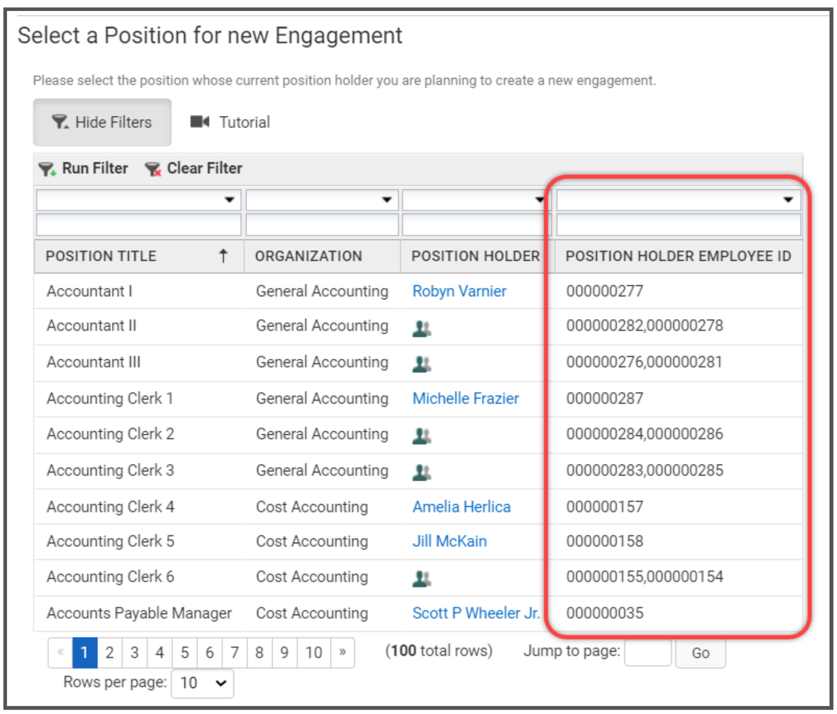


Figure: New Employee ID Column

The new column can be filtered, and if the position is a multi-seat position, the employee IDs are separated by commas.

Common Features

The features and enhancements described in this section apply to all PeopleFluent Talent Management applications. Because the applications are configurable per client, new features may affect each implementation differently. For more information about any new feature, and how it can be used in specific implementations, contact a PeopleFluent representative.

These features will be available when the client is upgraded to this version of PeopleFluent Talent Management.

Required Field UI Enhancement

Functionality

This enhancement improves the user interface (UI) around required fields in Performance forms and other pages across the application suite that validate required fields.

Details

In this update, the user interface around required fields has been improved to make it easier to identify fields that need to be populated.

On Performance forms and many other pages across the PeopleFluent Talent Management application suite, the UI displays required fields with a red asterisk. When required fields are not populated and a form or page is submitted, validation occurs and the application displays an error.

The red asterisks are now larger, allowing users to identify required fields more easily before submitting the form or page. Also, the yield symbol that previously appeared on some pages with errors has been removed to be consistent with other error messages across the application.

On Performance forms, when a form is submitted with required fields that have not been populated, a Validation Errors banner now appears at the top of the form. This banner lists the fields in error.

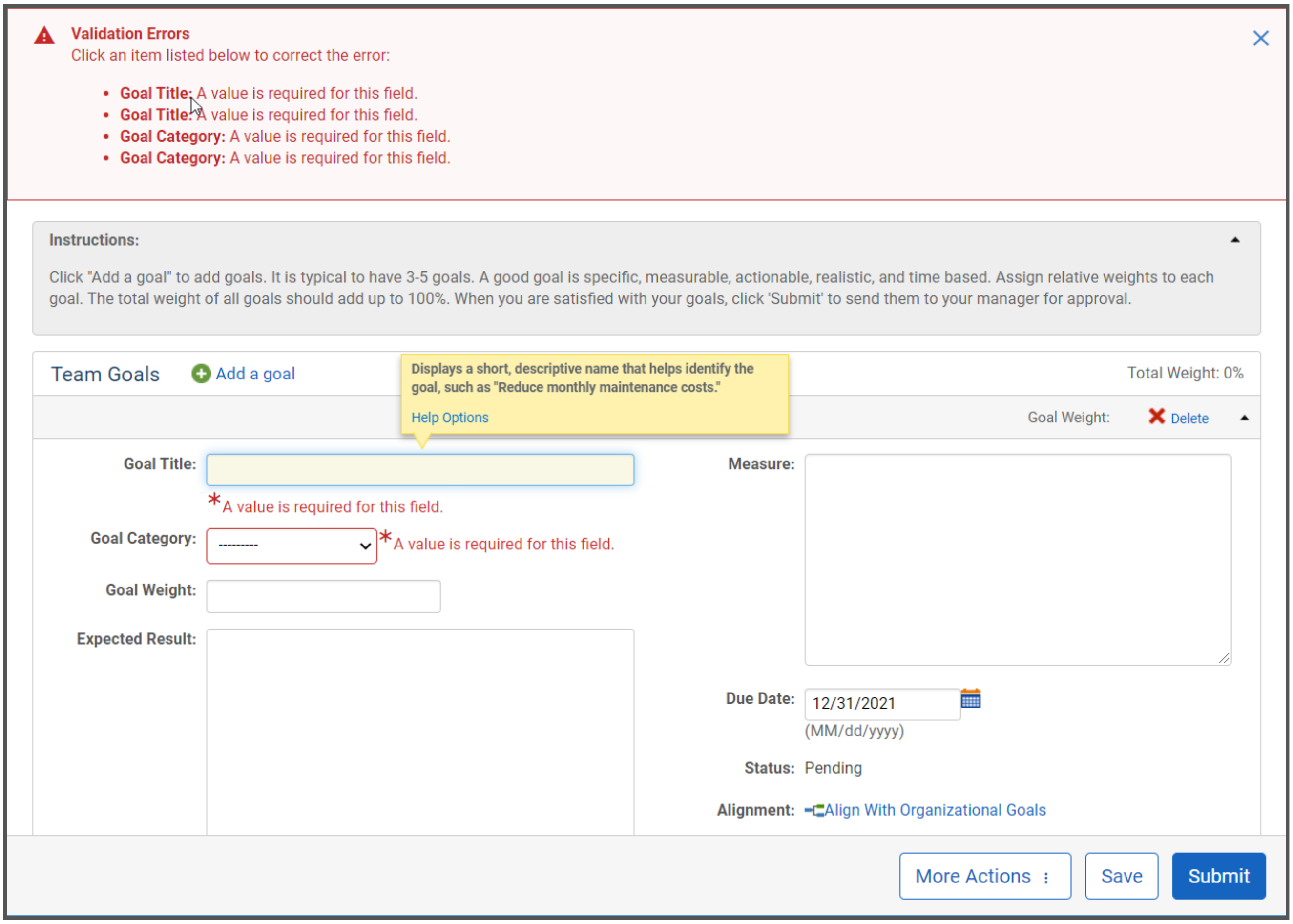


Figure: Required Fields Error List on a Performance Form

Clicking an item in the list moves that field to the centre of the page, and for many text fields, the cursor is moved into the field. All error fields on the page, text or not, are noted with red error text to make it easy to identify which fields need to be populated.

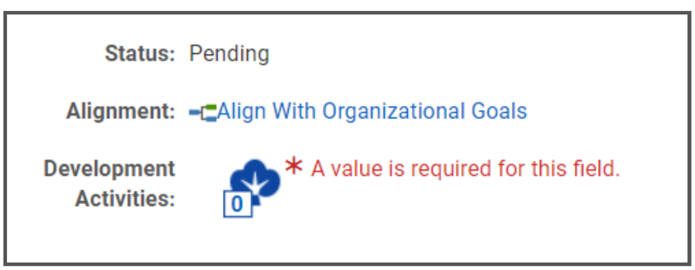


Figure: A Non-Text Field Error

Data Feeds and APIs

This section describes changes made to data feeds and APIs in v1.35.220400, which is the latest update to the integrations used in all PeopleFluent Talent Management applications.

For more information on data feeds and flat files, refer to the PeopleFluent Talent Management 22.04 Control Data Guide and the PeopleFluent Talent Management 22.04 Data Mapping Guide.

Changes to Existing Data Feeds and APIs

Data Feeds

The following changes have been made to existing data feeds.

Table: Data Feed Changes in PeopleFluent Talent Management 22.04

Data Feed	Description
Competency	Added a new field: CompetencyTag

APIs

The following changes have been made to existing APIs.

Table: API Changes in PeopleFluent Talent Management 22.04

Data Feed	Description
Competency	Added a new field: CompetencyTag
Person API Export	Added RMSCandidateid attribute to Person export XML if the RMS integration is enabled.

New Data Feeds and APIs

This update does not include any new data feeds or APIs.

Supported Languages

PeopleFluent Talent Management offers standard support for the following languages. Please contact your PeopleFluent representative for information about implementing a new or additional language.

Supported languages are defined as languages that may be implemented either as part of a customer's implementation or as an out of the box locale within the PeopleFluent Talent Management suite of products.

- Brazilian Portuguese
- Chinese (Simplified)
- Dutch
- French
- French Canadian
- German
- Italian
- Korean
- Spanish
- Russian
- UK English
- US English
- Vietnamese

Users can select their language by going to **My Account > Preferences & Settings**. They can also choose their Application Language, which controls the language of the interface itself, including headers, field labels, buttons, and supporting messages, and their Content Language, which controls the default content language used when new requisition and position documents are created.

Note: Spellcheck is not available for Brazilian Portuguese, Chinese, Dutch, Korean, Russian, or Vietnamese. PeopleFluent Recruiting Center is not available in Brazilian Portuguese.

Supported Browsers

To provide the best security and performance for our users, PeopleFluent recommends that clients use one of the following browsers to access PeopleFluent applications.

Older browser versions may have rendering or compatibility issues. When such issues are reported, PeopleFluent will attempt to recreate on recent browser versions and in the event this cannot be replicated, the remedy will likely be a recommendation for clients to upgrade to one of the following browsers.

Microsoft Edge (latest stable release)

PeopleFluent supports the latest stable release of Microsoft Edge browsers in accordance with Microsoft's support policy.

Microsoft Internet Explorer

PeopleFluent supports Microsoft Internet Explorer browsers in accordance with Microsoft's support policy:

https://support.microsoft.com/en-us/help/17454/lifecycle-faq-internet-explorer

Mozilla Firefox (latest stable release)

PeopleFluent supports Firefox's latest stable release channel. PeopleFluent's support also extends to Firefox's specialised Extended Support Release (ESR). For Mozilla Firefox release notes, go to:

https://www.mozilla.org/en-US/firefox/releases/

Google Chrome (latest stable release)

PeopleFluent supports Chrome's latest stable release from Google Stable Channel. For Chrome release updates, go to: https://chromereleases.googleblog.com/search/label/Stable%20updates

Apple Safari

PeopleFluent supports Apple Safari in accordance with Apple's web site. For more information, see: https://support.apple.com/en-us/HT204416.

Deprecated Browser Versions

Deprecated browser versions have been tested and found to have serious problems when used to access PeopleFluent Talent Management.

WARNING: Using any of the following deprecated browser versions may result in loss of functionality, data loss, or both:

- **Microsoft Internet Explorer 10 and below**
- **Microsoft Edge 14 and below**
- **Mozilla Firefox 59 and below**
- **Apple Safari 9 and below**
- **Google Chrome 66 and below**

PeopleFluent strongly recommends that all clients update the browsers used to access PeopleFluent Talent Management to the browser's latest stable release and to do so on a regular basis as the browser is updated.

Known Issues and Limitations

PeopleFluent requires the latest patches be installed for all supported web browser versions. The following are known issues or limitations of web browsers and operating systems that may affect the use of PeopleFluent Talent Management:

- PeopleFluent Talent Management does not support printing from Apple Safari on any supported Microsoft Windows operating systems due to the browser's limited printing support.
- PeopleFluent Talent Management does not support PDF-based online job forms or PDF-based master online job forms on Mozilla Firefox for the macOS.
- PeopleFluent Talent Management has known issues when rendering information in PDF-based online job forms on Safari.

- PDF form digital signature fields created using Nitro Pro are not supported on Onboarding PDF forms.
- PeopleFluent Talent Management does not support using Compatibility mode with any version of Microsoft Internet Explorer.
- PeopleFluent Talent Management does not support using Enterprise mode with any version of Microsoft Internet Explorer.
- PeopleFluent Talent Management requires native XMLHTTP support be enabled when using Microsoft Internet Explorer to access PeopleFluent Compensation worksheets with a fixed header.
- PeopleFluent Talent Management does not support using the Undo function when editing text areas with any version of Microsoft Internet Explorer. This issue is caused by a functional limitation of the web browser.
- PeopleFluent Talent Management does not support browser-based or operating system-based magnification or zoom features due to inconsistencies in how browsers implement content and image scaling.
- Resizing dialog boxes to be smaller than the default size may occasionally result in some screen elements being cut off. For best results, keep the PeopleFluent Talent Management window maximized (to at least 1024 x 768), and do not resize dialog boxes smaller than they first appear.
- Candidates accessing PeopleFluent Recruiting career sites cannot upload files from Dropbox using Google Chrome on an Apple iPhone.
- Microsoft Edge does not support the ActiveX plug-in which is required to view PDFs with Adobe Acrobat and Adobe Reader in a web browser. As a workaround, use Microsoft Internet Explorer 11. For more information, see: https://helpx.adobe.com/acrobat/using/display-pdf-in-browser.html#edge
- PeopleFluent Talent Management does not support the use of Adobe Flash Player. PeopleFluent recommends using Instilled or embedded links to video hosting sites to play video content.
- PeopleFluent Talent Management on Apple Safari does not support integration with PeopleFluent Learning.
- PeopleFluent Compensation Command Center does not support Microsoft Internet Explorer version 11.

Additional Documentation Resources

Additional document resources are available from your PeopleFluent representative and from PeopleFluent Customer Community (https://customers.peoplefluent.com).

Table: Documentation Resources

Documentation	Description
Hardware and Software System Requirements	Provides information on workstation requirements, recommended and supported browsers, and supporting third-party applications.
Online Help	Provides help content for administrators and end users.
Resolved Issues	Provides information about resolved issues addressed in this update.
Training Manuals and eLearning Modules	Please contact your PeopleFluent representative to schedule training.

About PeopleFluent

As a market leader in integrated talent management and learning solutions, PeopleFluent helps companies hire, develop, reward, and advance a skilled and motivated workforce. Deployed separately or as a suite, our software spans recruitment, talent mobility, performance, compensation, succession, org charting, and learning—tailored for either large or mid-enterprise organisations. We deliver unmatched functionality and flexibility, recognised by leading analysts, to develop people, drive performance and deliver results.

Our talent solutions unify talent processes within a collaborative experience that enables HR and L&D teams to guide managers and employees with contextual learning—right in the flow of work.

A part of Learning Technologies Group plc (LTG), PeopleFluent provides world-class service and an unparalleled ecosystem of partners to optimise employee experience, employer brand, and business results.

For more, visit peoplefluent.com

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Web site: www.peoplefluent.com

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