PeopleFluent Talent Management 21.07 Release Notes

Document Version: 1.1

Contents

New to PeopleFluent Talent Management

PeopleFluent is pleased to announce the upcoming PeopleFluent Talent Management 21.07 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 1: Revision Information

Revision Information	
Revision Date:	7 July 2021
Revised Document Version Number:	1.1
Details of Revision:	Added Performance release note: Employee ID on Multirater Nomination.
Revision Date:	2 July 2021
Revised Document Version Number:	1.0
Details of Revision:	Initial publication.

PeopleFluent Compensation Features and Enhancements

Smart Worksheet Processing

Functionality

This feature allows administrators to quickly republish worksheets if only a small number of participants are affected.

Summary Score Card

Table 2: Summary Score Card

PeopleFluent Talent Management 21.07	
Feature/Enhancement	Comments
Compensation	
Compensation Worksheets	Administrators can republish worksheets to update a certain section of the population.
Data Setup	N/A
Bonus Planning	N/A
Salary Planning	N/A
Stock Planning	N/A
Total Compensation Planning	N/A
Other Compensation Administration	N/A

Details

Administrators can now republish Compensation worksheets to update a subset of the total population, thereby saving a lot of time if only a few participants are affected by changes. This is similar to the existing Smart Plan Processing feature that allows administrators to process changes to a subset of Compensation plan participants.

The new functionality saves time when republishing worksheets if the updates are row-based (for example, row-level formulas, override data maps, and so on), as opposed to updates that involve the full population (for example, hierarchy validation or generating worksheet statistics).

There is a new **Worksheet Participants** data grid in Compensation focal reward cycles (under Worksheet Publication) that shows the published participants. This grid is specific to the reward cycle; views saved in one reward cycle are not available in other reward cycles, nor on the worksheet itself.

The new grid can be used to filter on participants that have recently changed (those that have been assigned, updated, or calculated). To that end we have added the following new columns:

- Last Edited Date
- Last Calculated Date
- Last Plan Updated Date
- Last Published Date

Once the filtered view is saved, administrators can navigate to the reward cycle's Publish Options page (under Worksheet Publication) and select one of two options in the Worksheet Processing section: **All Records** or **Subset of Records**.

Selecting **Subset of Records** displays a drop-down box where the saved Worksheet Participants grid view can be selected.

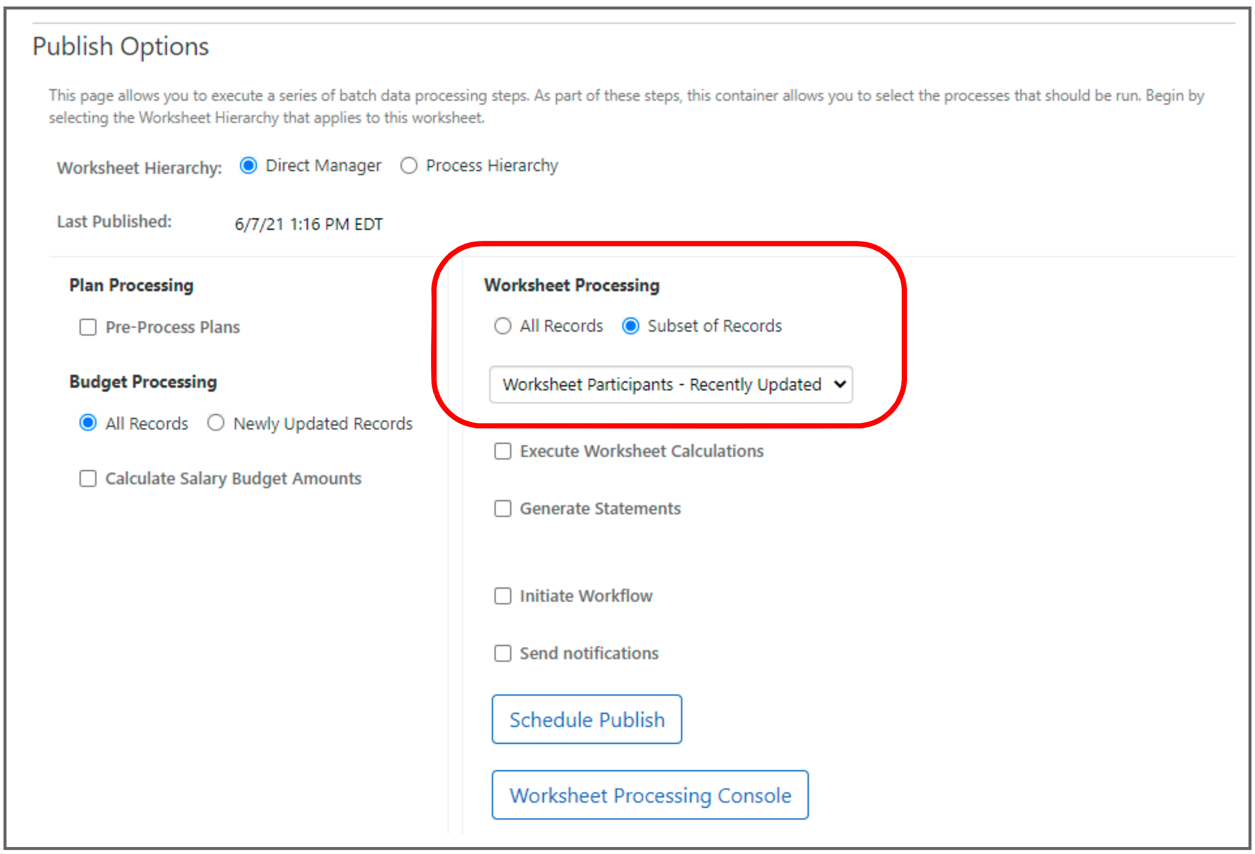

Figure 1: The Publish Options Page Worksheet Processing Section

After this selection is saved, the administrator can click the **Publish/Republish** button. The entire population will be used in the **Creating or Updated Worksheet Hierarchy and Validating Data** and **Populating Standard Fields** steps. After worksheet data publication, the saved filter will be used to perform batch execution of any of the following selected options: worksheet formulas, override data maps, alerts, edit rules, and generated statements.

Note: Selecting the Generate Statements check box previously displayed a Selective Per-Row Statement Generation option, allowing per-row selection of participants to be displayed in the statements. This option has been deprecated since the same functionality can now be achieved using a worksheet participants grid view.

Worksheet Processing Console

Administrators can also select the saved filter after clicking the **Worksheet Processing Console** button to select the subset of population to use for the processing from the Worksheet Processing Console.

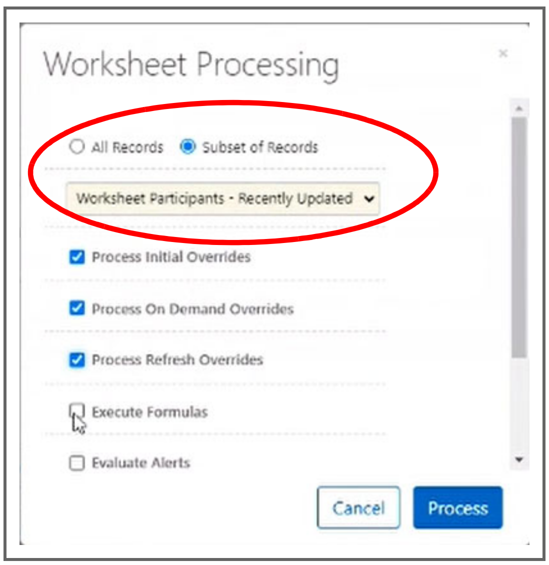

Figure 2: The New Subset of Records Option

After selecting the worksheet view, the worksheet can be republished based on the view rather than the entire list of participants.

Budget Processing

Apart from the All Records and Subset of Records options under Worksheet Processing, the **All Records** and **Newly Updated Records** options in the Budget Processing section have been added on the Publish Options page.

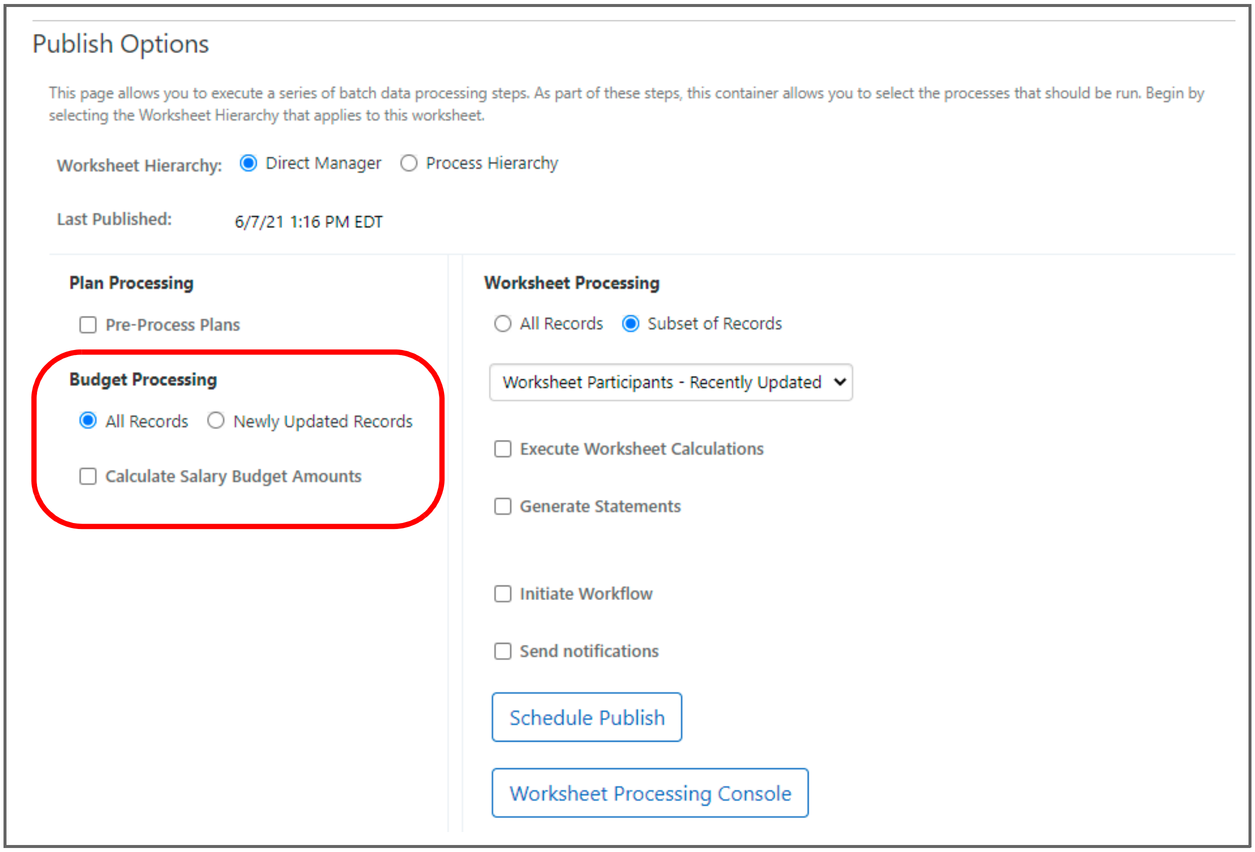

Figure 3: The Publish Options Page Budget Processing Section

The Publish process has been modified to use the Newly Updated Records option when calculating budget groups and holdback groups. The newly updated records are identified by comparing the new column **Date Last Plan Processed** value in the plan and the new **Last Published Date** field value in the Reward Cycle Publish Options page. If the Date Last Plan Processed is greater (more recent) than the Last Published Date, then those are considered as newly updated records and the budget group and holdback group calculation will occur only for those records. The budget and holdback will still be calculated for the entire population.

Skip Validation Checks

The first step of the worksheet publish process is to validate a set of underlying data. In cases where multiple publish processes are occurring throughout the day, the time invested in this validation check does not add any value if the underlying data dependencies have not changed.

Therefore, when publishing a worksheet that has been published within the previous 24 hours, an option now appears to skip the validation check, since it is likely that the underlying data dependencies have not changed significantly since the last publication process. This saves time when many publications are happening in a short period of time.

Upgrade Considerations

If a reward cycle was created prior to upgrading to PeopleFluent Compensation 21.07, the new **Last Published Date** and **Last Plan Updated Date** columns will be blank, and clients will need to republish the reward cycle before using this new functionality that relies on those columns.

In addition, the **Last Edited Date** column will be populated only if a worksheet row is edited after upgrade, and the **Last Calculated Date** column will be populated only if worksheet calculations happen after upgrade.

PeopleFluent Onboarding Features and Enhancements

The features and enhancements described in this section apply to PeopleFluent Onboarding. They are available to all PeopleFluent Onboarding clients.

Because PeopleFluent Onboarding is configurable per client, new features may affect each client's individual 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.

Limit Engagement Creator Access

Functionality

This enhancement allows PeopleFluent Onboarding users to use the Recruiting area of responsibility to limit engagement creator access to engagement subjects, even if the client does not have PeopleFluent Recruiting activated.

Summary Score Card

Table 3: Summary Score Card

PeopleFluent Talent Management 21.07	
Feature/Enhancement	Comments
Onboarding	
End User Onboarding Interface Changes	Recruiting HR area of responsibility is now available to Onboarding users if PeopleFluent Recruiting is not activated.
Data Setup	N/A
Task and Task List Templates	N/A
Notification Templates	N/A
Other Onboarding Administration	N/A

Details

PeopleFluent Onboarding clients typically use the Recruiting HR Area of Responsibility (AoR) to control access to engagement subjects (through organisations and positions). However, if the client did not have PeopleFluent Recruiting enabled, they did not have access to the Recruiting HR AoR.

With the 21.07 update of PeopleFluent Talent Management, PeopleFluent Onboarding clients now have access to the Recruiting HR AoR even if they do not have PeopleFluent Recruiting enabled in their implementation.

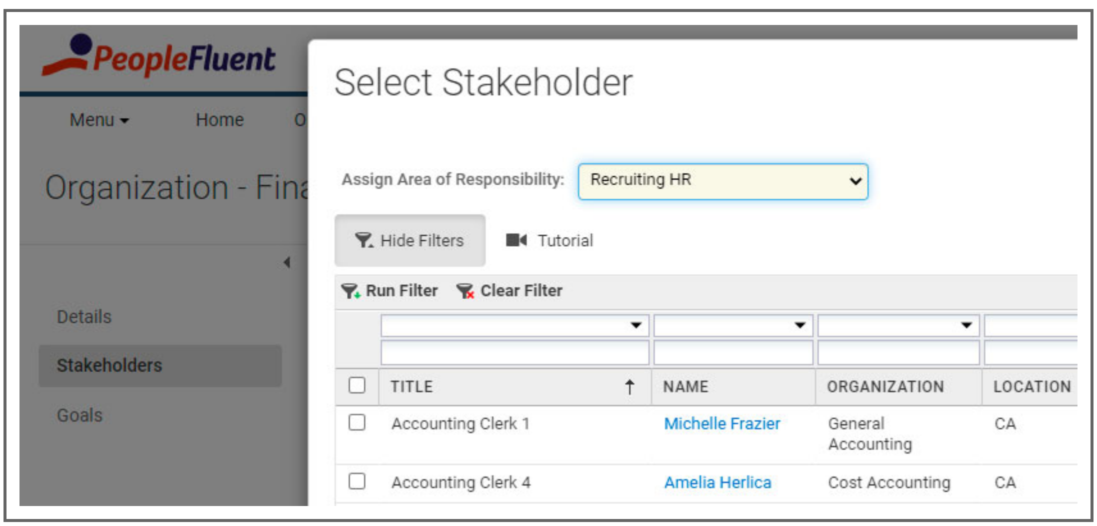

Figure 4: Selecting the Recruiting HR AoR for an Organisation

Client administrators can now select the **Recruiting HR** AoR when assigning stakeholders to organisations and positions whether or not they have PeopleFluent Recruiting as an activated application. This allows them to control engagement creators' access to employees when creating Onboarding engagements.

PeopleFluent Performance and Succession Features and Enhancements

The features and enhancements described in this section apply to PeopleFluent Performance and Succession. They are available to all PeopleFluent Performance and Succession clients.

Because PeopleFluent Performance and Succession is configurable per client, new features may affect each client's individual 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 Succession.

Move No Longer Eligible Participants to Completed State

Functionality

This enhancement allows administrators to move Performance workflow participants in the No Longer Eligible category directly to the Completed state.

Summary Score Card

Table 4: Summary Score Card

PeopleFluent Talent Management 21.07	
Feature/Enhancement	Comments
Performance	
End User Performance Interface Changes	N/A
Data Setup	N/A
Performance Management Plans/Org Goal Plans	N/A
Workflow Process Management	No longer eligible workflow participants can be moved directly to the Completed state.
Development Planning	N/A

Details

Performance workflow participants can become ineligible for a variety of reasons. For example, they may move to a different department within the company, or leave the company entirely. In these cases, an administrator previously had to move each ineligible participant through all of the remaining workflow states, one at a time, until they reached the Completed state.

In PeopleFluent Performance 21.07, there is now an easy way to quickly move all ineligible participants from whatever state they are in directly to the Completed state.

On a Performance Plan Workflow Process Management page, administrators can click the **Manage** icon next to Participants No Longer Eligible and then click **Manage Participants**. The resulting Participants No Longer Eligible dialog box now includes a **Move to Completed State** button.

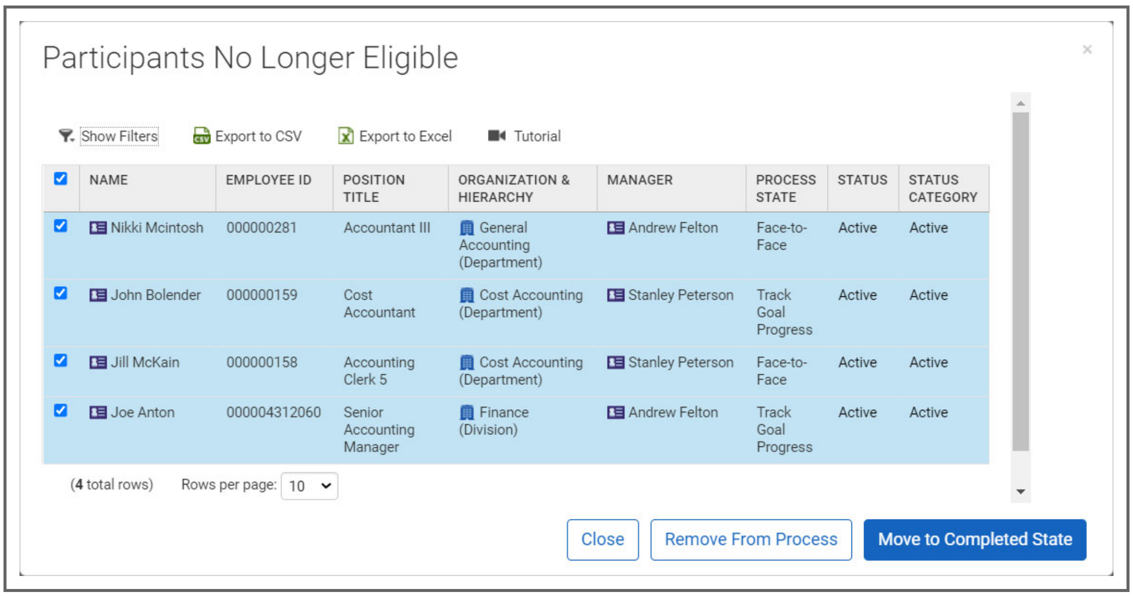

Figure 5: The New Move to Completed State Button

Selecting participants and clicking the **Move to Completed State** button opens a second dialog box that allows administrators to confirm the move and optionally add a comment that will appear in the activity log for that workflow process.

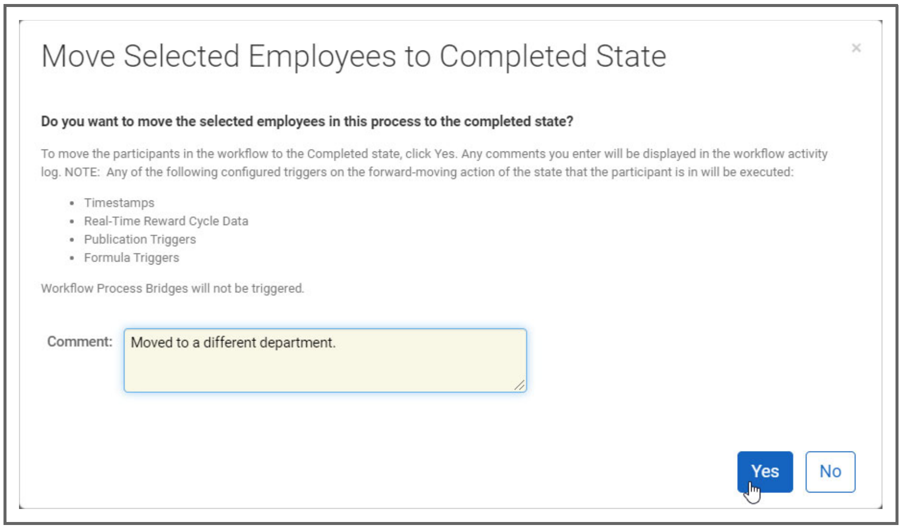

Figure 6: Confirmation and Comments Dialog Box

Note: There is a default comment ("Moved from <state name> to Completed because they are no longer eligible") that is always added to the process log; any additional comments entered by the administrator are appended to the default comment.

Any of the following configured triggers on the forward-moving action of the state that the participant is in will be executed when the participant is moved to Completed:

- Timestamps
- Real-Time Reward Cycle Data
- Publication Triggers
- Formula Triggers

However, Workflow Process Bridges will not be triggered.

Moving a participant to the Completed state in this way will delete all of the open tasks related to that participant.

If a participant is in any inner workflow process, such as multirater, or an Additional Feedback workflow process, those also get moved to Completed when they are moved to Completed in the main workflow process.

Reopening participants in the Completed state moves each participant back to the state from which they were moved.

Employee ID on Multirater Nomination

Functionality

This enhancement displays the employee ID when making multirater nominations to verify that the right user is being nominated.

Summary Score Card

Table 5: Summary Score Card

PeopleFluent Talent Management 21.07	
Feature/Enhancement	Comments
Common Talent Management Features	
Site Administration	N/A
Site Configuration	N/A
Organisation Data	N/A
My Team	N/A
Dashboards	N/A
Talent Search	N/A
Talent Profile	N/A
Reports	N/A
User Interface	Employee ID is now displayed when making multirater nominations.
Microapps	N/A

Details

Large companies sometimes have multiple employees with the same name. For example, there could be several John Smiths.

To differentiate these employees during multirater evaluations, the unique Employee ID number is now displayed when an employee nominates another employee to rate them.

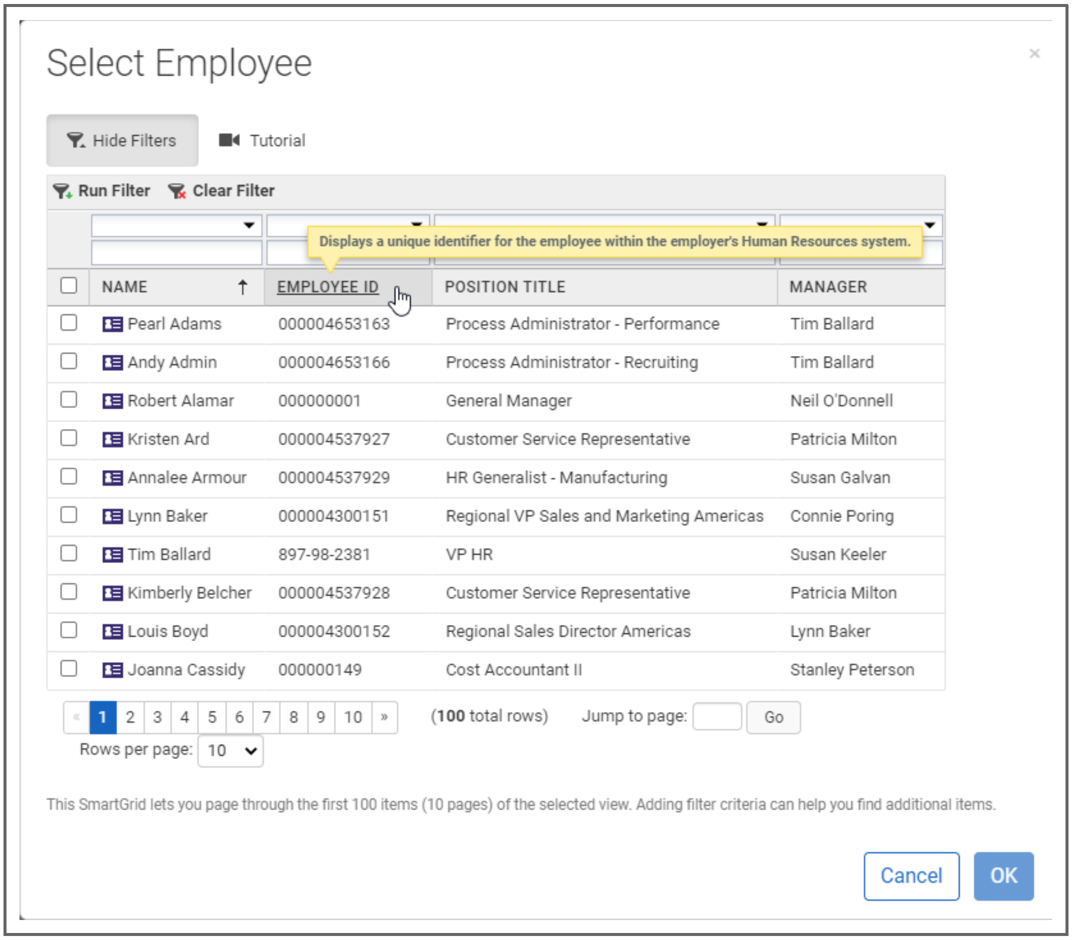

Figure 7: Employee ID Column When Selecting Employees

Note: The Employee ID column also appears when selecting employees to give or receive feedback, and when selecting delegatees for a process role.

The Employee ID column in these areas is visible by default. Clients who want to hide the employee ID can change the default visibility using design mode.

Calibration Session Enhancement

Functionality

This enhancement allows designated users to view all calibration sessions and to change the session owner.

Summary Score Card

Table 6: Summary Score Card

PeopleFluent Talent Management 21.07	
Feature/Enhancement	Comments
Succession Management	
Talent Pools	N/A
Succession Slates	N/A
Data Setup	N/A
Other Succession Administration	New permissions allow designated users to view all calibration sessions and change the session owner.

Details

In the 21.07 update of PeopleFluent Talent Management, designated users can view calibration sessions created by anyone in the application, and change the calibration session owner.

For example, if a manager that owns a calibration session moves to another department, they can change the session owner to the incoming manager so the new manger can continue the session. Or an administrator can view and change owners of any session in the application.

To facilitate this new ability, the following entities have been added:

Table 7: New Authority and Role

Entity	Name	Description
Authority	Can View All Calibration Sessions	Roles with this authority can view calibration sessions created by anyone in the application and change the session owner.
Role	Calibration Session Viewer	Users with this role can view calibration sessions created by anyone in the application and change the session owner. This role has the new authority listed above.

When a user has the new role, they can view calibration sessions owned by anyone in the application. Also, the owner field of calibration sessions gains a selection arrow, allowing the logged-in user to select a new user to own the session.

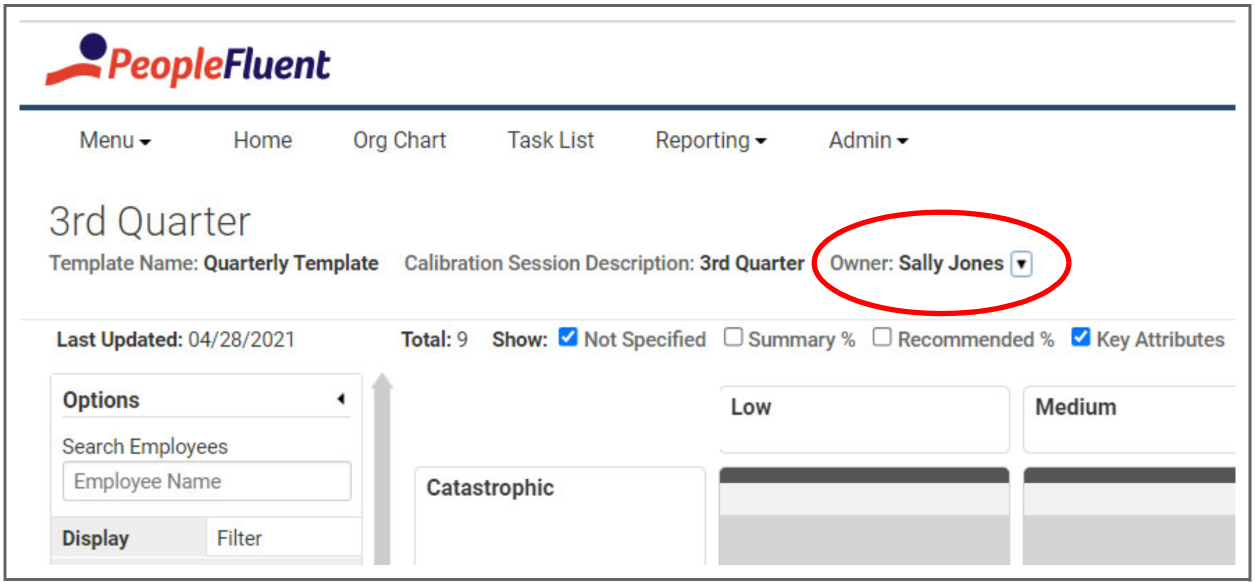

Figure 8: A Calibration Session Viewed by a Calibration Session Viewer

The new authority is only given to the new role by default, and the new role is not given by default to any user. Administrators can add the new role to an administrator or other user according to the organisation’s business needs.

Caution: Any role with the new authority can see all calibration sessions. To protect sensitive data, it is advised to assign the new role to users rather than add the new authority to existing roles.

PeopleFluent Recruiting Features and Enhancements

No new PeopleFluent Recruiting-specific features or enhancements were added in this update.

Common Features and Enhancements

The features and enhancements described in this section apply to all PeopleFluent Talent Management applications, and are available to all PeopleFluent Talent Management clients.

Because PeopleFluent Talent Management is configurable per client, new features may affect each client's individual 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.

User Interface Refresh

Functionality

This enhancement updates the microapp and PeopleFluent Talent Management user interface.

Summary Score Card

Table 8: Summary Score Card

PeopleFluent Talent Management 21.07	
Feature/Enhancement	Comments
Common Talent Management Features	
Site Administration	N/A
Site Configuration	N/A
Organisation Data	N/A
My Team	N/A
Dashboards	N/A
Talent Search	N/A
Talent Profile	N/A
Reports	N/A
User Interface	User interface updated.
Microapps	User interface updated.

Details

In this update of PeopleFluent Talent Management, the user interface of both the Productivity Platform microapps and PeopleFluent Talent Management itself has been updated with many small user experience enhancements.

For microapps, the size of some dialog boxes has been reduced to eliminate wasted space, icon styling and button appearance have been brought up to date, and we have rearranged screen elements for accessibility, consistency, and better fit onscreen.

In the PeopleFluent Talent Management user interface, buttons on some pages have been reordered, some wizards have been updated, and the loading icon has been changed.

Dynamic Proxy

Functionality

This feature adds the ability to quickly and temporarily proxy for users without having to go through the normal proxy set up process for each user.

Summary Score Card

Table 9: Summary Score Card

PeopleFluent Talent Management 21.07	
Feature/Enhancement	Comments
Common Talent Management Features	
Site Administration	Roles can be given a new authority allowing users to create temporary proxy sessions.
Site Configuration	N/A
Organisation Data	N/A
My Team	N/A
Dashboards	N/A
Talent Search	N/A
Talent Profile	N/A
Reports	N/A
User Interface	N/A
Microapps	N/A

Details

To make it easier for client administrators to temporarily proxy for users, the PeopleFluent Talent Management 21.07 update includes a new authority that enables administrators to proxy for users (full impersonation) without having to set up standard proxy permissions.

This allows client administrators to handle occasional user requests without permanently assigning the administrator to proxy for each user.

To facilitate this, the following new authority has been added:

Table 10: New Authority

Name	Description
Can Create Login Proxies	Roles with this authority can dynamically create login proxies.

The intended use for this new feature is for a client administrator to add the new authority to the **Can manage login proxies** security group, as it is likely that anyone with that security group will need to temporarily proxy for people. However, each client's situation is unique and clients can determine the best strategy for their particular business needs. Therefore, this authority is not given to any role or security group by default.

Caution: Dynamic proxy users can proxy (with full impersonation) for any user that has a role administration level that is less than or equal to their own role's administration level. It is recommended that clients review their existing security setup when adding this authority to ensure the right users are getting the right permissions.

A dynamic proxy session will end automatically if the proxying user logs out or is logged out due to application timeout, and the administrator can end the proxy session normally.

Dynamic proxies appear on the **Site Administration > Users > Login Proxies** page for both the proxy user and the user being proxied for, but only during the dynamic proxy session.

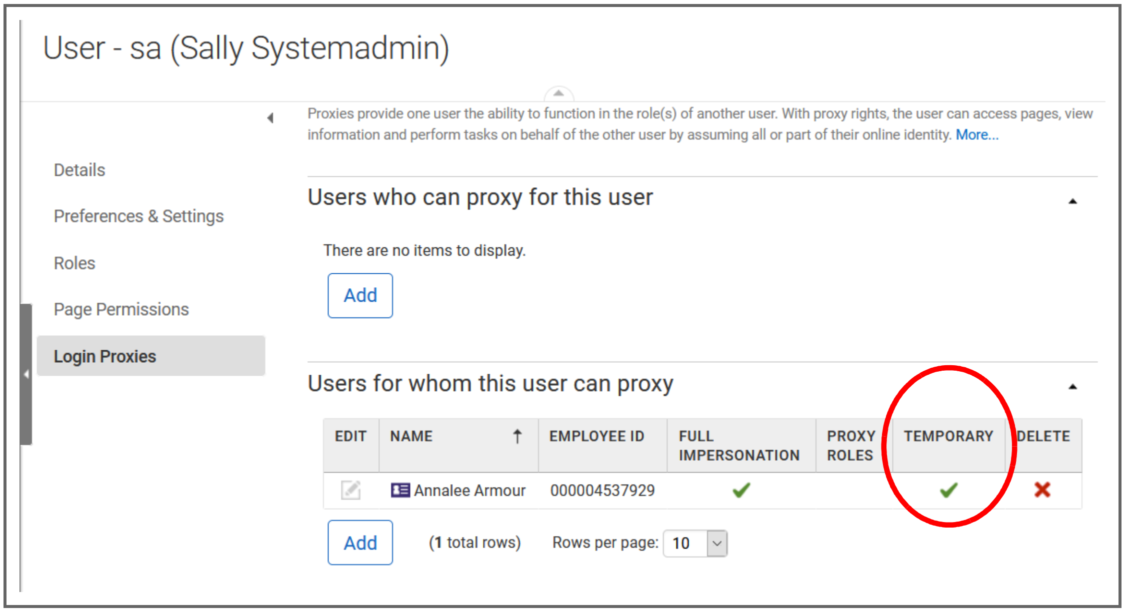

Figure 9: Dynamic Proxy (marked as Temporary)

Changes made during dynamic proxy sessions appear in the audit log history, the same as standard proxy sessions.

Appendix

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.

Web Browser Support Policy

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 Safari browsers in accordance with Apple's support policy. 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 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 maximised (to at least 1024 x 768), and do not resize dialog boxes smaller than they first appear.
- Candidates accessing PeopleFluent Recruiting Center 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 on Apple Safari does not support integration with PeopleFluent Learning.

- PeopleFluent Compensation Command Center does not support Microsoft Internet Explorer version 11.

Product Documentation Changes

PeopleFluent has updated the PeopleFluent Talent Management documentation set to reflect enhancements and new features introduced in the 21.07 update.

There are no Integrations-related changes in the 21.07 update and the API version number remains at 1.33.111600, therefore there will not be any Integrations Release Notes published for this update.

Additional Documentation Resources

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

Table 11: Documentation Resources

Documentation	Description
Control Data Guide	Provides guidance regarding the loading of control data into the PeopleFluent Talent Management application. The functional consultant and the client will use this as part of the initial and on-going data discussions during the implementation.
Data Mapping Guide	Spreadsheet used by clients to map their data to the PeopleFluent flat file templates.
Hardware and Software System Requirements	Provides information on workstation requirements, recommended and supported browsers, and supporting third-party applications.
Initial Data Documentation	Provides information about the default configuration of compensation workflow templates, competency libraries, development catalogs, form field configuration, legal scan words and phrases, merge fields, notifications, online help links, performance workflows, Rapid Assist videos, rating scales, reports, security settings, system and user enum values, and system settings. It also contains a Microsoft Excel and XML files listing the available grids, the columns added and dropped since the previous update, and a text file with all of the grid column IDs.
Integrations Release Notes	Provides information about changes made to the control data flat files used to load control data during implementation and to integrate between PeopleFluent Talent Management and external systems of record.
Online Help	Provides role-based help content for administrators, recruiters, and end users.

Table 11: Documentation Resources (Continued)

Documentation	Description
Release Notes	Provides a detailed summary of new features and enhancements to existing features, including screenshots, impact on the user interface, security, workflows, SmartGrids, reports, and your organisation's data. This document includes a list of supported browsers and operating systems, supported languages, and product documentation. This document also provides a list of changes to the documentation.
Resolved Issues	Provides information about resolved issues addressed in this update.
Training Manuals and elearning Modules	Please contact your PeopleFluent representative to schedule training.

Legal Notices

Website: www.peoplefluent.com