Cornerstone February 2015 Release Notes

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Table of Contents

What's New for January 09 Patch Release

The following new features and enhancements are released along with the January 09 patch release:

Feature	Description
Compensation UI Enhancements	With this enhancement: • When a compensation manager views a compensation plan that requires their approval, the **Approve** and **Deny** buttons are available on all component tabs (i.e., Base, Bonus, Equity) and the Summary and Approve Compensation Plan tabs. • Only employees within the compensation manager's compensation manager hierarchy who are eligible for one or more compensation plan tabs are displayed by default on the Summary/Read-only/Approval tab with an option to show ineligible employees.
Onboarding Integrations Enhancements	The following enhancements are made to Onboarding integrations: • An Integration Task Completed email is added to Email Administration. This email is triggered when an integration task is completed. • A Result column is added to the task table on the Onboarding Tab. This tab displays the results for integration tasks.

Compensation UI Enhancements

Compensation UI Enhancements

Prior to this enhancement:

- When a compensation manager viewed a compensation plan that required their approval, the **Approve** and **Deny** buttons only appeared on the Summary or Approve Compensation Plan tab.
- All employees within the compensation manager's compensation manager hierarchy appeared by default on the Summary/Read-only/Approval tab regardless of the employee's eligibility for the compensation task.

With this enhancement:

- When a compensation manager views a compensation plan that requires their approval, the **Approve** and **Deny** buttons are available on all component tabs (i.e., Base, Bonus, Equity) and the Summary and Approve Compensation Plan tabs.
- Only employees within the compensation manager's compensation manager hierarchy who are eligible for one or more compensation plan tabs are displayed by default on the Summary/Read-only/Approval tab with an option to show ineligible employees.

Use Cases

- An approver has navigated to the Base tab to make adjustments to an employee's allocations. The approver can now approve the plan directly from the Base tab instead of having to navigate back to the Summary tab.
- A compensation task includes a Base and Bonus template. In the organization, any employee who joins the company after November 1 is not eligible for a base or bonus increase. The compensation manager does not need to see these ineligible employees by default on the Base or Bonus tabs. The compensation manager also does not need to see these ineligible employees by default on the Summary tab.

Considerations

Once the redesigned Compensation Task user interface (UI) is enabled, it cannot be disabled.

The redesigned Compensation Task UI is not supported in Internet Explorer 7 or below.

Implementation

This functionality is only available when using the redesigned Compensation Task UI.

Upon release, this functionality is automatically enabled for all organizations using the redesigned Compensation Task UI.

Compensation Plan - Approve/Deny

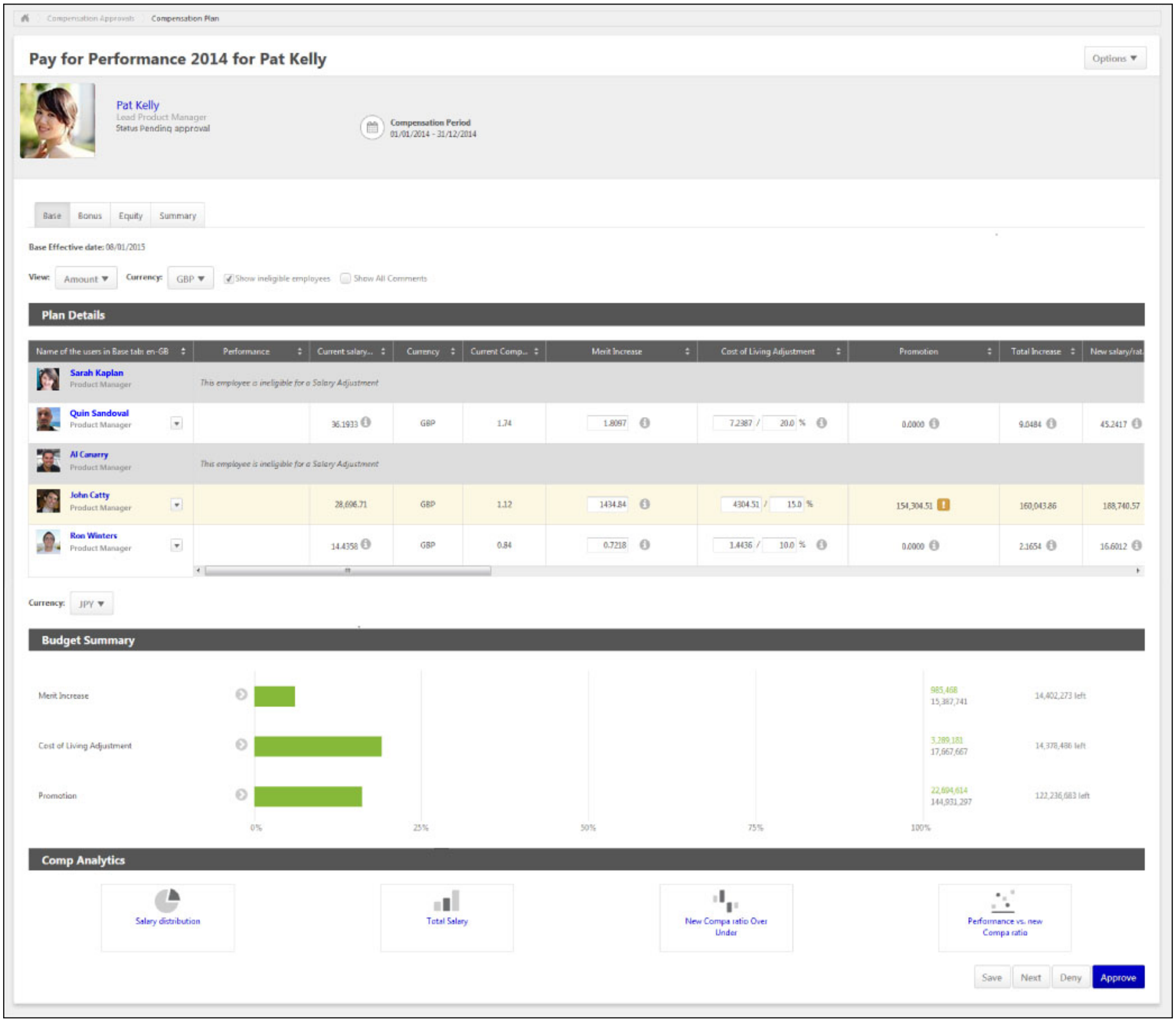
Prior to this enhancement, when a compensation manager viewed a compensation plan that required their approval, the **Approve** and **Deny** buttons only appeared on the Summary or Approve Compensation Plan tab.

With this enhancement, when a compensation manager views a compensation plan that requires their approval, the **Approve** and **Deny** buttons are available on all component tabs (i.e., Base, Bonus, Equity) and the Summary and Approve Compensation Plan tabs. **Note:**

This functionality is only available when using the redesigned Compensation Task user interface.

The following actions are available on the component tabs when an approver has the ability to edit the compensation plan during the approval workflow:

- **Save**
- **Previous** - This button is not available on the first tab of the compensation plan.
- **Next**
- **Deny** - Clicking this button validates the compensation allocations for the tab. If all allocation validations are passed, then the Summary tab is opened, and the Approve/Deny Confirmation pop-up is opened. If all allocation validations are not passed, then the approver must adjust the allocations prior to proceeding to the Summary tab.
- **Approve** - Clicking this button validates the compensation allocations for the tab. If all allocation validations are passed, then the Summary tab is opened, and the Approve/Deny Confirmation pop-up is opened. If all allocation validations are not passed, then the approver must adjust the allocations prior to proceeding to the Summary tab.

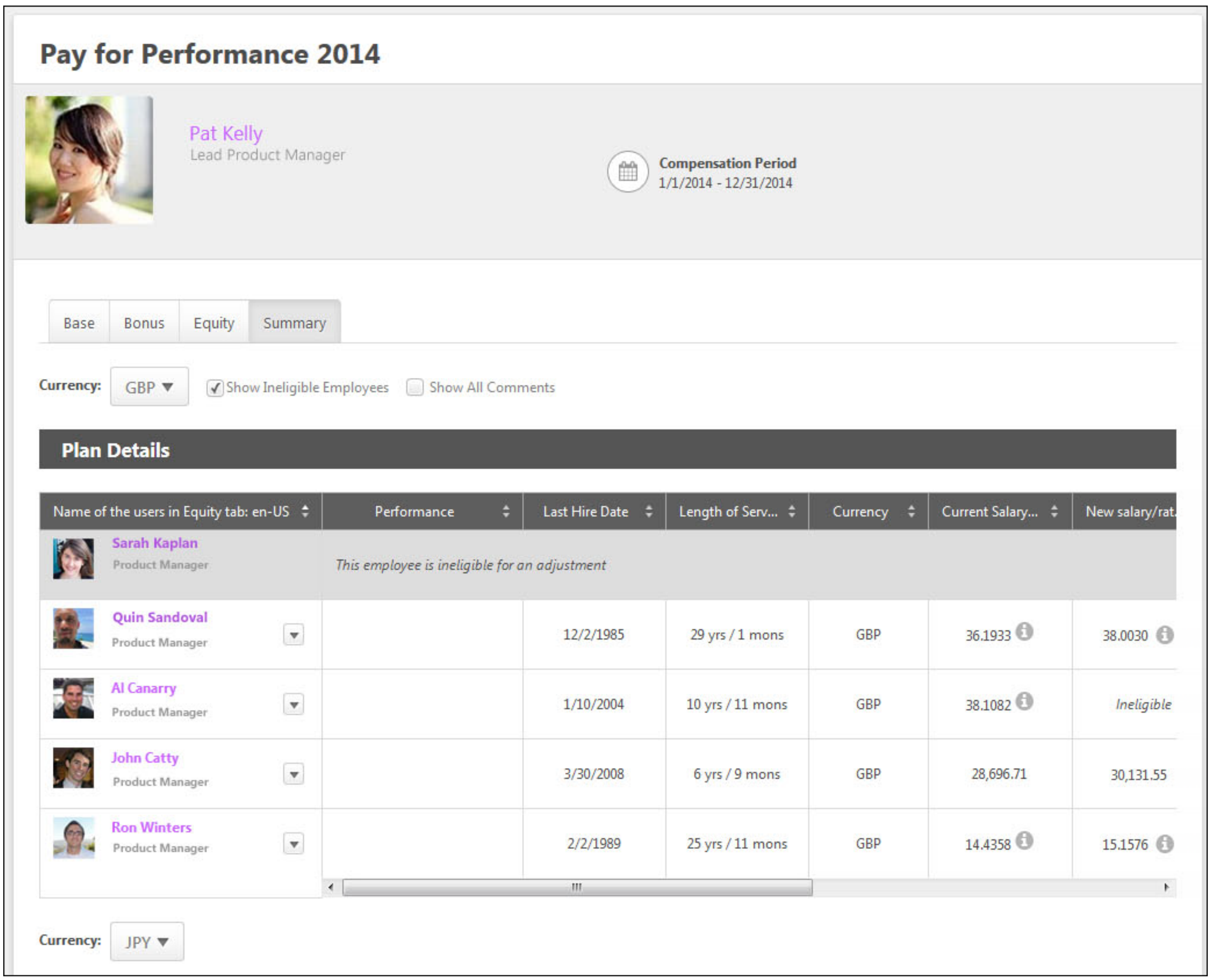


Compensation Plan - Summary/Read-only/Approval Tab

Prior to this enhancement, all employees within the compensation manager's compensation manager hierarchy appeared by default on the Summary/Read-only/Approval tab regardless of the employee's eligibility for the compensation task.

With this enhancement, only employees within the compensation manager's compensation manager hierarchy who are eligible for one or more compensation plan tabs are displayed by default on the Summary/Read-only/Approval tab. A Show Ineligible Employees option is now available, which enables the compensation manager to include ineligible employees in the Plan Details table for the tab. This option is unchecked by default. When ineligible employees are included, no component data is displayed and no options are available for ineligible employees.

This functionality is only available when using the redesigned Compensation Task user interface.



Onboarding Integrations Enhancements

Onboarding Integrations Enhancements Overview

The following enhancements are made to Onboarding integrations:

- An Integration Task Completed email is added to Email Administration. This email is triggered when an integration task is completed.
- A Result column is added to the task table on the Onboarding Tab. This tab displays the results for integration tasks.

Upon implementation, these enhancements are disabled by default. To enable these enhancements, contact your Client Success Manager or Global Product Support.

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
Employee Onboarding Action Items - View	Allows user to access Employee Onboarding on Universal Profile Action Items. This permission cannot be constrained. This is an end user permission.	Universal Profile
Employee Onboarding - Manage	Allows user to view an employee's onboarding progress from the Onboarding tab on the Universal Profile. This permission can be constrained by OU and User's OU.	Employee Onboarding
Global Email Administration - Manage	Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration
Global Email Administration - View	Grants view only access to email templates/triggers and email logs at the global level for the portal. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration

Email Administration

With this enhancement, an Integration Task Completed email is added to Email Administration. This email is triggered when an integration task is completed.

Permissions

Permission Name	Permission Description	Category
Global Email Administration - Manage	Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration
Global Email Administration - View	Grants view only access to email templates/triggers and email logs at the global level for the portal. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration

Integration Task Completed Email

Action	Description/Trigger
Integration Task Completed	This email is triggered when an integration task is completed. The email can be sent to Onboarding User, User's Approver, User's Manager, or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Employee Onboarding action type section of Email Administration. Use Case: Use this trigger to notify applicants that they have been assigned the Reference Letter Request task.

The following tags are available (new tags display in red):

Tag Name	Description
ACTION.DATE	Date that the action took place that triggers the email.
EMPLOYERUSER.DIVISION	Division of employer user.
EMPLOYERUSER.FIRST.NAME	First name of employer user.
EMPLOYERUSER.LAST.NAME	Last name of employer user.
EMPLOYERUSER.POSITION	Position of employer user.
INTEGRATIONTASK.TITLE	Integration task title.

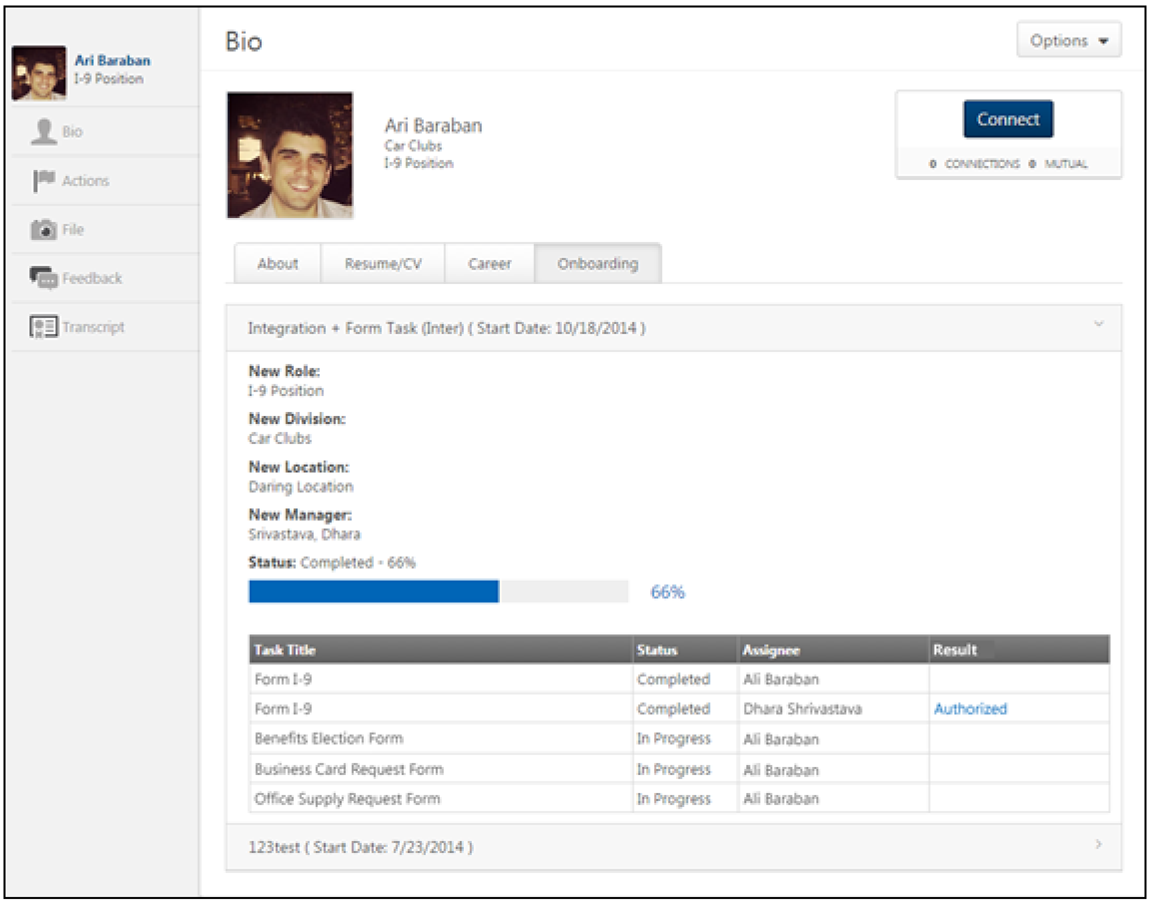
Tag Name	Description
INTEGRATION.TITLE	Integration title.
RECIPIENT.DIVISION	Recipient's division.
RECIPIENT.FIRST.NAME	Recipient's first name.
RECIPIENT.LAST.NAME	Recipient's last name.
RECIPIENT.POSITION	Recipient's position.
TASK.DUE.DATE	Due date of the task.
TASK.START.DATE	Start date of the task.

Universal Profile - Onboarding Tab

A Result column is added to the task table on the Onboarding Tab. This tab is used to track and display the results of integration tasks.

Permissions

Permission Name	Permission Description	Category
Employee Onboarding - View	Allows user to view the Onboarding tab on the Universal Profile. Also, allows access from a user's Applicant Profile. This permission can be constrained by OU and User's OU.	Employee Onboarding



Task Table

The task table displays the integration tasks for the user. With this enhancement, the table also displays the result for integration tasks.

The following information displays in the table for integration tasks:

- Task Title - This column displays the title of the integration task.

- Status - This column displays the status of the integration task. The following are the possible statuses:
  - Cancelled - This status displays if onboarding is cancelled for the user.
  - Completed - For form tasks, this status displays if the user has submitted the form. For I-9 E-Verify tasks, this status displays if all steps of the task are completed.
  - In Progress - For form tasks, this status displays if the user has started completing the form but has not yet submitted the form. For I-9 E-Verify tasks, this status displays if the task has been assigned and at least one or more steps of the task are not yet completed by the assignee.
  - Not Started - This status displays if the user has not yet started the task. This status also displays if a Not Started status is submitted by the integration provider.
- Assignee - This column displays the name of the user assigned to the task.

Result Column

This is a new column that displays as the last column in the task table. This column displays for all tasks but only provides results for integration tasks. The column is blank for form tasks.

I-9 E-Verify Tasks

As with existing functionality for displaying the result of I-9 E-Verify tasks, the result displays the status of the I-9 form after it has been submitted to the third party application. The column displays one of the following results of the e-verification, depending on the case state of the verification process:

- Action Required - This result displays if an action is required by the employer to complete the e-verify process for the new hire.
- Authorized - This result indicates that the user's identity has been verified and the user is authorized to work in the United States. This result displays if the e-verification has been completed and the case is closed.
- Authorized - Closed Case - This result indicates that the new hire is authorized to work in the United States, and the employer must access the third party application to close the e-verify case to make the work authorization official.
- N/A - If a result has not yet been received, then N/A displays.
- Pending - This result displays if a decision to verify whether or not the new hire is authorized to work in the United States is pending on the verification.
- Unauthorized - This result indicates that the user's identity has been verified and the user is not authorized to work in the United States. This result displays if the e-verification has been completed and the case is closed.
- Unauthorized - Close Case - This result indicates that the new hire is determined to be not authorized to work in the United States, and the employer must access the third party application to close the e-verify case to make the work authorization official.

What's New for February 27 Patch Release

The following new features and enhancements are released along with the February 27 patch release:

Feature	Description
Inactivate Standard Form Tasks	With this enhancement, an *Inactivate* option is added to the Options drop-down on the Form Task Administration page. This option enables administrators to inactivate a standard form task.
Prevent Upload of HTML Files	Prior to this enhancement, a backend setting controlled whether users could upload HTML files (.htm/.html) to the Custom HTML Widget in New Connect communities and Knowledge Bank. With this enhancement, the backend setting is expanded to control whether users can upload HTML files to anywhere in New Connect, Legacy Connect, Legacy Knowledge Bank, Universal Profile: Feedback, and Universal Profile: Snapshot - Documents. Organizations may choose to disable the ability to upload HTML files because malicious HTML files may be uploaded, which is a potential security risk.

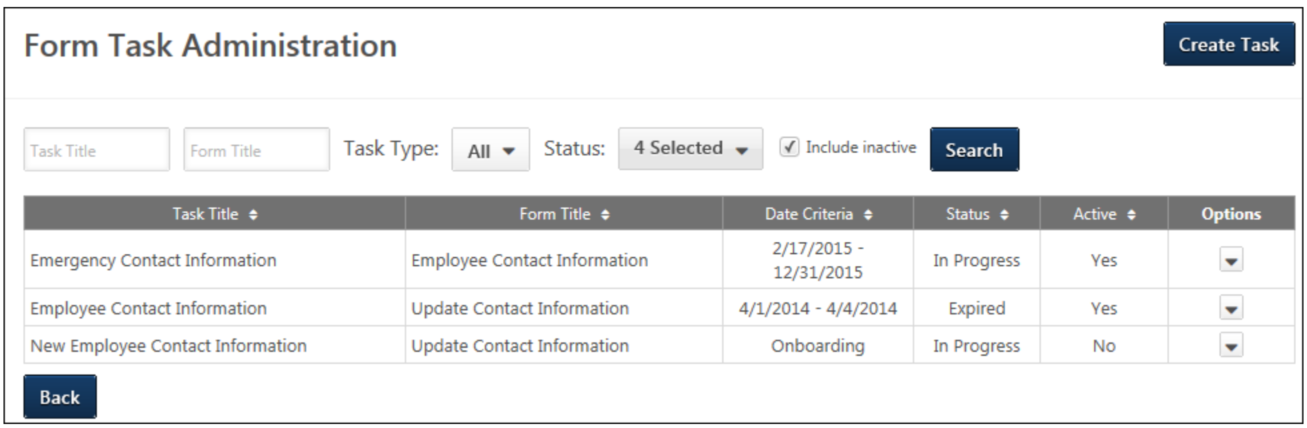
Inactivate Standard Form Tasks

With this enhancement, an *Inactivate* option is added to the Options drop-down on the Form Task Administration page. This option enables administrators to inactivate a standard form task.

In addition to this option, other minor changes are made to the Form Task Administration page.

Permissions

Permission Name	Permission Description	Category
Form Management: Task Administration	Grants access to the Form Task Administration functionality. This permission can be constrained by OU and User's OU. This is an administrator permission.	Forms Administration



Status Filter

The *Inactive* status option is removed from the Status filter. To display inactive tasks in the search results, administrators will now use the new Include Inactive checkbox to the right of the **Search** button.

Include Inactive Checkbox

An Include Inactive checkbox is added to the right of the **Search** button. Check the box to include inactive form tasks in the task table.

When the box is not checked, the task table only displays active form tasks.

Status Column

With this enhancement, the Inactive status no longer displays in the Status column. The active/inactive status of a task now displays in a new Active column in the table.

Active Column

An Active column is added to the task table to the right of the Status column. The Active column indicates whether or not a task is active. The column displays "Yes" for active tasks and "No" for inactive tasks.

Inactivate a Task

To inactivate a task:

1. Select the *Inactivate* option from the Options drop-down. This opens a warning message pop-up. The message indicates that inactivating the task removes the task for users who are in an In Progress status. Dependent tasks are also inactivated.
2. Click **Yes** to inactivate the task. Or, click **No** to cancel inactivating the task.

Once the task is inactivated, the task is removed from users who have not yet completed the task. For users who have completed the task, the task remains as a completed task.

Note: *Tasks that are in a Queued status cannot be inactivated.*

Reactivate a Task

To reactivate a task, click the *Reactivate* option from the Options drop-down. This reactivates the associated inactive tasks and re-assigns the tasks to users who were previously assigned the task.

Prevent Upload of HTML Files

Prior to this enhancement, a backend setting controlled whether users could upload HTML files (.htm/.html) to the Custom HTML Widget in New Connect communities and Knowledge Bank.

With this enhancement, the backend setting is expanded to control whether users can upload HTML files to anywhere in New Connect, Legacy Connect, Legacy Knowledge Bank, Universal Profile: Feedback, and Universal Profile: Snapshot - Documents. Organizations may choose to disable the ability to upload HTML files because malicious HTML files may be uploaded, which is a potential security risk.

Implementation

By default, users can upload HTML files. To prevent users from uploading HTML files, contact Global Product Support (GPS).

What's New for February 2015

The following new features and enhancements are available for February 2015:

Compensation Features

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
Retroactive Proration	Retroactive Proration		With this enhancement, compensation can now be prorated retroactively based on the employee's Last Hire Date. This enables organizations to account for periods of time an employee worked before the start of the compensation period. For example, employees who were ineligible for the last compensation cycle because they were hired after a specific cutoff date can be prorated for the cutoff period in the next compensation cycle.
Proration by Last Salary Change Date	Proration by Last Salary Change Date		With this enhancement, compensation proration can now accommodate for salary changes that occurred during the compensation period. For example, an employee who received a promotion and a raise in salary mid-year can be prorated from the date of the salary increase.

Connect Features

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
Connect Redesign - Configurable File Size Limit	Configurable File Size in Connect	Yes	With this enhancement, organizations can configure the maximum file size that can be uploaded within Redesigned Connect.
Connect Redesign - Course Rating Activity Update			With this enhancement, a new Course Rating activity update is now available for the Redesigned Connect Live Feed. When enabled, this activity update displays in the Live Feed whenever a user rates a learning object within the system.
Connect Redesign - Custom HTML Widget	Custom HTML Widget in Communities		With this enhancement, organizations can now customize their communities using an

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
			approved list of HTML tags. When enabled, a custom HTML widget is available on the following pages: • Edit Knowledge Bank • Create/Edit Community • Create/Edit Learning Community
Connect Redesign - Default Images for Widgets	Default Image for Featured/Trending Widgets		With this enhancement, if a Knowledge Bank or community posting does not have an attached link and is displayed in the Featured or Trending widgets, then a default image is displayed in the widget. However, each posting type has a unique default image.
Connect Redesign - Live Feed Optimization	Live Feed Optimization		The Live Feed pages within Redesigned Connect are being optimized for faster processing and future API opportunities. This does not change any of the functionality, but testing is advised to validate experience and workflows.
Connect Redesign - Social Feed Widget	Connect Live Feed Widget		With this enhancement, a new Social Feed widget is now available when configuring the Welcome Page or a custom page. The Social Feed widget displays the latest Live Feed updates from connections and team members.
Connect Redesign - Upload New File Types	Upload New File Types in Connect		With this enhancement, the following file types are now supported as attachments in Redesigned Connect: • .mov • .docm • .xlsm
Knowledge Bank and Communities Data Migration	Connect Data Migration	Yes	With this enhancement, a data migration script is now available for all organizations using the legacy version of Connect. Communities, topics, and postings from the legacy version of Connect are copied into the redesigned Knowledge Bank and Communities functionality. The redesigned

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
			Knowledge Bank and Communities functionality functions differently than the legacy version of Connect, so only data is migrated; no permissions or preferences are migrated.

Learning Features

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
Curriculum Player Redesign Phase 2	Curriculum Player Redesign - Logic Enhancements & In-Line Enhancements	Automatically available when Curriculum Redesign is in use. Curriculum Redesign is automatically enabled in Stage when Curriculum Player is enabled. By request in Live until October 1015.	With the November 2014 release, the Curriculum Player was redesigned and enhanced to include additional functionality. With a more intuitive design, the new Curriculum Player is now optimized to track a user's completion percentage more accurately, return users to the last visited section in the curriculum, and view full postings in line. Users will also have a more intuitive navigation experience with the removal of the Overview button and the addition of section title wrapping in the navigation.
Data Merge Tool Optimization	Data Merge Tool Performance Optimizations		With this enhancement, the Data Merge Tool is optimized and can now sync a high volume of transcript items without causing page timeouts or other performance issues. In addition, the Data Merge Tool now indicates an accurate status during the merging process.
Edit Coupon After Activation	Edit Active Coupons (EXE)		With this enhancement, coupons can now be edited after they are created. Previously, coupons could not be edited once they were saved. If errors were made on the coupon or if the administrator wanted to make changes to the coupon, the administrator needed to create a new coupon.
HTML for External	Add HTML to External Training		With this enhancement, administrators can now utilize HTML when configuring

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
Training Instructions	Instructions		the instructions for the Add External Training page. This enables administrators to implement HTML tags, including hyperlinks and font tags.
Microsoft Lync Integration	MS Lync Integration	Yes. Requires MS Lync account.	With this enhancement, the system can now be integrated with Microsoft (MS) Lync. This integration enables organizations to conduct meetings and virtual instructor led training (vILT) sessions over MS Lync through the system.
Offline Player Support	Offline Player Redesign	Yes	With the June 2014 release, a redesigned Offline Player was introduced. The new Offline Player also added support for SCORM 2004 learning objects. With the May 2015 release, the old Offline Player functionality is being retired and will no longer be supported. Organizations that are currently using the old Offline Player are able to convert to the new Offline Player functionality. To enable this functionality, contact your Account Manager.
Training Purpose Email Tag	Add "Training Purpose" tag to Assign ILT Session Email		With this enhancement, the Training Purpose email tag (TRAINING.PURPOSE) is now available for the Assign ILT Session email trigger. This enables organizations to notify users who have been assigned an instructor led training (ILT) session of the training purpose for the assignment.
REPORTS Analytics - Added Extended Enterprise Fields			With this enhancement, fields are added to the Transaction section for custom Transaction reports.
REPORTS Analytics - Added LMS Fields			With this enhancement, fields are added to the Training section and the ILT Seat Allocation section for certain custom reports.

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
REPORTS Training Plans Co-Planners in Reporting	Training Plans Co-Planners Fields to Standard and Custom Reports		With this enhancement, training plan co-planners can now be reported on in custom reports and the Training Demand Forecast Summary standard report. New fields are added to custom Training Plan reports, and a Contributor Co-Planners column is added to the Training Demand Forecast Summary standard report output.
REPORTS Training Plans Deny Items in Reporting	Add Training Plans Denied Items to Standard and Custom Reports		With this enhancement, training items that have been denied or approved for a training plan can be reported on in custom reports and the Training Demand Forecast Summary standard report. New fields are added to custom Training Plan reports, and Approval Status and Denial Comments columns are added to the Training Demand Forecast Summary standard report output.
REPORTS Training Unit Key Code Custom Report Constraints	Constraints on Training Unit Key Code Report (EXE)		With this enhancement, constraints are added to the permissions for creating and viewing the Training Unit Key Code custom report. Prior to this enhancement, users with permission to create or view Training Unit Key Code custom reports could see all training unit assignments and key codes in the portal. This enhancement enables administrators to set constraints on the permissions to limit the visibility of report data to specific users or organizational units (OU). In addition, a Training Unit Contact field is added to the Key Code section in the Fields panel to enable reporting on the training unit contact.

Mobile Features

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
Launch Mobile Material Learning Object	Launch Material Learning Types on Mobile		With this enhancement, users can now launch and complete material learning object (LO) types in Cornerstone Mobile®. The LO must be mobile-enabled by the administrator in Course Catalog in order for users to launch the LO in the app.
Mobile Device Management	Mobile Device Management, iOS	Not accessible in Stage. By request in Live.	For iOS devices, organizations that have a Mobile Device Management (MDM) provider can now remotely wipe the Cornerstone Mobile® app, localize and brand sign-in pages, and control mobile offline learning. Administrators have additional control and security over the Cornerstone Mobile® app on an employee's iOS device.
Search for Training	Mobile Search, Request, Assign Training		With this enhancement, within the Cornerstone Mobile® app, users can easily search for and request training to be added to their transcript. Users can also view training details, ratings, and reviews for all types of training to make informed decisions prior to learning. Managers can quickly search for and assign training to direct reports.
Session Timeout	Mobile Session Timeout		With this enhancement, users are automatically logged out of the Cornerstone Mobile® app after the period of inactivity that is defined for the portal. Users are automatically logged out regardless of the method they used to log in to the app: single sign-on (SSO), user name and password, or device registration.

Performance Features

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
Display All Instances of Recurring Checklists	Display All Instances of Recurring Checklists		With this enhancement, all instances of recurring checklists are available on the My Checklists page.
Lock Completed Checklists	Option to Lock Completed		With this enhancement, administrators can configure an observation checklist task so

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
	Checklists		that completed instances of the checklist are locked. This prevents the completed checklists from receiving new items, which would cause the checklist to switch from Completed status to In Progress. Similarly, checklists that are not completed would be updated with the new item.
Observation Checklist Validity Period	Observation Checklist Validity Period		With this enhancement, when creating an observation checklist, administrators can designate a validity period for previously validated competencies. The validity period for a checklist is the amount of time a previously validated competency is considered valid towards the checklist. This enables administrators to ensure that certain competencies are being validated on a regular basis.
Skills Matrix - Additional Competency Information	Display Additional Competency Info on Skills Matrix		With this enhancement, administrators now have the option to include additional competency details on the Role Details page when creating or editing a role. The additional competency details include the competency description, items, and behaviors.
Skills Matrix - Role Availability for Administrators	Restrictions for Managing Roles in Skills Matrix		With this enhancement, when an administrator is creating a role, administrator availability can be set for the role. When administrator availability is set, this determines which administrators can view and manage the role. In addition, permission constraints are now available for the Role Management permission. Administrators can now only assign roles to users within their permission constraints.
Skills Matrix - Include all LO Versions	Include all Learning Object Versions in Skills Matrix		With this enhancement, users now receive credit towards role qualification for completing any version of the required LOs. Users can request or assign the latest version of the LO from the Role Details page.
REPORTS Localize Performance Review Custom Fields in Analytics	Localize Performance Custom Fields in Analytics		With this enhancement, the translated values for the Checkbox, Dropdown, and Radio Button Performance Review custom field types now display when creating and viewing custom Performance Review Reports.
REPORTS	Observation		This enhancement adds the ability to report

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
Observation Checklist in Analytics	Checklists Custom Reporting		on observation checklist data in custom reporting. This provides greater flexibility when creating reports and extracting data generated from those reports. Users have the ability to filter results based on fields and define which fields to include in the report. In addition, the report can be exported to Excel.

Platform Features

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
Admin User Page Optimization - Delayed			This enhancement has been delayed until the May 2015 release.
Emails - Include Recipients of All Languages	Email Administration - Include Recipients of All Languages		With this enhancement, administrators of multi-language portals can now create a single email trigger that will be sent regardless of the user's configured language. When this new language override option is selected, an email that is created in English (UK) will be sent to recipients of any language configured for the portal (e.g., English (US), Japanese, Polish, Thai) that meet the selected availability criteria.
Gender Neutral Default Photo	Gender Neutral Default Photo		With this enhancement, a new gender neutral default photo is used throughout all new user interface (UI) pages for users who do not have a custom photo loaded.
Help Videos	More Help Videos for Admins	Automatically enabled. Contact GPS to disable all Admin Help Videos.	With this enhancement, additional in-line help videos are available if in-line help videos are enabled. These videos provide a simple and visual demonstration of how to use the administration pages. The videos are available directly on the page, making the information easy to view while using the page.
Inherited Permission Constraint			With this enhancement, when editing a parent role that has inherited a permission from a child role, administrators do not

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
Clarification			have the option to add constraints to any permission that was inherited from a child role. The instructions on the Create/Edit Role - General, Permissions, and Constraints pages are updated to more accurately reflect how permissions, constraints, and inheritance function within security roles.
Language Pack Updates to Thai and Spanish (Spain)	Language Pack Updates to Thai and Spanish (Spain)		With this enhancement, the language packs are updated for Thai and Spanish (Spain). These improved strings will enhance the user experience with clearer phrases and words.
SOAP Web Services Throttling			To increase the performance and reliability of the system, throttling is implemented on all existing SOAP Web Services for all organizations using SOAP Web Services. The maximum request rate for all SOAP services is now 35K requests per hour per organization, meaning that an organization cannot make more than 35K requests within an hour. Other limits include: • The maximum throttle rate for the GetTranscriptandTask SOAP Service is 2K requests per hour per organization. • The maximum throttle rate for the Learning Object Web Service (LOWS) is 2K requests per hour per organization.
REPORTS Analytics - Added Fields in User Section			With this enhancement, two existing fields are modified and new fields are added to the User section for all reports that include a User section.
REPORTS Colon Added to Criteria Items in Reporting			With this enhancement, a colon is added to the end of each criteria item label in the header of the criteria for non-Excel output report views for custom and standard reporting. This creates consistency between the report outputs, as a colon is already used at the end of each criteria

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
			item label in the header for reports when viewing the Excel output.

Recruiting Features

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
Anonymous Reference Letters	Anonymous Reference Letters		With this enhancement, reference letters can now be sent directly from an applicant's referrers and automatically added to the applicant's Applicant Profile page. The recruiter sends the applicant a new Reference Letter Request task, and the applicant provides the names and email addresses of each referrer. When the applicant submits the task, the referrers are sent an email containing a link to a reference letter form. Once the reference letter form is submitted, the letter is automatically added to the applicant's Documents tab in their applicant profile.
Attachments on Forms	Assign Forms with Attachments		With this enhancement, administrators can add attachments to forms that are assigned via either an onboarding workflow or form task so that new hires can reference the attachments as they complete the forms. Up to three attachments can be added to a form.
Form Creation Workflow Enhancements	Form Creation Workflow Enhancements		With this enhancement, updates are made to the Create Form pages.
Internal/External Applicant Email Availability	Email Availability by Applicant Type		With this enhancement, options are added to Recruitment emails to allow administrators to specify the type of applicant recipient. Previously, Recruitment emails could be sent to Applicant, but this option did not allow administrators to specify whether the applicant was internal or external. This enhancement removes the Applicant option and replaces it with separate External Applicant and Internal Applicant options. Administrators can select

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
			to send an email to internal recipients or external applicants or select both as recipients. In addition, when defining availability for emails that are configured to be sent to Internal Applicant recipients, the Internal Applicant recipients who receive the email are the recipients that are part of the organizational unit (OU) that is defined for the job requisition to which the applicant applied. Previously, the availability setting for the email applied to the OU in which the user was defined.
Job Search Enhancements	Job Search - Geolocation		With this enhancement, applicants can now search for jobs on the career site by geographical location (geolocation). Prior to this enhancement, applicants could only search for jobs by selecting a specific location, such as a city or state. In addition, applicants can view their job search results on a map and in a table that offers sorting options.
Multi-Select Question Types	Multi-Select for Question Types on Form Builder		With this enhancement, checkbox and drop-down question types can now be configured in the Question Bank in Form Management to allow users to select multiple options for a question. Prior to this enhancement, checkbox and drop-down question types only allowed users to select a single option for a question.
Onboarding Task Due Dates	Configurable Assignment Dates and Due Dates		With this enhancement, administrators can configure the onboarding assignment date and due dates for tasks assigned via an onboarding workflow. This provides administrators with the flexibility to determine their own assignment and due dates for onboarding tasks.
Related Requisitions Phase 2	Related Requisitions - Apply to Multiple Jobs		With this enhancement, applicants can now apply to up to 10 requisitions at the same time that are related to the parent requisition. A new related requisition type Related Requisitions (Apply to Multiple Jobs) can be selected when configuring related requisitions for the parent. Applicants select the requisitions to which they would like to

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
			apply on the Job Details page on the career site, and then complete a single application that applies to all of the requisitions to which they selected. Once submitted, the completed application is available on the Applicant Profile page for all of the requisitions to which the applicant applied.
Search Candidates Enhancements	Candidate Search - Geolocation		With this enhancement, the following improvements are made to the Search Candidates feature: • Recruiters can search for candidates by geographical location • Search Candidates page now displays all search options by default

Succession Features

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
Pre-populate Succession Task	Succession Task Pre-populated by Most Recent Data		With this enhancement, administrators can configure Succession Management Planning (SMP) tasks to be pre-populated with the most recent succession data, including succession custom field values, ratings, and successors. This enables succession planners to leverage existing succession data more easily.
Display Inactive Successors	Display Inactive Successors in Succession Plans		With this enhancement, administrators can configure SMP tasks to display inactive successors. When inactive successors are displayed in a succession task, they are clearly identified as inactive.

Release Notes Updates

Changes have been made on February 02, 2015, to the following areas of the release notes for the February '15 release:

Platform

Enhancement Name	Name of Updated Topic	Purpose of Change	Change Made to Topic
Admin User Page Optimization	Admin User Page Optimization - Delayed	This enhancement has been delayed until the May 2015 release.	The enhancement content is removed.

Recruiting

Enhancement Name	Name of Updated Topic	Purpose of Change	Change Made to Topic
Related Requisitions Phase 2	Career Site - Apply to Multiple Jobs	The change was made to provide a current image of the page.	The image of the Job Details page has been replaced.

Changes have been made on January 30, 2015, to the following areas of the release notes for the February '15 release:

Connect

Enhancement Name	Name of Updated Topic	Purpose of Change	Change Made to Topic
Connect Redesign - Custom HTML Widget	Connect Redesign - Custom HTML Widget in Communities	The change was made to reflect that the Custom HTML widget is enabled by default.	The Implementation section is updated to reflect that the backend setting that controls this functionality is enabled by default.
Connect Redesign - Custom HTML Widget	Connect Redesign - Custom HTML Widget in Communities	The change was made to reflect that all HTML tags are accepted by the Custom HTML widget. Because this is a potential security risk, organizations may choose to disable this functionality.	The Approved HTML Tags section is updated to reflect that all tags are accepted by the Custom HTML widget.
Connect	Edit Knowledge	The change was made to	The Approved HTML Tags

Enhancement Name	Name of Updated Topic	Purpose of Change	Change Made to Topic
Redesign - Custom HTML Widget	Bank	reflect that all HTML tags are accepted by the Custom HTML widget. Because this is a potential security risk, organizations may choose to disable this functionality.	table is removed, and the text is updated to reflect that all tags are accepted by the Custom HTML widget.
Connect Redesign - Custom HTML Widget	Create/Edit Community	The change was made to reflect that all HTML tags are accepted by the Custom HTML widget. Because this is a potential security risk, organizations may choose to disable this functionality.	The Approved HTML Tags table is removed, and the text is updated to reflect that all tags are accepted by the Custom HTML widget.
Connect Redesign - Custom HTML Widget	Create/Edit Learning Community	The change was made to reflect that all HTML tags are accepted by the Custom HTML widget. Because this is a potential security risk, organizations may choose to disable this functionality.	The Approved HTML Tags table is removed, and the text is updated to reflect that all tags are accepted by the Custom HTML widget.
Connect Redesign - Custom HTML Widget	View Knowledge Bank or Community	The change was made to reflect that all HTML tags are accepted by the Custom HTML widget. All HTML tags will be displayed in the widget.	The HTML tag restriction text is removed from the introductory paragraph.

Platform

Enhancement Name	Name of Updated Topic	Purpose of Change	Change Made to Topic
Language Pack Updates	Language Pack Updates to Thai and Spanish (Spain)	This enhancement was added to the release.	This is a new topic.

Recruiting

Enhancement Name	Name of Updated Topic	Purpose of Change	Change Made to Topic
Internal/External Applicant Email Availability	Email Administration – Recruitment Emails	The change was made to clarify the functionality of defining the availability setting for internal user recipients.	Replaced the first paragraph in the "Defining Availability" section with the following: "For emails that are configured to be sent to internal users, the

Enhancement Name	Name of Updated Topic	Purpose of Change	Change Made to Topic
			availability defined in the Availability field applies to the OU/Division to which the internal user applies. This is the OU/Division that is defined for the job requisition to which the internal user applies."

Online Help Glossary Update

The Online Help Glossary has been updated with additional terms and updated definitions. In addition, acronyms are included for all applicable terms, and each term's associated module is provided for additional context.

Compensation

Proration by Last Salary Change Date

Proration by Last Salary Change Date Overview

With this enhancement, compensation proration can now accommodate for salary changes that occurred during the compensation period. For example, an employee who received a promotion and a raise in salary mid-year can be prorated from the date of the salary increase.

Use Case

An employee received a promotion in July 2013. The promotion included a title change and a salary change, effective July 15, 2013. During the compensation cycle for 2013, the promoted employee should receive an increase that is prorated from July 15, 2013 because the employee already received an increase during the compensation period.

Considerations

The proration percentage since the last salary change date is equal to the number of days from the last salary change date to the end of the Compensation Period divided by the number of days in the Compensation Period. For example, an employee receives a promotion and a salary increase on October 31, 2013. There are 61 days between the date of the salary change and the end of the 2013 compensation period. The employee's proration percentage is 61/365, or 16.7%.

Administrators can only prorate components within a template by one criterion, either Last Hire Date or Last Salary Change Date. Both criteria cannot be used in the same template.

Implementation

This functionality is only available when using the redesigned Compensation Task user interface (UI).

Upon release, this functionality is automatically enabled in Stage and Live portals for all organizations using the redesigned Compensation Task UI.

The redesigned Compensation Task UI is available by request until July 2015.

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
Compensation Plan Templates	Grants ability to create and manage compensation plan templates for base, bonus, and equity compensation. This permission cannot be constrained. This is an administrator permission.	Compensation - Administration

Compensation Task Administration	Grants ability to configure and assign compensation planning and modeling tasks to managers in the organization. This permission cannot be constrained. This is an administrator permission.	Compensation - Administration

Compensation Template - Proration by Last Salary Change Date

With this enhancement, compensation can be prorated by Last Salary Change Date. This option prorates the component by the date on which the employee's salary last changed within the compensation period.

Administrators can only prorate components within a template by one criterion, either Last Hire Date or Last Salary Change Date. Both criteria cannot be used in the same template.

This functionality is only available when using the redesigned Compensation Task user interface (UI).

To create a compensation plan template, go to **Admin > Configuration Tools > Compensation > Compensation Templates**. Then, click the *Create Compensation Template* link.

Permissions

Permission Name	Permission Description	Category
Compensation Plan Templates	Grants ability to create and manage compensation plan templates for base, bonus, and equity compensation. This permission cannot be constrained. This is an administrator permission.	Compensation - Administration

Proration Rules

In the *Proration Rules* section, a component can now be prorated by Last Salary Change Date. This option is only available when using the redesigned Compensation Task UI.

When a component is prorated by Last Salary Change Date, the component proration is calculated if the employee had a change in salary within the compensation task's compensation period.

- If the employee has not had a salary change within the compensation period, then the employee will receive guidelines and contribute budget based upon a 100% proration percentage. That is, the employee will not be prorated.
    - Adjustment guideline defines the recommended amounts in the compensation plan.
    - Full budget definition applies to the employees.
- If the employee has had a salary change within the compensation period, then the employee will receive guidelines and contribute budget based upon the number of days between the Last Salary Change Date and the end of the compensation period. That is, the employees will have a proration percentage that is less than or equal to 100%. If there have been more than one salary changes within the compensation period, then the proration is calculated from the most recent salary change within the compensation period.

- Proration Percentage = <Number of days between Last Salary Change Date and end of compensation period including Last Salary Change Date and last day of compensation period> / <Number of days in compensation period>
- Proration percentage is calculated and rounded to the nearest fourth decimal place before being applied to other calculations.
- Adjustment Guideline = <Adjustment guideline recommendation> * <Proration percentage>
- Budget = <Full budget calculation> * <Proration percentage>

Use Cases

The following information is used for these use cases:

Employee	Effective Date	Current Salary
Melissa	November 10, 2012	$65,000
Kevin	March 3, 2013	$85,000
Kevin	October 12, 2013	$100,000
Paul	July 15, 2013	$50,000

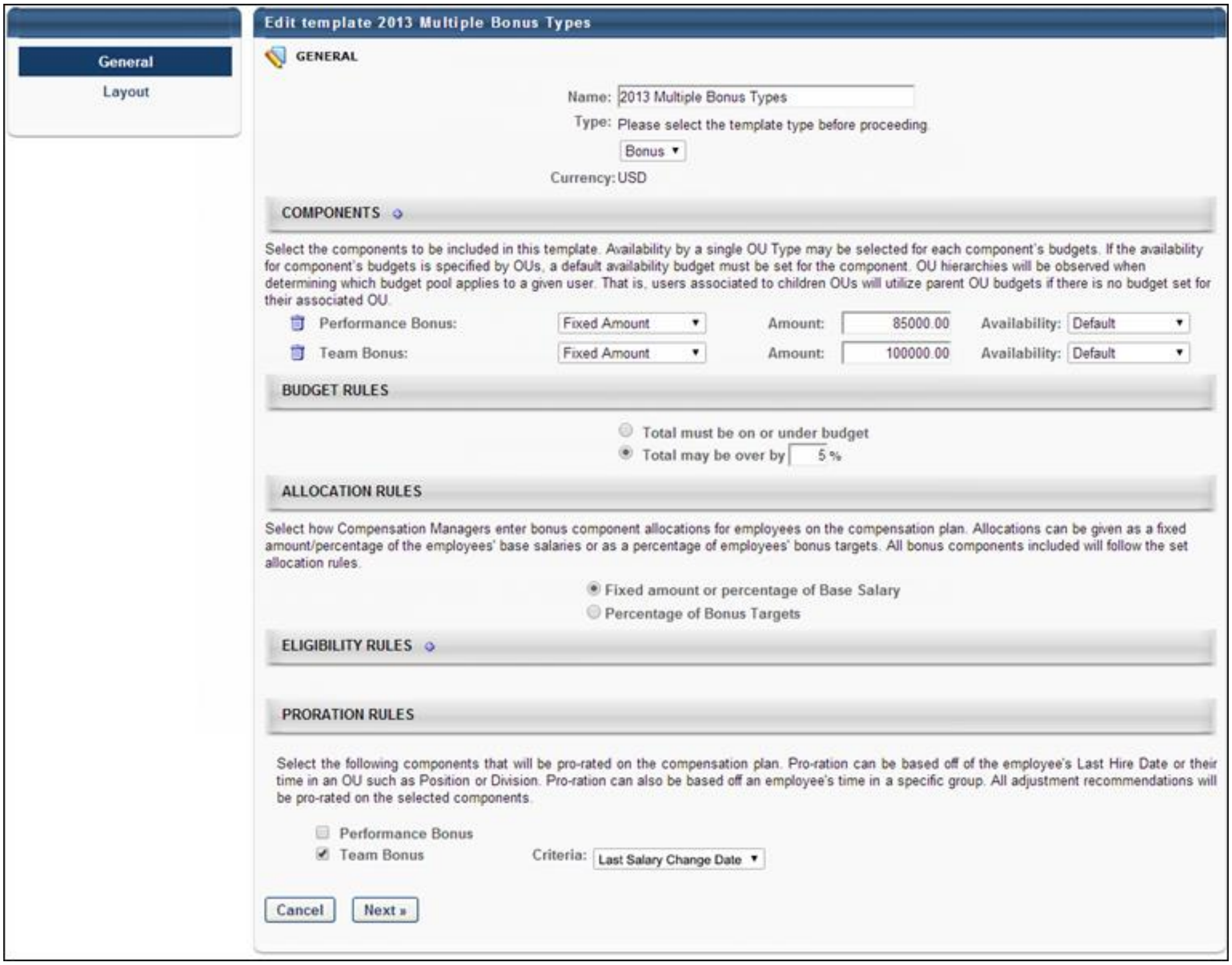
- Compensation Task: 2013 Compensation Cycle
- Compensation Period: January 1, 2013 - December 31, 2013
- Bonus Budget: 10% of Base
- Bonus Proration: Prorate by Last Salary Change Date

Use Case 1: Adjustment Guideline Calculation with Last Salary Change Date Proration

1. Default Bonus Adjustment Guideline is set to 5% of Base.
2. Compensation Manager launches 2013 Compensation Cycle.
3. Compensation Plan recommends the following Bonus allocations:
    1. Melissa:
        1. Proration Percentage = No proration percentage
        2. Recommendation = (0.05 * $65,000) = $3,250
    2. Kevin:
        1. Proration Percentage = 81 / 365 = 0.2219 = 22.19%
        2. Recommendation = (0.05 * $100,000) * 0.2219 = $1,109.50
    3. Paul
        1. Proration Percentage = 170 / 365 = 0.4658 = 46.58%
        2. Recommendation = (0.05 * $50,000) * 0.4658 = $1,164.50

Use Case 2: Budget Calculation with Retroactive Proration

1. The compensation task is configured as described above.
2. Compensation Manager launches 2013 Compensation Cycle.
3. Compensation Plan displays Bonus Budget of $11,048.00.
4. The Bonus Budget is calculated as follows:
    1. Melissa:
        1. Proration Percentage = No proration percentage
        2. Recommendation = (0.1 * $65,000) = $6,500
    2. Kevin:
        1. Proration Percentage = 81 / 365 = 0.2219 = 22.19%
        2. Recommendation = (0.1 * $100,000) * 0.2219 = $2,219
    3. Paul
        1. Proration Percentage = 170 / 365 = 0.4658 = 46.58%
        2. Recommendation = (0.1 * $50,000) * 0.4658 = $2,329


General
Layout
Edit template 2013 Multiple Bonus Types
GENERAL
Name: 2013 Multiple Bonus Types
Type: Please select the template type before proceeding.
Bonus
Currency: USD
COMPONENTS
Select the components to be included in this template. Availability by a single OU Type may be selected for each component's budgets. If the availability for component's budgets is specified by OUs, a default availability budget must be set for the component. OU hierarchies will be observed when determining which budget pool applies to a given user. That is, users associated to children OUs will utilize parent OU budgets if there is no budget set for their associated OU.
Performance Bonus: Fixed Amount Amount: 85000.00 Availability: Default
Team Bonus: Fixed Amount Amount: 100000.00 Availability: Default
BUDGET RULES
Total must be on or under budget
Total may be over by 5 %
ALLOCATION RULES
Select how Compensation Managers enter bonus component allocations for employees on the compensation plan. Allocations can be given as a fixed amount/percentage of the employees' base salaries or as a percentage of employees' bonus targets. All bonus components included will follow the set allocation rules.
Fixed amount or percentage of Base Salary
Percentage of Bonus Targets
ELIGIBILITY RULES
PRORATION RULES
Select the following components that will be pro-rated on the compensation plan. Pro-ration can be based off of the employee's Last Hire Date or their time in an OU such as Position or Division. Pro-ration can also be based off an employee's time in a specific group. All adjustment recommendations will be pro-rated on the selected components.
Performance Bonus
Team Bonus Criteria: Last Salary Change Date
Cancel
Next »

Compensation Plan - Proration by Last Salary Change Date

With this enhancement, compensation can be prorated by Last Salary Change Date. This prorates the component by the date on which the employee's salary last changed within the compensation period.

If proration by last salary change date is enabled for a component and a user is eligible for proration for the component, then the Prorated Recommendations hover displays proration percentages for the component, as previously implemented.

Budgets that are defined as "% of Base" or "Sum of Targets" are calculated using the proration percentage for users who have been prorated, as previously implemented.

When prorating by Last Salary Change Date, the current compensation manager is responsible for planning for the employee. The compensation manager for the prorated period is not responsible for employee's compensation.

Compensation Statement - Proration by Last Salary Change Date

With this enhancement, compensation can be prorated by Last Salary Change Date. This prorates the component by the date on which the employee's salary last changed within the compensation period.

Including any Proration Breakdown tag (e.g., <Component Name>.PRORATION.BREAKDOWN) in a custom compensation statement will produce a table with all periods that are counted towards the entire compensation period for the employee for the specified component.

If proration by last salary change date is enabled for a component and a user has had a salary change within the compensation period, then the last salary change date period is displayed in the Proration Breakdown table.

The following is an example of a component proration breakdown displaying a period that is prorated by last salary change date.

Date	Num Days	Target	Amount
11/10/2013	52	712.50 USD	748.20 USD
			748.20 USD

The total allocation amount for the component in the Proration Breakdown tag will match the allocation amount for the component in the compensation plan.

Retroactive Proration

Retroactive Proration Overview

With this enhancement, compensation can now be prorated retroactively based on the employee's Last Hire Date. This enables organizations to account for periods of time an employee worked before the start of the compensation period. For example, employees who were ineligible for the last compensation cycle because they were hired after a specific cutoff date can be prorated for the cutoff period in the next compensation cycle.

Because compensation can now be prorated retroactively, proration percentages may now exceed 100%.

Use Case

An organization has a policy that states that employees are not eligible for the annual compensation cycle if they are hired on or after November 1. The following year, those employees who were hired on or after November 1 of the previous year are able to receive their normal annual compensation awards and also receive prorated awards for the time they were previously considered ineligible.

An employee is hired on November 10, 2012 and is ineligible for the 2012 compensation cycle. During the 2013 compensation cycle, the employee receives the full allocation amounts from the 2013 compensation cycle. In addition, the employee receives an additional 14.2% of the allocation amounts for the appropriate components for the time the employee worked after being hired and before the 2013 compensation cycle. In total, the employee receives 114.2% allocations for the retroactively prorated components.

Considerations

The proration percentage for the retroactive period is equal to the number of days from the retroactive proration date to the Compensation Period start date divided by the number of days in the Compensation Period. For example, a employee was hired on November 10, 2012 and is ineligible for the 2012 compensation cycle. November 10, 2012 is 52 days before the start of the 2013 compensation cycle. The 2013 compensation cycle is 365 days. The proration percentage for the retroactive period is 52/365, or 14.2%.

When prorating by Last Hire Date and including retroactive proration, the current compensation manager is responsible for planning for the employee. The compensation manager for the previous compensation period is not responsible for employee's compensation.

Implementation

This functionality is only available when using the redesigned Compensation Task user interface (UI).

Upon release, this functionality is automatically enabled in Stage and Live portals for all organizations using the redesigned Compensation Task UI.

The redesigned Compensation Task UI is available by request until July 2015.

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
Compensation Plan Templates	Grants ability to create and manage compensation plan templates for base, bonus, and equity compensation. This permission cannot be constrained. This is an administrator permission.	Compensation - Administration
Compensation Task Administration	Grants ability to configure and assign compensation planning and modeling tasks to managers in the organization. This permission cannot be constrained. This is an administrator permission.	Compensation - Administration

Compensation Template - Retroactive Proration

Administrators can configure each component in a template to be prorated by Last Hire Date. With this enhancement, the administrator can include retroactive proration by specifying a fixed date from which the Last Hire Date should be prorated.

This functionality is only available when using the redesigned Compensation Task user interface (UI).

To create a compensation plan template, go to **Admin > Tools > Compensation Management > Compensation Templates**. Then, click the *Create Compensation Template* link.

Permissions

Permission Name	Permission Description	Category
Compensation Plan Templates	Grants ability to create and manage compensation plan templates for base, bonus, and equity compensation. This permission cannot be constrained. This is an administrator permission.	Compensation - Administration

Proration Rules

In the *Proration Rules* section, when a component is prorated by Last Hire Date, a Retroactive Proration From option is now available. This option is only available when using the redesigned Compensation Task UI.

Retroactive Proration From - This option is only available if Last Hire Date is selected from the Criteria field. When this option is selected, a retroactive proration date must be specified. The selected date should occur before the start of the compensation task's compensation period. If the selected date is not before the start of the compensation period, then retroactive proration is disabled for the component. When retroactive proration is enabled, employees with a Last Hire Date between the selected retroactive proration date and the start of the compensation task's compensation period will receive guidelines with a prorated amount for that period in addition to the compensation period. **Note:** *The retroactive proration date is a fixed date. When reusing templates for a different compensation period (e.g., the following year's annual compensation task), the retroactive proration date must be adjusted for the new compensation period.*

- Employees with a Last Hire Date that occurs before the Retroactive Proration From date will receive guidelines and contribute budget based upon a 100% proration percentage. That is, the employees will not be prorated.
    - Adjustment guideline defines the recommended amounts in the compensation plan.
    - Full budget definition applies to the employees.
- Employees with a Last Hire Date that occurs within the compensation period for the compensation task will receive guidelines and contribute budget based upon the number of

days between the Last Hire Date and the end of the compensation period. That is, the employees will have a proration percentage that is less than or equal to 100%.

- Proration Percentage = <Number of days between Last Hire Date and end of compensation period including Last Hire Date and last day of compensation period> / <Number of days in compensation period>
- Proration percentage is calculated and rounded to the nearest fourth decimal place before being applied to other calculations.
- Adjustment Guideline = <Adjustment guideline recommendation> * <Proration percentage>
- Budget = <Full budget calculation> * <Proration percentage>

- Employees with a Last Hire Date that occurs between the Retroactive Proration From date and the start of the compensation period for the compensation task will receive guidelines and contribute budget based upon the entire compensation period and the number of days between the Retroactive Proration From date and the start of the compensation period. That is, the employees will have a proration percentage that is greater than 100%.
    - Proration Percentage = (1 + <Number of days between Last Hire Date and start of compensation period including Last Hire Date> / <Number of days in compensation period>
    - Proration percentage is calculated and rounded to the nearest fourth decimal place before being applied to other calculations.
    - Adjustment Guideline = <Adjustment guideline recommendation> * <Proration percentage>
    - Budget = <Full budget calculation> * <Proration percentage>

Use Cases

The following information is used for these use cases:

Employee	Last Hire Date	Current Salary
Melissa	November 10, 2012	$65,000
Kevin	March 3, 2008	$100,000
Paul	July 30, 2013	$50,000

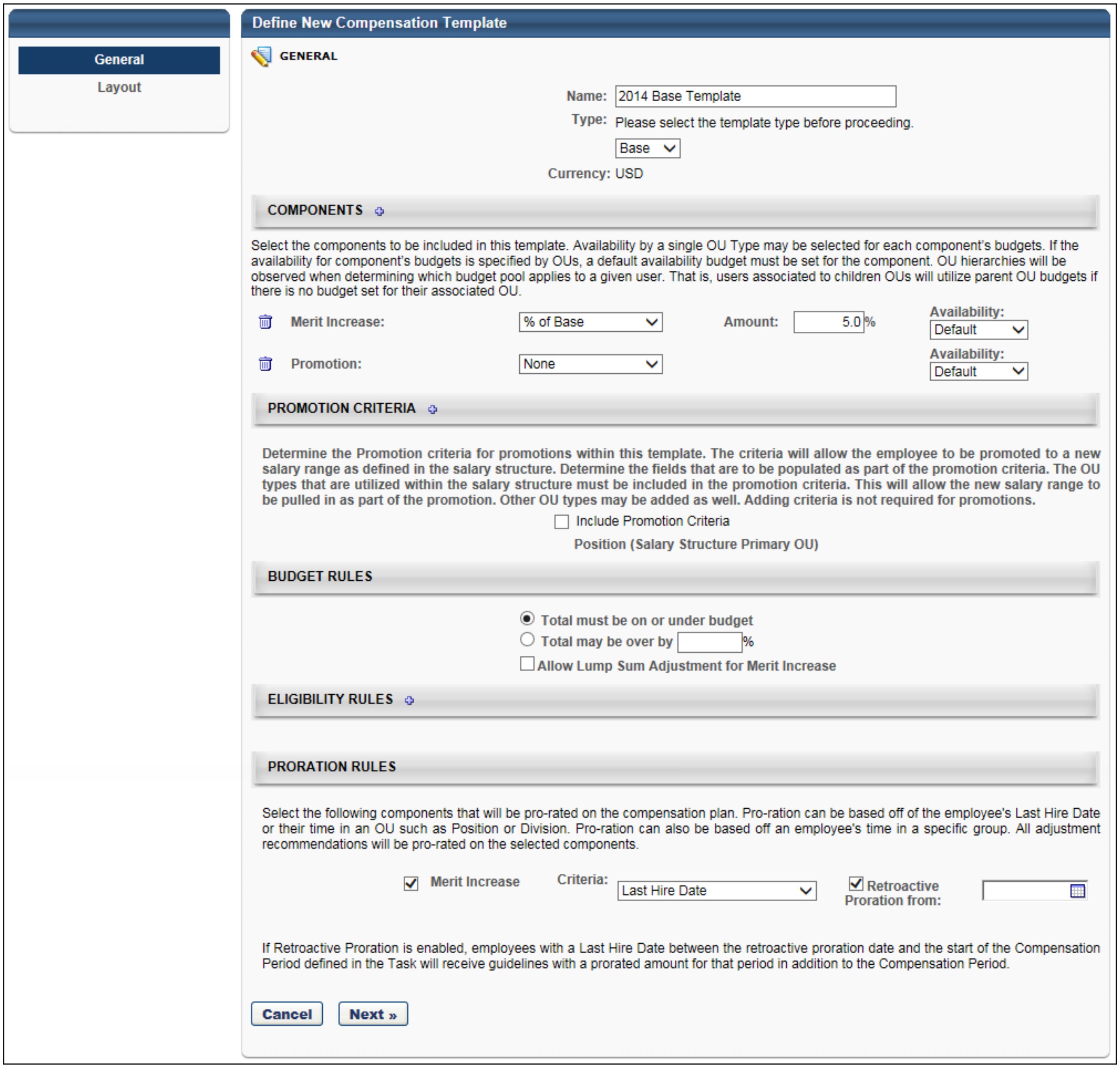
- Compensation Task: 2013 Compensation Cycle
- Compensation Period: January 1, 2013 - December 31, 2013
- Bonus Budget: 10% of Base
- Bonus Proration: Prorate by Last Hire Date with Retroactive Proration
- Retroactive Proration Date: November 1, 2012

Use Case 1: Adjustment Guideline Calculation with Retroactive Proration

1. Default Bonus Adjustment Guideline is set to 5% of Base.
2. Compensation Manager launches 2013 Compensation Cycle.
3. Compensation Plan recommends the following Bonus allocations:
    1. Melissa:
        1. Proration Percentage = (1 + (52 / 365)) = 1.1425 = 114.25%
        2. Recommendation = (0.05 * $65,000) * 1.1425 = $3,713.13
    2. Kevin:
        1. Proration Percentage = No proration percentage
        2. Recommendation = (0.05 * $100,000) = $5,000
    3. Paul
        1. Proration Percentage = 155 / 365 = 0.4247 = 42.47%
        2. Recommendation = (0.05 * $50,000) * 0.4247 = $1,061.75

Use Case 2: Budget Calculation with Retroactive Proration

1. The compensation task is configured as described above.
2. Compensation Manager launches 2013 Compensation Cycle.
3. Compensation Plan displays Bonus Budget of $19,549.75.
4. The Bonus Budget is calculated as follows:
    1. Melissa:
        1. Proration Percentage = (1 + (52 / 365)) = 1.1425 = 114.25%
        2. Recommendation = (0.1 * $65,000) * 1.1425 = $7,426.25
    2. Kevin:
        1. Proration Percentage = No proration percentage
        2. Recommendation = (0.1 * $100,000) = $10,000
    3. Paul
        1. Proration Percentage = 155 / 365 = 0.4247 = 42.47%
        2. Recommendation = (0.1 * $50,000) * 0.4247 = $2,123.50


Define New Compensation Template
General
Layout
GENERAL
Name: 2014 Base Template
Type: Please select the template type before proceeding.
Base
Currency: USD
COMPONENTS
Select the components to be included in this template. Availability by a single OU Type may be selected for each component's budgets. If the availability for component's budgets is specified by OUs, a default availability budget must be set for the component. OU hierarchies will be observed when determining which budget pool applies to a given user. That is, users associated to children OUs will utilize parent OU budgets if there is no budget set for their associated OU.
Merit Increase:
% of Base
Amount:
5.0 %
Availability:
Default
Promotion:
None
Availability:
Default
PROMOTION CRITERIA
Determine the Promotion criteria for promotions within this template. The criteria will allow the employee to be promoted to a new salary range as defined in the salary structure. Determine the fields that are to be populated as part of the promotion criteria. The OU types that are utilized within the salary structure must be included in the promotion criteria. This will allow the new salary range to be pulled in as part of the promotion. Other OU types may be added as well. Adding criteria is not required for promotions.
Include Promotion Criteria
Position (Salary Structure Primary OU)
BUDGET RULES
Total must be on or under budget
Total may be over by %
Allow Lump Sum Adjustment for Merit Increase
ELIGIBILITY RULES
PRORATION RULES
Select the following components that will be pro-rated on the compensation plan. Pro-ration can be based off of the employee's Last Hire Date or their time in an OU such as Position or Division. Pro-ration can also be based off an employee's time in a specific group. All adjustment recommendations will be pro-rated on the selected components.
Merit Increase
Criteria:
Last Hire Date
Retroactive Proration from:
If Retroactive Proration is enabled, employees with a Last Hire Date between the retroactive proration date and the start of the Compensation Period defined in the Task will receive guidelines with a prorated amount for that period in addition to the Compensation Period.
Cancel
Next »

Compensation Plan - Retroactive Proration

With this enhancement, employees can receive a retroactive proration for time worked prior to the start of the compensation period for the compensation task.

If retroactive proration is enabled for a component and a user is eligible for retroactive proration for the component, then the Prorated Recommendations hover displays retroactive proration percentages for the component. Because compensation can be prorated retroactively, proration percentages may exceed 100%.

Budgets that are defined as "% of Base" or "Sum of Targets" are calculated using the proration percentage for users who have been prorated, as previously implemented.

When prorating by Last Hire Date and including retroactive proration, the current compensation manager is responsible for planning for the employee. The compensation manager for the previous compensation period is not responsible for employee's compensation.

Compensation Statement - Retroactive Proration

With this enhancement, employees can receive a retroactive proration for time worked prior to the start of the compensation period for the compensation task.

Including any Proration Breakdown tag (e.g., <Component Name>.PRORATION.BREAKDOWN) in a custom compensation statement will produce a table with all periods that are counted towards the entire compensation period for the employee for the specified component. If an employee has not been prorated, a single period encompassing the entire compensation period will appear.

If retroactive proration is enabled for a component and a user's Last Hire Date is between the Retroactive Proration Date for the component and the start of the compensation period, then the Proration Breakdown tags will include retroactive prorated periods prior to the start of the compensation period. The retroactive proration period is displayed at the top of the table.

The following is an example of a component proration breakdown displaying a retroactive proration period at the top of the table.

Date	Num Days	Target	Amount
11/10/2012	52	712.50 USD	748.20 USD
1/1/2013	365	5,000.00 USD	5,251.80 USD
			6,000.00 USD

The total allocation amount for the component in the Proration Breakdown tag will match the allocation amount for the component in the compensation plan. When retroactive proration has been applied for the employee for the component, the retroactive prorated period and compensation period amounts are calculated based on the total amount. Rounding is only done when determining the final output of the prorated amount, which is rounded using the precision that is specified for the currency. Due to rounding, the sum of the retroactive prorated period amount and compensation period amount may not equal the total amount.

- Retroactive prorated period amount calculation = (<Num Days in retroactive period> / (<Num Days in retroactive period> + <Num Days in compensation period>)) * <Total compensation allocation>
    - (52 / (52 + 365)) * $6000 = $748.20
- Compensation period amount calculation = (<Num Days in compensation period> / (<Num Days in retroactive period> + <Num Days in compensation period>)) * <Total compensation allocation>
    - (365 / (52 + 365)) * $6000 = $5251.80

Connect

Connect Redesign - Configurable File Size Limit

Prior to this enhancement, the maximum file size that could be uploaded within Redesigned Connect was 20 MB.

With this enhancement, organizations can configure the maximum file size that can be uploaded within Redesigned Connect.

The file size limit applies to files uploaded in the following areas:

- Live Feed
- Team Feed
- Team Feed - Task Details
- Create/Edit Community
- Edit Knowledge Bank
- Create/Edit Discussion Posting
- Create/Edit File Posting
- Create/Edit Suggestion Posting
- Create/Edit Q&A Posting

When the file size limit is changed, the updated limit is enforced throughout the Redesigned Connect.

Use Case

Curtis works as a teacher. His school district sets up topics within communities for teachers to upload videos of their lectures so that teachers can learn from other teacher's styles. However, the 50-minute lectures he teaches and records result in 250 MB files. Since 20 MB is too low of a limit for video files, the administrator requests to increase the maximum file size to 250 MB.

Implementation

By default, the maximum file size for Redesigned Connect is 20 MB. This limit is controlled by a backend setting, which can be increased up to 1 GB.

To update the maximum file size for Redesigned Connect, contact Global Product Support (GPS).

Connect Redesign - Course Rating Activity Update

Connect Redesign - Course Rating Live Feed Activity Update

With this enhancement, a new Course Rating activity update is now available for the Redesigned Connect Live Feed. When enabled, this activity update displays in the Live Feed whenever a user rates a learning object within the system.

Considerations

Activity updates are not generated when a user edits an existing course rating or anonymously rates a learning object.

A course rating activity update is only visible to a user if the rated learning object is available to the user.

Implementation

This functionality is only available for organizations using Redesigned Connect.

Upon release, this functionality is automatically enabled in Stage and Live portals.

Redesigned Connect is available by request until May 2015.

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
View New Connect Preferences	Grants ability to view and manage the New Connect Preferences. This permission can be constrained by OU and User's OU.	New Connect
View New Connect	Grants ability to view the new Connect pages, including Live Feed, All Teams, Team Overview, Team Feed, Team Tasks, Task Details, and Connections. This permission cannot be constrained.	New Connect

Connect Redesign - Connect Preferences

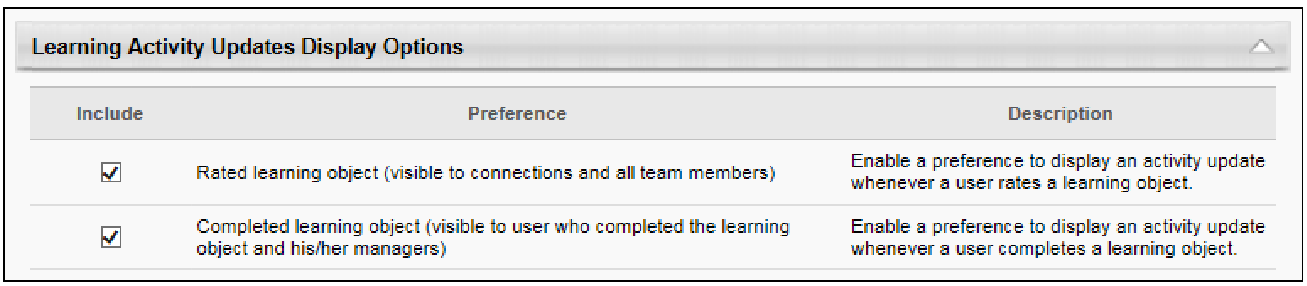
With this enhancement, a new option is now available in the *Learning Activity Updates Display Options* section of Connect Preferences.

To access the Connect Preferences page for Redesigned Connect, go to **Admin > Tools > Connect > Connect Administration**, and under Connect Administration, select *Connect Preferences*.

Permissions

Permission Name	Permission Description	Category
View New Connect Preferences	Grants ability to view and manage the New Connect Preferences. This permission can be constrained by OU and User's OU.	New Connect

Rated learning object - When this option is selected, a Connect update is posted whenever a user rates a learning object within the system. Activity updates are not generated when a user edits an existing course rating or anonymously rates a learning object. The update is only visible to a user if the rated learning object is available to the user.


Learning Activity Updates Display Options

Include	Preference	Description
☑	Rated learning object (visible to connections and all team members)	Enable a preference to display an activity update whenever a user rates a learning object.
☑	Completed learning object (visible to user who completed the learning object and his/her managers)	Enable a preference to display an activity update whenever a user completes a learning object.

Connect Redesign - Live Feed

With this enhancement, a new Course Rating activity update is now available for the Redesigned Connect Live Feed. When enabled, this activity update displays in the Live Feed whenever a user rates a learning object within the system. Activity updates are not generated when a user edits an existing course rating or anonymously rates a learning object.

When a user's course rating update is displayed in the Live Feed, the update is visible to the user's connections and team members. The update is only visible to a user if the rated learning object is available to the user.

To access the Live Feed, go to **Connect > Live Feed**.

Permissions

Permission Name	Permission Description	Category
View New Connect	Grants ability to view the new Connect pages, including Live Feed, All Teams, Team Overview, Team Feed, Team Tasks, Task Details, and Connections. This permission cannot be constrained.	New Connect

Connect Redesign - Custom HTML Widget

Connect Redesign - Custom HTML Widget in Communities

Prior to this enhancement, communities could not be customized using HTML.

With this enhancement, organizations can now customize their communities using an approved list of HTML tags. When enabled, a custom HTML widget is available on the following pages:

- Edit Knowledge Bank
- Create/Edit Community
- Create/Edit Learning Community

Use Case

A Human Resources administrator has set up a community to be a learning hub for its community members. The administrator wants to place image links that redirect users to various places. Some of the links redirect users to internal web sites at the organization, while other links redirect users to postings within the system.

Approved HTML Tags

All HTML tags are accepted by the Custom HTML widget. Because malicious HTML files may be uploaded, this is a potential security risk and organizations may choose to disable this functionality.

Implementation

This functionality is only available for Redesigned Connect.

The availability of the custom HTML widget is controlled by a backend setting, and is enabled by default.

To enable the custom HTML widget for communities within Redesigned Connect, contact Global Product Support (GPS).

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
Manage Knowledge Bank/Communities Administration	Grants ability to view the New Knowledge Bank Administration page. Based on permission constraints, administrators with this permission can create and delete topics and subtopics. Administrators with this permission	New Connect

	can view all communities, topics, sub-topics and postings, regardless of permission constraints. In addition, administrators can add a posting to the Course Catalog. This permission can be constrained by OU and User's OU. This permission is assigned to the default Administrator role by default.	
View Knowledge Bank/Communities	Grants ability to view the Knowledge Bank and Communities pages. This permission can be constrained by OU and User's OU. This permission is assigned to the default Administrator role by default.	New Connect

Edit Knowledge Bank

When editing the Knowledge Bank, community moderators and administrators may have the option to upload an HTML file (.htm or .html). When viewing the Knowledge Bank, the uploaded HTML file will appear in the upper-left corner of the page. The ability to upload an HTML file is controlled by a backend setting, and is disabled by default.

To edit the Knowledge Bank, on the Knowledge Bank page, select *Edit Knowledge Bank* from the Options drop-down menu. This option is only available to community moderators and administrators.

Permissions

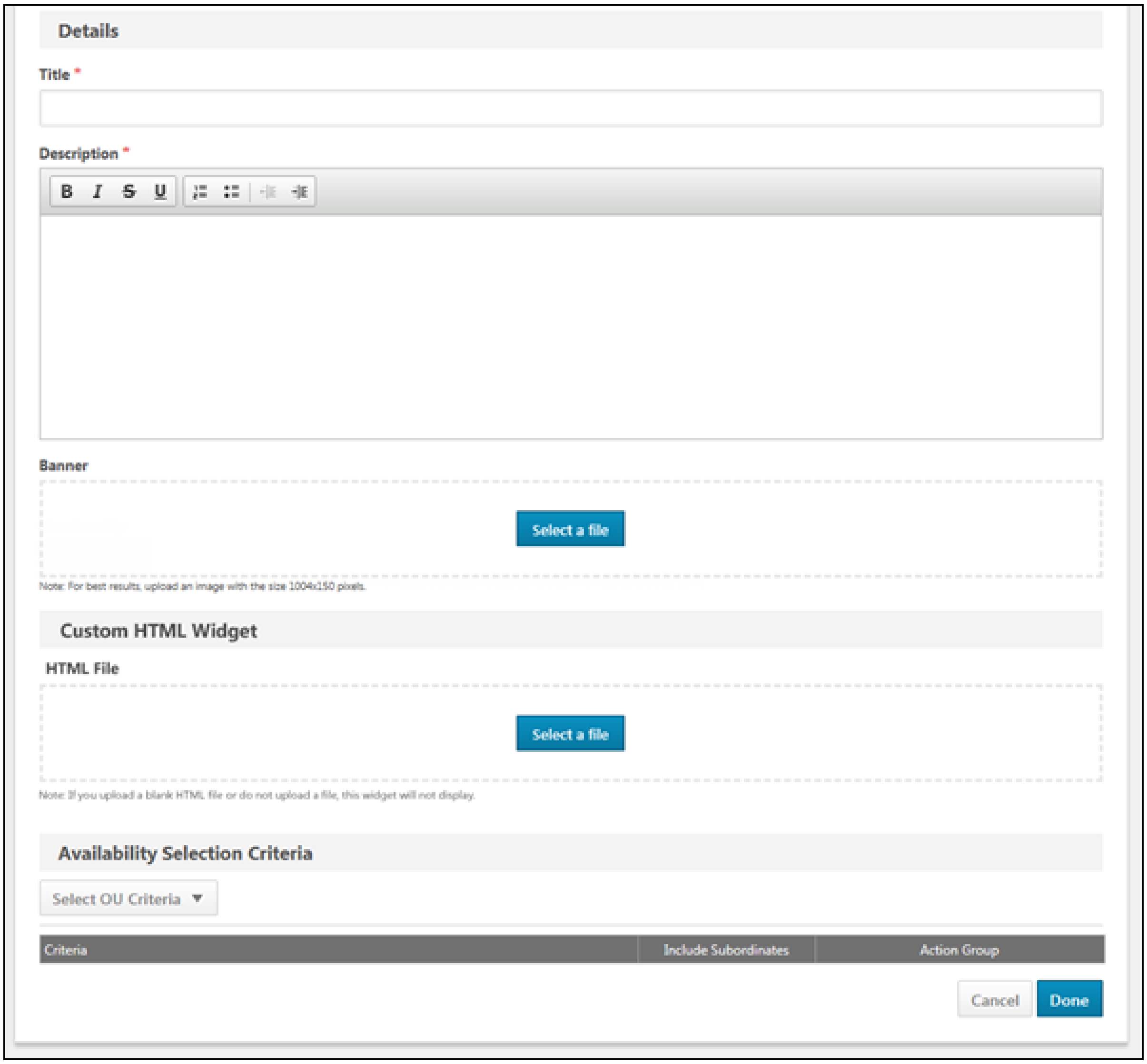
Permission Name	Permission Description	Category
Manage Knowledge Bank/Communities Administration	Grants ability to view the New Knowledge Bank Administration page. Based on permission constraints, administrators with this permission can create and delete topics and subtopics. Administrators with this permission can view all communities, topics, sub-topics and postings, regardless of permission constraints. In addition, administrators can add a posting to the Course Catalog. This permission can be constrained by OU and User's OU. This permission is assigned to the default Administrator role by default.	New Connect

Custom HTML Widget

The *Custom HTML Widget* section is only available if enabled by a backend setting. This section enables community moderators to upload an HTML file (.htm or .html), up to 5 MB in size. Once the Knowledge Bank is saved, the HTML data is rendered and displayed in the upper-left corner of the Knowledge Bank.

Add an HTML file by dragging and dropping the file into the Attachment area. You can also attach a file by clicking the **Select a file** button and select a file from your computer. **Note:** *The drag-and-drop functionality is not supported by Internet Explorer browsers.* Once the file is selected, a preview of the HTML widget is displayed in the section. If an empty file or no file is selected, then the HTML widget does not appear on the Knowledge Bank homepage.

All HTML tags are accepted by the Custom HTML widget. Because malicious HTML files may be uploaded, this is a potential security risk and organizations may choose to disable this functionality.


Details
Title *
Description *
B I S U
Banner
Select a file
Note: For best results, upload an image with the size 1004x150 pixels.
Custom HTML Widget
HTML File
Select a file
Note: If you upload a blank HTML file or do not upload a file, this widget will not display.
Availability Selection Criteria
Select OU Criteria
Criteria
Include Subordinates
Action Group
Cancel
Done

Create/Edit Community

When creating or editing a community, community moderators and administrators may have the option to upload an HTML file (.htm or .html). When viewing the community page, the uploaded HTML file will appear in the upper-left corner of the page. The ability to upload an HTML file is controlled by a backend setting, and is disabled by default.

To create a new community, select *Community* from the New Community drop-down menu on the All Communities page. This option is only available to community moderators and administrators.

To edit a community, on the Community page, select *Edit Community* from the Options drop-down menu. This option is only available to community moderators and administrators.

Permissions

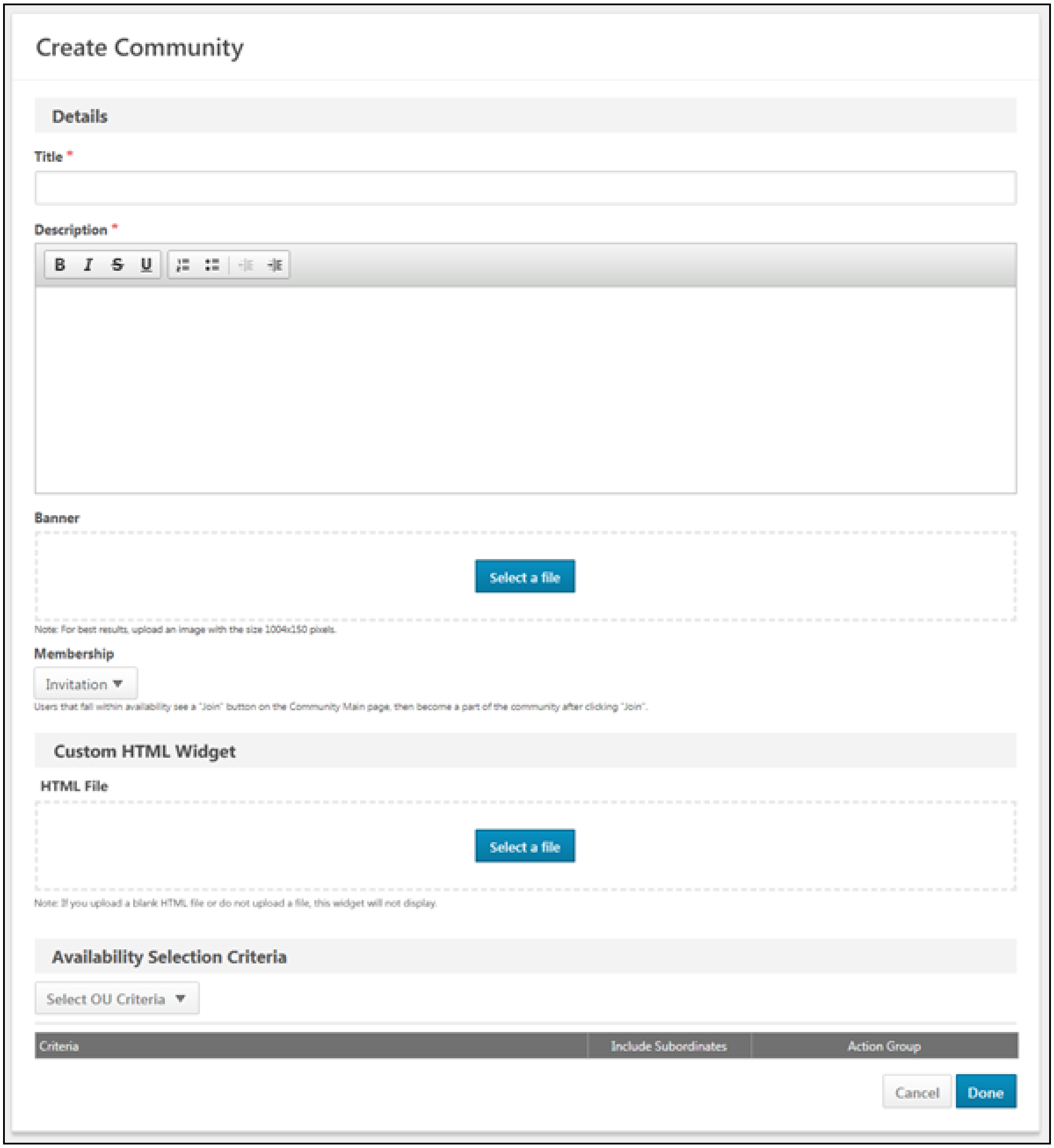
Permission Name	Permission Description	Category
Manage Knowledge Bank/Communities Administration	Grants ability to view the New Knowledge Bank Administration page. Based on permission constraints, administrators with this permission can create and delete topics and subtopics. Administrators with this permission can view all communities, topics, sub-topics and postings, regardless of permission constraints. In addition, administrators can add a posting to the Course Catalog. This permission can be constrained by OU and User's OU. This permission is assigned to the default Administrator role by default.	New Connect

Custom HTML Widget

The *Custom HTML Widget* section is only available if enabled by a backend setting. This section enables community moderators to upload an HTML file (.htm or .html), up to 5 MB in size. Once the community is saved, the HTML data is rendered and displayed in the upper-left corner of the community.

Add an HTML file by dragging and dropping the file into the Attachment area. You can also attach a file by clicking the **Select a file** button and select a file from your computer. **Note:** *The drag-and-drop functionality is not supported by Internet Explorer browsers.* Once the file is selected, a preview of the HTML widget is displayed in the section. If an empty file or no file is selected, then the HTML widget does not appear on the community homepage.

Important: *All HTML tags are accepted by the Custom HTML widget. Because malicious HTML files may be uploaded, this is a potential security risk and organizations may choose to disable this functionality.*


Create Community
Details
Title *
Description *
Banner
Select a file
Note: For best results, upload an image with the size 1004x150 pixels.
Membership
Invitation
Users that fall within availability see a "Join" button on the Community Main page, then become a part of the community after clicking "Join".
Custom HTML Widget
HTML File
Select a file
Note: If you upload a blank HTML file or do not upload a file, this widget will not display.
Availability Selection Criteria
Select OU Criteria
Criteria
Include Subordinates
Action Group
Cancel
Done

Create/Edit Learning Community

When creating or editing a learning community, community moderators and administrators may have the option to upload an HTML file (.htm or .html). When viewing the community page, the uploaded HTML file will appear in the upper-left corner of the page. The ability to upload an HTML file is controlled by a backend setting, and is disabled by default.

To create a new learning community, select *Learning Community* from the New Community drop-down menu on the All Communities page. This option is only available to community moderators and administrators who have permission to view the Course Catalog.

To edit a community, on the Community page, select *Edit Community* from the Options drop-down menu. This option is only available to community moderators and administrators.

Permissions

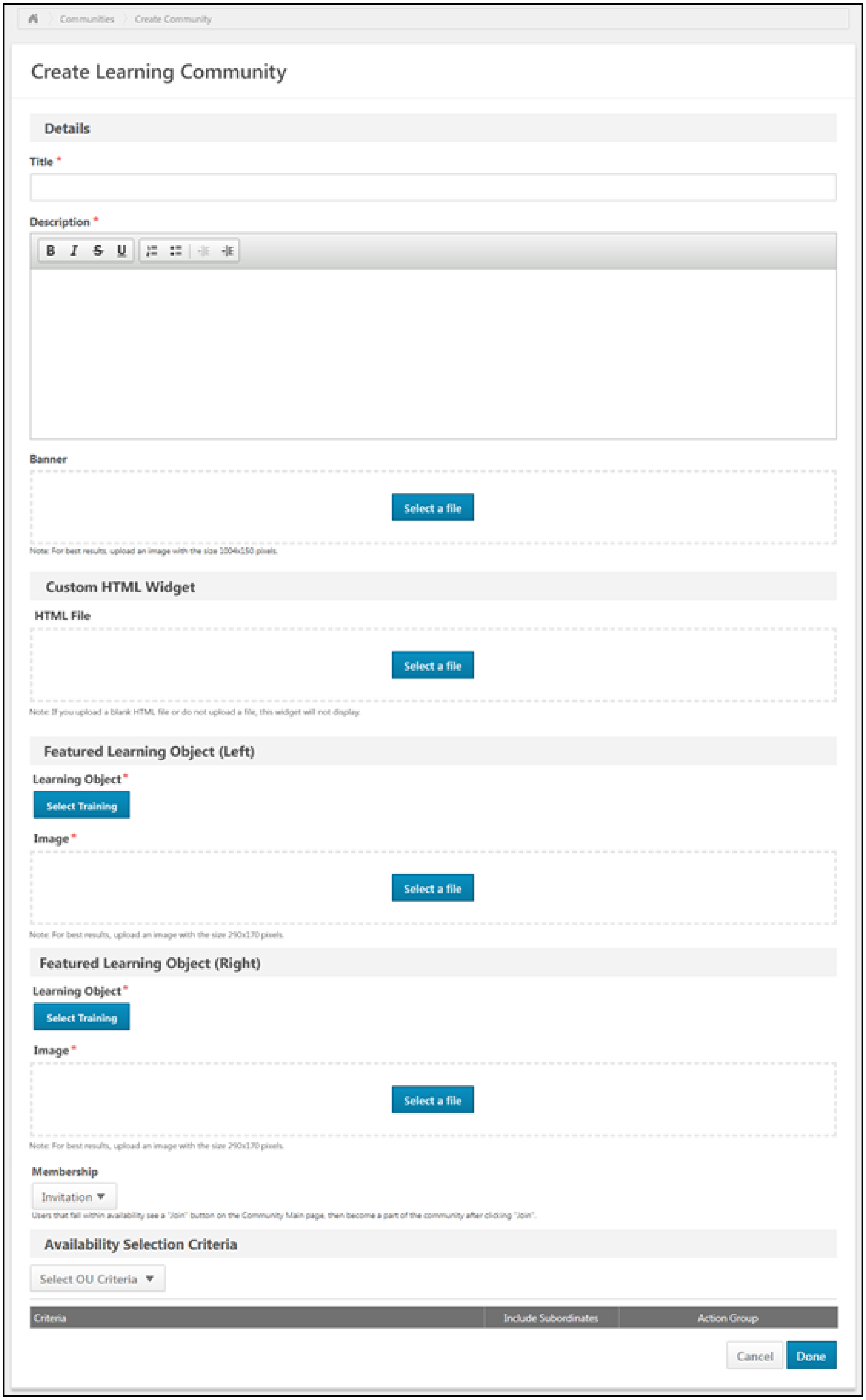
Permission Name	Permission Description	Category
Manage Knowledge Bank/Communities Administration	Grants ability to view the New Knowledge Bank Administration page. Based on permission constraints, administrators with this permission can create and delete topics and subtopics. Administrators with this permission can view all communities, topics, sub-topics and postings, regardless of permission constraints. In addition, administrators can add a posting to the Course Catalog. This permission can be constrained by OU and User's OU. This permission is assigned to the default Administrator role by default.	New Connect

Custom HTML Widget

The *Custom HTML Widget* section is only available if enabled by a backend setting. This section enables community moderators to upload an HTML file (.htm or .html), up to 5 MB in size. Once the community is saved, the HTML data is rendered and displayed in the upper-left corner of the community.

Add an HTML file by dragging and dropping the file into the Attachment area. You can also attach a file by clicking the **Select a file** button and select a file from your computer. **Note:** *The drag-and-drop functionality is not supported by Internet Explorer browsers.* Once the file is selected, a preview of the HTML widget is displayed in the section. If an empty file or no file is selected, then the HTML widget does not appear on the community homepage.

Important: *All HTML tags are accepted by the Custom HTML widget. Because malicious HTML files may be uploaded, this is a potential security risk and organizations may choose to disable this functionality.*


Communities
Create Community
Create Learning Community
Details
Title *
Description *
Banner
Select a file
Custom HTML Widget
HTML File
Select a file
Featured Learning Object (Left)
Learning Object *
Select Training
Image *
Select a file
Featured Learning Object (Right)
Learning Object *
Select Training
Image *
Select a file
Membership
Invitation
Availability Selection Criteria
Select OU Criteria
Criteria
Include Subordinates
Action Group
Cancel
Done

View Knowledge Bank or Community

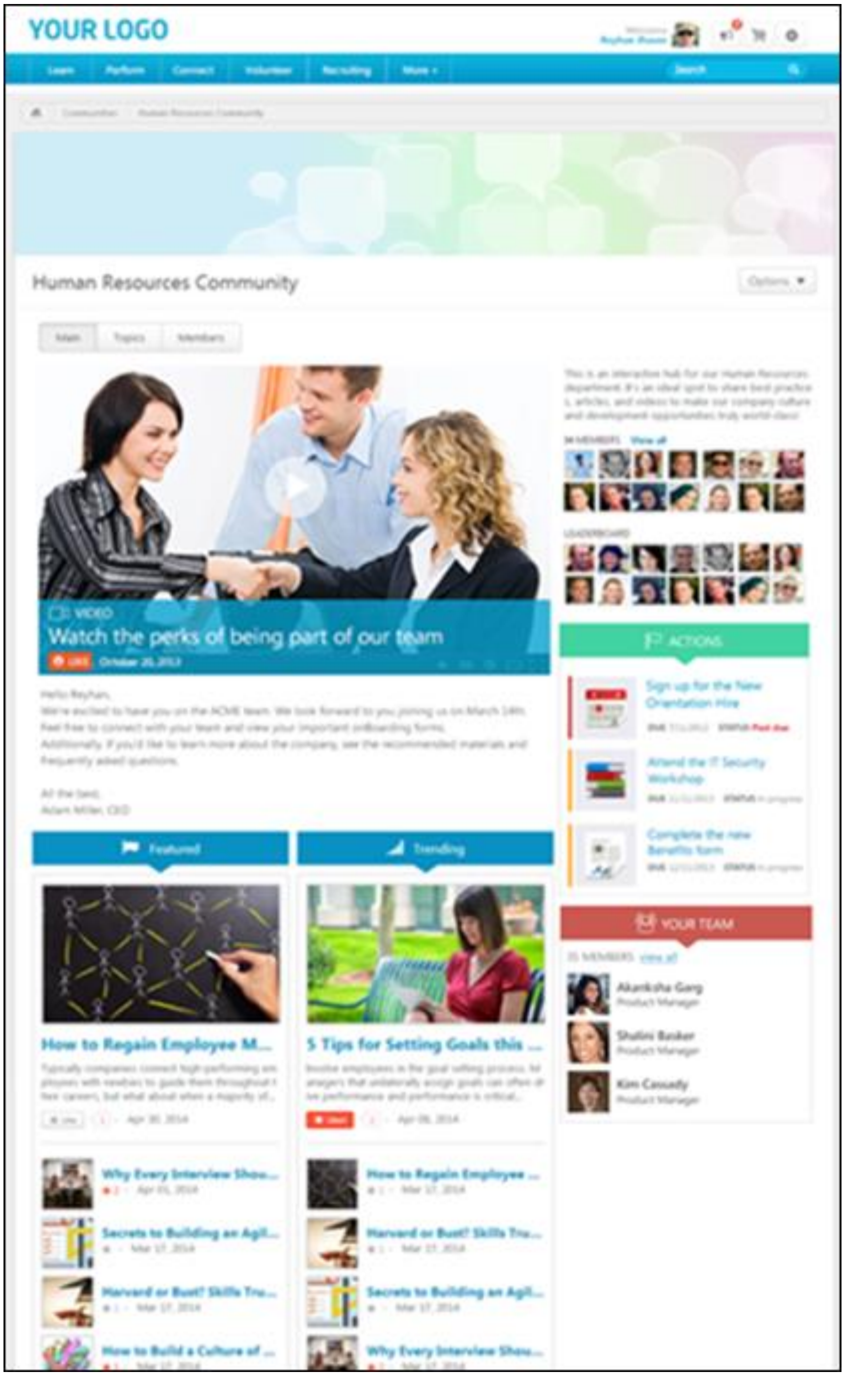
When viewing the Knowledge Bank or community, the uploaded HTML file will appear in the upper-left corner of the page. The HTML widget is two columns wide, and the widget height is not restricted.

To access the Knowledge Bank, go to **Connect > Knowledge Bank**.

To access a community, go to **Connect > Communities**. Then, click the community title.

Permissions

Permission Name	Permission Description	Category
View Knowledge Bank/Communities	Grants ability to view the Knowledge Bank and Communities pages. This permission can be constrained by OU and User's OU. This permission is assigned to the default Administrator role by default.	New Connect


YOUR LOGO
Human Resources Community
VIDEO
Watch the perks of being part of our team
Featured
Trending
ACTIONS
YOUR TEAM
How to Regain Employee M...
5 Tips for Setting Goals this ...

Connect Redesign - Default Images for Widgets

Connect Redesign - Default Images for Widgets

Prior to this enhancement, if a Knowledge Bank or community posting did not have an attached link and was displayed in the Featured or Trending widgets, then a default image was displayed in the widget. The same default image was displayed for all posting types.

With this enhancement, if a Knowledge Bank or community posting does not have an attached link and is displayed in the Featured or Trending widgets, then a default image is displayed in the widget. However, each posting type has a unique default image.

Use Case

A learning administrator creates an "Executive Leadership Best Practices" discussion posting in a community. A lot of people view and reply to the posting, so the posting appears in the Trending widget. When displayed in the Trending widget, a default Discussion graphic is displayed with the posting.

Implementation

Upon release, this functionality is automatically enabled in Stage and Live portals for all organizations using the Redesigned Connect.

Security

The following existing permission applies to this functionality:

Permission Name	Permission Description	Category
View Knowledge Bank/Communities	Grants ability to view the Knowledge Bank and Communities pages. This permission can be constrained by OU and User's OU. This permission is assigned to the default Administrator role by default.	New Connect

Default Images in Featured and Trending Widgets

With this enhancement, if a Knowledge Bank or community posting does not have an attached link and is displayed in the Featured or Trending widgets, then a default image is displayed in the widget. Each posting type has a unique image.

To access the Knowledge Bank, go to **Connect > Knowledge Bank**.

To access a community, go to **Connect > Communities**. Then, click the community title.

Permissions

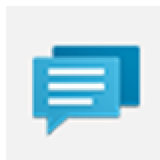
Permission Name	Permission Description	Category
View Knowledge Bank/Communities	Grants ability to view the Knowledge Bank and Communities pages. This permission can be constrained by OU and User's OU. This permission is assigned to the default Administrator role by default.	New Connect

For postings that are displayed in the Featured or Trending widgets, a unique default image is displayed if the posting does not have an attached link. A larger image is displayed if the posting is displayed in the first slot of the widget, and a smaller image is displayed if the posting is displayed in the second through fifth slot of the widget.


Communities
Learning Photoshop
Ps
Learning Photoshop
Search community
Join Community
Options
Main
Topics
Members
ANNOUNCEMENTS
FEATURED
Explore how to leverage the power of Adobe Photoshop to express your creative vision. We never stop learning what we love. more
235 MEMBERS view all
OS Compatibility and FAQs for Mac OS Mavericks (v10.9)
Adobe and Apple have worked closely together to test Adobe® Creative Cloud applications and Adobe Creative Suite 6...
LIKE
Nov 20, 2013
Top 10 Game Trailers
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed posuere consectetur est at lobortis. Donec ullamcorper nulla non metus auctor fringilla. Nullam quis risus eget urna mollis ornare vel eu leo...
LIKE
Nov 20, 2013
Sed posuere consectetur est at lobortis.
Nov 20, 2013
Cras justo odio, dapibus ac facilisis in,
Nov 20, 2013
Nullam quis risus eget
Nov 20, 2013
Sed posuere consectetur est at lobortis.
Nov 20, 2013
Cras justo odio, dapibus ac facilisis in,
Nov 20, 2013
Nullam quis risus eget
Nov 20, 2013

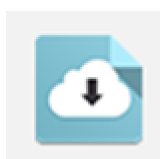
Discussion Posting - First Slot

Discussion Posting - Second through Fifth Slot



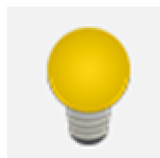
File Posting - First Slot

File Posting - Second through Fifth Slot



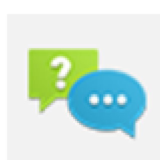
Suggestion Posting - First Slot

Suggestion Posting - Second through Fifth Slot



Q&A Posting - First Slot

Q&A Posting - Second through Fifth Slot



Connect Redesign - Live Feed Optimization

The Live Feed pages within Redesigned Connect are being optimized for faster processing and future API opportunities. This does not change any of the functionality, but testing is advised to validate experience and workflows.

This only impacts organizations using Redesigned Connect.

Connect Redesign - Social Feed Widget

Connect Redesign - Social Feed Widget

With this enhancement, a new Social Feed widget is now available when configuring the Welcome Page or a custom page. The Social Feed widget displays the latest Live Feed updates from connections and team members.

Implementation

This functionality is only available for organizations using Redesigned Connect.

Upon release, this functionality is automatically enabled in Stage and Live portals.

Redesigned Connect is available by request until May 2015.

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
Custom Pages - Manage	Grants access to create and edit custom pages for the portal. This permission cannot be constrained. This is an administrator permission.	Core Administration
Welcome Page Preferences - Manage	Grants ability to configure the look and feel of the Welcome Page that users see upon logging in to the portal. This permission can be constrained by OU and User's OU. This is an administrator permission.	Core Administration

Custom Page Builder - Social Feed Widget

With this enhancement, a new Social Feed widget is now available when configuring the Welcome Page or a custom page. The Social Feed widget displays the latest Live Feed updates from connections and team members.

When creating a custom page or modifying the Welcome page, the Social Feed widget is available in the General category in the Widgets panel. This widget is only available to organizations using Redesigned Connect.

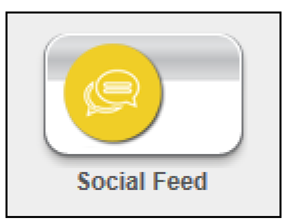
To set Welcome Page Preferences, go to **Admin > Tools > Core Functions > Core Preferences**, and under Cross-Platform Preferences, select *Welcome Page*.

To manage custom pages, go to **Admin > Tools > Core Functions > Core Preferences**, and under Cross-Platform Preferences, select *Custom Pages*.

Permissions

Permission Name	Permission Description	Category
Custom Pages - Manage	Grants access to create and edit custom pages for the portal. This permission cannot be constrained. This is an administrator permission.	Core Administration
Welcome Page Preferences - Manage	Grants ability to configure the look and feel of the Welcome Page that users see upon logging in to the portal. This permission can be constrained by OU and User's OU. This is an administrator permission.	Core Administration

To add the Social Feed widget to the page, drag the Social Feed widget from the Widgets panel to the Layout panel.



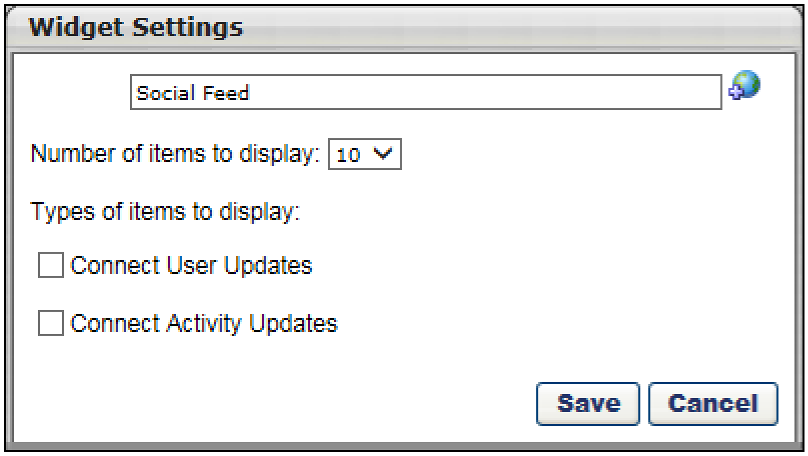
When the widget is added to the Layout panel, a sample widget is displayed.

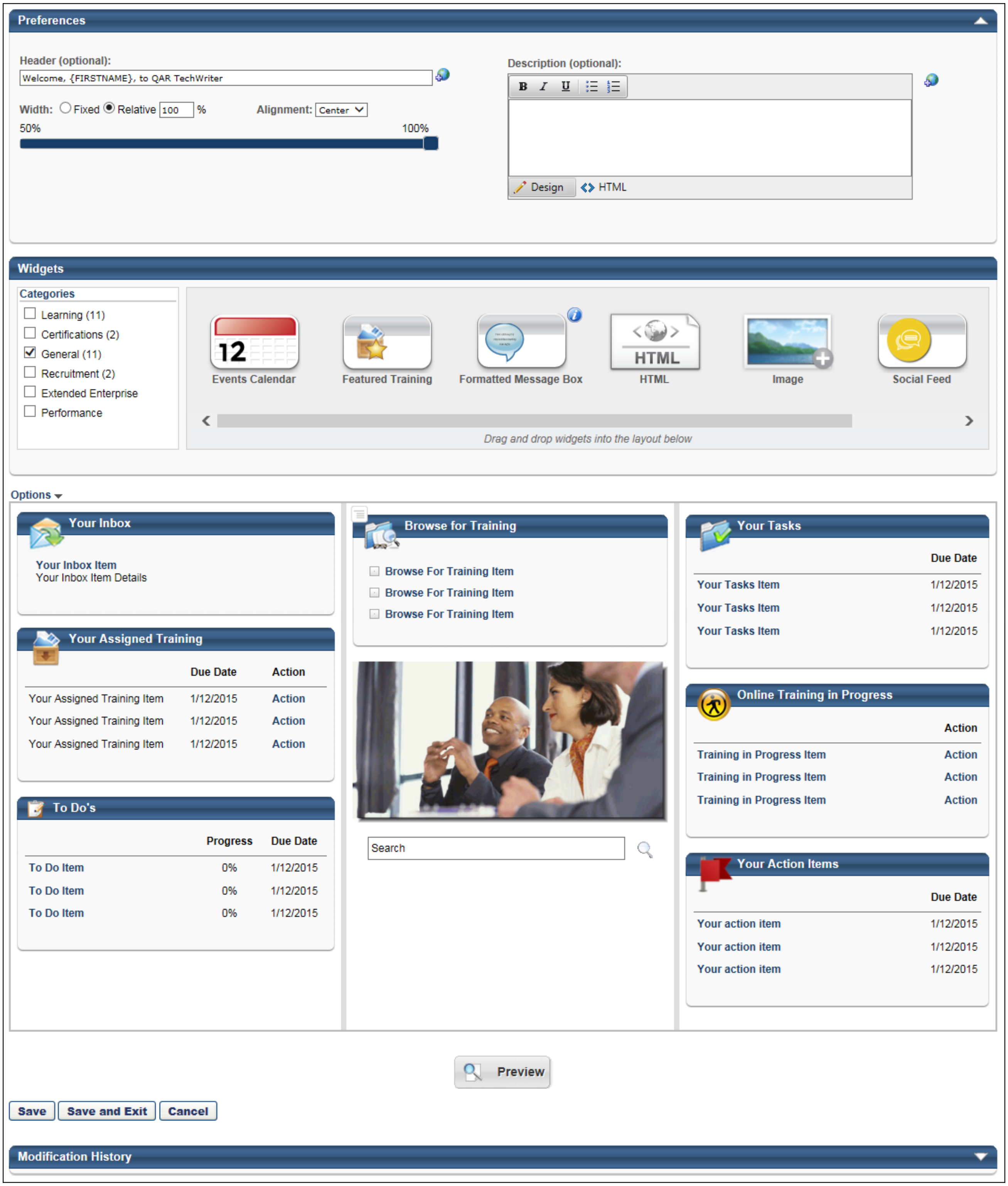
Administrators can configure the widget settings by hovering the cursor over the upper-right corner of the sample widget and clicking the Settings icon. This opens the Widget Settings pop-up.

The following settings are available:

- Title - The default widget title is Social Feed. To change the title, enter a different name in the field, up to 100 characters. If multiple languages are enabled for your portal, click the Translate icon to translate the field into other available languages.
- Number of items to display - Select the maximum number of items that should appear in the widget, between 1 and 10. The default number is 10.
- Connect User Updates - Select this option to include Connect user updates as feed items in the widget.
- Connect Activity Updates - Select this option to include Connect activity updates as feed items in the widget.

Click **Save** to save the settings. Or, click **Cancel** to close the pop-up without saving the settings.


Widget Settings
Social Feed
Number of items to display: 10
Types of items to display:
Connect User Updates
Connect Activity Updates
Save
Cancel


Preferences
Header (optional):
Welcome, {FIRSTNAME}, to QAR TechWriter
Width: Fixed Relative 100 %
Alignment: Center
50%
100%
Description (optional):
Design
HTML
Widgets
Categories
Learning (11)
Certifications (2)
General (11)
Recruitment (2)
Extended Enterprise
Performance
Events Calendar
Featured Training
Formatted Message Box
HTML
Image
Social Feed
Drag and drop widgets into the layout below
Options
Your Inbox
Your Inbox Item
Your Inbox Item Details
Your Assigned Training
Due Date
Action
Your Assigned Training Item 1/12/2015 Action
Your Assigned Training Item 1/12/2015 Action
Your Assigned Training Item 1/12/2015 Action
To Do's
Progress
Due Date
To Do Item 0% 1/12/2015
To Do Item 0% 1/12/2015
To Do Item 0% 1/12/2015
Browse for Training
Browse For Training Item
Browse For Training Item
Browse For Training Item
Search
Your Tasks
Due Date
Your Tasks Item 1/12/2015
Your Tasks Item 1/12/2015
Your Tasks Item 1/12/2015
Online Training in Progress
Action
Training in Progress Item Action
Training in Progress Item Action
Training in Progress Item Action
Your Action Items
Due Date
Your action item 1/12/2015
Your action item 1/12/2015
Your action item 1/12/2015
Preview
Save
Save and Exit
Cancel
Modification History

Social Feed Widget

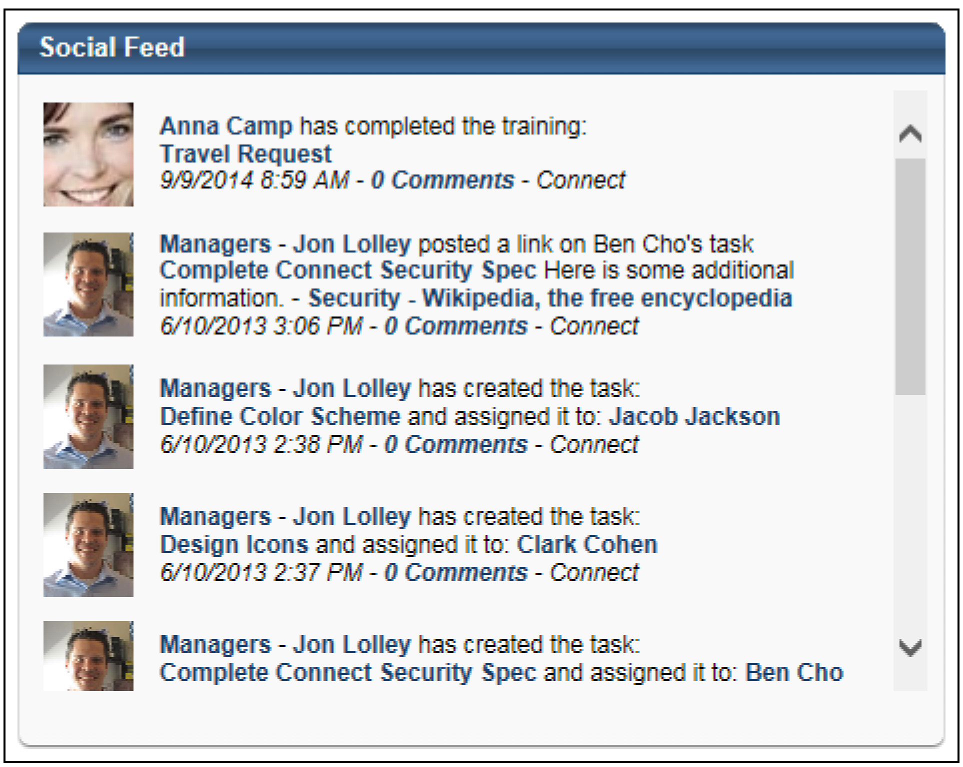
After the Social Feed widget is configured, it can be viewed on the Welcome page or a custom page if enabled by the administrator.

This widget is only available to organizations using Redesigned Connect.

The Social Feed widget can be configured to display up to 10 updates and may include Connect user updates and Connect activity updates. The widget only displays updates that are visible to the user. Updates are displayed in chronological order with the most recent updates displayed first.

The following information is displayed for each update:

- User Photograph and Name - The photograph and name of the user who made the update is displayed. Users can click the photograph or name to open the Universal Profile - Bio page for the user in a new window. *See Universal Profile - Bio Overview for additional information.*
- Update Text - The update text is displayed after the user's name.
- Timestamp - The date and time of the update is displayed.
- Comments - The number of comments associated with the update is displayed. Users can click the *Comments* link to open the Live Feed.
- Source - The source of the update is displayed. Currently, Connect is the only available source.



Connect Redesign - Upload New File Types

With this enhancement, the following file types are now supported as attachments in Redesigned Connect:

- .mov
- .docm
- .xlsm

The ability to upload .mov files enables users to capture videos on an iPhone or iPad and upload them to Connect.

The ability to upload .docm and .xlsm files enables users to upload Microsoft Word and Microsoft Excel files that contain macros.

The new file types can be uploaded in the following areas of Redesigned Connect:

- Live Feed
- Team Feed
- Team Feed - Task Details
- Create/Edit Community
- Edit Knowledge Bank
- Create/Edit Discussion Posting
- Create/Edit File Posting
- Create/Edit Suggestion Posting
- Create/Edit Q&A Posting

Implementation

This functionality is only available for Redesigned Connect.

Knowledge Bank and Communities Data Migration

Knowledge Bank and Communities Data Migration

With this enhancement, a data migration script is now available for all organizations using the legacy version of Connect. Communities, topics, and postings from the legacy version of Connect are copied into the redesigned Knowledge Bank and Communities functionality. The redesigned Knowledge Bank and Communities functionality functions differently than the legacy version of Connect, so only data is migrated; no permissions or preferences are migrated.

Considerations

This migration does not migrate data from the legacy version of Knowledge Bank to the redesigned Knowledge Bank and Communities. This migration is only possible if users have existing content in the legacy version of Connect. For additional information, contact Global Product Support (GPS).

In the legacy version of Connect, it is not required that a topic is associated with a community, and a topic can be associated with multiple communities. Also, because topics can be placed anywhere, a parent topic and its child topic can exist in a traditional parent/child relationship and also at the same level. In the redesigned Knowledge Bank and Communities functionality, a topic must be associated with a single community or the Knowledge Bank. Because of these nuances, migration for these topics is handled differently than topics that are associated with a single topic. *See* **Migration - Topic to Topic** *on* page 101 *for additional information.*

Migration creates copies of all postings, topics, etc. Existing links to old postings, topics, etc. are not updated to the new copy. Organizations must update all existing links to the new copies.

Threaded comments (i.e., commenting on comments) will be flattened out and sorted chronologically.

Forum, URL, Wiki, and Blog postings in the legacy version of Connect are migrated as Discussion postings. Podcast and Webcast postings in the legacy version of Connect are migrated as File postings.

There is currently no reporting for Redesigned Connect.

Implementation

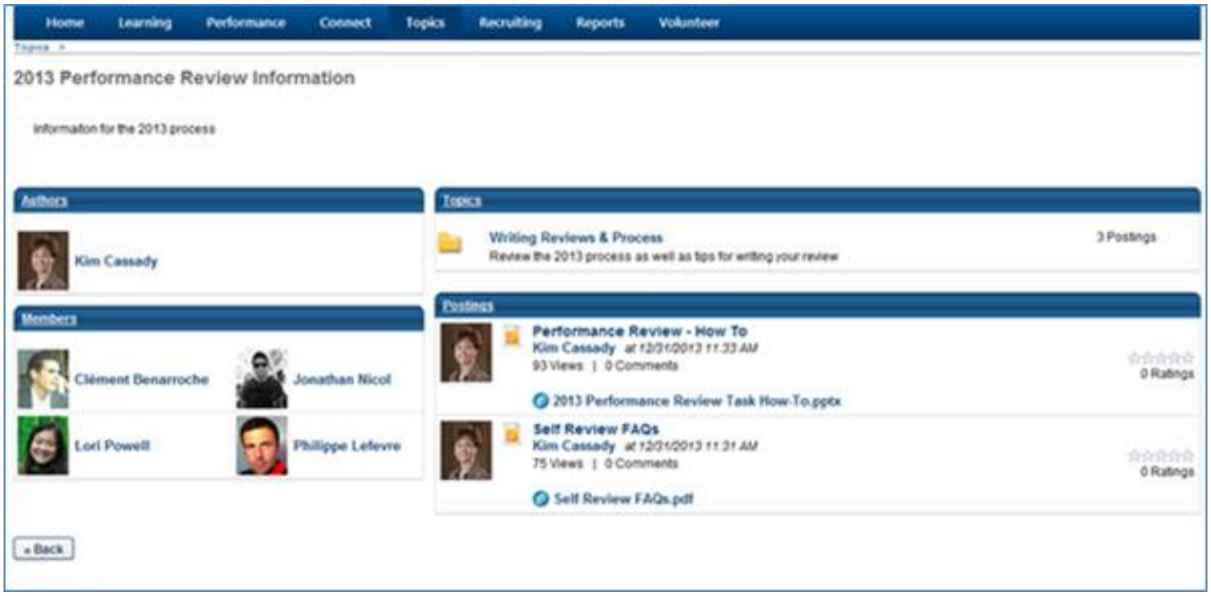
This functionality is only available to organizations using Connect.

Contact GPS to migrate data from the legacy version of Connect to the redesigned Knowledge Bank and Communities functionality.

Migration - Community to Community

Communities within the legacy version of Connect are migrated to the new Communities functionality.

Old Connect Community



Redesigned Connect Community

Data Migration

The following data is not migrated:

Data	Notes
Community Tags	Community tags are not migrated. However, they are stored for future use.

The following data is migrated:

Data	Notes
Community Title	Previously, the character limit for this field was 200. Now, the character limit is 70. The full community title is migrated regardless of the number of characters. However, if the community title is edited, the character limit of 70 is enforced.
Community Description	
Community Members	
Community Topics	*See* **Migration - Topic to Topic** *on* page 101 *for additional information.*
Community Postings	
Community Leaders	*See the Community Membership and Assignment Migration section below for additional information.*
Community Assigned Users	*See the Community Membership and Assignment Migration section below for additional information.*
Community Creator	
Community Creation Date	
Community Modifier	
Community Modification Date	

Community Membership and Assignment Migration

The following table illustrates how the community type within the legacy version of Connect determines the community membership and assignment in the new Communities functionality.

Old Community Access Type	New Community Membership Setting	Leaders	Assignment
Private	Auto-enrollment	Leaders from the old community are automatically added to the new community as Community Moderators.	Assigned users from the old community are automatically added to the new community as Members.
Request Only	Auto-enrollment - If a user is not an Assigned User, Approved User,	Leaders from the old community are	Assigned or Approved users from the old

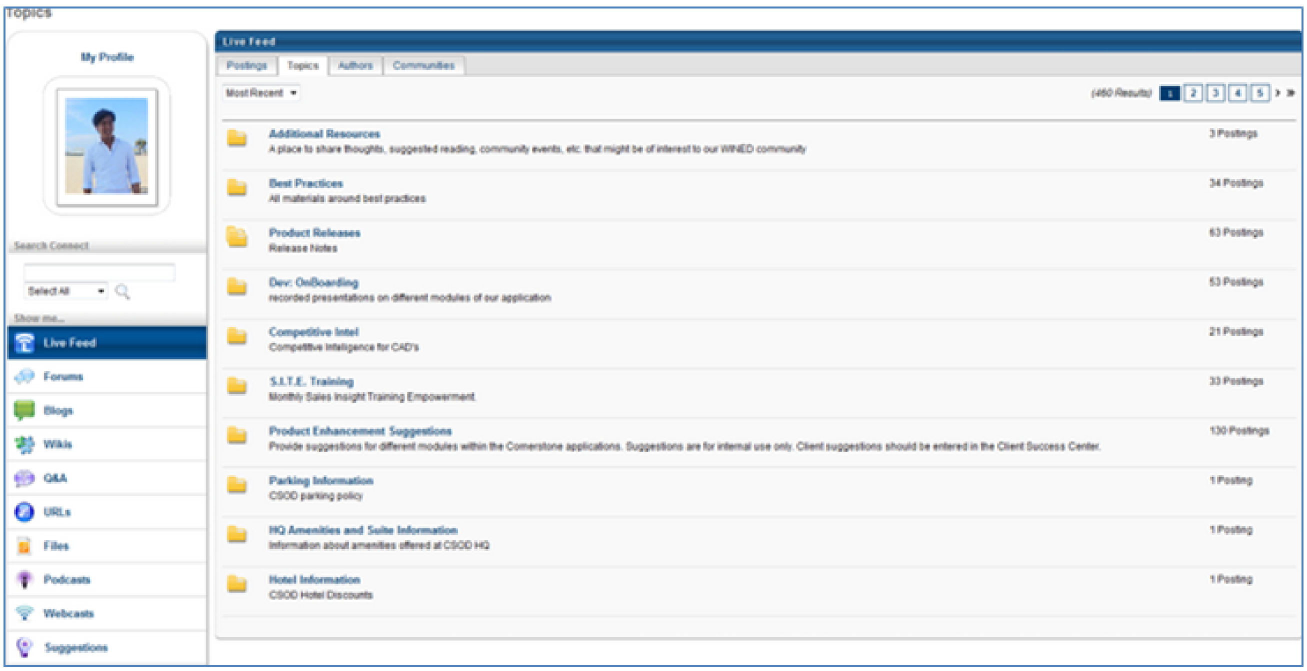
Old Community Access Type	New Community Membership Setting	Leaders	Assignment
	or Leader in the old community, then they cannot search for or join the new community. This also applies if the user previously requested access to the community, but access was not granted.	automatically added to the new community as Community Moderators.	community are automatically added to the new community as Members.
Public	Invitation	Leaders from the old community are automatically added to the new community as Community Moderators.	Assigned users and user who joined the old community are automatically added to the new community as Members.

Migration - Topic to Topic

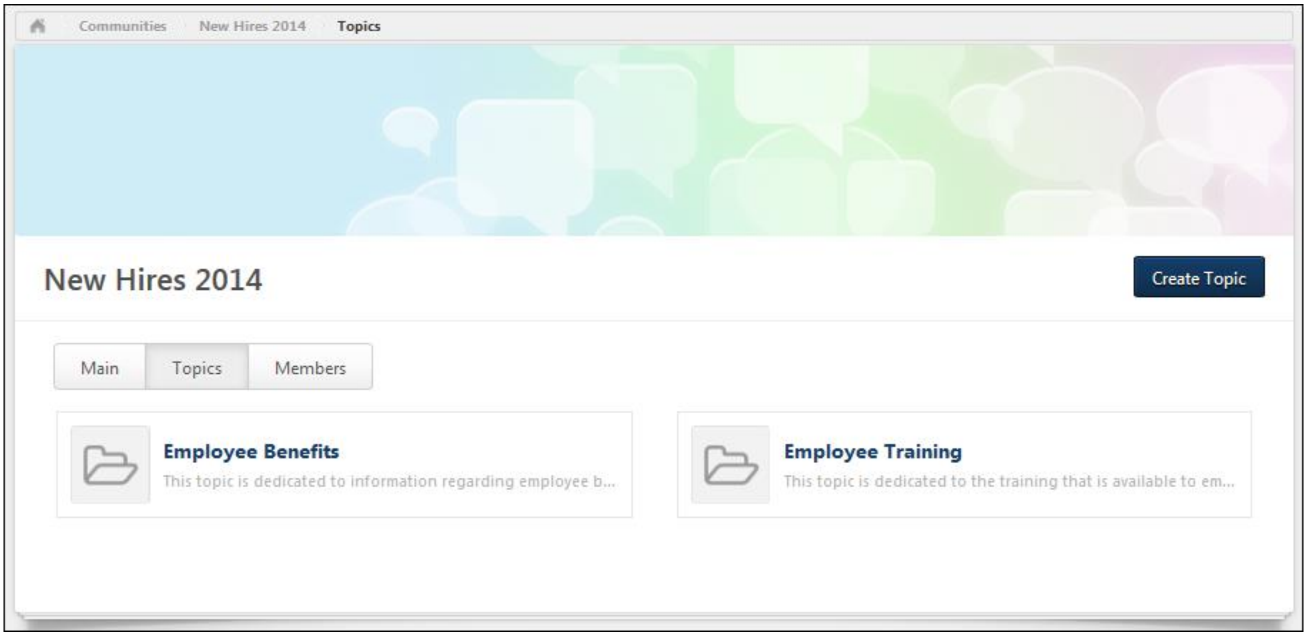
Topics within the legacy version of Connect are migrated to the new Knowledge Bank functionality.

All topics previously available on the Topics tab of the legacy version of Connect are migrated as Knowledge Bank topics.

Old Connect Topics



Redesigned Knowledge Bank Topics



Data Migration

The following data is not migrated:

Data	Notes
Tags	Topic tags are not migrated. However, they are stored for future use.

The following data is migrated:

Data	Notes
Topic Title	
Topic Description	
Topic Postings	
Topic Moderators	
Active Child Topics	
Active Child Postings	
Availability for Users	The availability for users is based on the user's access level in the old topic: • Read Only - These users are migrated to the new topic as Visitors. • Read Write - These users are migrated as Members.

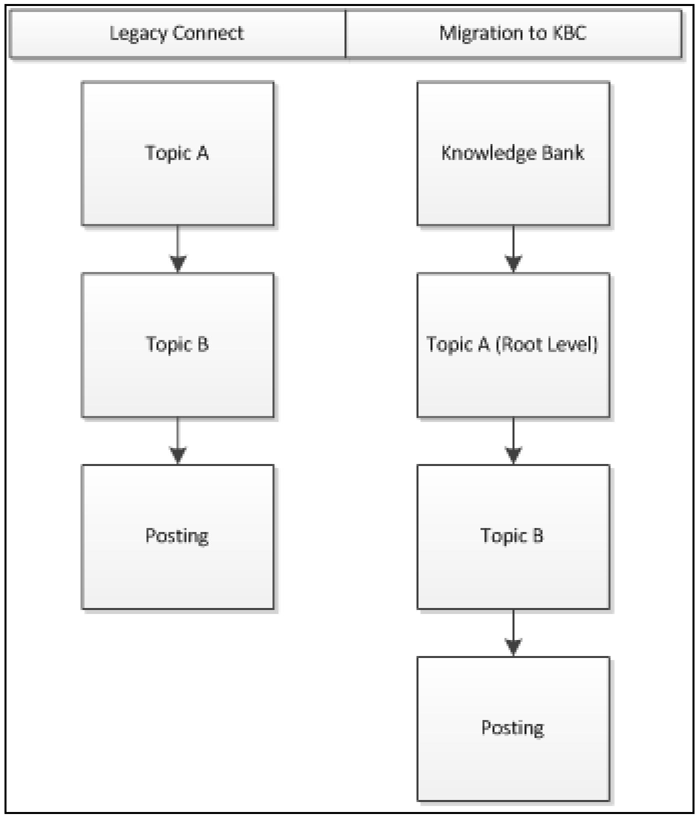
Data	Notes
	• Read Only w/ Question Asking - These users are migrated as Members. • Read Only w/ Commenting - These users are migrated as Members.
Availability for OUs	The availability for organizational units (OUs) is based on the OU's access level in the old topic: • Read Only - These users are migrated to the new topic as Visitors. • Read Write - These users are migrated as Members. • Read Only w/ Question Asking - These users are migrated as Members. • Read Only w/ Commenting - These users are migrated as Members.

Migration Considerations

The following considerations apply when migrating topics:

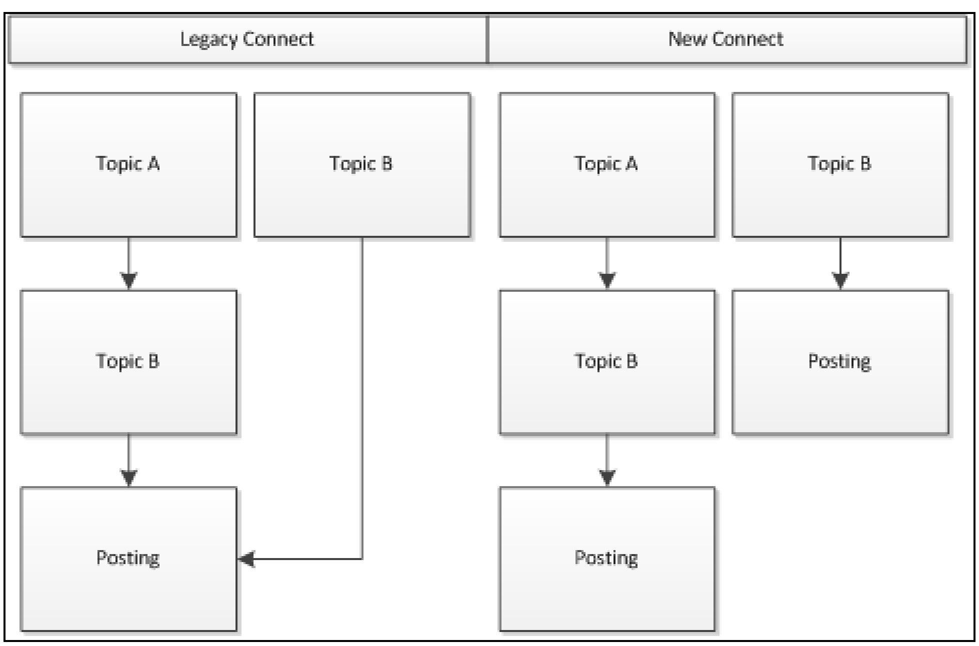
Topic without a Community

If a topic in the legacy version of Connect is not associated with a community, then it is migrated into the Knowledge Bank.



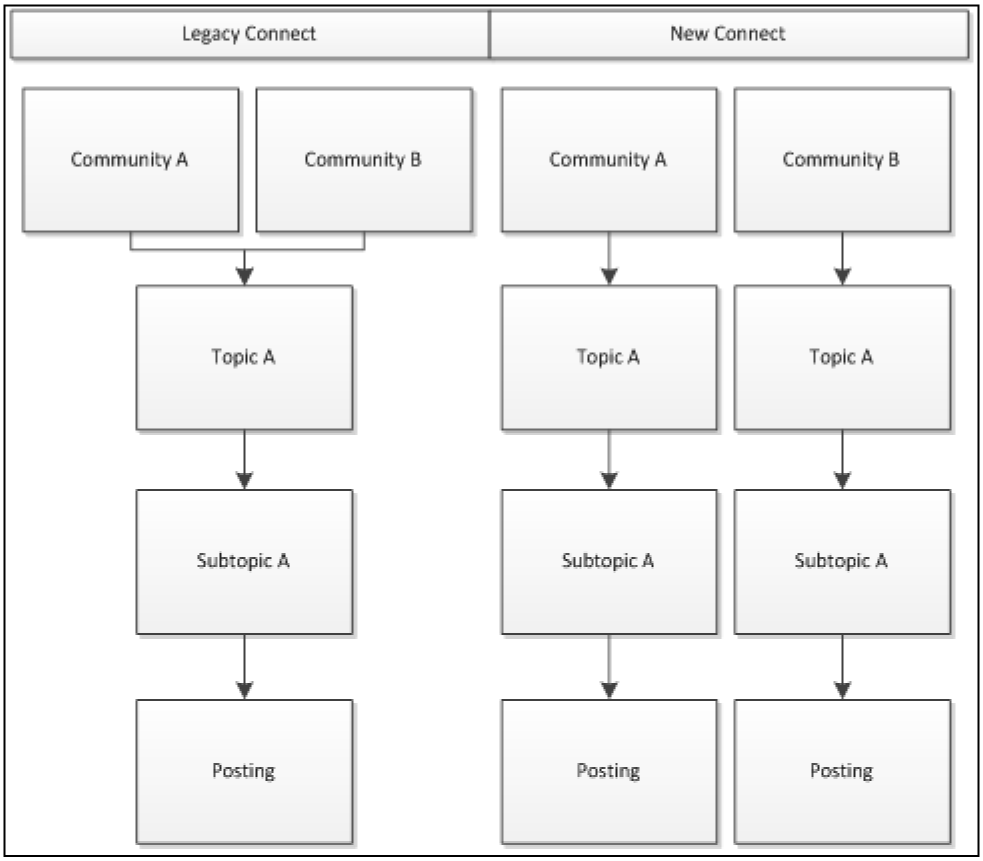
Parent Topic and Child Topic Co-exist at Same Topic Level

If a parent topic and a child topic co-exist at the same topic level, a copy of the child topic and all associated postings is migrated to the level of the parent topic. The copy of the child topic is no longer associated with the parent topic.



Topic Exists in Multiple Communities

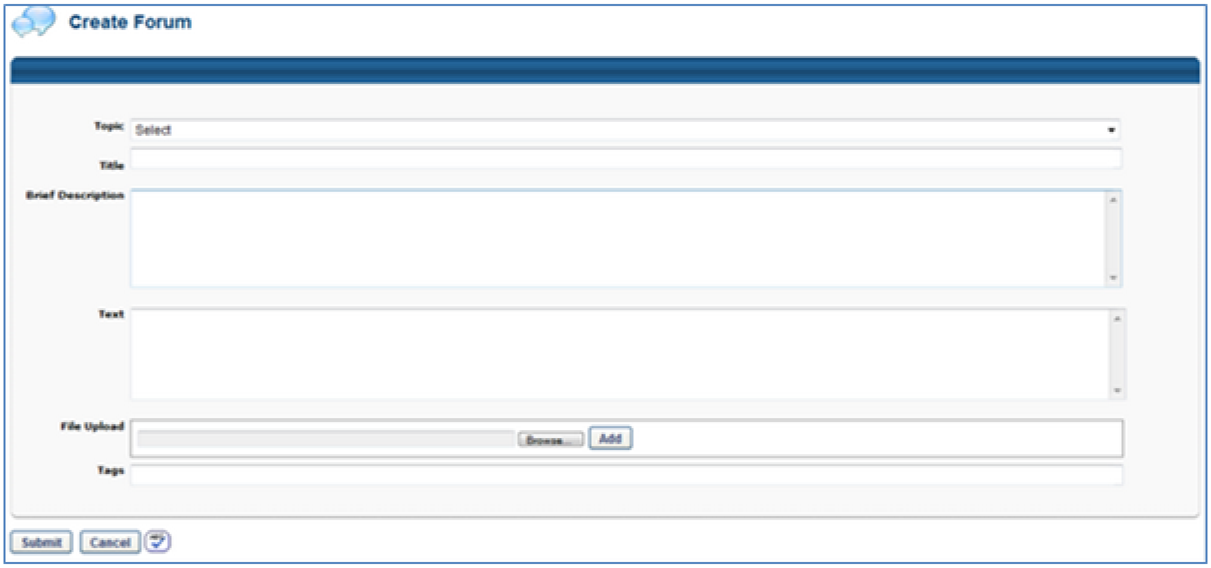
If a topic exists in multiple communities, a copy of the topic and all associated child topics and postings is migrated to the second community. The copy of the topic and all child topics and postings is no longer associated with the first community.



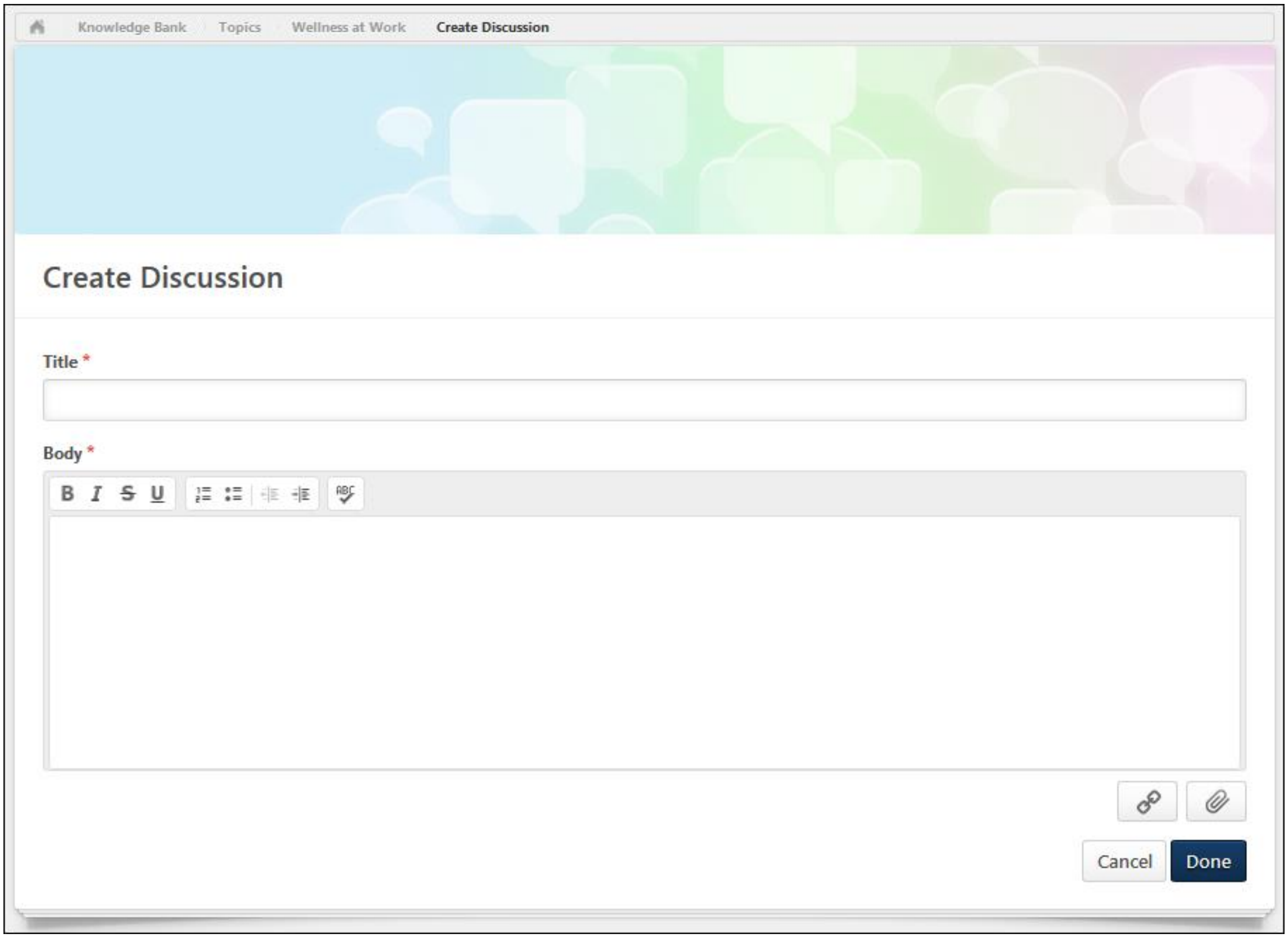
Migration - Forum Posting to Discussion Posting

Forum postings within the legacy version of Connect are migrated as Discussion postings within the new Knowledge Bank functionality.

Forum Posting - Create



Discussion Posting - Create



Data Migration

The following data is not migrated:

Data	Notes
Brief Description	
Rating	
Tags	Posting tags are not migrated. However, they are stored for future use.

The following data is migrated:

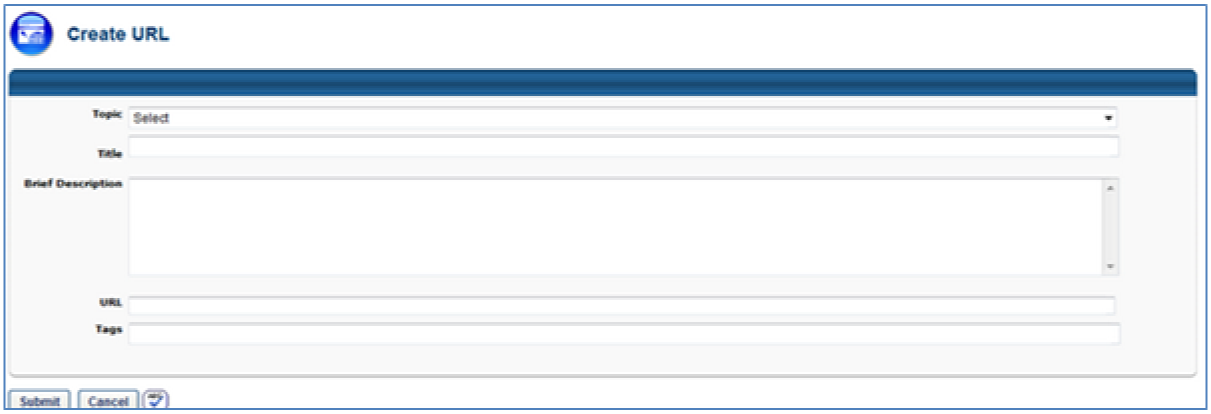
Data	Notes
Parent Topic	
Title	
Text (Body)	

Data	Notes
File Attachments	
Comments	The posting comments are maintained.
Views	The number of posting views is maintained.
Timestamps	The timestamps that indicates when the posting was created and when comments are added are maintained.
Posting Creator	

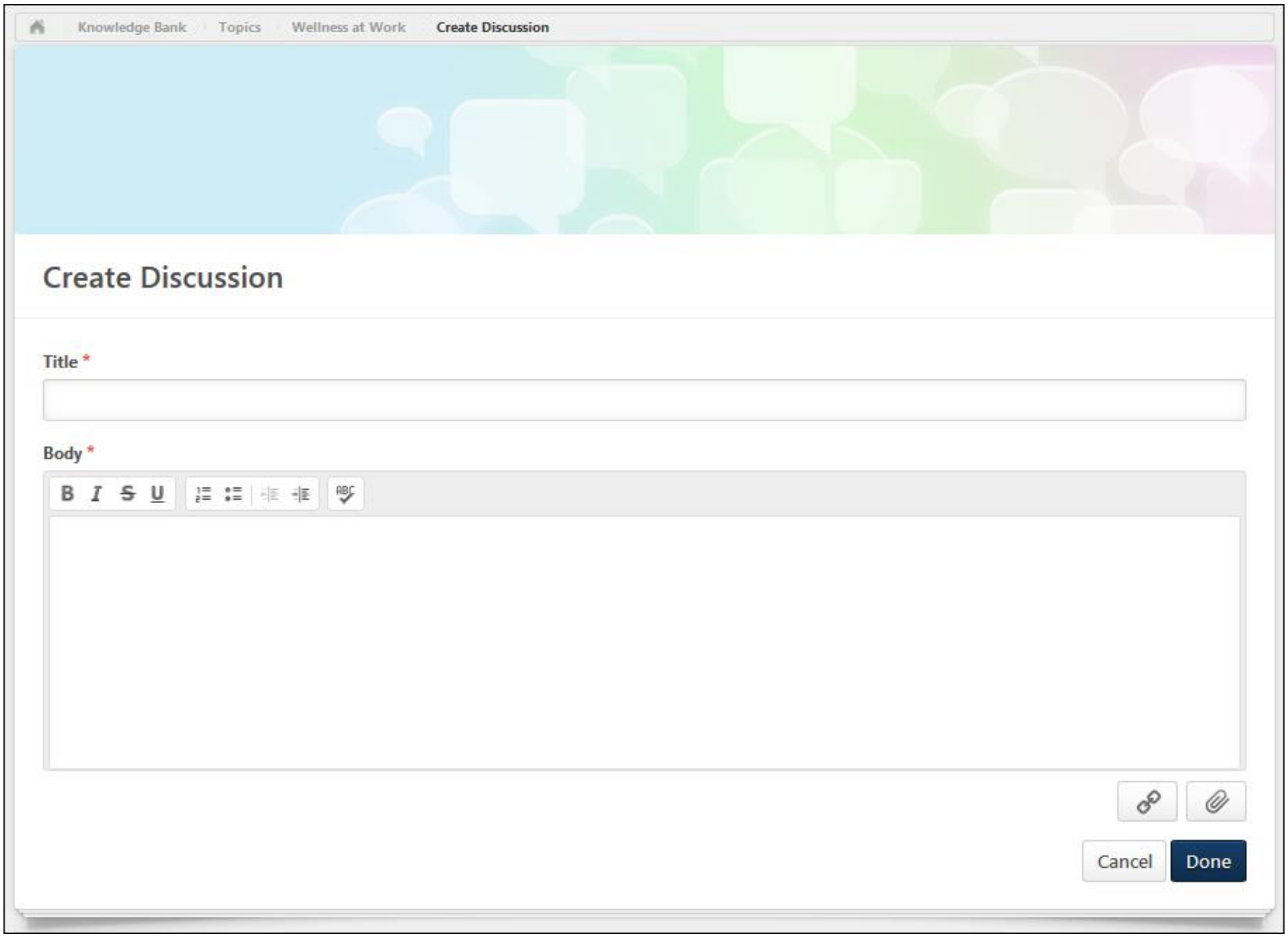
Migration - URL Posting to Discussion Posting

URL postings within the legacy version of Connect are migrated as Discussion postings within the new Knowledge Bank functionality.

URL Posting - Create



Discussion Posting - Create



Data Migration

The following data is not migrated:

Data	Notes
Brief Description	
Rating	
Tags	Posting tags are not migrated. However, they are stored for future use.

The following data is migrated:

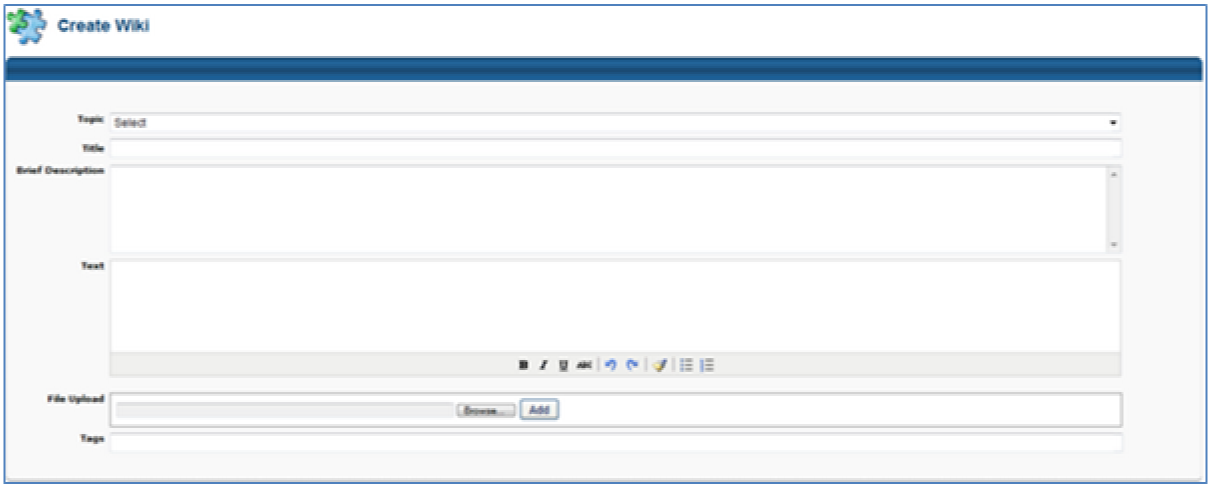
Data	Notes
Parent Topic	
Title	
URL	

Data	Notes
Comments	The posting comments are maintained.
Views	The number of posting views is maintained.
Timestamps	The timestamps that indicates when the posting was created and when comments are added are maintained.
Posting Creator	

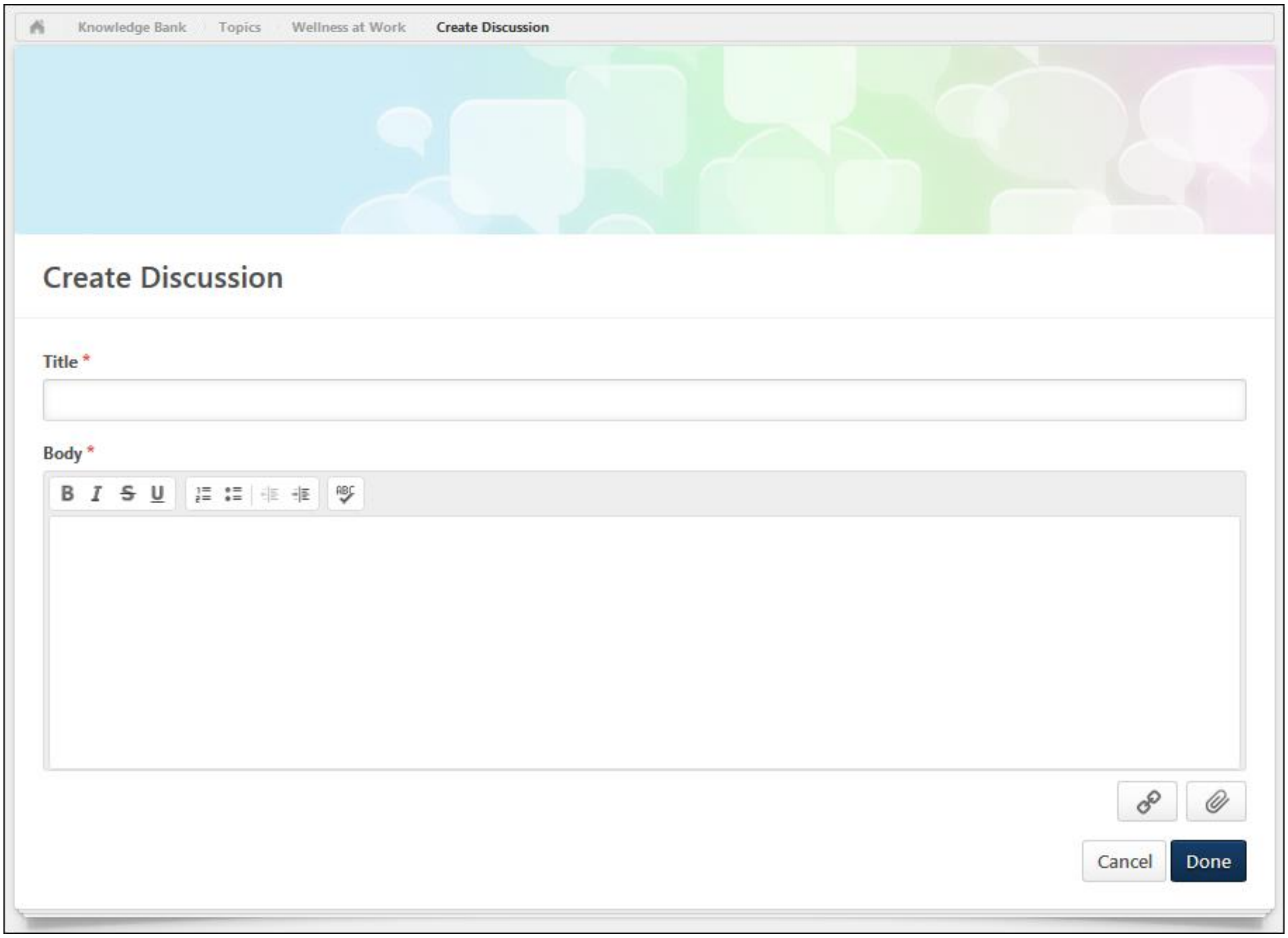
Migration - Wiki Posting to Discussion Posting

Wiki postings within the legacy version of Connect are migrated as Discussion postings within the new Knowledge Bank functionality.

Wiki Posting - Create



Discussion Posting - Create



Data Migration

The following data is not migrated:

Data	Notes
Brief Description	
Rating	
Tags	Posting tags are not migrated. However, they are stored for future use.
Editable by Others	This setting is not migrated.

The following data is migrated:

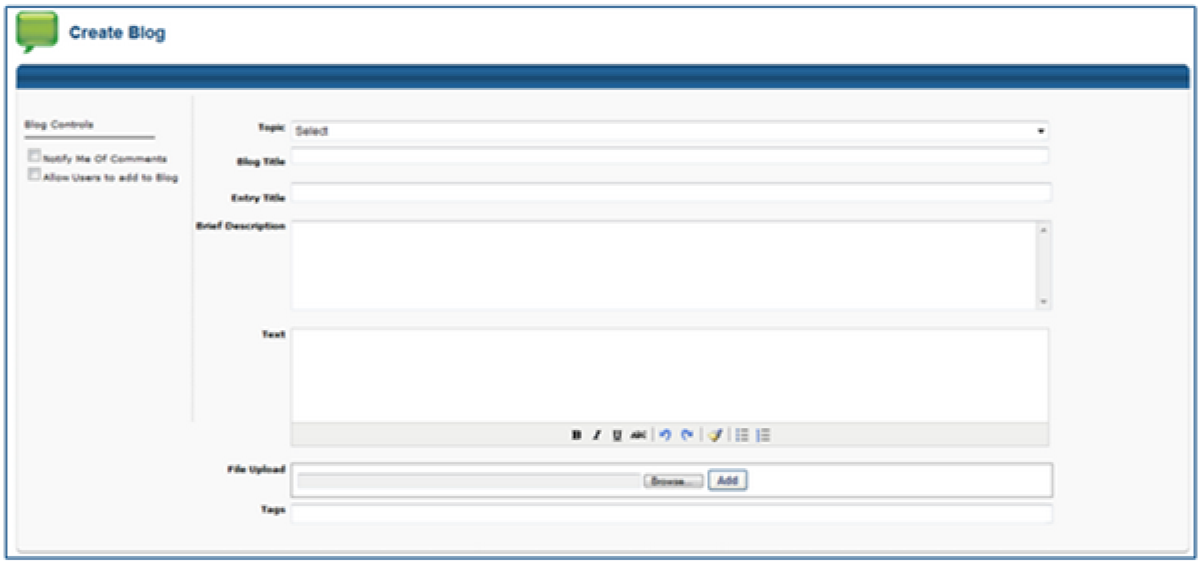
Data	Notes
Parent Topic	
Title	

Data	Notes
Text (Body)	
File Attachments	
Comments	The posting comments are maintained.
Views	The number of posting views is maintained.
Timestamps	The timestamps that indicates when the posting was created and when comments are added are maintained.
Posting Creator	
Contributor History	This data is maintained. However, this information is not displayed in the system.

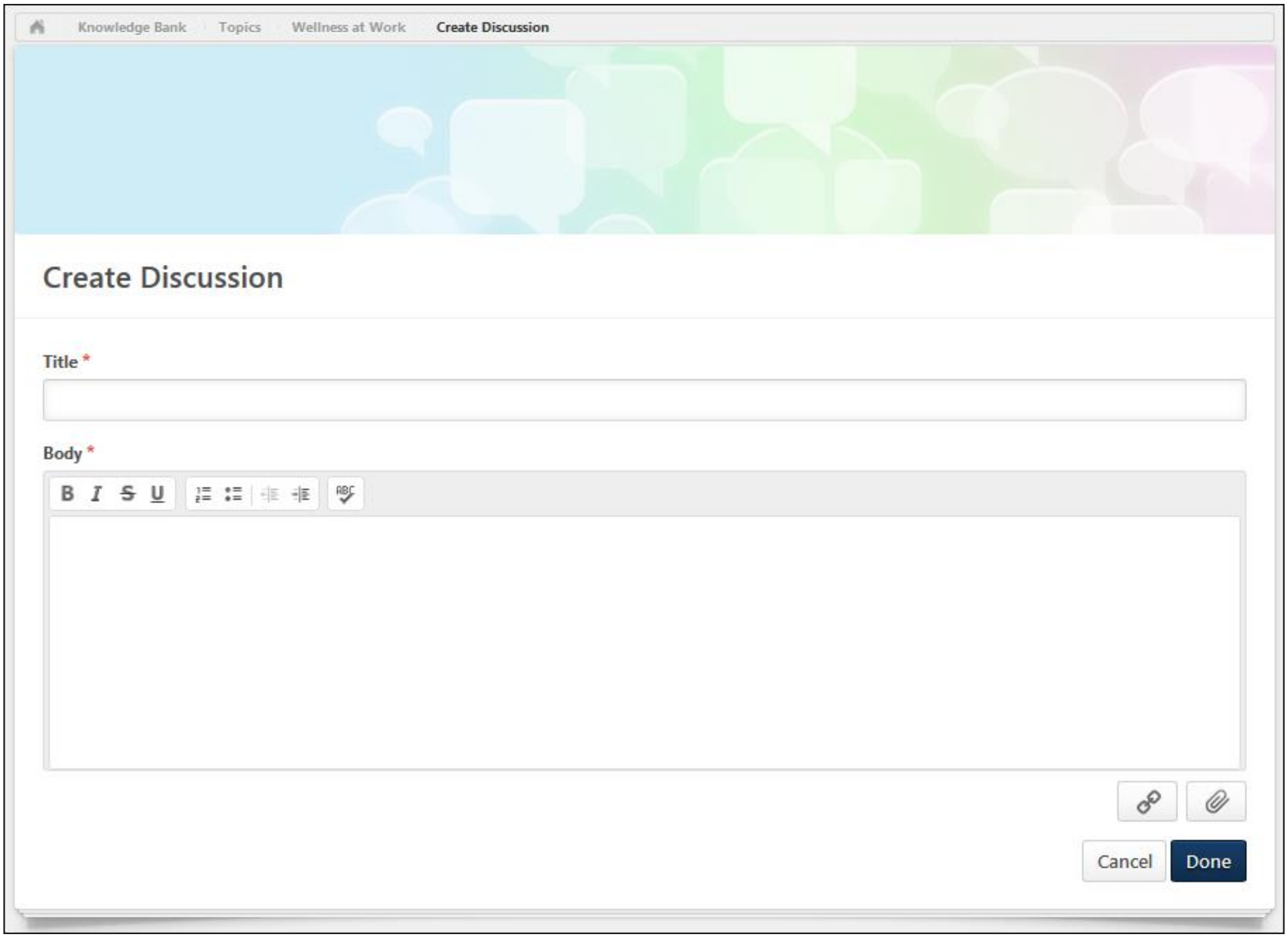
Migration - Blog Posting to Discussion Posting

Blog postings within the legacy version of Connect are migrated as Discussion postings within the new Knowledge Bank functionality. Each blog entry is migrated as a separate Discussion posting.

Blog Posting - Create



Discussion Posting - Create



Data Migration

The following data is not migrated:

Data	Notes
Brief Description	
Rating	
Tags	Posting tags are not migrated. However, they are stored for future use.
Notify Me Of Comments	This setting is not migrated.
Allow Users to add to Blog	This setting is not migrated.

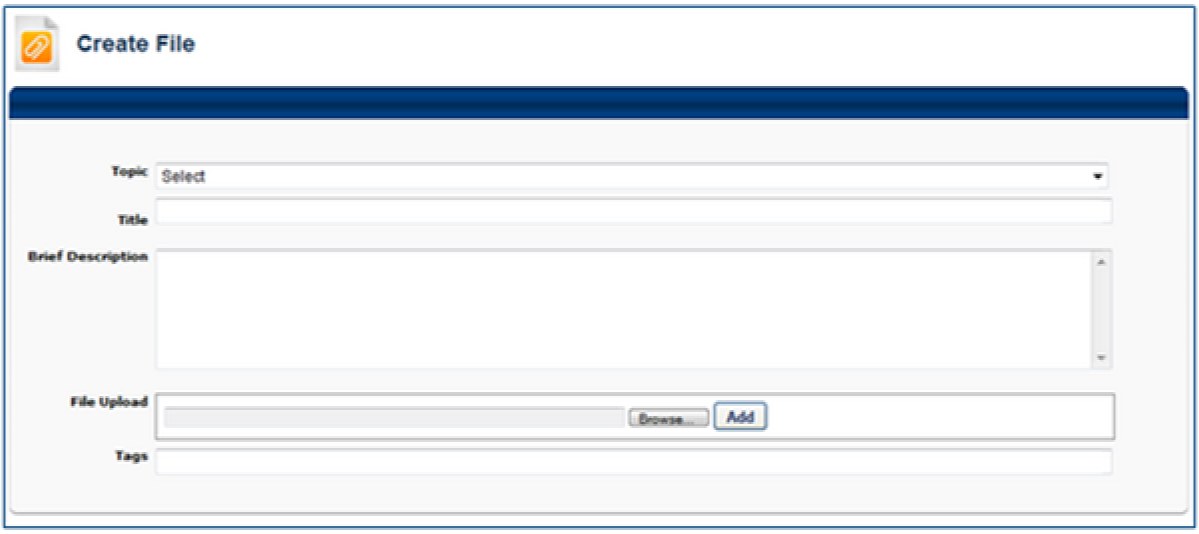
The following data is migrated:

Data	Notes
Parent Topic	
Title	
Text (Body)	
File Attachments	
Comments	The posting comments are maintained.
Views	The number of posting views is maintained.
Timestamps	The timestamps that indicates when the posting was created and when comments are added are maintained.
Posting Creator	

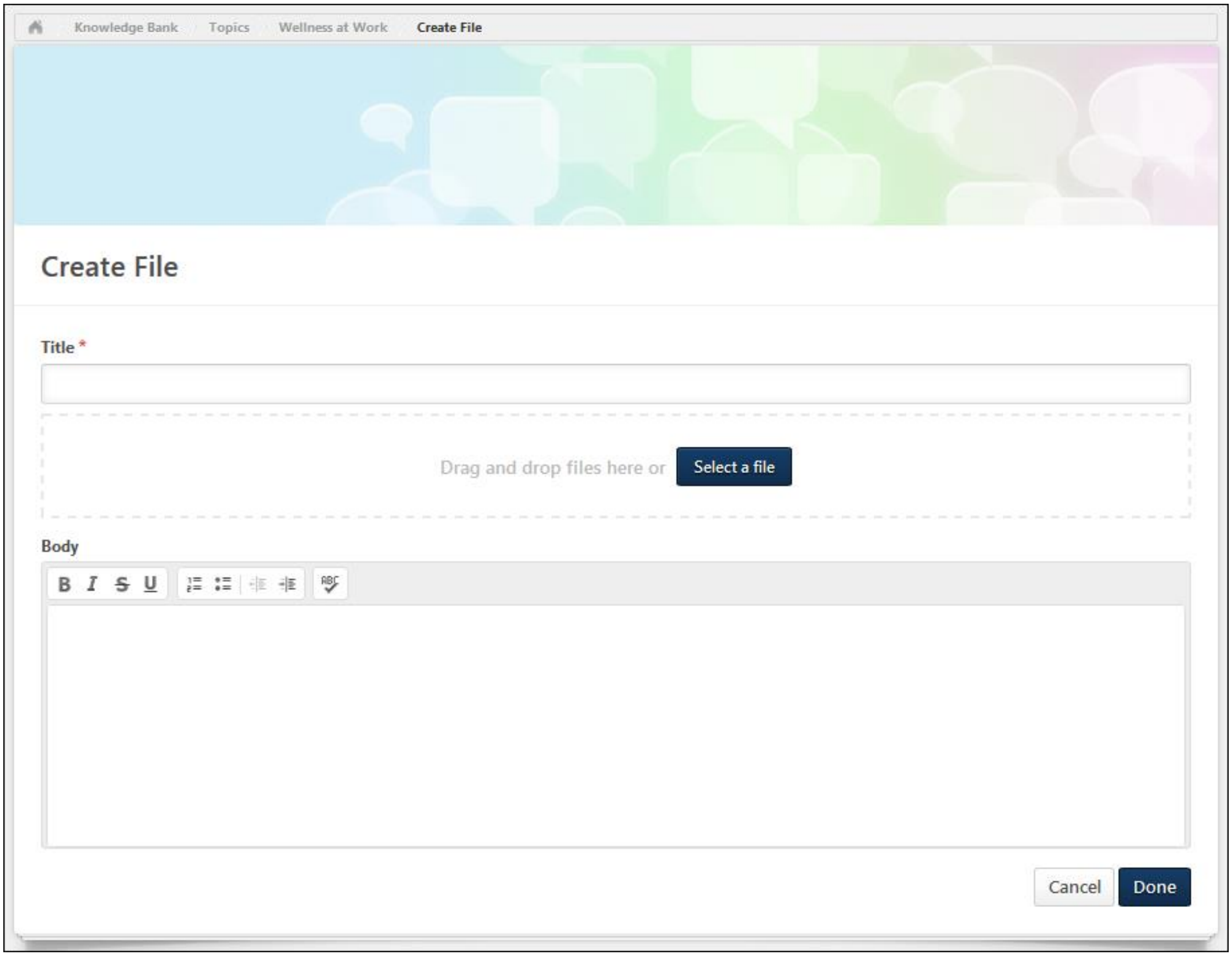
Migration - File Posting to File Posting

File postings within the legacy version of Connect are migrated as File postings within the new Knowledge Bank functionality.

File Posting - Create (Old)



File Posting - Create (New)



Data Migration

The following data is not migrated:

Data	Notes
Brief Description	
Rating	
Tags	Posting tags are not migrated. However, they are stored for future use.

The following data is migrated:

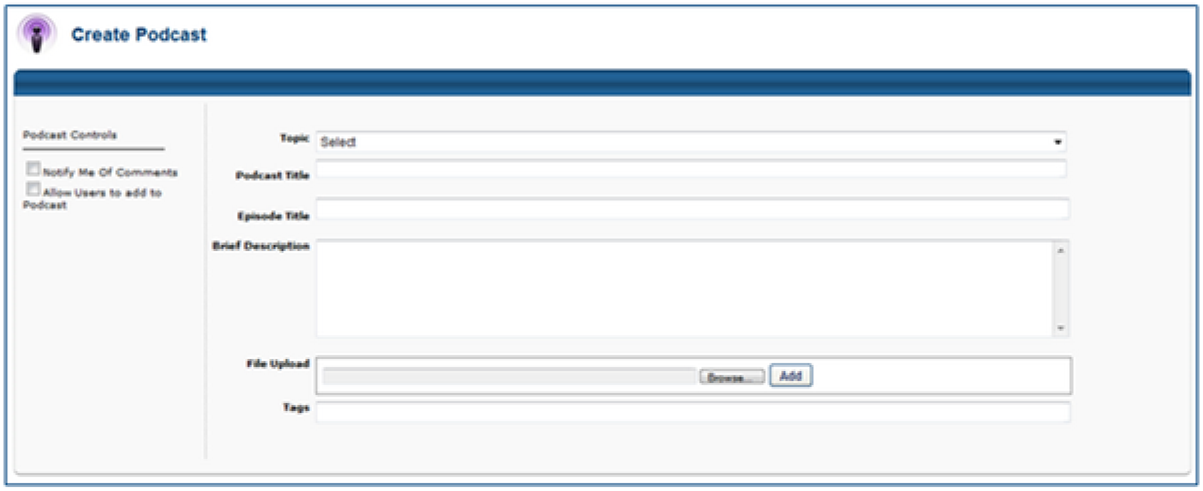
Data	Notes
Parent Topic	

Data	Notes
Title	
Text (Body)	
File Attachments	With the new Connect, file attachments are limited to 20 MB. All files are migrated from the old File posting to the new File posting. However, if the File posting is edited, the file attachment size limit of 20 MB is enforced. With the new Connect, File postings are limited to one file attachment. All files are migrated from the old File posting to the new File posting. However, if the File posting is edited, the file attachment limit of one is enforced.
Comments	The posting comments are maintained.
Views	The number of posting views is maintained.
Timestamps	The timestamps that indicates when the posting was created and when comments are added are maintained.
Posting Creator	

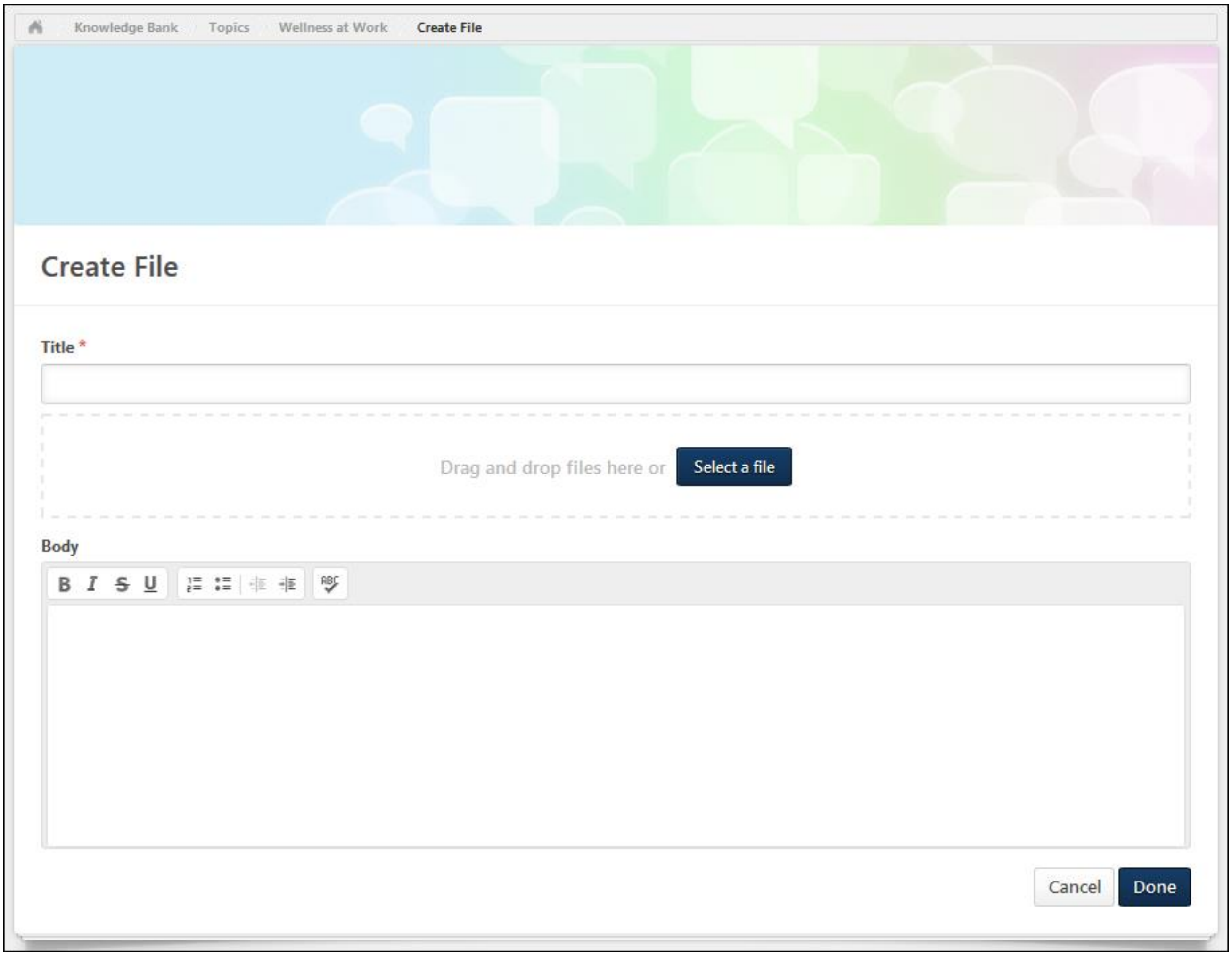
Migration - Podcast Posting to File Posting

Podcast postings within the legacy version of Connect are migrated as File postings within the new Knowledge Bank functionality.

Podcast Posting - Create (Old)



File Posting - Create (New)



Data Migration

The following data is not migrated:

Data	Notes
Brief Description	
Rating	
Tags	Posting tags are not migrated. However, they are stored for future use.
Podcast Title	The Podcast Title is not migrated. However, it is stored as a tag for future use.
Notify Me Of Comments	This setting is not migrated.
Allow Users to add to	This setting is not migrated.

Data	Notes
Podcast	

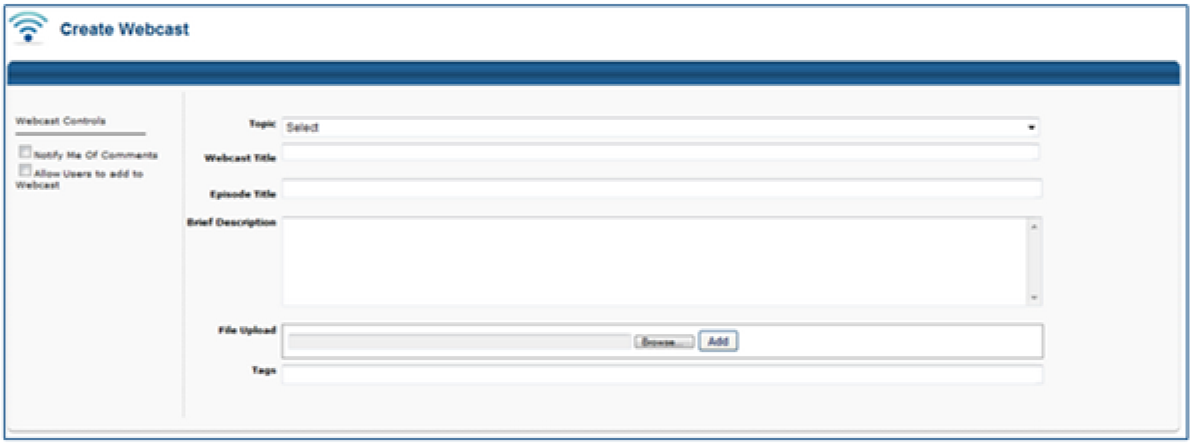
The following data is migrated:

Data	Notes
Parent Topic	
Episode Title	The Episode Title is migrated as the File posting title.
Text (Body)	
File Attachments	With the new Connect, file attachments are limited to 20 MB. All files are migrated from the old File posting to the new File posting. However, if the File posting is edited, the file attachment size limit of 20 MB is enforced. With the new Connect, File postings are limited to one file attachment. All files are migrated from the old File posting to the new File posting. However, if the File posting is edited, the file attachment limit of one is enforced.
Comments	The posting comments are maintained.
Views	The number of posting views is maintained.
Timestamps	The timestamps that indicates when the posting was created and when comments are added are maintained.
Posting Creator	

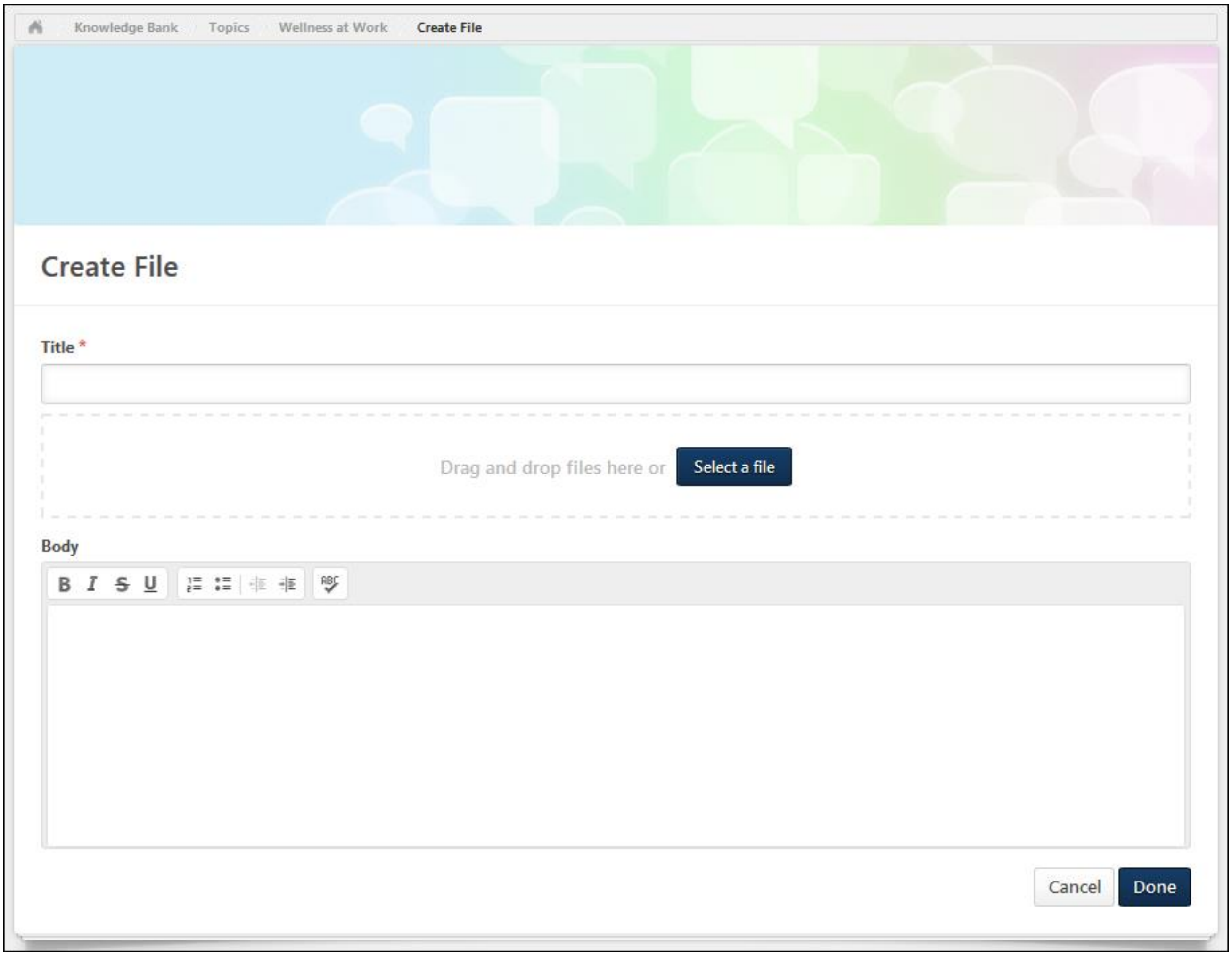
Migration - Webcast Posting to File Posting

Webcast postings within the legacy version of Connect are migrated as File postings within the new Knowledge Bank functionality.

Webcast Posting - Create (Old)



File Posting - Create (New)



Data Migration

The following data is not migrated:

Data	Notes
Brief Description	
Rating	
Tags	Posting tags are not migrated. However, they are stored for future use.
Webcast Title	The Webcast Title is not migrated. However, it is stored as a tag for future use.
Notify Me Of Comments	This setting is not migrated.
Allow Users to add to	This setting is not migrated.

Data	Notes
Webcast	

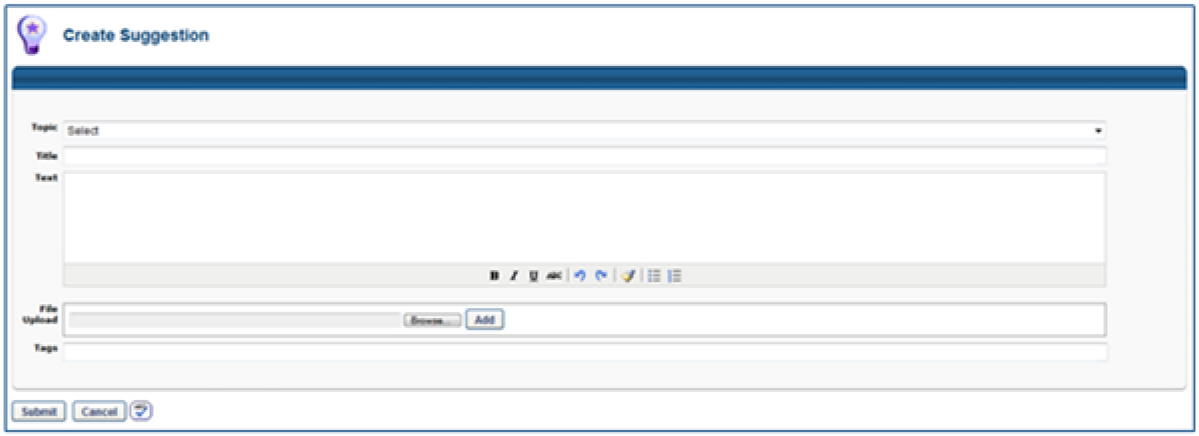
The following data is migrated:

Data	Notes
Parent Topic	
Episode Title	The Episode Title is migrated as the File posting title.
Text (Body)	
File Attachments	With the new Connect, file attachments are limited to 20 MB. All files are migrated from the old File posting to the new File posting. However, if the File posting is edited, the file attachment size limit of 20 MB is enforced. With the new Connect, File postings are limited to one file attachment. All files are migrated from the old File posting to the new File posting. However, if the File posting is edited, the file attachment limit of one is enforced.
Comments	The posting comments are maintained.
Views	The number of posting views is maintained.
Timestamps	The timestamps that indicates when the posting was created and when comments are added are maintained.
Posting Creator	

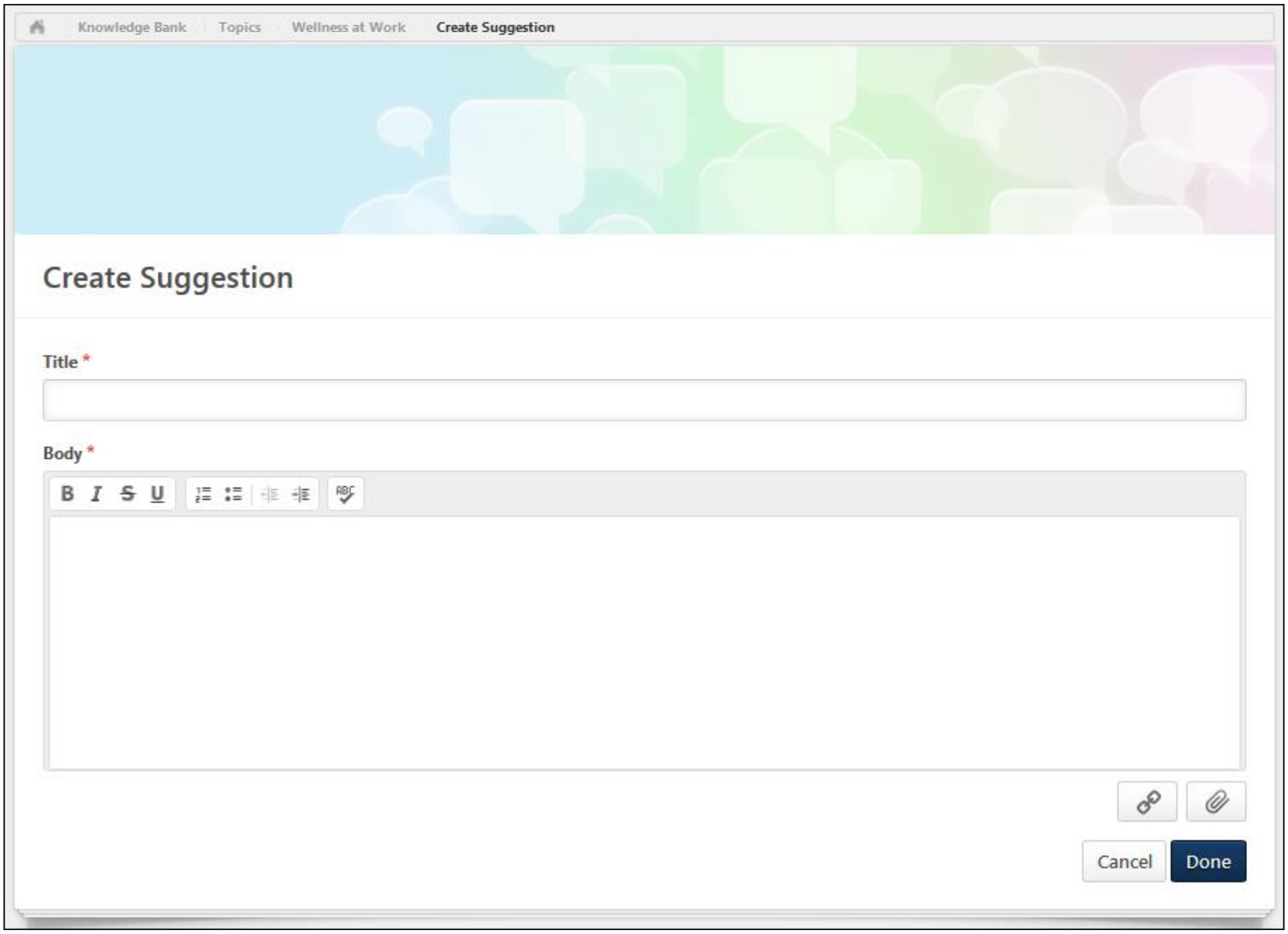
Migration - Suggestion Posting to Suggestion Posting

Suggestion postings within the legacy version of Connect are migrated as Suggestion postings within the new Knowledge Bank functionality.

Suggestion Posting - Create (Old)



Suggestion Posting - Create (New)



Data Migration

The following data is not migrated:

Data	Notes
Brief Description	
Tags	Posting tags are not migrated. However, they are stored for future use.

The following data is migrated:

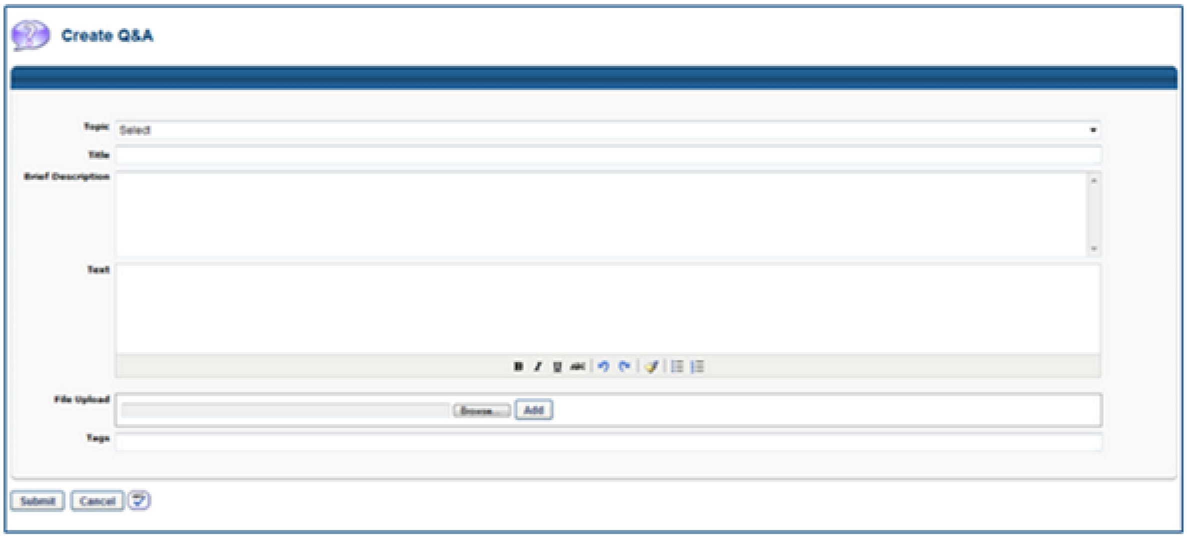
Data	Notes
Parent Topic	
Title	
Text (Body)	
File Attachments	

Data	Notes
Comments	The posting comments are maintained.
Views	The number of posting views is maintained.
Timestamps	The timestamps that indicates when the posting was created and when comments are added are maintained.
Posting Creator	
Vote Count/Total Votes	

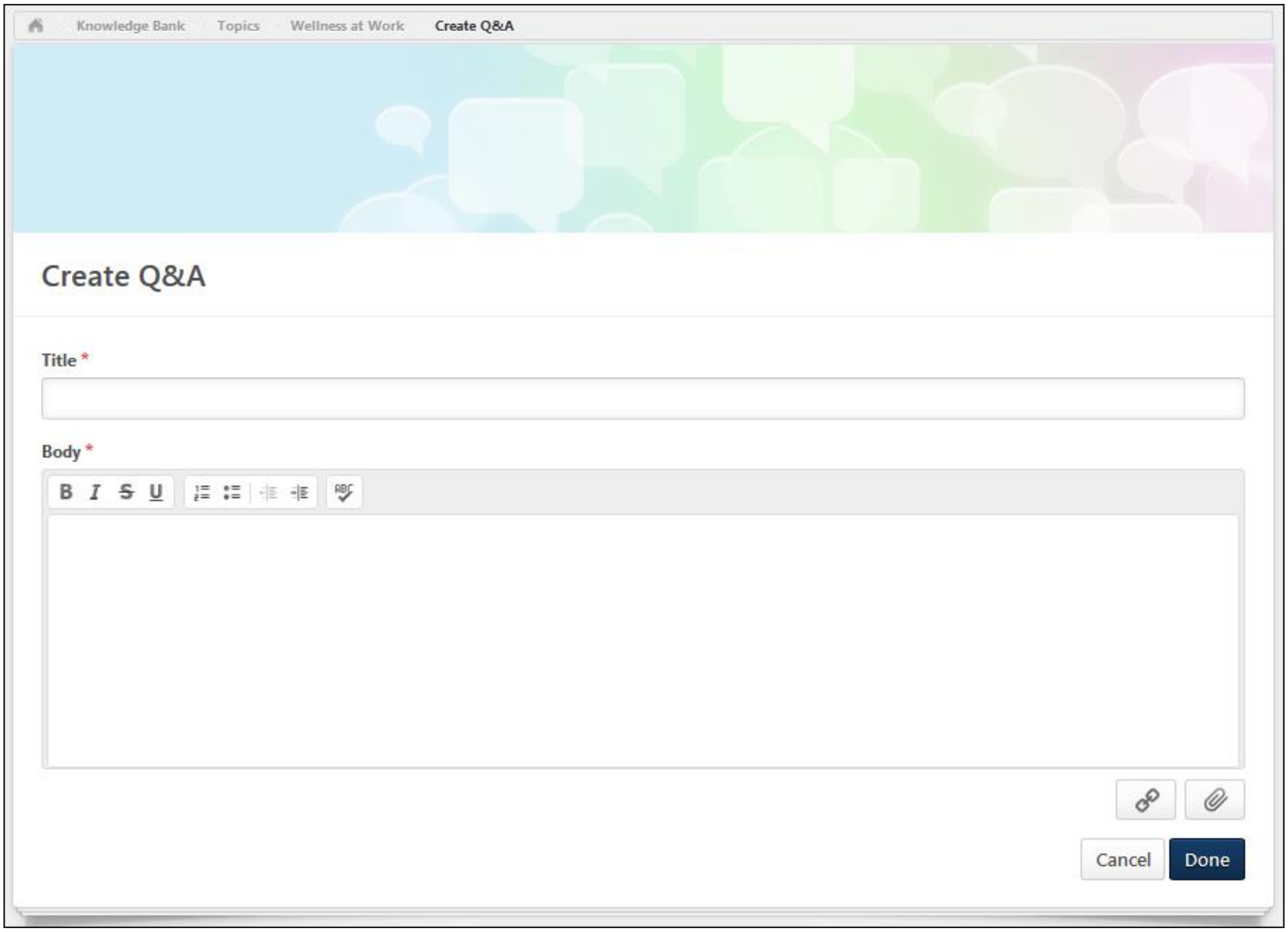
Migration - Q&A Posting to Q&A Posting

Q&A postings within the legacy version of Connect are migrated as Q&A postings within the new Knowledge Bank functionality.

Q&A Posting - Create (Old)



Q&A Posting - Create (New)



Data Migration

The following data is not migrated:

Data	Notes
Brief Description	
Rating	
Tags	Posting tags are not migrated. However, they are stored for future use.

The following data is migrated:

Data	Notes
Parent Topic	
Title	
Text (Body)	

Data	Notes
File Attachments	
Comments	The posting comments are maintained.
Views	The number of posting views is maintained.
Timestamps	The timestamps that indicates when the posting was created and when comments are added are maintained.
Posting Creator	

Learning

Curriculum Player Redesign Phase 2

Curriculum Player Redesign Phase 2

With the November 2014 release, the Curriculum Player was redesigned and enhanced to include additional functionality. With this enhancement, the following enhancements are available within the redesigned Curriculum Player:

- The Curriculum Player now displays incremental curriculum completion based on individual learning object (LO) completion. Curriculum percentages roll up and are weighted at the section and overall levels.
- When navigating away from and then returning to the Curriculum Player, users are now returned to the last page the user viewed.
- Users now have the ability to view full postings in line within the curriculum with the exception of posting comments.
- The Overview buttons on the left navigation are removed. Instead, users can now click a section in the left navigation. When clicked, the section expands to display its subsections in the left navigation and the right panel displays all LOs within the section. In addition, the full section title is now displayed in the navigation menu. If the section title exceeds the width of the navigation menu, the section title is wrapped to the next line.
- LO descriptions are now truncated to two lines of text instead of one.
- Note LOs can now be launched after they are completed.
- Within the Curriculum Player and Transcript, the primary action for online courses that are pending acknowledgment is now Acknowledge.

Considerations

This enhancement only applies to the new Curriculum Player. The Certification Player is not impacted.

Implementation

In Stage portals, the redesigned Curriculum Player is automatically enabled for all organizations using the Curriculum Player.

In Production portals, the redesigned Curriculum Player is available to all organizations using the Learning module, but is controlled by a backend setting that must be enabled. To enable this functionality, contact Global Product Support or your Client Success Manager.

No migration is required when switching from the old Curriculum Player to the redesigned Curriculum Player.

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category

Curricula Admin - Manage	Grants ability to create new and edit/update existing curricula. This permission can be constrained by OU, User's OU, Provider, and User's LO Availability. This is an administrator permission.	Learning - Administration
Curriculum Player Options	Grants ability to enable Curriculum Player feature via the General step when creating or editing a curriculum. This permission cannot be constrained. This is an administrator permission.	Learning - Administration

Curriculum Player - Progress Calculation

Prior to this enhancement, all requirements for a section or subsection had to be satisfied in order for the section progress to increase.

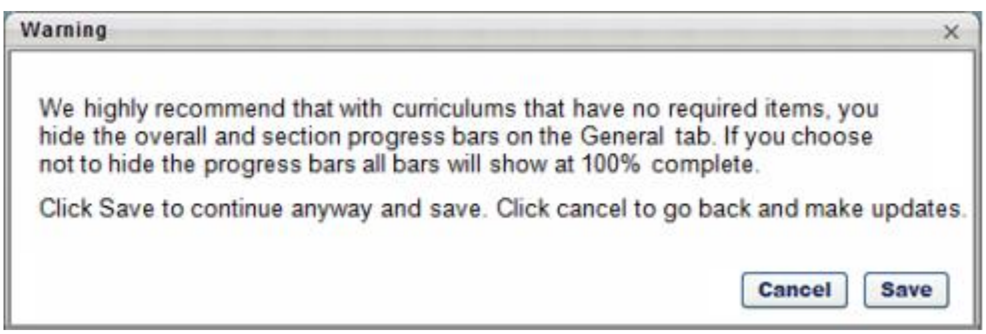
With this enhancement, curriculum progress is displayed incrementally based on learning object (LO) completion. That is, each time a required LO is completed, the section and overall curriculum completion percentage is incrementally increased.

Completion percentages always round up for all numbers up to 99%. Once 99% completion is reached, the completion percentage remains at 99% until exactly 100% completion is reached. Then, the completion percentage is updated to 100%. 100% is the maximum completion percentage for a curriculum.

If a curriculum or a section do not have any required items (e.g., 0 of 3 items are required), then the progress for the corresponding curriculum or section is automatically 100%.

- The completion of a child section that has no required items does not contribute to the completion percentage of its parent section or curriculum unless the parent section or curriculum is 100% completed by the child section. For example, if Section 1.1 is a subsection of Section 1, and Section 1.1 has zero required items, then Section 1.1 is automatically 100%. If the completion of Section 1.1 results in Section 1 being completed (i.e., all other requirements for Section 1 have been completed), then Section 1 is 100% complete. However, if Section 1 has other requirements that have not yet been completed, then the progress for Section 1 does not include Section 1.1.

When creating a curriculum, when a curriculum is saved in which the curriculum has no required LOs, a warning message is displayed. This message is intended to discourage administrators from creating a curriculum with no required LOs.



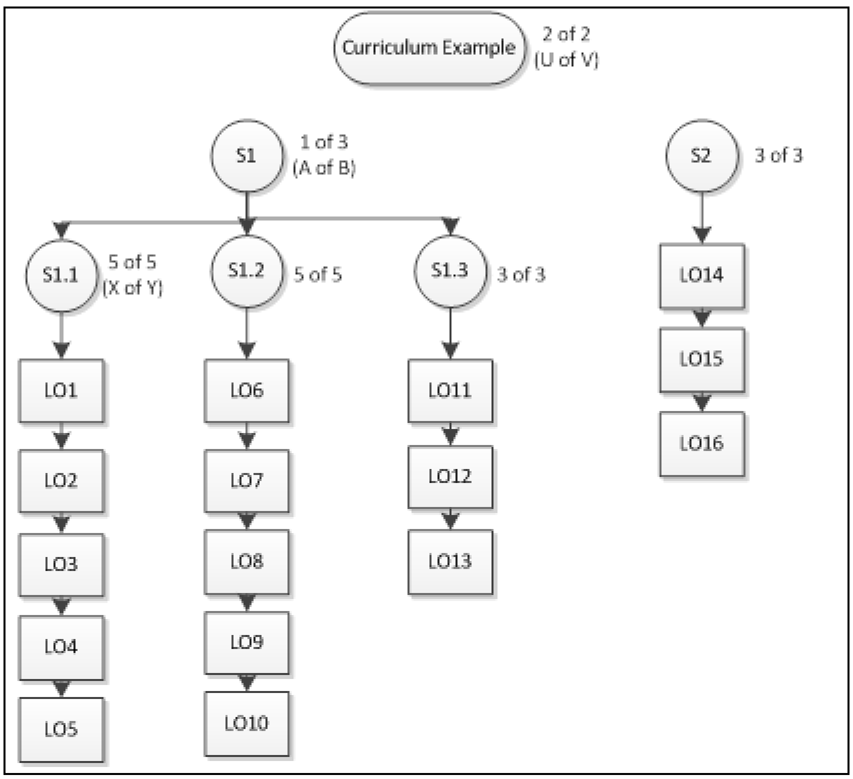
Use Case

1. Ellen is a new employee and has been assigned her New Hire curriculum.
2. She navigates to the curriculum from her transcript and begins viewing the curriculum sections and items.
3. She sees that Section 1 and Section 2 each have three online courses and only two items are required from each section.

4. Ellen navigates to Section 1, and launches and completes one online course. As soon as the course is complete, the overall curriculum progress bar is updated to 25% and the section progress bar is updated to 50%. This immediately shows Ellen her progress without having to complete the entire section. She is able to receive acknowledgment of the work she has completed as she completes it.
5. In Section 1, Ellen launches and completes a second online course. As soon as the second course is complete, the overall curriculum progress bar is updated to 50% and the section progress bar is updated to 100%.
6. Although it is not required, Ellen decides she wants to complete the third course in Section 1. She launches and completes the third course. After completing the third course, the overall and section progress bars are not impacted because the course is not required and does not change her completion progress.

Curriculum Progress Calculation Details

The examples in this section use the following curriculum as an example:



Calculation Rules

When calculating the completion progress for a section that contains only LOs (e.g., section S1.1 in the image), then the section progress is dependent upon the number of LOs that are required to be completed within the section. For example, in section S1.1 in the image there are a total of five LOs in the section, and all five LOs must be completed to complete the section (i.e., 5 of 5, or X of Y).

- Completion Progress = (Number of LOs completed in section / Number of items required for section)
- For example, S1.1 requires 5 of 5 LOs. If 3 have been completed, then the section progress equals (3/5), or 60%.

When calculating the completion progress for a section that contains only subsections (e.g., section S1 in the image), then the section progress is dependent upon the number of subsections that are required to be completed within the section. For example, in section S1 in the image there are three subsections in the section, and one subsection must be completed to complete the section (i.e., 1 of 3 or A of B).

- Completion Progress = Sum of highest progress percentages from required subsections / Number of required subsections
- For example, S1 requires 1 of 3 subsections. If S1.1 is 40% complete, S1.2 is 20% complete, and S1.3 is 34% complete, then the progress for S1 is 40%/1, or 40%. If S1 required 2 of 3 subsections, then the progress for S1 would be (40%+34%)/2, or 37%.

If a curriculum or a section does not have any required LOs, then the progress for the corresponding curriculum or section is automatically 100%.

- The completion of a child section that has no required items does not contribute to the completion percentage of its parent section or curriculum unless the parent section or curriculum is 100% completed by the child section.

Use Case 1

LO Completed	Subsection Completion %	Section Completion %	Overall Completion %	Notes
LO1	S1.1: (1/5)=20% S1.2: (0/5)=0% S1.3: (0/3)=0%	S1: 20%/1=20% S2: 0%/1=0%	Overall % = (S1+S2)/2 (20%+0%)/2=10%	
LO6	S1.1: (1/5)=20% S1.2: (1/5)=20% S1.3: (0/3)=0%	S1: 20%/1=20% S2: 0%/1=0%	(20%+0%)/2=10%	Overall progress is unchanged because progress for S1.1 and S1.2 are the same.
LO2	S1.1: (2/5)=40% S1.2: (1/5)=20% S1.3: (0/3)=0%	S1: 40%/1=40% S2: 0%/1=0%	(40%+0%)/2=20%	
LO7	S1.1:	S1: 40%/1=40%	(40%+0%)/2=20%	Overall progress is

LO Completed	Subsection Completion %	Section Completion %	Overall Completion %	Notes
	(2/5)=40% S1.2: (2/5)=40% S1.3: (0/3)=0%	S2: 0%/1=0%		unchanged because progress for S1.1 and S1.2 are the same.
LO3	S1.1: (3/5)=60% S1.2: (2/5)=40% S1.3: (0/3)=0%	S1: 60%/1=60% S2: 0%/1=0%	(60%+0%)/2=30%	
LO4	S1.1: (4/5)=80% S1.2: (2/5)=40% S1.3: (0/3)=0%	S1: 80%/1=80% S2: 0%/1=0%	(80%+0%)/2=40%	
LO5	S1.1: (5/5)=100% S1.2: (2/5)=40% S1.3: (0/3)=0%	S1: 100%/1=100% S2: 0%/1=0%	(100%+0%)/2=50%	

Use Case 2

LO Completed	Subsection Completion %	Section Completion %	Overall Completion %	Notes
LO11	S1.1: (0/5)=0% S1.2: (0/5)=0% S1.3: (1/3)=34%	S1: 34%/1=34% S2: 0%/1=0%	Overall % = (S1+S2)/2 (34%+0%)/2=17%	
LO6	S1.1: (0/5)=0% S1.2: (1/5)=20% S1.3: (1/3)=34%	S1: 34%/1=34% S2: 0%/1=0%	(34%+0%)/2=17%	Section S1 and Overall progress are unchanged because progress for S1.3 is higher than progress for S1.2 and only one subsection is required for S1.
LO1	S1.1: (1/5)=20%	S1: 34%/1=34%	(34%+0%)/2=17%	Section S1 and Overall progress are unchanged

LO Completed	Subsection Completion %	Section Completion %	Overall Completion %	Notes
	S1.2: (1/5)=20% S1.3: (1/3)=34%	S2: 0%/1=0%		because progress for S1.3 is higher than progress for S1.1 and only one subsection is required for S1.
LO12	S1.1: (1/5)=20% S1.2: (1/5)=20% S1.3: (2/3)=67%	S1: 67%/1=67% S2: 0%/1=0%	(67%+0%)/2=34%	
LO13	S1.1: (1/5)=20% S1.2: (1/5)=20% S1.3: (3/3)=100%	S1: 100%/1=100% S2: 0%/1=0%	(100%+0%)/2=50%	

Use Case 3

In this Use Case, the requirement for S1 is increased to 2 of 3.

LO Completed	Subsection Completion %	Section Completion %	Overall Completion %	Notes
LO1	S1.1: (1/5)=20% S1.2: (0/5)=0% S1.3: (0/3)=0%	S1: (20%+0%)/2=10% S2: 0%/1=0%	Overall % = (S1+S2)/2 (10%+0%)/2=5%	
LO6	S1.1: (1/5)=20% S1.2: (1/5)=20% S1.3: (0/3)=0%	S1: (20%+20%)/2=20% S2: 0%/1=0%	(20%+0%)/2=10%	Since S1.1 and S1.2 are the two highest progress subsections in S1, they both count towards section S1 and Overall progress.
LO2	S1.1: (2/5)=40% S1.2: (1/5)=20% S1.3:	S1: (40%+20%)/2=30% S2: 0%/1=0%	(30%+0%)/2=15%	Since S1.1 and S1.2 are the two highest progress subsections in S1, they both count

LO Completed	Subsection Completion %	Section Completion %	Overall Completion %	Notes
	(0/3)=0%			towards section S1 and Overall progress.
LO7	S1.1: (2/5)=40% S1.2: (2/5)=40% S1.3: (0/3)=0%	S1: (40%+40%)/2=40% S2: 0%/1=0%	(40%+0%)/2=20%	Since S1.1 and S1.2 are the two highest progress subsections in S1, they both count towards section S1 and Overall progress.
LO11	S1.1: (2/5)=40% S1.2: (2/5)=40% S1.3: (1/3)=34%	S1: (40%+40%)/2=40% S2: 0%/1=0%	(40%+0%)/2=20%	Since S1.1 and S1.2 remain the two highest progress subsections in S1, they both count towards section S1 and Overall progress.
LO12	S1.1: (2/5)=40% S1.2: (2/5)=40% S1.3: (2/3)=67%	S1: (67%+40%)/2=54% S2: 0%/1=0%	(54%+0%)/2=27%	Now S1.3 and S1.1 are the two highest subsections in S1.
LO3	S1.1: (3/5)=60% S1.2: (2/5)=40% S1.3: (2/3)=67%	S1: (67%+60%)/2=64% S2: 0%/1=0%	(64%+0%)/2=32%	Since S1.3 and S1.1 remain the two highest progress subsections in S1, they both count towards section S1 and Overall progress.
LO4	S1.1: (4/5)=80% S1.2: (2/5)=40% S1.3: (2/3)=67%	S1: (67%+80%)/2=74% S2: 0%/1=0%	(74%+0%)/2=37%	Since S1.3 and S1.1 remain the two highest progress subsections in S1, they both count towards section S1 and Overall progress.
LO5	S1.1:	S1:	(84%+0%)/2=42%	Since S1.3 and

LO Completed	Subsection Completion %	Section Completion %	Overall Completion %	Notes
	(5/5)=100% S1.2: (2/5)=40% S1.3: (2/3)=67%	(67%+100%)/2=84% S2: 0%/1=0%		S1.1 remain the two highest progress subsections in S1, they both count towards section S1 and Overall progress.
LO13	S1.1: (5/5)=100% S1.2: (2/5)=40% S1.3: (3/3)=100%	S1: (100%+100%)/2=100% S2: 0%/1=0%	(100%+0%)/2=50%	Since S1.3 and S1.1 remain the two highest progress subsections in S1, they both count towards section S1 and Overall progress.

Use Case 4

In this Use Case, the requirement for S1 is increased to 3 of 3.

LO Completed	Subsection Completion %	Section Completion %	Overall Completion %	Notes
LO1	S1.1: (1/5)=20% S1.2: (0/5)=0% S1.3: (0/3)=0%	S1: (20%+0%+0%)/3=7% S2: 0%/1=0%	Overall % = (S1+S2)/2 (7%+0%)/2=4%	All three subsections within S1 count towards section S1 and Overall progress.
LO6	S1.1: (1/5)=20% S1.2: (1/5)=20% S1.3: (0/3)=0%	S1: (20%+20%+0%)/3=12% S2: 0%/1=0%	(12%+0%)/2=6%	
LO2	S1.1: (2/5)=40% S1.2: (1/5)=20% S1.3: (0/3)=0%	S1: (40%+20%+0%)/3=20% S2: 0%/1=0%	(20%+0%)/2=10%	

LO Completed	Subsection Completion %	Section Completion %	Overall Completion %	Notes
LO7	S1.1: (2/5)=40% S1.2: (2/5)=40% S1.3: (0/3)=0%	S1: (40%+40%+0%)/3=27% S2: 0%/1=0%	(27%+0%)/2=14%	
LO3	S1.1: (3/5)=60% S1.2: (2/5)=40% S1.3: (0/3)=0%	S1: (60%+40%+0%)/3=34% S2: 0%/1=0%	(34%+0%)/2=17%	
LO4	S1.1: (4/5)=80% S1.2: (2/5)=40% S1.3: (0/3)=0%	S1: (80%+40%+0%)/3=40% S2: 0%/1=0%	(40%+0%)/2=20%	
LO5	S1.1: (5/5)=100% S1.2: (2/5)=40% S1.3: (0/3)=0%	S1: (100%+40%+0%)/3=47% S2: 0%/1=0%	(47%+0%)/2=24%	
LO8	S1.1: (5/5)=100% S1.2: (3/5)=60% S1.3: (0/3)=0%	S1: (100%+60%+0%)/3=54% S2: 0%/1=0%	(54%+0%)/2=27%	
LO9	S1.1: (5/5)=100% S1.2: (4/5)=80% S1.3: (0/3)=0%	S1: (100%+80%+0%)/3=60% S2: 0%/1=0%	(60%+0%)/2=30%	
LO10	S1.1: (5/5)=100% S1.2: (5/5)=100% S1.3: (0/3)=0%	S1: (100%+100%+0%)/3=67% S2: 0%/1=0%	(67%+0%)/2=34%	
LO11	S1.1: (5/5)=100% S1.2:	S1: (100%+100%+34%)/3=78% S2: 0%/1=0%	(78%+0%)/2=39%	

LO Completed	Subsection Completion %	Section Completion %	Overall Completion %	Notes
	(5/5)=100% S1.3: (1/3)=34%			
LO12	S1.1: (5/5)=100% S1.2: (5/5)=100% S1.3: (2/3)=67%	S1: (100%+100%+67%)/3=89% S2: 0%/1=0%	(89%+0%)/2=45%	
LO13	S1.1: (5/5)=100% S1.2: (5/5)=100% S1.3: (3/3)=100%	S1: (100%+100%+100%)/3=100% S2: 0%/1=0%	(100%+0%)/2=50%	

Curriculum Player - Navigation Workflow

Prior to this enhancement, if a user navigated away from the Curriculum Player and then returned to the Curriculum Player, the user would be navigated to the section that contained the next actionable learning object (LO).

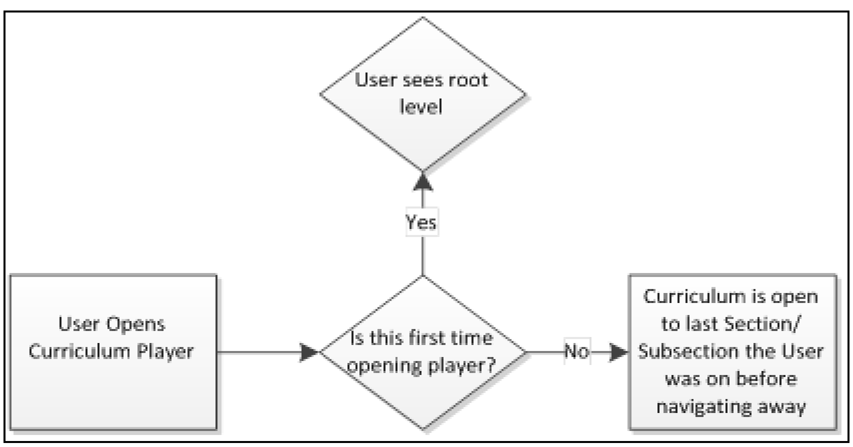
With this enhancement, if a user navigates away from the Curriculum Player and then returns to the Curriculum Player, the user is navigated to the section or subsection page that the user last viewed prior to navigating away from the Curriculum Player.

- If the last section or subsection page is no longer available to the user (e.g., the corresponding LO is removed from the curriculum), the user is brought to the proceeding page of the last viewed section or subsection.

Use Case

1. Ellen is a new employee and has been assigned her New Hire curriculum.
2. She navigates to the curriculum from her transcript. Since this is the first time she is viewing the curriculum, she sees the root level of the curriculum, which displays all of the first level sections and LOs.
3. She clicks Section 1 and then Section 1.1.
4. Ellen closes the Internet browser window.
5. When she reopens the curriculum, Section 1.1 is displayed, which is the section that Ellen most recently viewed prior to exiting the curriculum player. This allows Ellen to resume the curriculum where she last left it.

Workflow



Curriculum Player - Postings Displayed Inline

Prior to this enhancement, when a Connect or Knowledge Bank posting was displayed in the Curriculum Player, only the posting creator, the posting text, and the posting creation date and time were displayed. Users had to click the **View Full Posting** button to view the entire posting.

With this enhancement, the entire posting is visible inline for all posting types. All included links, attachments, and images are displayed inline along with the posting creator, the posting text, and the posting creation date and time. If the posting has comments, then a **View Comments** button is available, which opens the full posting in a new window.

Additionally, when hovering over an Old Connect posting, the specific posting type is displayed (e.g., Forum). Previously, "Connect Posting" was displayed.

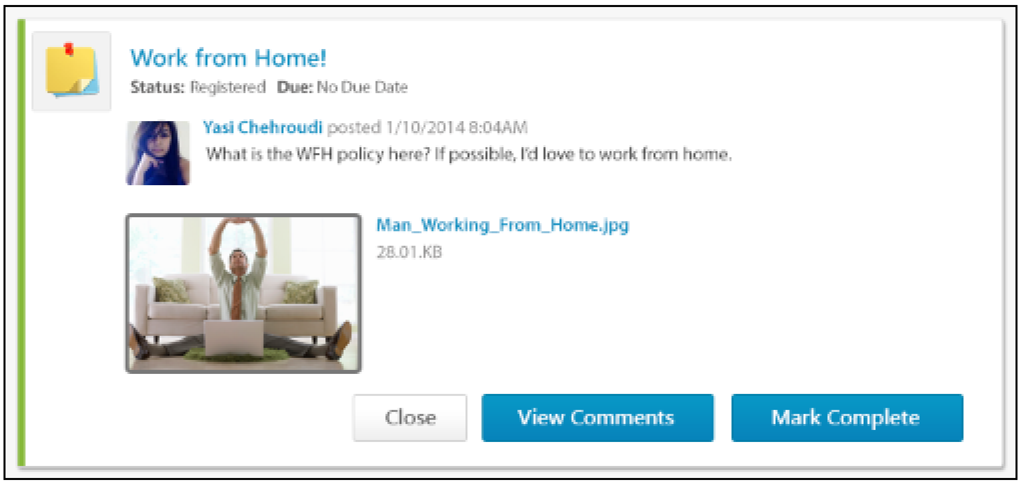
Users can click the **Launch** option to view the posting details.

When a posting is expanded, the following information is displayed for all posting types:

- Color Strip - The left edge of the curriculum item is color coded to represent the proximity to the due date of the item. For example, if the item due date is past due, then the color strip is red to indicate that item is due immediately. If an item due date is not eminent, then the color strip is green to indicate that item is not due immediately. *See the Color Strip Key section below for additional information.*
- Icon - An LO icon is displayed to indicate the type of LO. Each LO type is represented by a unique icon. When a LO is completed, a checkmark icon  appears in the upper-right corner of the LO icon.
- Title - This displays the LO title. Click the LO title to open the Training Details page for the LO. This action is only available once the LO is activated. *See Training Details - View for additional information.*
- Status - This displays the current status of the LO.
- Due - This displays the LO due date.
- Training Hours - This displays how long the training will take to complete. If there are no training hours set for the LO, then this field does not display.
- Posting Author - A photograph and the name of the user who created the posting is displayed.
- Posting Date and Time - The date and time at which the posting was created is displayed.
- Posting Text - Below the posting author's name, the body of the posting is displayed.
- Posting Attachment - If a posting has an attachment (e.g., image, file, URL), the attachment appears below the posting text.
    - Images - For image attachments, a preview of the image is displayed. The image file name and size is displayed to the right of the preview. The file name can be clicked to download the file.

- File - For other attachment types, an icon is displayed that indicates the type of attachment. The attachment file name and size is displayed to the right of the icon. The file name can be clicked to download the file.
- URL - For URL attachments, a preview of the URL is displayed, if available. The URL title, URL, and description are displayed to the right of the preview. The URL title can be clicked to open the URL in a new window.

- Posting Action Buttons - The following buttons appear below the posting details:
  - **Close** - Click this button to close the expanded view of the posting. This does not complete the posting.
  - **View Comments** - Click this button to view the full posting in a new window. In the new window, all posting comments are displayed below the posting. This button is only available if the posting has associated comments.
  - **Mark Complete** - Click this button to mark the posting as compete. This indicates that the user has viewed the posting.



Use Case

1. Ellen is a new employee and has been assigned her New Hire curriculum.
2. She navigates to the curriculum from her transcript and sees a posting titled "Things I wish I knew on my first day."
3. She clicks the **Launch** option. The posting is displayed within the Curriculum Player. Directly within the Curriculum Player, Ellen can see the posting author, the posting text, and a link to a blog for new hires.
4. At the bottom of the posting, Ellen clicks the **View Comments** button. A new window opens, which displays the full posting and its comments.
5. Ellen reads the comments and returns to the posting in the Curriculum Player. She then marks the posting complete.

Posting File Types

The following file types are supported for postings:

File Type	Supported File Extensions
Audio	• mid • m4a • mp3 • wav
Compressed	• zip
Data	• xls/xlsx
Image	• bmp - An icon displays for this file type instead of an image preview. • gif • jpeg/jpg • png
Presentation	• pps/ppsx • ppt/pptx
Project	• mpp
Recording	• arf
Text	• doc/docx • dot/dotx
Vector Graphic	• vsd
Video	• avi

File Type	Supported File Extensions
	• flv • m4v

Color Strip Key

The following colors are available:

- Red - Due today or past due
- Yellow- Due within the next seven days, not including today
- Green - Due after seven days
- Gray - The color strip is gray for all items that do not meet the criteria for the other states (Red, Yellow, Green).

Curriculum Player - Navigation Menu

Prior to this enhancement, the curriculum navigation menu included an Overview item for the curriculum and for each section within the curriculum.

With this enhancement, the Overview items are removed. Users can click the curriculum title to view the root level of the curriculum.

Clicking a section in the navigation menu performs the following actions:

- Expand the section within the navigation menu to display any subsections within the section.
- Display all learning objects (LOs) within the selected section.

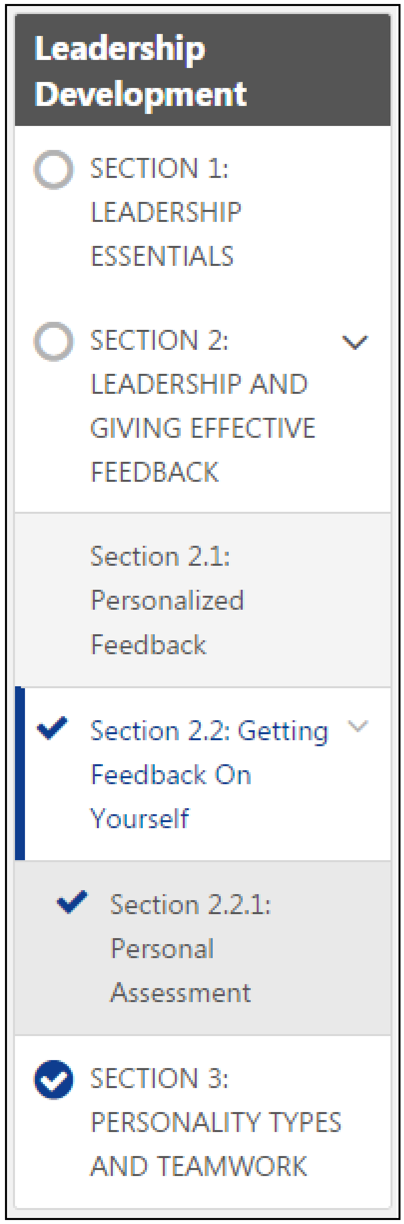
In addition, the full section title is now displayed in the navigation menu. If the section title exceeds the width of the navigation menu, the section title is wrapped to the next line.

Use Case

1. Ellen is a new employee and has been assigned her New Hire curriculum.
2. She navigates to the curriculum from her transcript and begins viewing the sections and items within the curriculum.
3. On the left, Ellen sees the navigation menu, which displays "Section 1: Your First Day" and "Section 2: Your First Week." The entire title is displayed in the navigation menu, so Ellen can read the entire section title without navigating to the section.
4. When she clicks "Section 2: Your First Week," the section expands within the navigation menu to display "Section 2.1" and "Section 2.2." Simultaneously, the right side of the page updates to display all items contained within Section 2.

Previous Navigation Menu

New Navigation Menu



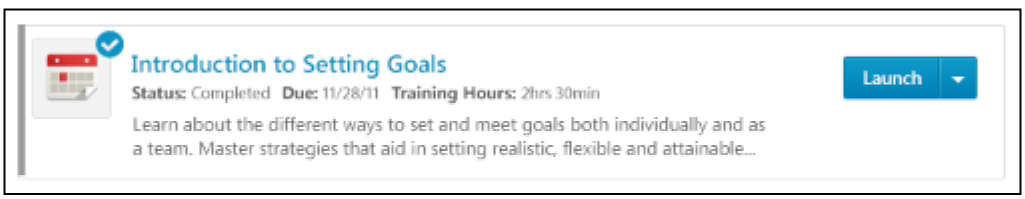
Curriculum Player - Learning Object Description

Prior to this enhancement, learning object (LO) descriptions for some LO types displayed under the LO status within the Curriculum Player. Only one line of the description was displayed. If the description exceeded one line, the description was truncated.

With this enhancement, up to two lines of the LO description is displayed. If the description exceeds two lines, the description is truncated and an ellipsis is displayed at the end of the second line. Users can hover the cursor over the description to view the full description.

The LO description is displayed for the following LO types:

- Events
- Sessions
- Online Courses
- Videos
- Forms
- Tests
- Materials



Use Case

1. Ellen is a new employee and has been assigned her New Hire curriculum.
2. She navigates to the curriculum from her transcript and begins viewing the sections and items within the curriculum.
3. At the root level of the curriculum, Ellen sees an event and an online course. Two lines of the LO description are displayed, allowing Ellen to see more information about the LO without launching the LO or viewing the LO Details page.

Curriculum Player - Launch Notes after Completion

Prior to this enhancement, when a note learning object (LO) was completed, the action button for the LO in the curriculum player no longer included the option to launch the note.

With this enhancement, when a note LO is completed, users still have the option to launch the note.

Use Case

1. Ellen is a new employee and has been assigned her New Hire curriculum.
2. She has just finished reading an introductory note for the New Hire curriculum. She marks the note as Completed.
3. Ellen completes other LOs within the curriculum, and then realizes that she forgot the content of the note.
4. She launches the completed note and views its contents.

Curriculum Player - Pending Acknowledgment

Prior to this enhancement, when an item was in Pending Acknowledgment status, the Acknowledge action was available for the item, but it was not the primary action.

With this enhancement, Acknowledge is the primary action for a learning object (LO) in Pending Acknowledgment status within the Curriculum Player and on the Universal Profile - Transcript page.

Use Case

1. Ellen is a new employee and has been assigned her New Hire curriculum.
2. She has just finished an online course and the course is now in need of a user acknowledgment in order to be in a Completed status.
3. The primary action for the online course is Acknowledge.

Data Merge Tool Optimization

Data Merge Tool Performance Optimizations

With this enhancement, the Data Merge Tool is optimized and can now sync a high volume of transcript items without causing page timeouts or other performance issues. In addition, the Data Merge Tool now indicates an accurate status during the merging process.

Implementation

Upon release, this functionality is automatically enabled in Stage and Live portals for all organizations using the Data Merge Tool.

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
Training Data Merge - Manage	Grants ability to merge the training records of multiple existing accounts and deactivate one of the accounts, if necessary. The availability of this permission is controlled by a backend setting. This permission can be constrained by OU, User's OU, User Self and Subordinates, and Users. The applied constraints limit the users that are available to be merged and that are displayed in the History section. This is an administrator permission.	Core Administration
Training Data Merge - View	Grants ability to view past training record merges. The availability of this permission is controlled by a backend setting. This permission can be constrained by OU, User's OU, User Self and Subordinates, and Users. Which records are displayed in the History section is dependent on creator constraints. This is an administrator permission.	Core Administration

Data Merge Tool

With this enhancement, the data merge process is now asynchronous. This means that the system merges the two accounts in the background, while the administrator can move on to other areas of the system. When the data merge is complete, the administrator can return to the Data Merge Tool and view the results of the merge.

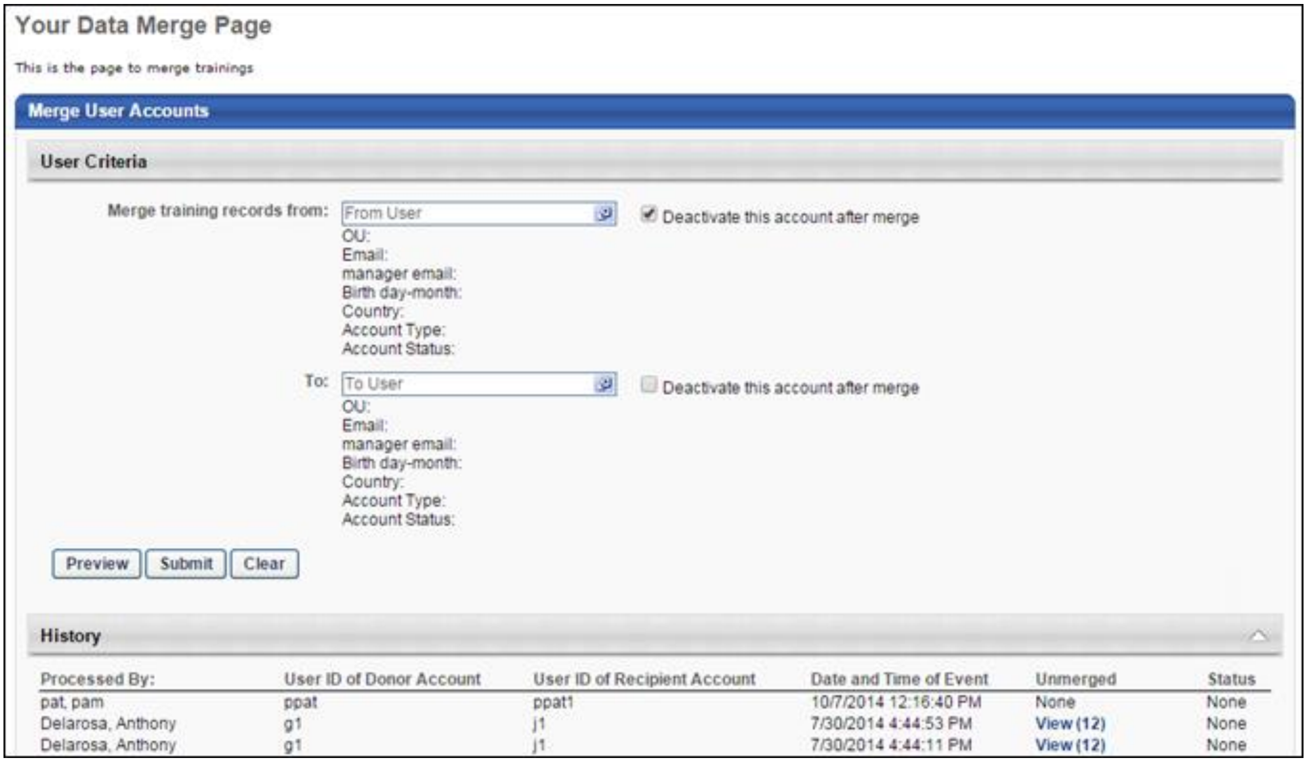
Because the data merges process is asynchronous, the Status column is in the History section now includes the following new statuses:

- Queued - This indicates that the data merge has been submitted, but the accounts have not yet been merged.
- Processed - This indicates that the data merge has been completed and the accounts have been merged.

To access the Data Merge tool, go to **Admin > Tools >Learning > Training Tools**. Then, click the *Data Merge* link.

Permissions

Permission Name	Permission Description	Category
Training Data Merge - Manage	Grants ability to merge the training records of multiple existing accounts and deactivate one of the accounts, if necessary. The availability of this permission is controlled by a backend setting. This permission can be constrained by OU, User's OU, User Self and Subordinates, and Users. The applied constraints limit the users that are available to be merged and that are displayed in the History section. This is an administrator permission.	Core Administration
Training Data Merge - View	Grants ability to view past training record merges. The availability of this permission is controlled by a backend setting. This permission can be constrained by OU, User's OU, User Self and Subordinates, and Users. Which records are displayed in the History section is dependent on creator constraints. This is an administrator permission.	Core Administration


Your Data Merge Page
This is the page to merge trainings
Merge User Accounts
User Criteria
Merge training records from:
From User
Deactivate this account after merge
OU:
Email:
manager email:
Birth day-month:
Country:
Account Type:
Account Status:
To:
To User
Deactivate this account after merge
OU:
Email:
manager email:
Birth day-month:
Country:
Account Type:
Account Status:
Preview
Submit
Clear
History
Processed By: | User ID of Donor Account | User ID of Recipient Account | Date and Time of Event | Unmerged | Status
pat, pam | ppat | ppat1 | 10/7/2014 12:16:40 PM | None | None
Delarosa, Anthony | g1 | j1 | 7/30/2014 4:44:53 PM | View (12) | None
Delarosa, Anthony | g1 | j1 | 7/30/2014 4:44:11 PM | View (12) | None

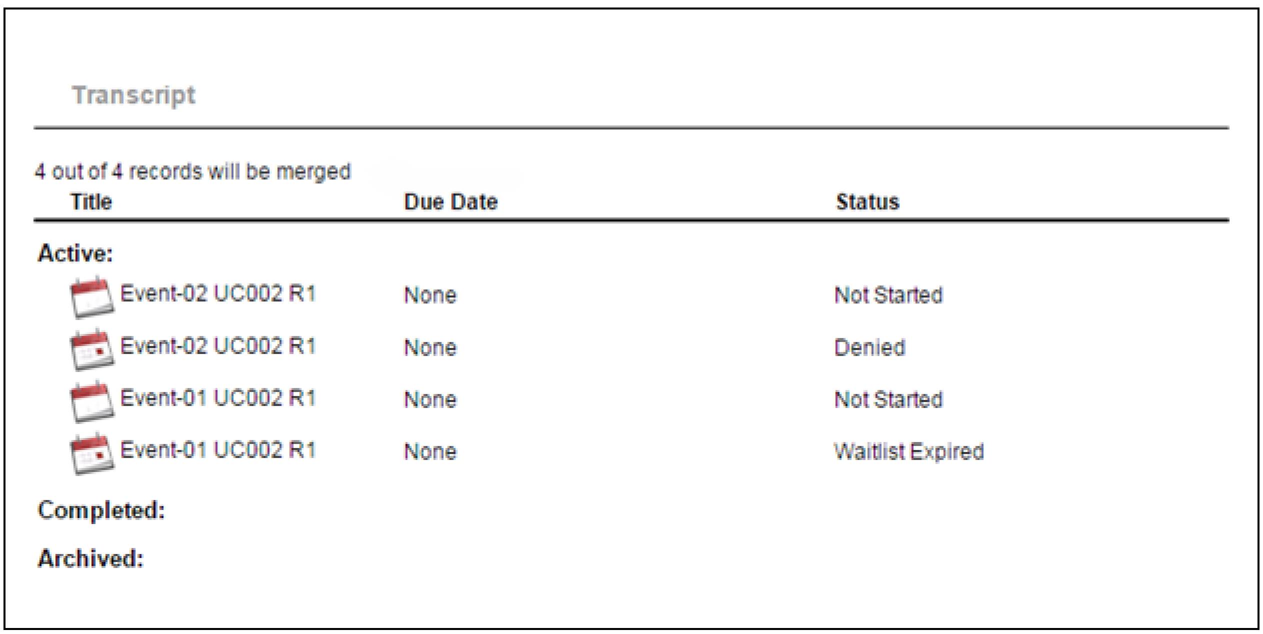
Data Merge Tool - Preview

With this enhancement, the data merge preview now displays the total number of trainings on the donor account and the number of trainings that will be merged to the recipient account.

To access the Data Merge tool, go to **Admin > Tools >Learning > Training Tools**. Then, click the *Data Merge* link.

Permissions

Permission Name	Permission Description	Category
Training Data Merge - Manage	Grants ability to merge the training records of multiple existing accounts and deactivate one of the accounts, if necessary. The availability of this permission is controlled by a backend setting. This permission can be constrained by OU, User's OU, User Self and Subordinates, and Users. The applied constraints limit the users that are available to be merged and that are displayed in the History section. This is an administrator permission.	Core Administration
Training Data Merge - View	Grants ability to view past training record merges. The availability of this permission is controlled by a backend setting. This permission can be constrained by OU, User's OU, User Self and Subordinates, and Users. Which records are displayed in the History section is dependent on creator constraints. This is an administrator permission.	Core Administration



Edit Coupon After Activation

Edit Coupon After Activation Overview

With this enhancement, coupons can now be edited after they are created. Previously, coupons could not be edited once they were saved. If errors were made on the coupon or if the administrator wanted to make changes to the coupon, the administrator needed to create a new coupon.

Upon implementation of this enhancement, existing coupons can also be edited.

Use Case

1. Ann, an Extended Enterprise administrator, creates a new coupon for her company's latest marketing campaign.
2. After creating the coupon, Ann gives the coupon code to her colleague in the marketing department so that the coupon can be added to an email.
3. After the coupon code has been added to the email and the email is sent to hundreds of recipients, Ann realizes she has made a mistake on the coupon.
4. Ann goes to Coupon Administration, finds the coupon, and changes the expiration date from March 1, 2015, to March 15, 2015.
5. Ann saves the change. The coupon can now be used an additional 15 days.

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
Coupon Admin - Manage	Provides manage access to Coupon Administration screen, enabling admins to view, add, delete and edit coupons. This permission can be constrained by Provider, ILT Provider, OU, User's OU, and User's LO Availability. This is an administrator permission.	eCommerce - Administration
Coupon Admin - View	Provides view only access to Coupon Administration screen, enabling user to view details of existing coupons, but not add, edit or delete coupons. This permission can be constrained by Provider, ILT Provider, OU, User's OU, and User's LO Availability. This is an administrator permission.	eCommerce - Administration
Custom Transaction Reports - Create	Grants ability to create and edit Custom Transaction (Billing) reports.	Reports - Analytics
Custom Transaction Reports - View	Grants ability to view results of Custom Transaction (Billing) reports created by self or shared by others.	Reports - Analytics

Transaction Manager - Manage	Grants ability to access the Manage Transaction page and also create and edit transactions. On the Order History Details page, the administrator can edit the order status, adjust prices, issue refunds, or enter comments. This permission can be constrained by User's OU. This is an administrator permission.	eCommerce - Administration
Transaction Manager - View	Grants ability to view the Manage Transaction page where the administrator can review the transactions that meet their permission constraints. This permission can be constrained by User's OU. This is an administrator permission.	eCommerce - Administration

Edit Coupon Page

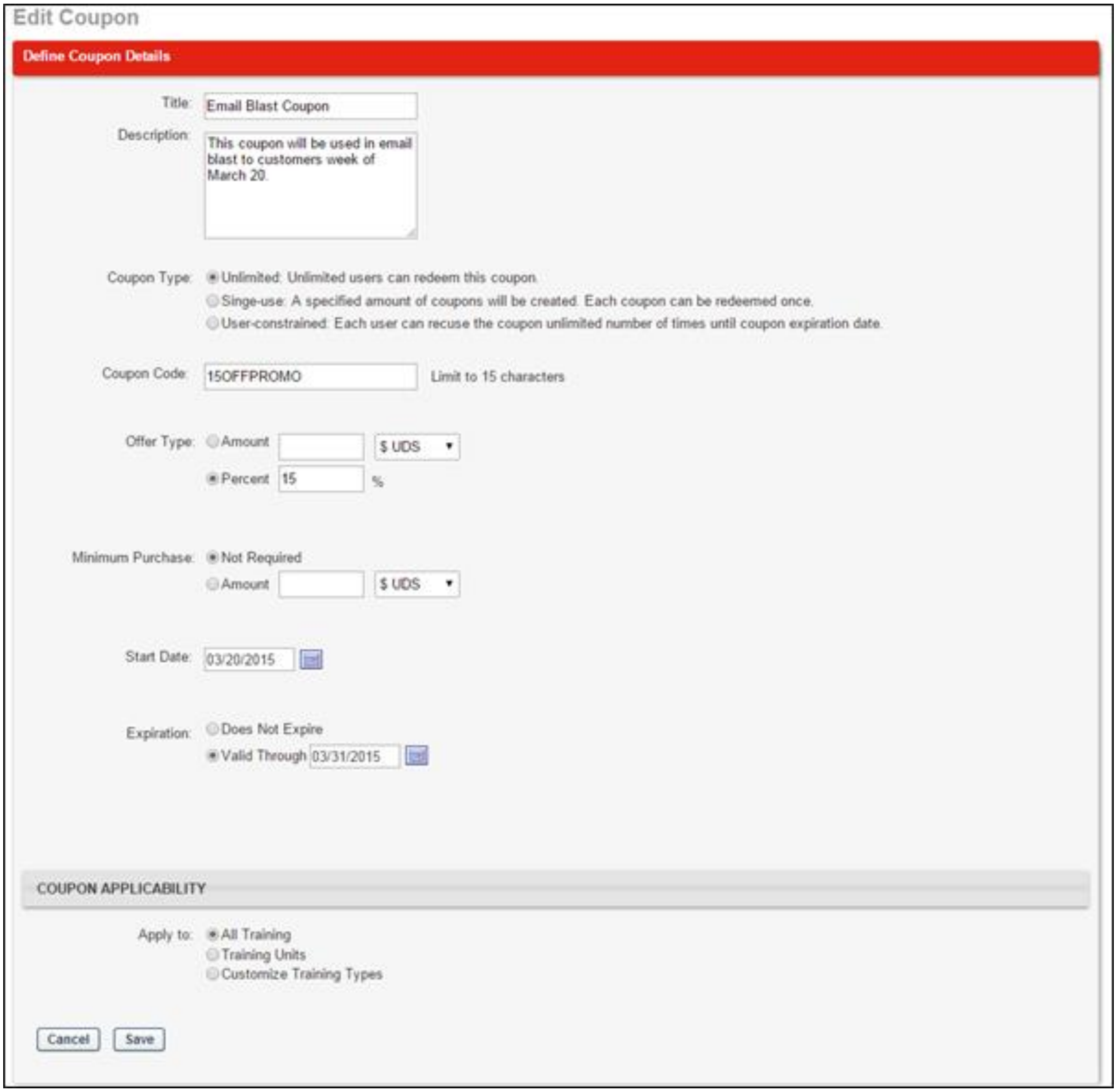
With this enhancement, coupons can now be edited after they are created. Previously, coupons could not be edited once they were saved.

Upon implementation of this enhancement, existing coupons can also be edited.

To create a coupon, go to **Admin > Configuration Tools > Learning**. Then, select the *E-Commerce* link to open the E-Commerce page. Then, select *Coupons* from the E-Commerce section. Then click the *Create New Coupon* link.

Permissions

Permission Name	Permission Description	Category
Coupon Admin - Manage	Provides manage access to Coupon Administration screen, enabling admins to view, add, delete and edit coupons. This permission can be constrained by Provider, ILT Provider, OU, User's OU, and User's LO Availability. This is an administrator permission.	eCommerce - Administration
Coupon Admin - View	Provides view only access to Coupon Administration screen, enabling user to view details of existing coupons, but not add, edit or delete coupons. This permission can be constrained by Provider, ILT Provider, OU, User's OU, and User's LO Availability. This is an administrator permission.	eCommerce - Administration



Editable Fields

The following fields can now be edited after the coupon is created:

- Coupon Code
- Description
- Expiration
- Minimum Purchase - Amount
- Offer Type
- Start Date
- Title

- Coupon Applicability Section > All Training
- Coupon Applicability Section > Training Units
- Coupon Applicability Section > Customize Training Types

Amount Fields

With this enhancement, a "Select Currency" option is added to the Amount fields. This option displays by default.

Activate/Inactivate Coupon

With this enhancement, the Active option to activate or inactivate a coupon is removed from the Create Coupon page. The Active option now only displays on the Copy Coupon, Edit Coupon, and View Coupon pages.

Edit Coupon Code Field

With this enhancement, the Coupon Code field on the Edit Coupon page can be modified after the coupon is created. As with existing functionality for the field, the new coupon code must be unique. The maximum character limit is 15 characters. The field cannot be left blank.

When editing the Coupon Code field, the change to the coupon code impacts the following areas of the system:

- Coupon Usage Page - The new coupon code displays in the Coupon Code column. If the coupon was used prior to changing the coupon code, the new coupon code still replaces the old coupon code.
- Shopping Cart - When the coupon code is updated, users can enter the new code in their shopping cart and will receive the discount associated with the coupon. The old coupon code is no longer usable.
- Manage Transactions > Order History Details - The new coupon code displays in the Coupon Code field in the Order Information section. If the coupon was used prior to changing the coupon code, then the old coupon code displays in the Coupon Code field.
- Custom Transaction Reports - The new coupon code displays when running custom Transaction reports.
- Coupon History Page - The Coupon Code/Prefix column displays the new coupon code.
  Note: *The Coupon History page is a new page with this enhancement. See* **Coupon History Page** *on* page 179 *for additional information.*

Edit Coupon Prefix Field

With this enhancement, the Coupon Prefix field on the Edit Coupon page can be modified after the coupon is created. As with existing functionality for the field, the new coupon prefix must be unique. The maximum character limit is seven characters. The field cannot be left blank.

When editing the Coupon Prefix field, the change to the coupon prefix impacts the following areas of the system:

- Coupon Usage Page - The new coupon prefix displays in the Coupon Code column for unredeemed coupons. If the coupon was used prior to changing the coupon prefix, then the old coupon prefix displays in the Coupon Code column, and the new prefix does not display.
- Shopping Cart - When the coupon prefix is updated, users can enter the new prefix in their shopping cart and will receive the discount associated with the coupon. The old coupon prefix is no longer usable.
- Manage Transactions > Order History Details - The new coupon prefix displays in the Coupon Prefix field in the Order Information section. If the coupon was used prior to changing the coupon prefix, then the old coupon prefix displays in the Coupon Prefix field.
- Custom Transaction Reports - The new coupon prefix displays when running custom Transaction reports.
- Coupon History Page - The Coupon Code/Prefix column displays the new coupon prefix. **Note:** *The Coupon History page is a new page with this enhancement. See* **Coupon History Page** *on* page 179 *for additional information.*

Edit Coupon Type Field

With this enhancement, when a coupon has not yet been redeemed, the Coupon Type field on the Edit Coupon page can be modified after the coupon is created. Once at least one instance of the coupon is redeemed, the Coupon Type field cannot be modified.

When editing the Coupon Type field, the change to the coupon type impacts the following areas of the system:

- Coupon Administration Page - The new coupon type displays in the Coupon Type column in the Manage Coupons table.
- Coupon Usage Page - The new coupon type displays in the Type field in the Coupon Details section.
- Coupon History Page - The Coupon Type column displays the new coupon type. **Note:** *The Coupon History page is a new page with this enhancement.* *See* **Coupon History Page** *on* page 179 *for additional information.*

Edit Description Field

With this enhancement, the Description field on the Edit Coupon page can be modified after the coupon is created. As with existing functionality for the field, the maximum character limit is 500 characters.

When editing the Description field, the change to the description impacts the following areas of the system:

- Coupon Administration Page - The new description displays in the Description column in the Manage Coupons table.
- Coupon Usage Page - The new description displays in the Description field in the Coupon Details section.
- Coupon History Page - The Description column displays the new description. **Note:** *The Coupon History page is a new page with this enhancement.* *See* **Coupon History Page** *on* page 179 *for additional information.*

Edit Expiration Date Field

With this enhancement, the Expiration field on the Edit Coupon page can be modified after the coupon is created. As with current functionality for this field, the expiration date for the coupon must be a current or future date. **Note:** *Every time the administrator attempts to save a change to the coupon, the system checks to make sure the expiration date is a current or future date. If the date is not a current or future date, then the change to the coupon cannot be made until the expiration date meets the date criteria.*

When editing the Expiration field, the change to the expiration date impacts the following areas of the system:

- Coupon Usage Page - The new expiration date displays in the Expiration field.
- Coupon History Page - The new expiration date displays in the Expiration Date column. **Note:** *The Coupon History page is a new page with this enhancement. See* **Coupon History Page** *on* page 179 *for additional information.*

Edit Minimum Purchase Amount Field

With this enhancement, the Minimum Purchase Amount field on the Edit Coupon page can be modified after the coupon is created. As with existing functionality for the field, the new amount must be between 1 and 99,999,999 and a currency must be defined for the amount.

When editing the Minimum Purchase Amount field, the change to the amount impacts the following areas of the system:

- Coupon Usage Page - The new minimum purchase amount displays in the Minimum Purchase field.
- Shopping Cart - When the minimum purchase amount is updated, the new amount is applied to the Shopping Cart. When applying the coupon to purchase an item in the shopping cart, users must meet the new minimum purchase amount.
- Coupon History Page - The Min Purchase column displays the new amount. **Note:** *The Coupon History page is a new page with this enhancement. See* **Coupon History Page** *on* page 179 *for additional information.*

Edit Offer Type Field

With this enhancement, the Offer Type field on the Edit Coupon page can be modified after the coupon is created. When editing the Offer Type field, the change to the offer type impacts the following areas of the system:

- Coupon Usage Page - The new offer type displays in the Percent/Amount field in the Coupon Details section.
- Coupon History Page - The Offer Type column displays the new offer type value. **Note:** *The Coupon History page is a new page with this enhancement. See* **Coupon History Page** *on* page 179 *for additional information.*

Edit Start Date Field

With this enhancement, the Start Date field on the Edit Coupon page can be modified after the coupon is created. As with current functionality for this field, the start date for the coupon must be a current or future date. The field cannot be left blank. **Note:** *Every time the administrator attempts to save a change to the coupon, the system checks to make sure the start date is a current or future date. If the date is not a current or future date, then the change to the coupon cannot be made until the start date meets the date criteria.*

When editing the Start Date field, the change to the start date impacts the following areas of the system:

- Coupon Usage Page - The new start date displays in the Start Date field in the Coupon Details section.
- Shopping Cart - When the start date is updated to a future date, the coupon cannot be used until the new start date, even if a user was previously able to use the coupon.
- Coupon History Page - The Start Date column displays the new start date. **Note:** *The Coupon History page is a new page with this enhancement. See* **Coupon History Page** *on* page 179 *for additional information.*

Edit Title Field

With this enhancement, the Title field on the Edit Coupon page can be modified after the coupon is created. As with existing functionality for the field, the maximum character limit is 50 characters.

When editing the Title field, the change to the title impacts the following areas of the system:

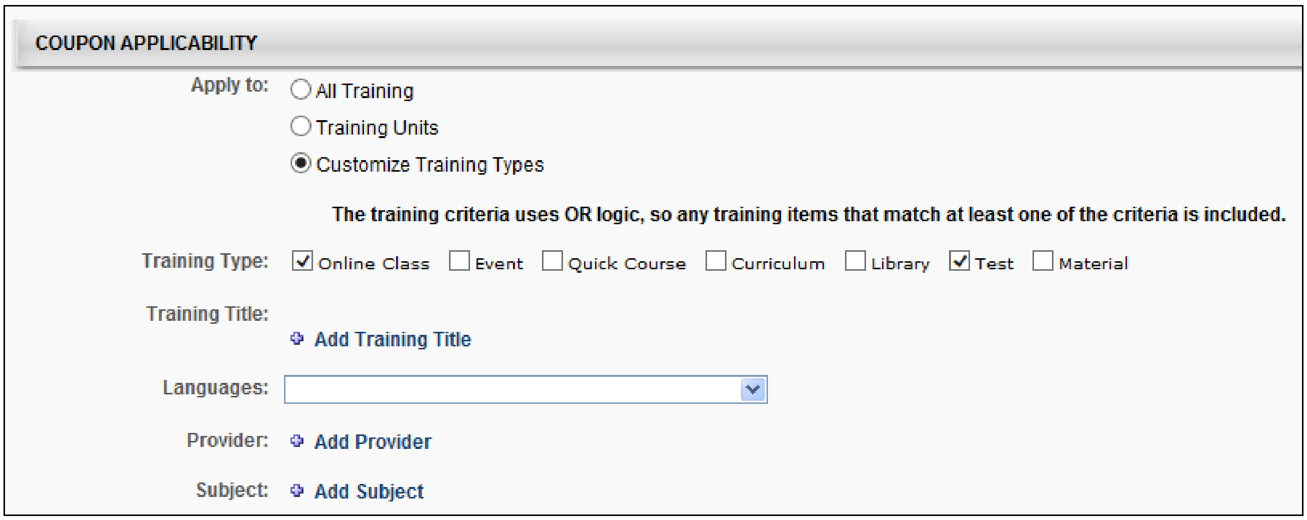
- Coupon Administration Page - The new title displays in the Title column in the Manage Coupons table.
- Coupon Usage Page - The new title displays in the Coupon Title field in the Coupon Details section.
- Custom Transaction Reports - The new title displays when running custom Transaction reports.
- Coupon History Page - The Title column displays the new title. **Note:** *The Coupon History page is a new page with this enhancement. See* **Coupon History Page** *on* page 179 *for additional information.*

Coupon Applicability Section

With this enhancement, all fields in the Coupon Applicability section can be modified after the coupon is created. The updated value is reflected on the Coupon History page.

If the Customize Training Types option is selected, then at least one training type must be defined in the Training Type field.

Note: *The Coupon History page is a new page with this enhancement. See* **Coupon History Page** *on* page 179 *for additional information.*



Coupon Usage Page

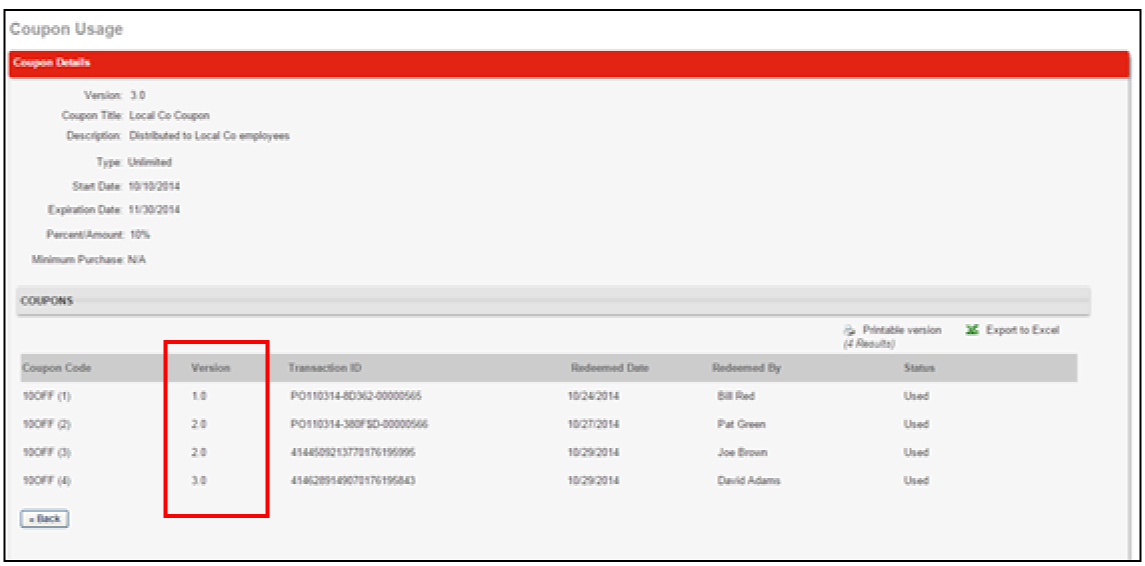
With this enhancement, a Version column is added to the Coupons table on the Coupon Usage page. This column displays the version number of the coupon when it was used in a transaction.

Upon implementation of this enhancement, the Version column displays "1.0" as the coupon version for existing coupons.

To access the Coupon Usage page, go to **Admin > Configuration Tools > Learning**. Then, select the *E-Commerce* link to open the E-Commerce page. Then, select *Coupons* from the E-Commerce section. Search for the appropriate coupon, and then click the View Usage icon in the Options column.

Permissions

Permission Name	Permission Description	Category
Coupon Admin - Manage	Provides manage access to Coupon Administration screen, enabling admins to view, add, delete and edit coupons. This permission can be constrained by Provider, ILT Provider, OU, User's OU, and User's LO Availability. This is an administrator permission.	eCommerce - Administration
Coupon Admin - View	Provides view only access to Coupon Administration screen, enabling user to view details of existing coupons, but not add, edit or delete coupons. This permission can be constrained by Provider, ILT Provider, OU, User's OU, and User's LO Availability. This is an administrator permission.	eCommerce - Administration



Coupon History Page

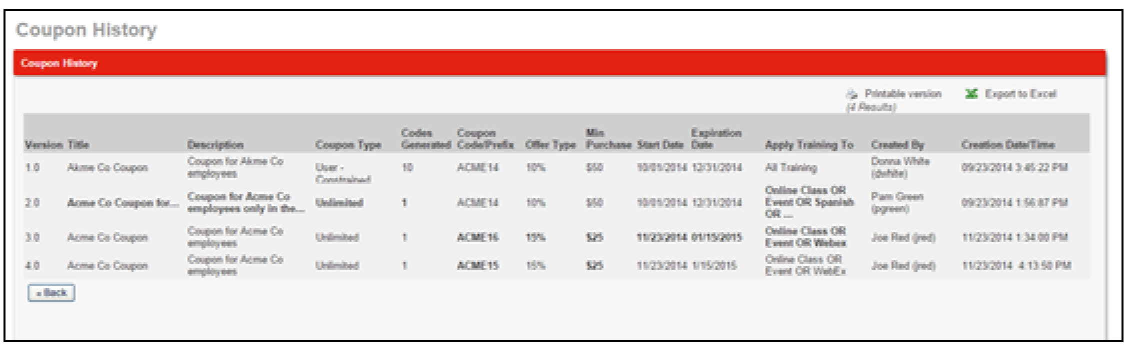
With this enhancement, a Coupon History page is added to Coupon Administration. The Coupon History page displays the version history of coupons that have two or more versions. Coupon versions are created by editing a field on the Edit Coupon page and saving the change.

Upon implementation of this enhancement, a coupon history will be created for existing coupons when a new version of the coupon is created.

To access the Coupon History page, select the View History icon in the Options column on the Coupon Administration page.

Permissions

Permission Name	Permission Description	Category
Coupon Admin - Manage	Provides manage access to Coupon Administration screen, enabling admins to view, add, delete and edit coupons. This permission can be constrained by Provider, ILT Provider, OU, User's OU, and User's LO Availability. This is an administrator permission.	eCommerce - Administration
Coupon Admin - View	Provides view only access to Coupon Administration screen, enabling user to view details of existing coupons, but not add, edit or delete coupons. This permission can be constrained by Provider, ILT Provider, OU, User's OU, and User's LO Availability. This is an administrator permission.	eCommerce - Administration



Printable Version

A printable version of the coupon history can be generated. Select the *Printable version* link to generate a printable version of the coupon history.

Export to Excel

The coupon history can be exported to an Excel file. Select the *Export to Excel* link to export the coupon history to an Excel file.

Coupon History Table

The following information displays in the Coupon History table:

Column Name	Description
Version	This column displays the version number of the coupon. The earliest version displays at the top. Versions display as 1.0, 2.0, 3.0, etc.
Title	This column displays the title of the coupon version. To view titles that are more than 25 characters, mouse over the title to view a tooltip with the full title.
Description	This column displays the description of the coupon version. To view descriptions that are more than 25 characters, mouse over the description to view a tooltip with the full description.
Coupon Type	This column displays the coupon type. The following are the possible values: • Single - Use • Unlimited • User-Constrained
Codes Generated	This column only applies to Single - Use and User-Constrained coupon types. This column displays the number of coupon codes that were generated for the coupon.
Coupon Code/Prefix	For Unlimited coupon types, this column displays the coupon code. For Single - Use and User-Constrained coupon types, this column displays the coupon prefix.
Offer Type	This column displays the type of coupon offer, either a percentage (e.g., 15%) or a monetary amount (e.g., $5).
Min Purchase	This column displays the minimum amount that the user must purchase in order to use the coupon. If a minimum purchase amount was not defined for the coupon, then the column displays "N/A."
Start Date	This column displays the date on which the coupon is first available for use. The date displays in MM/DD/YYYY format.
Expiration Date	This column displays the date on which the coupon expires. The date displays in MM/DD/YYYY format.
Apply Training To	This column displays the value selected in the Coupon Applicability section when configuring the coupon. The following are the possible values: • All Training • Custom Training Types - This option also displays the training types selected. If the list of training types is more than 50 characters, then hovering over the mouse to view the full list.

Column Name	Description
	• Training Units
Created By	This column displays the user ID of the user who created the new version of the coupon.
Creation Date/Time	This column displays the date and time at which the new version of the coupon was created. The time displays in the user's time zone. For example, Jan is an administrator who makes a change to a coupon at 2:00pm EST. Anita, who is also an administrator but is not the coupon creator and is in the PST time zone, views the history for the coupon. Anita sees the time of the change as 11:00am PST.

Back Button

Select the **Back** button to return to the Coupon Administration page.

HTML for External Training Instructions

HTML for External Training Instructions

With this enhancement, administrators can now utilize HTML when configuring the instructions for the Add External Training page. This enables administrators to implement HTML tags, including hyperlinks and font tags.

Implementation

Upon release, this functionality is automatically available in Stage and Live portals for all organizations using external training.

This enhancement applies to organizations using the old and new Transcript functionality.

Security

The following existing permission applies to this functionality:

Permission Name	Permission Description	Category
Configure External Training	Grants ability to configure external training preferences at global/OU level. This is an administrator permission.	Learning - Administration

Configure External Training

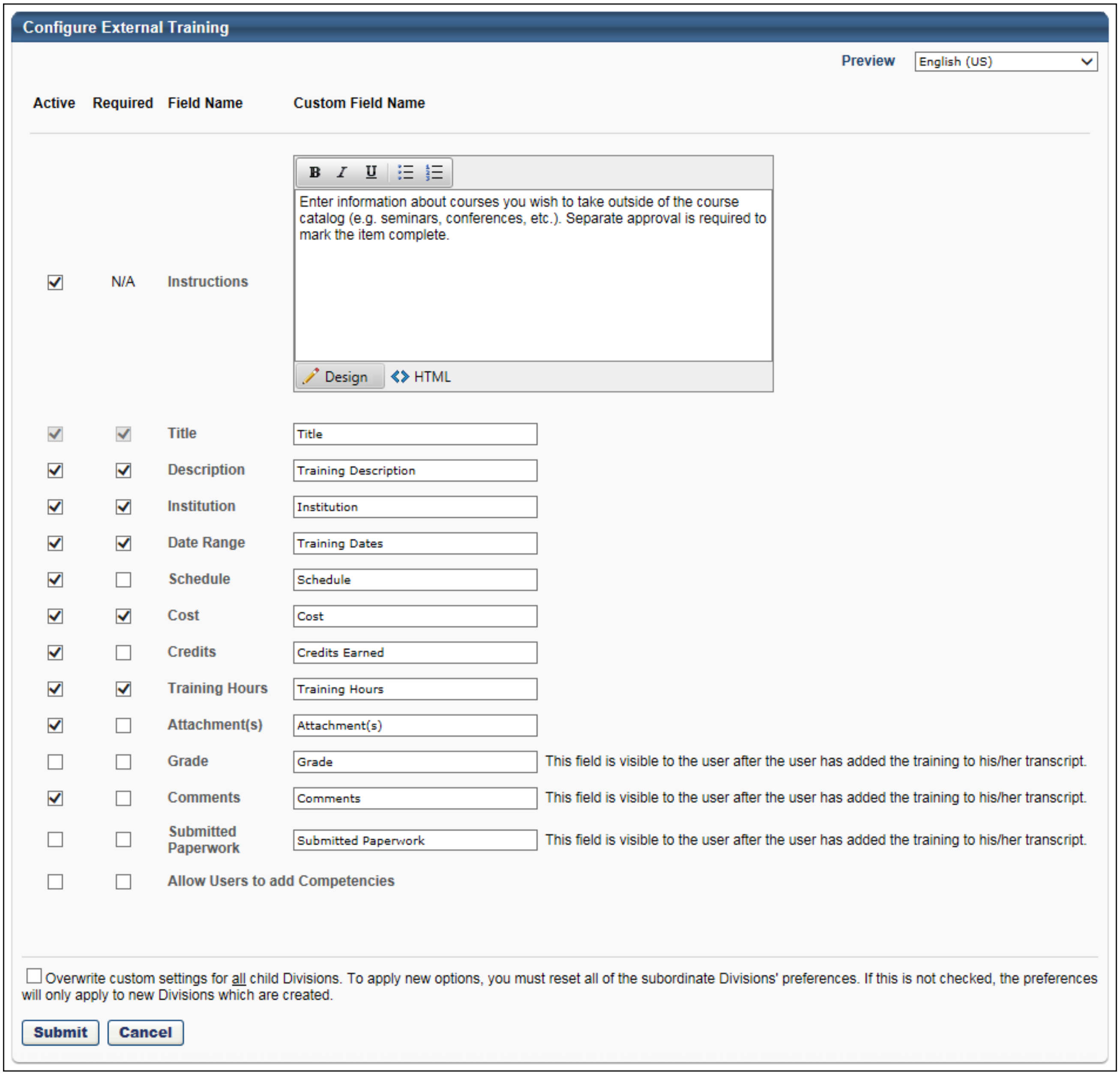
With this enhancement, administrators can now utilize HTML when configuring the instructions for the Add External Training page. In addition, the character limit for the Instructions field is now 2000, including HTML tags. Any HTML that is added is applied when previewing the Add External Training page.

This enhancement applies to organizations using the old and new Transcript functionality.

To configure external training by OU, go to **Admin > Tools > Learning > Learning Preferences**. In the General Learning Preferences section, select *Configure External Training*.

Permissions

Permission Name	Permission Description	Category
Configure External Training	Grants ability to configure external training preferences at global/OU level. This is an administrator permission.	Learning - Administration


Configure External Training
Preview
English (US)
Active
Required
Field Name
Custom Field Name
Enter information about courses you wish to take outside of the course catalog (e.g. seminars, conferences, etc.). Separate approval is required to mark the item complete.
N/A
Instructions
Design
HTML
Title
Description
Training Description
Institution
Date Range
Training Dates
Schedule
Cost
Credits
Credits Earned
Training Hours
Attachment(s)
Grade
Comments
Submitted Paperwork
This field is visible to the user after the user has added the training to his/her transcript.
Allow Users to add Competencies
Overwrite custom settings for all child Divisions. To apply new options, you must reset all of the subordinate Divisions' preferences. If this is not checked, the preferences will only apply to new Divisions which are created.
Submit
Cancel

Add External Training

When a user or administrator is adding external training, the instructions for the page may include HTML, including font enhancements and hyperlinks. External training can be added in the following areas of the system:

- Transcript > Add External Training
- Certification Details > Add External Training
- Admin > Certifications > Framework > Add External Training

Microsoft Lync Integration

Microsoft Lync Integration Overview

With this enhancement, the system can now be integrated with Microsoft (MS) Lync. This integration enables organizations to conduct meetings and virtual instructor led training (vILT) sessions over MS Lync through the system.

When the system is integrated with MS Lync, the following functionality is available within the system:

- Administrators can manually add, edit, and inactivate instructors from MS Lync to the system. In order for a user to be added as an instructor, the user must exist in both the MS Lync Active Directory and the system.
- Administrators can create, edit, and copy MS Lync events and sessions. Administrators can also cancel MS Lync sessions.
- Instructors can launch MS Lync sessions from the View Your Sessions page.
- Users can request events and sessions and launch sessions.
- Instructors and administrators can update class roster attendance and pass/fail information. MS Lync only provides information regarding the users who launched the session. No information is provided regarding the length of time in a session or pass/fail information. This information must be manually updated.

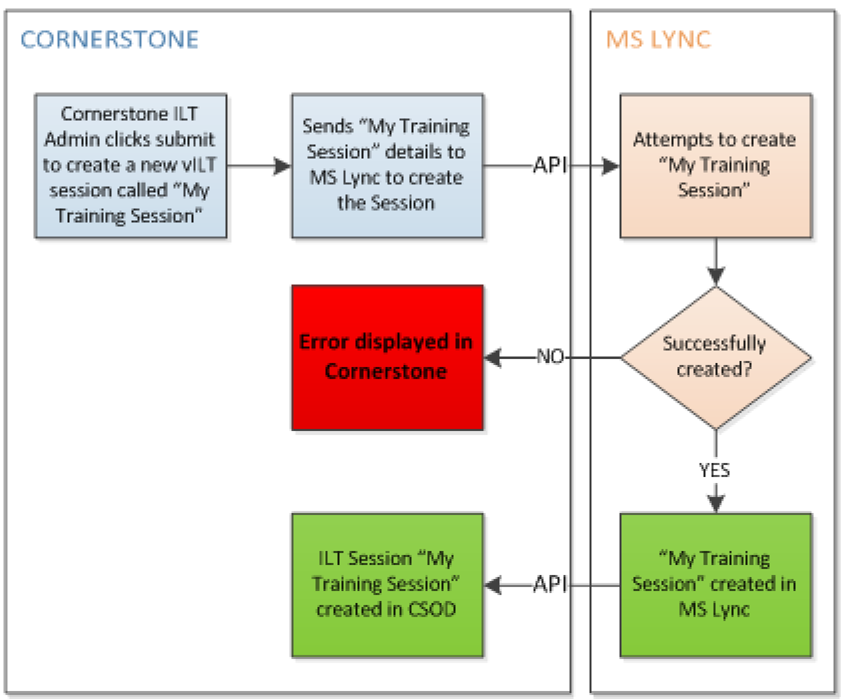
Use Case

1. An administrator needs to assign virtual training sessions to a division.
2. The administrator currently tracks and administers sessions via MS Lync's virtual products and the organization is using Lync Server with an Active Directory. The administrator wants to track sessions and have users launch MS Lync sessions via the Cornerstone OnDemand (CSOD) system.
3. The administrator contacts their CSOD Client Success Manager (CSM) and requests the ability to integrate the CSOD system with MS Lync. *See the Implementation section below for additional details.*
4. CSOD enables a preferences page where the administrator can enter the MS Lync username, password, and endpoint.
5. When the preferences are saved, MS Lync is automatically available as an ILT vendor.
6. The administrator edits the vendor and adds all of the necessary users as instructors.
7. The administrator creates an event that has MS Lync selected as the vendor.
8. The administrator creates and configures sessions for the event. When the sessions are created, they are created in the CSOD system and in MS Lync.
9. After the session is created, any edits that are performed in the CSOD system are also reflected in MS Lync.
10. The administrator cancels one of the sessions. This also deletes the session from MS Lync.

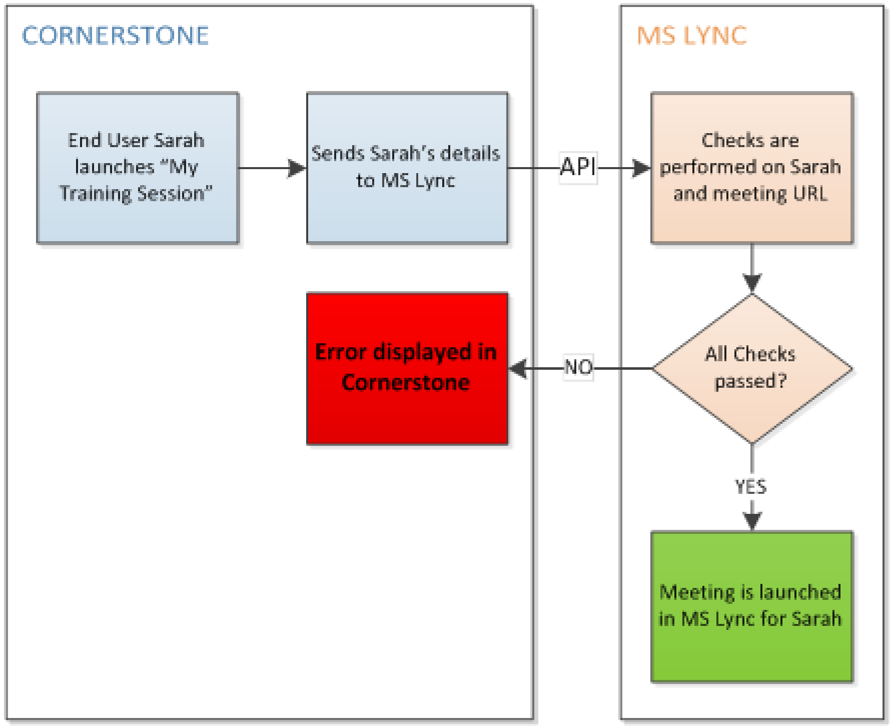
Workflow - High Level

1. Organization configures MS Lync Server.
2. Organization requests MS Lync integration.
3. CSOD enables MS Lync integration.
4. Administrator configures MS Lync Preferences.
5. Administrator adds MS Lync administrators.
6. Administrator creates MS Lync events.
7. Administrator creates MS Lync sessions and sets the instructor.
8. Instructor launches the session from the View Your Sessions page.
9. Users launch the session up to 60 minutes prior to the session start time.
10. Instructor and administrators update and submit session attendance.

Workflow - Session Creation



Workflow - Session Launch



Requirements

In order to integrate the CSOD system with MS Lync, organizations must first configure Lync Server 2013, and this server must communicate with an Active Directory. Only users who are configured in the Active Directory can serve as instructors in the CSOD system. The following requirements must be satisfied to configure Lync Server:

- Windows Server running Lync Server 2013 on site. The following versions of Windows Server are acceptable:
    - 2008 R2 Service Pack 1 or the latest service pack
    - 2012
    - 2012 R2
- Lync Server 2013 requires a CU1 update (http://support2.microsoft.com/?kbid=2809243)
- Lync Server 2013 communicates with an Active Directory. Therefore, Active Directory must be prepared for Lync Server 2013 (http://technet.microsoft.com/en-us/library/gg398630.aspx).
- Lync Server 2013 must be configured to enable UCWA, which is the API with which CSOD integrates. This API does not support prior versions of Lync Server. (https://ucwa.lync.com/documentation/ITAdmin-Configuration)
    - **Note:** *Currently, UCWA does not support Office 365. Therefore, CSOD does not integrate with the Lync cloud solution.*

Implementation

Once an organization meets the integration requirements, the organization must submit a request to their Client Success Manager (CSM), who will work with the necessary parties to implement a script that enables MS Lync integration. Once the MS Lync integration is enabled, the following occurs:

- MS Lync Preferences are enabled. In order to integrate the system with MS Lync, organizations must create an account on their MS Lync Active Directory that will be used solely for the integrations. The email address and password for this account is used as the username and password for the API.
- Once the MS Lync Preferences are configured, a MS Lync vendor is automatically created.
- Administrators can add instructors to the MS Lync vendor. Then, events and sessions can be created using the MS Lync vendor and instructors.

There is an additional cost associated with this integration.

This functionality is only available to organizations using the Learning module. This functionality is controlled by a backend setting.

Considerations

Instructors must exist as users in the MS Lync Active Directory and in the CSOD system to be used as an instructor in the CSOD system. This information must be validated manually. If an instructor does not exist in MS Lync, the CSOD system cannot validate this. If an instructor does not exist as a user in MS Lync, this will cause errors in the CSOD system and may disrupt the course launching and administration process. Therefore, it is critical that this validation is manually performed prior to adding instructors.

When requesting attendance information, MS Lync will provide attendance data based on those users who launched the session. However, MS Lync does not determine the length of time each attendee remained in the session. Additionally, pass/fail information is not provided by MS Lync. Therefore, it is recommended that the administrator or instructor manually validate and update this information.

Security

The following new permission applies to this functionality:

Permission Name	Permission Description	Category
MS Lync Portal Preferences - Manage	Grants ability to manage MS Lync Preferences, including the API username, password, and endpoint for integration with Microsoft (MS) Lync. This permission cannot be constrained. This is an administrator permission.	Learning - Administration

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
Events - Create	Grants ability to create new instructor led training events. This permission works in conjunction with Events - View permission. This permission can be constrained by OU, User's OU, ILT Provider, and User's ILT Provider. This is an administrator permission.	Learning - Administration
Events - Edit	Grants ability to edit/update existing instructor led training events. This permission works in conjunction with Events - View permission. This permission can be constrained by OU, User's OU, ILT Provider, and User's ILT Provider. This is an administrator permission.	Learning - Administration
Events - View	Grants view-only access to instructor led training events, enabling the user to view all details/options that were selected when the event was created. This permission can be constrained by OU, User's OU, User's ILT Provider, and ILT Provider. This is an administrator permission.	Learning - Administration
Exceptions - Manage	Grants ability to approve or deny Instructor Led Training Exception requests (e.g. availability exceptions, pre-requisite exceptions). This permission works in conjunction with the Event - View and Exceptions - View permissions. This is an administrator permission.	Learning - Administration
Exceptions - View	Grants view-only access to instructor led training exception requests, via the ILT Events and Session screen. This permission works in conjunction with the Events - View permission. This is an administrator permission.	Learning - Administration
ILT - Batch Create Sessions	Allows the admin to create more than one ILT session at the same time using a session schedule wizard. This is an administrator permission.	Learning - Administration
ILT Schedule Part Occurrence	Allows the admin to create more than one ILT session schedule part at the same time using a part occurrence schedule wizard. This is an administrator permission.	Learning - Administration
Interest Tracking - Manage	Grants ability to manage Interest Lists for instructor led training events, including adding and removing users from interest lists. This permission works in conjunction with Events - View, and Interest Tracking - View permissions. This is an administrator permission.	Learning - Administration
Interest Tracking - View	Grants view-only access to instructor led training Interest Lists, via the ILT Events and Sessions screen, enabling the user to view the Interest Lists for various ILT events. This permission works in conjunction with the Events - View permission. This is an	Learning - Administration

	administrator permission.	

Roster - Add Users	Grants ability to add named users to class rosters for instructor led training sessions. This permission works in conjunction with the Roster - View permission. This is an administrator permission.	Learning - Administration

Roster - Batch Withdrawal or Move Users	Grants ability to withdraw multiple users for an instructor led training session class roster, or to move them from one class roster to another. This permission works in conjunction with the Roster- View permission.	Learning - Administration

Roster - Email Registered Users	Grants ability to send a custom email message to all students listed on the roster for an instructor led training session. An additional link appears on ILT roster page for sending such messages. This is an administrator/ILT instructor permission.	Learning - Administration

Roster - Manage	Grants ability to manage instructor led training session rosters, including updating attendance, and marking the ILT session complete to update student transcripts. A variety of other features are available depending upon additional roster permissions. This permission works in conjunction with Events - View, Sessions - View and Roster - View permissions. This permission can be constrained by Instructor, User as Instructor, ILT Provider, and User's ILT Provider. This is an administrator permission.	Learning - Administration

Roster - View Evaluation Status	Grants ability to view whether students' learning evaluations are pending for a given session. Without this permission, the admin sees status "completed" for any users who are actually in pending evaluation status on the roster This permission works in conjunction with Roster - View permission. This is an administrator permission.	Learning - Administration

Roster - View	Grants view-only access to instructor led training session rosters. This permission works in conjunction with Events - View and Sessions - View permissions. This permission can be constrained by Instructor, ILT Provider, User's ILT Provider, and User as Instructor. This is an administrator permission.	Learning - Administration

Roster - Withdrawal Penalty Override	Grants ability to override the withdrawal penalty when withdrawing a student from an ILT session. This permission works in conjunction with the Events - View, Sessions - View, Roster - View and Roster - Manage permissions. This is an administrator permission.	Learning - Administration

Session Details - View Student Roster	Allows user to view student roster for a given ILT session via a link on ILT session details screen when searching for training, and from transcript details screen after a session has been added to the user's transcript. This is an end user permission.	Learning

Sessions - Cancel	Grants ability to cancel instructor led training sessions. This permission works in conjunction with Events - View and Sessions - View permissions. This is an administrator permission.	Learning - Administration
Sessions - Create	Grants ability to create new instructor led training sessions. This permission works in conjunction with Events - View and Sessions - View permissions. Administrators can only create sessions for events for which they have the availability to view. This permission can be constrained by OU, User's OU, Instructor, User as Instructor, Facility, Facilities Owned by User, ILT Provider, User's ILT Provider, User, and User Self and Subordinates. This is an administrator permission.	Learning - Administration
Sessions - Edit	Grants ability to edit/update existing instructor led training sessions. This permission works in conjunction with Events - View and Sessions - View permissions. Administrators can only edit sessions for which they have the availability to view and edit. This permission can be constrained by OU, User's OU, Instructor, User as Instructor, Facility, Facilities Owned by User, ILT Provider, User's ILT Provider, User, and User Self and Subordinates. This is an administrator permission.	Learning - Administration
Sessions - View	Grants view-only access to instructor led training sessions, enabling the user to view all details/options that were selected when the session was created. This permission works in conjunction with the Events - View permission. This permission can be constrained by OU, User's OU, Instructor, Facility, Facilities Owned by User, ILT Provider, User's ILT Provider, User, User as Instructor, and User Self and Subordinates. This is an administrator permission.	Learning - Administration
Waitlists - Manage	Grants ability to approve or deny instructor led training waitlist requests. This permission works in conjunction with the Events - View and Waitlists - View permissions. This is an administrator permission.	Learning - Administration
Waitlists - View	Grants view-only access to instructor led training session waitlists, via the ILT Events and Sessions screen, enabling the user to view the waitlists for various ILT sessions. This permission works in conjunction with Events - View and Sessions - View permissions.	Learning - Administration

MS Lync Preferences

This page enables administrators to specify the username and password that is used to communicate with the MS Lync server. In addition, administrators must specify the API Endpoint that is used to integrate with MS Lync.

To manage MS Lync Preferences, go to **Admin > Tools > Learning > Learning Preferences**. Then, click the *MS Lync Preferences* link in the *ILT Preferences* section.

Permission Name	Permission Description	Category
MS Lync Portal Preferences - Manage	Grants ability to manage MS Lync Preferences, including the API username, password, and endpoint for integration with Microsoft (MS) Lync. This permission cannot be constrained. This is an administrator permission.	Learning - Administration

MS Lync Preferences

In order to integrate the system with MS Lync, organizations must create an account on their MS Lync Active Directory that will be used solely for the integrations. The email address and password for this account is used as the username and password for the API.

Enter the following information:

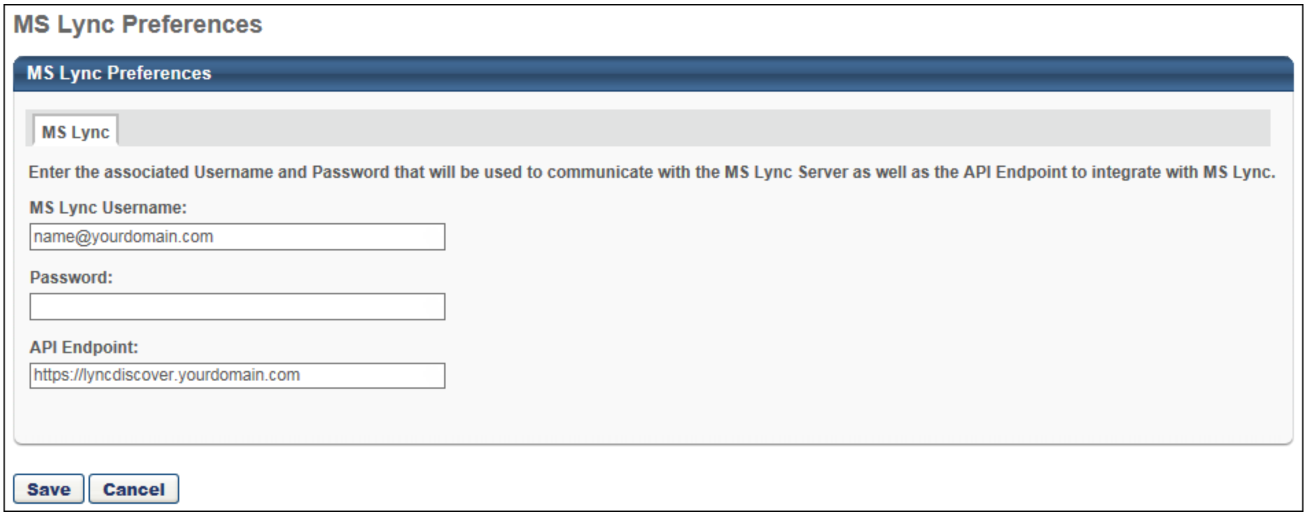
- MS Lync Username - Enter the username that will be used to communicate with the MS Lync server. When launching MS Lync sessions using the web client, the MS Lync username is displayed as part of the URL.
- Password - Enter the password that is associated with the username that will be used to communicate with the MS Lync server.
- API Endpoint - Enter the API endpoint to integrate with MS Lync. This will be in the form of https://lyncdiscover.your_domain.com. The endpoint must be configured to be discoverable via the Internet. Contact your IT department to determine and configure your API endpoint.

Save or Cancel

Click **Save** to save the MS Lync settings. If all information is entered correctly, the system will automatically perform the integration. Or, click **Cancel** to discard any unsaved changes.

After configuring the MS Lync preferences, administrators must then add instructors. Once instructors are added, organizations can begin creating MS Lync events and sessions.

- *See Manage Vendors & Instructors for additional information.*
- *See ILT Event Overview for additional information.*


MS Lync Preferences
MS Lync Preferences
MS Lync
Enter the associated Username and Password that will be used to communicate with the MS Lync Server as well as the API Endpoint to integrate with MS Lync.
MS Lync Username:
name@yourdomain.com
Password:
API Endpoint:
https://lyncdiscover.yourdomain.com
Save
Cancel

ILT Vendors & Instructors

After the system is integrated with MS Lync, MS Lync is automatically added as a vendor on the Vendors & Instructors page.

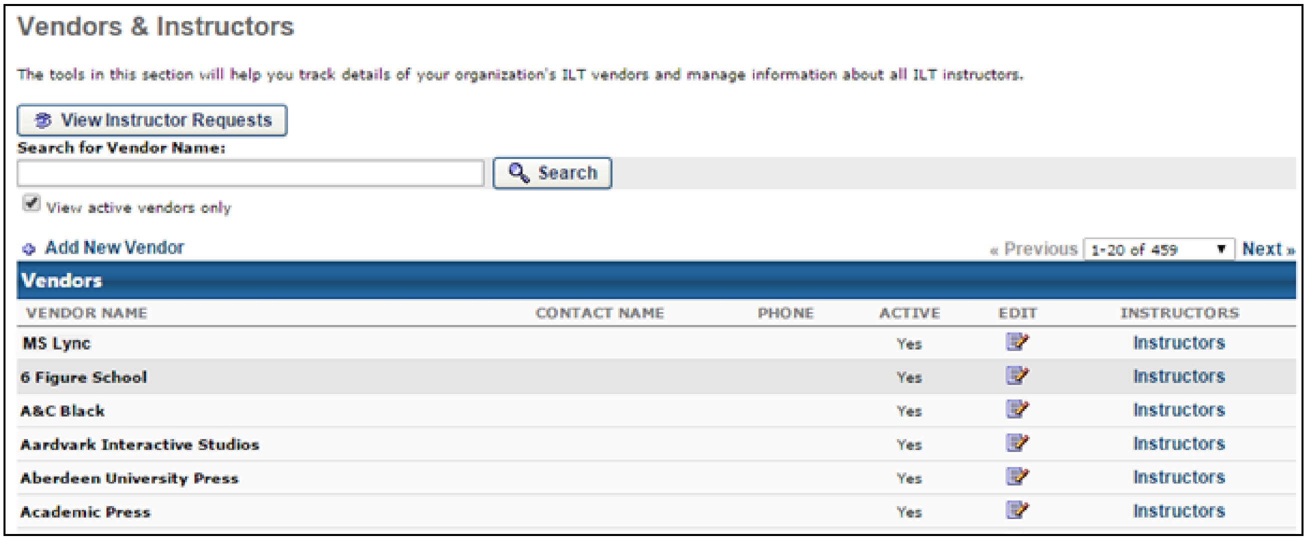
Administrators can perform the following actions on the MS Lync vendor:

- Add instructors to the vendor by clicking the *Instructors* link to the right of the vendor. *See Instructors - Add for additional information.*
- Edit the vendor by clicking the Edit icon to the right of the vendor. When editing the vendor, the vendor name is pre-populated as MS Lync, but this can be modified. *See Vendor - Add/Edit for additional information.*

To manage vendors and instructors, go to **ILT > Vendors & Instructors**.

Permissions

Permission Name	Permission Description	Category
ILT Vendors - Create	Grants ability to create new training Vendors (Providers). This permission works in conjunction with the Vendors - View permission. This is an administrator permission.	Learning - Administration
ILT Vendors - Update	Grants ability to edit/update existing training Vendors (Providers). This permission works in conjunction with the Vendors - View permission. This is an administrator permission.	Learning - Administration
ILT Vendors - View	Grants view only access to instructor led training vendors (providers), via the ILT Vendors and Instructors screen. This is an administrator permission.	Learning - Administration
Instructor Requests - Manage	Grants ability to approve or deny instructor requests for ILT sessions. This permission works in conjunction with the Vendors - View, and Instructor Requests - View permissions. This is an administrator permission.	Learning - Administration
Instructor Requests - View	Grants view-only access to instructor led training session Instructor Requests, via the ILT Vendors and Instructors screen. This permission works in conjunction with the Vendors - View permission. This is an administrator permission.	Learning - Administration


Vendors & Instructors
The tools in this section will help you track details of your organization's ILT vendors and manage information about all ILT instructors.
View Instructor Requests
Search for Vendor Name:
Search
View active vendors only
Add New Vendor
« Previous
1-20 of 459
Next »
Vendors
VENDOR NAME
CONTACT NAME
PHONE
ACTIVE
EDIT
INSTRUCTORS
MS Lync
Yes
Instructors
6 Figure School
Yes
Instructors
A&C Black
Yes
Instructors
Aardvark Interactive Studios
Yes
Instructors
Aberdeen University Press
Yes
Instructors
Academic Press
Yes
Instructors

Add/Edit Instructor

When adding an instructor to the MS Lync vendor, administrators must select an existing user within the system. Instructors cannot be manually added to the MS Lync vendor.

To add an instructor to the MS Lync vendor, go to **ILT > Vendors & Instructors**. To the right of the MS Lync vendor, click the *Instructors* link. Then, on the Instructors page, click the *Add New Instructor* link.

Administrators cannot manually enter an instructor's first and last name. Manually entering an instructor's first and last name for the MS Lync vendor will result in an error.

Administrators must select an existing user within the system. To search for a user, click the pop-up icon to the right of the Instructor Name field.

The selected user must have an email address, and the email address must also be associated with a user within the MS Lync Active Directory.

- The email address must be manually validated by the administrator, because the system is not able to validate whether the email address exists within the MS Lync Active Directory.
- If the instructor's email address is incorrect within the system and the instructor is not using the web version of MS Lync, when the instructor launches a session, they will be added to the session as an attendee instead of the instructor.
- If the user's email address changes within the MS Lync Active Directory, the email address must be manually updated within the system.

To edit an instructor, from the Instructors page, click the Edit icon to the right of the instructor.

- If an instructor is edited within the system, the modifications are only recorded within the system and are not updated in MS Lync.
- Instructors cannot be deleted. They can only be made inactive when editing them.

Permissions

Permission Name	Permission Description	Category
Instructors - Create	Grants the ability to add new instructors for Instructor Led Training Vendors. This permission works in conjunction with the Vendors - View, and Instructors - View permissions. This is an administrator permission.	Learning - Administration
Instructors - Update	Grants ability to edit/update existing instructors for Instructor Led Training Vendors. This permission works in conjunction with the Vendors - View, and Instructors - View permissions. This is an administrator permission.	Learning - Administration

Create/Edit Event

When creating or editing an event, MS Lync can be selected as a vendor on the Properties page. *See ILT Event - Create - Step 1 - Properties for additional information.*

On the Session Defaults page, the following is true:

- In the Registration section, the Maximum Registration field is required, and this value cannot exceed 248. The instructor and event creator do not count towards the maximum registration.
- When adding preferred instructors, the administrator can only select instructors that are associated with the MS Lync vendor in Vendors & Instructors. *See ILT Event - Create - Step 5 - Session Defaults for additional information.*

To create an ILT event, go to **ILT > Events & Sessions**. Then, click the *Create New Event* link.

Permissions

Permission Name	Permission Description	Category
Events - Create	Grants ability to create new instructor led training events. This permission works in conjunction with Events - View permission. This permission can be constrained by OU, User's OU, ILT Provider, and User's ILT Provider. This is an administrator permission.	Learning - Administration
Events - Edit	Grants ability to edit/update existing instructor led training events. This permission works in conjunction with Events - View permission. This permission can be constrained by OU, User's OU, ILT Provider, and User's ILT Provider. This is an administrator permission.	Learning - Administration

Create/Edit Session

When creating or editing a session for an event in which MS Lync is selected as the vendor, the process is modified.

To create an ILT session, go to **ILT > Manage Events & Sessions**. Search for the appropriate event, and in the Options column next to the event, click the View Sessions icon. Then, click the *Create MS Lync Provider Session* link.

Permissions

Permission Name	Permission Description	Category
ILT Schedule Part Occurrence	Allows the admin to create more than one ILT session schedule part at the same time using a part occurrence schedule wizard. This is an administrator permission.	Learning - Administration
Sessions - Cancel	Grants ability to cancel instructor led training sessions. This permission works in conjunction with Events - View and Sessions - View permissions. This is an administrator permission.	Learning - Administration
Sessions - Create	Grants ability to create new instructor led training sessions. This permission works in conjunction with Events - View and Sessions - View permissions. Administrators can only create sessions for events for which they have the availability to view. This permission can be constrained by OU, User's OU, Instructor, User as Instructor, Facility, Facilities Owned by User, ILT Provider, User's ILT Provider, User, and User Self and Subordinates. This is an administrator permission.	Learning - Administration
Sessions - Edit	Grants ability to edit/update existing instructor led training sessions. This permission works in conjunction with Events - View and Sessions - View permissions. Administrators can only edit sessions for which they have the availability to view and edit. This permission can be constrained by OU, User's OU, Instructor, User as Instructor, Facility, Facilities Owned by User, ILT Provider, User's ILT Provider, User, and User Self and Subordinates. This is an administrator permission.	Learning - Administration
Sessions - View	Grants view-only access to instructor led training sessions, enabling the user to view all details/options that were selected when the session was created. This permission works in conjunction with the Events - View permission. This permission can be constrained by OU, User's OU, Instructor, Facility, Facilities Owned by User, ILT Provider, User's ILT Provider, User, User as Instructor, and User Self and Subordinates. This is an administrator permission.	Learning - Administration

Canceling a Session

Canceling a MS Lync session within the system also cancels the session within MS Lync.

Copying a Session

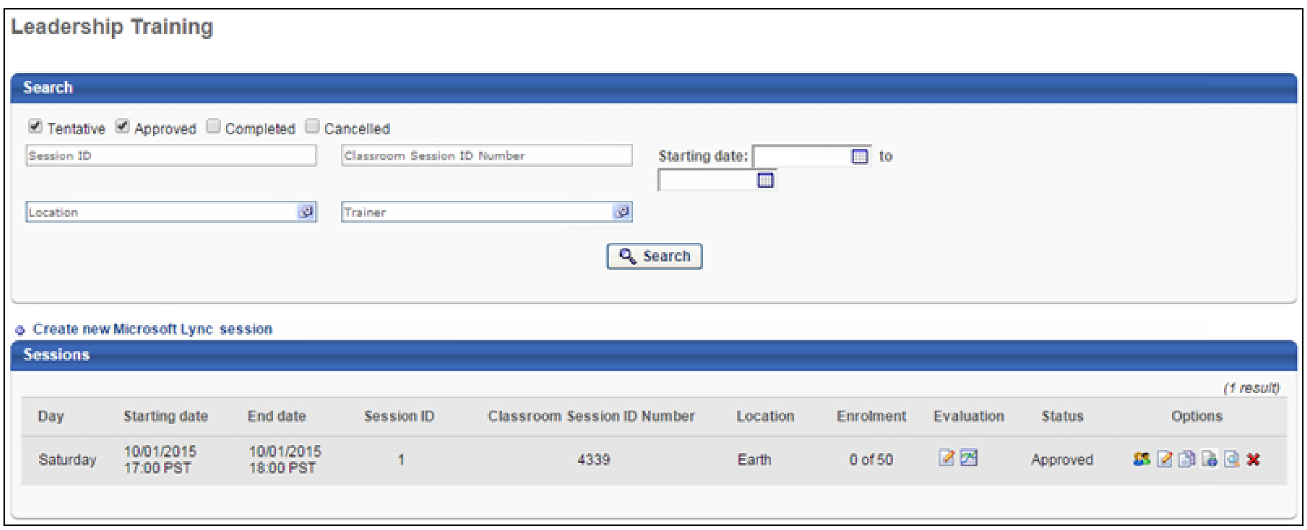
Copying a MS Lync session within the system also creates a new session within MS Lync.

Editing a Session

Editing a MS Lync session within the system also updates the session within MS Lync.

Sessions Page

When viewing the Sessions page for an event in which MS Lync is selected as the vendor, the *Create New Session* link is renamed to *Create [Microsoft Lync Provider] session*. **Note:** *The MS Lync vendor name can be customized, and the customized name will be reflected in this link.*



Schedule Wizard

As with non-MS Lync sessions, administrators can use the Schedule Wizard to create multiple sessions at once.

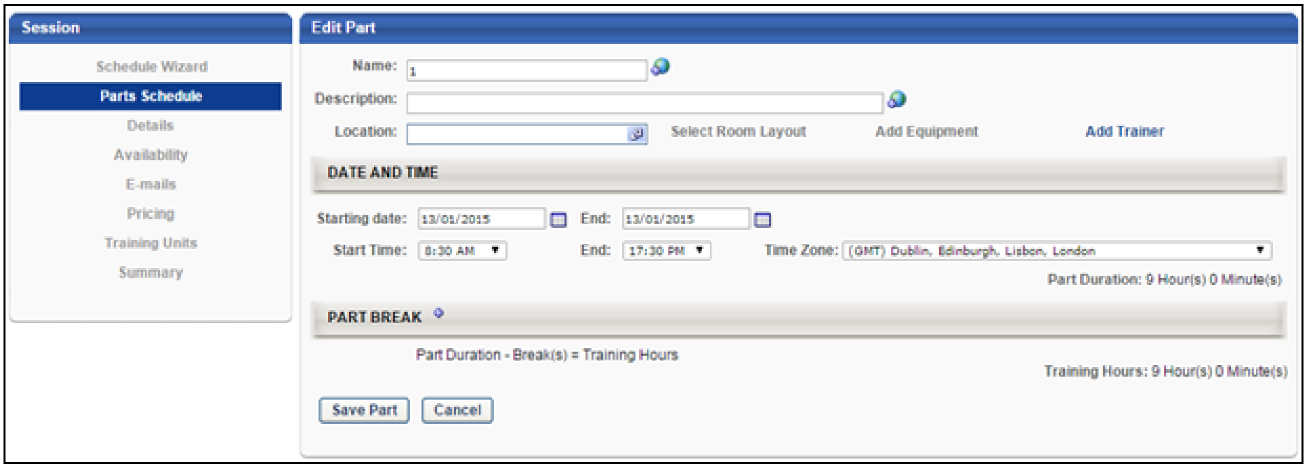
See ILT Scheduling Wizard for additional information.

Parts Schedule

If an instructor was not selected on the Session Defaults page when the event was created, the instructor must be selected on this page.

MS Lync sessions can only have one part per session. Therefore, when adding or editing a session part, the **Save & Add New Part** button is not available.

See Create Session - Parts Schedule - Define Part for additional information.



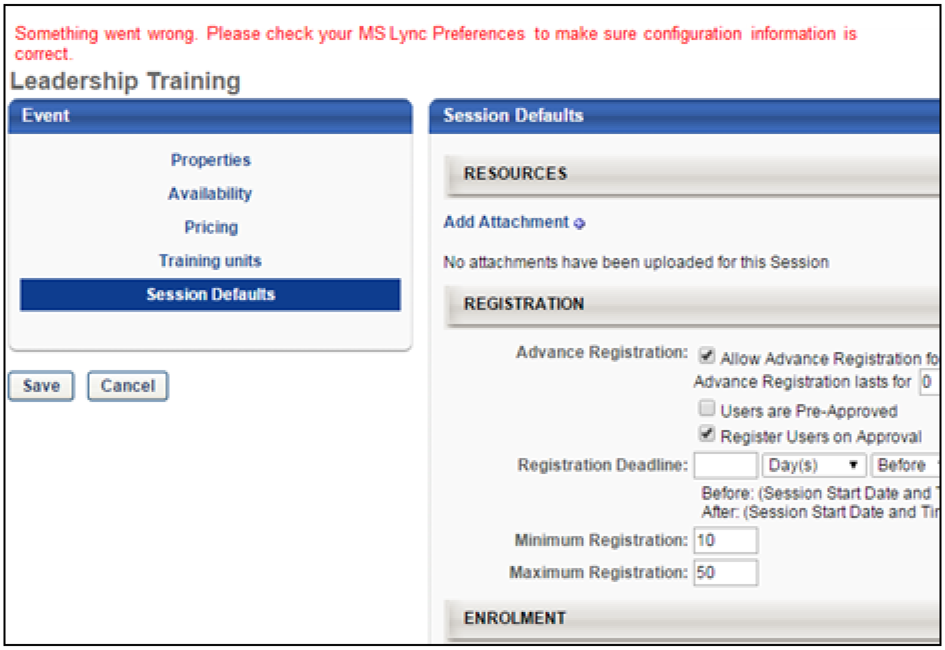
Details

In the Registration section, the Maximum Registration field is required, and this value cannot exceed 248. The instructor and event creator do not count towards the maximum registration.

See Create Session - Details for additional information.

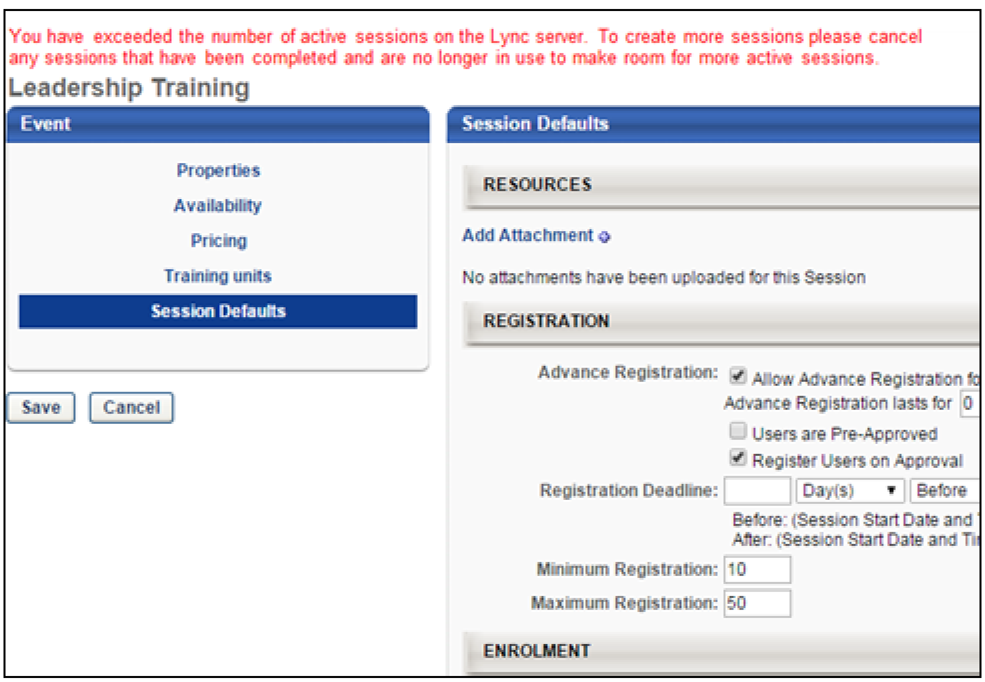
Communication Error

When creating or editing a MS Lync event or session, if the system has an issue communicating with the MS Lync server, an error message is displayed.



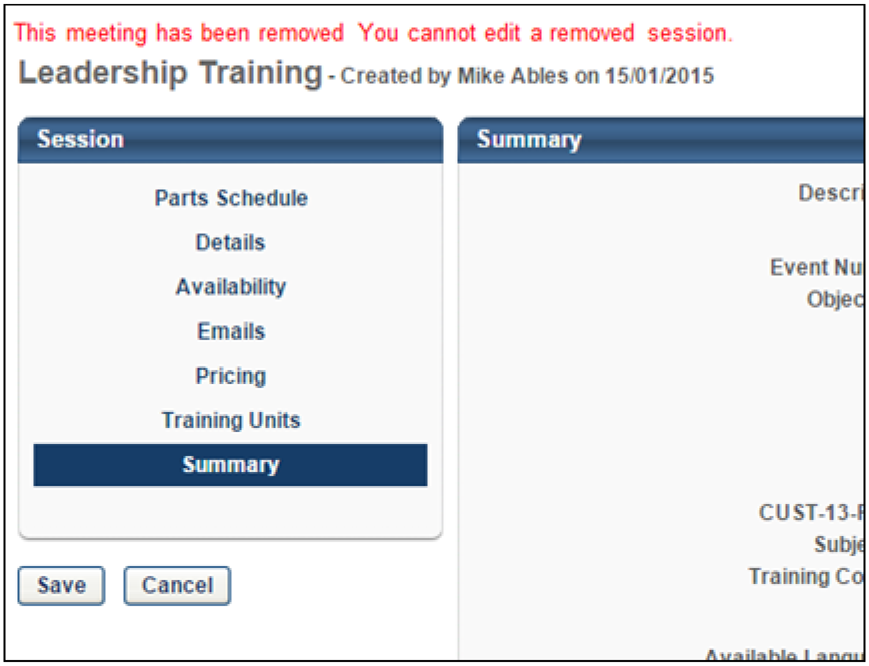
Maximum Number of Sessions

Each MS Lync session is stored on the MS Lync server for one year after the session's End Time, after which the session is deleted from the MS Lync server. In addition, the MS Lync server can store a maximum of 1000 sessions. If the server contains 1000 sessions and an administrator attempts to create an additional session, an error message is displayed.



Session Removed from MS Lync Server

If a session is removed from the MS Lync server but still exists within the system, then editing the session within the system results in an error.



Proxy Enrollment - Increase Session Seats

The maximum number of users who can be registered for a MS Lync session is 248. When proxy enrolling users into a MS Lync session and the additional users exceed the maximum registration for the session, administrators may have the option to increase the number of seats in the session. If the registration is increased above 248, the system does not provide an error. However, MS Lync will not allow more than the first 248 attendees into the session. Therefore, administrators should never increase the number of seats for a MS Lync session past 248.

See Create Proxy Enrollment - Insufficient Session Seats for additional information.

To create a proxy enrollment, go to **Admin > Tools > Learning > Proxy Enrollment**. Then, click the *Create Proxy Enrollment* link.

Permissions

Permission Name	Permission Description	Category
Proxy Enrollment - Standard	Grants ability to create standard proxy enrollment requests to assign training to users. This is an administrator permission.	Learning - Administration
Proxy Enrollment - Standard, Dynamic, Recurring	Grants ability to create standard, dynamic or recurring proxy enrollment requests to assign training to users. This is an administrator permission.	Learning - Administration
Proxy Enrollment - Standard, Dynamic	Grants ability To create Standard and Dynamic proxy enrollment requests, to assign training to users. This is an administrator permission.	Learning - Administration
Proxy Enrollment Catalog	This permission enables constraining of proxy enrollment requests to learning objects that are available to the administrator as a user when searching for and requesting training. This permission works in conjunction with Proxy Enrollment Standard, or Dynamic, or Recurring permission(s). This is an administrator permission.	Learning - Administration

Session Roster - Attendance and Scoring

On the Session Roster - Attendance and Scoring page for a MS Lync session, the following changes are applied:

- When the roster is submitted, MS Lync will automatically select the Attendance option for all users who launched the session, even if the instructor had previously unchecked the Attendance for a user. Therefore, it is recommended that administrators and instructors always click the **Update Attendance** upon viewing the Roster page.
- When the **Update Attendance** button is clicked, the system populates the attendance data with data from MS Lync to indicate which users attended the MS Lync session. This indicates that the user launched the session, but it does not indicate that the user attended the entire session.
    - If a user is marked as attended for a MS Lync session, administrators should not unselect the Attendance option for the user because MS Lync will reselect the option when the roster is submitted.
    - Administrators can select the Attendance option for any users who were not marked as attended by MS Lync.
- The roster cannot populate the pass/fail data with data from MS Lync. Administrators or instructors must manually update this information.

To access the ILT session roster:

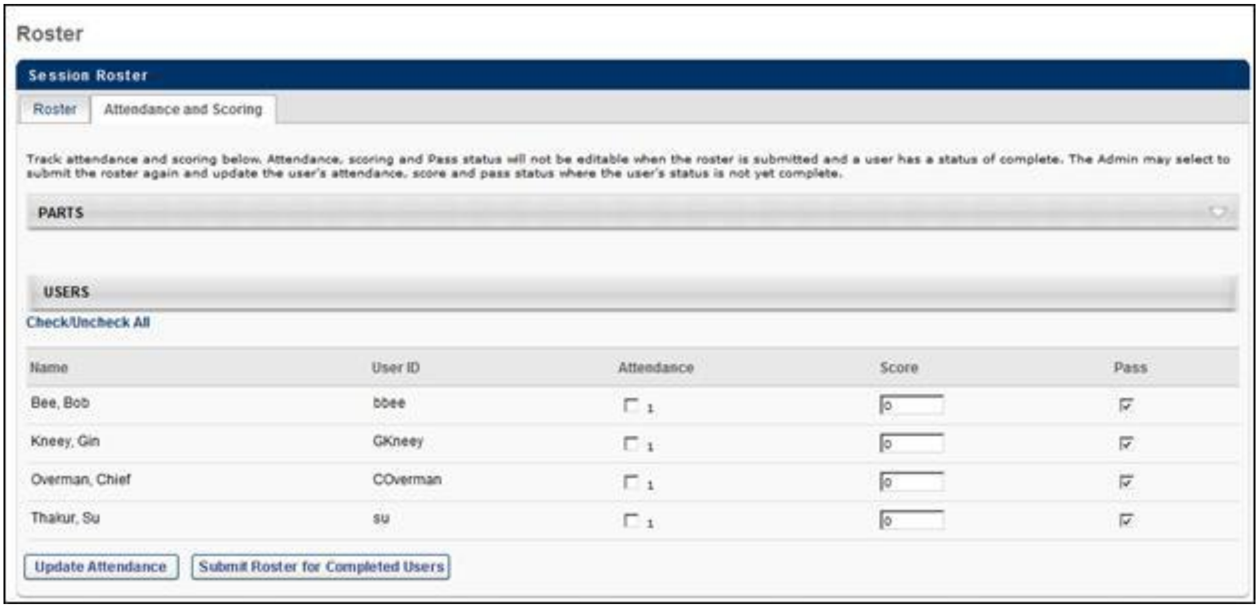
1. Go to **ILT > Manage Events & Sessions**.
2. Search for the appropriate event and next to the event in the search results, in the Options column, click the View Sessions icon. This option is only available to users with permission to view sessions.
3. Next to the appropriate session, in the Options column, click the View Roster icon.

Permissions

Permission Name	Permission Description	Category
Roster - Manage	Grants ability to manage instructor led training session rosters, including updating attendance, and marking the ILT session complete to update student transcripts. A variety of other features are available depending upon additional roster permissions. This permission works in conjunction with Events - View, Sessions - View and Roster - View permissions. This permission can be constrained by Instructor, User as Instructor, ILT Provider, and User's ILT Provider. This is an administrator permission.	Learning - Administration
Roster - View	Grants view-only access to instructor led training session rosters. This permission works in conjunction with Events - View and Sessions - View permissions. This permission can be constrained by Instructor, ILT Provider, User's ILT Provider, and User as Instructor. This is an	Learning - Administration

	administrator permission.	

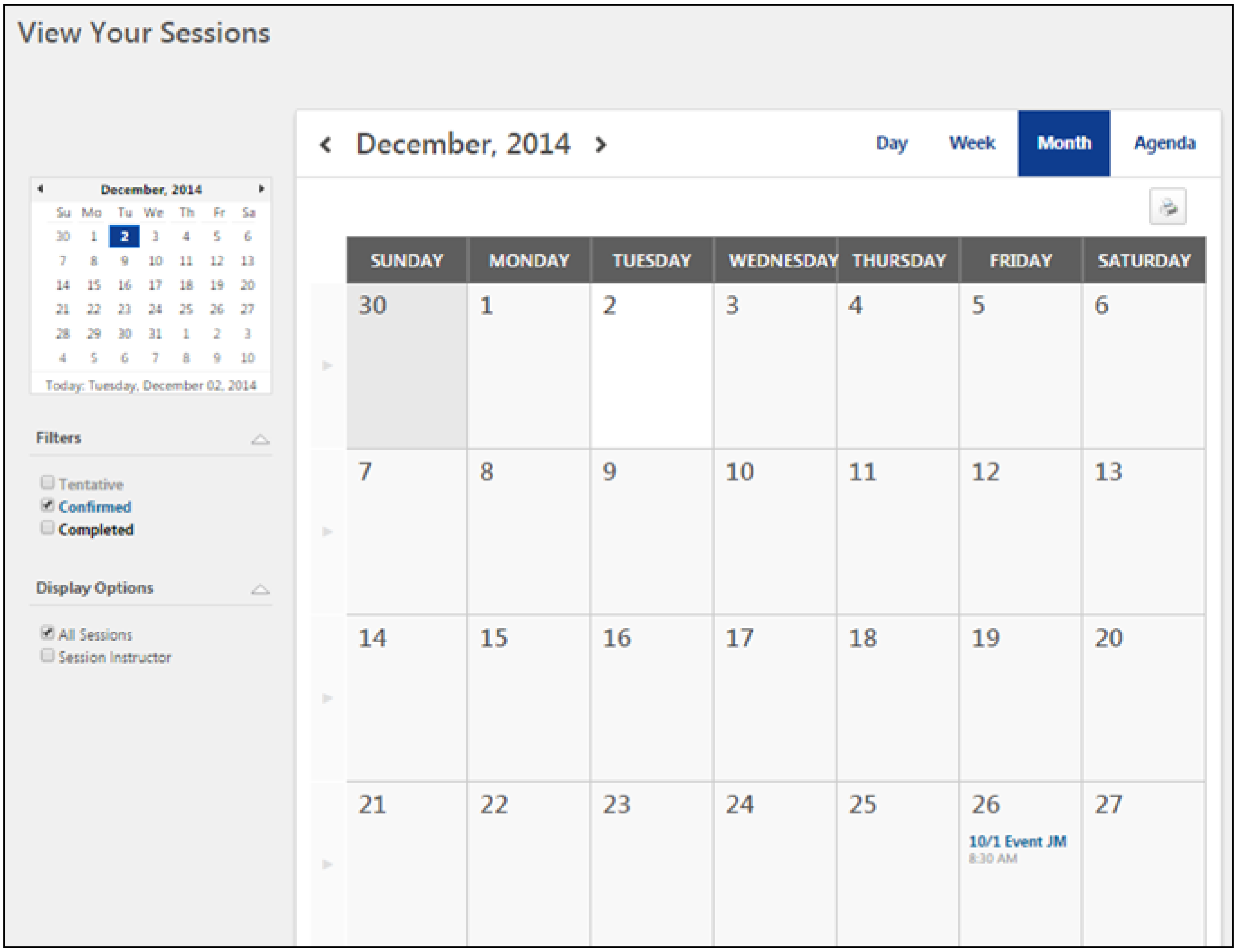
Sessions - View	Grants view-only access to instructor led training sessions, enabling the user to view all details/options that were selected when the session was created. This permission works in conjunction with the Events - View permission. This permission can be constrained by OU, User's OU, Instructor, Facility, Facilities Owned by User, ILT Provider, User's ILT Provider, User, User as Instructor, and User Self and Subordinates. This is an administrator permission.	Learning - Administration



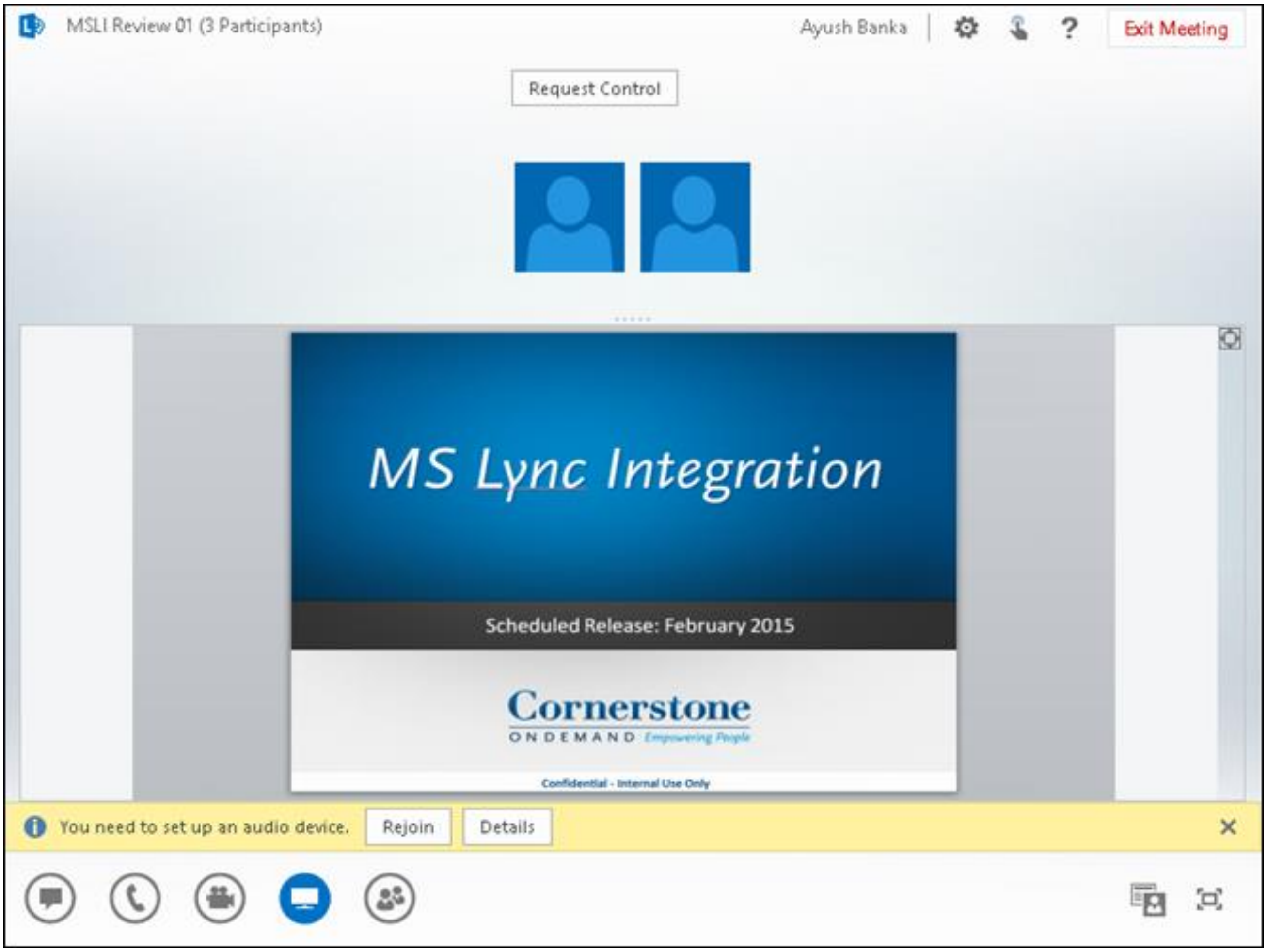
View Your Sessions

Once a session is created, instructor can launch the session from the View Your Sessions page. Users can also launch a session up to 60 minutes before the session start time.

To view your ILT session calendar, go to **ILT > View Your Sessions**.



When a session is launched, the event title appears in the upper-left corner of the window.


MSLI Review 01 (3 Participants)
Ayush Banka
Exit Meeting
Request Control
MS Lync Integration
Scheduled Release: February 2015
Cornerstone
ONDEMAND
Confidential - Internal Use Only
You need to set up an audio device.
Rejoin
Details

Request Event/Select Session/Launch Session

Similar to standard events, users can request MS Lync events in the following ways:

- Browse for Training > LO Details > Request Event - *See Browse for Training for additional information.*
- Global Search > LO Details > Request Event - *See Global Search Page for additional information.*
- Events Calendar > Session LO Details > Event LO Details > Request Event - *See Events Calendar for additional information.*

After the user has been approved for the event, the user can select a session from their Transcript.

- *See Transcript (Old) - View for additional information.*
- *See Universal Profile - Transcript Overview for additional information.*

After a session has been selected, the session can be launched 60 minutes prior to the session in the following ways:

- Transcript > Launch Session
  - *See Transcript (Old) - View for additional information.*
  - *See Universal Profile - Transcript Overview for additional information.*
- My Training Widget > Launch Session - *See Welcome Page Overview for additional information.*
- Universal Profile > Actions > Launch Session - *See Universal Profile - Actions Overview for additional information.*

Permissions

Permission Name	Permission Description	Category
Events Calendar	Grants access to view Events Calendar page. This is an end user permission.	Learning - Administration
Global Search - Training	Grants ability to search for training via Global Search. If this permission is constrained to a specific OU, then that constraint is automatically applied within Global Search, including search filters and search results. This is an end user permission. The availability of this permission is controlled by a backend setting.	Learning

Offline Player Support

With the June 2014 release, a redesigned Offline Player was introduced. The new Offline Player also added support for SCORM 2004 learning objects.

With the May 2015 release, the old Offline Player functionality is being retired and will no longer be supported. Organizations that are currently using the old Offline Player are able to convert to the new Offline Player functionality. To enable this functionality, contact your Account Manager.

Training Purpose Email Tag

Prior to this enhancement, the Training Purpose email tag was only available for the Assign Training email trigger.

With this enhancement, the Training Purpose email tag (TRAINING.PURPOSE) is now available for the Assign ILT Session email trigger. This enables organizations to notify users who have been assigned an instructor led training (ILT) session of the training purpose for the assignment.

To create an email, go to **Admin > Tools > Core Functions > Email Management**. Then, click the Add Email icon in the Options column of the email action for which you would like to create an email. This opens the Create New Email page.

Use Cases

An organization with offices in several European locations, and it is legally required that a training purpose must be associated with all training, including ILT sessions. The Training Purpose email tag enables the organization to clearly communicate the purpose for all training when the training is assigned to a user.

Implementation

Upon release, this functionality is automatically available in Stage and Live portals for all organizations using ILT functionality.

Analytics - Added Extended Enterprise Fields

With this enhancement, fields are added to the Transaction section for custom Transaction reports.

To create custom Transaction reports, go to **Reports > Custom Reports**. Then, select the *Transaction Report* link from the **New** drop-down.

Permissions

Permission Name	Permission Description	Category
Custom Transaction Reports - Create	Grants ability to create and edit Custom Transaction (Billing) reports.	Reports - Analytics
Custom Transaction Reports - View	Grants ability to view results of Custom Transaction (Billing) reports created by self or shared by others.	Reports - Analytics

The following fields are added to the Transaction section:

Field Name	Field Description	Field Type
Coupon ID	The unique identifier for a coupon.	Text
Coupon Version	The version number of a coupon.	Text

Analytics - Added LMS Fields

With this enhancement, fields are added to the Training section for the following custom reports:

- Certification Report
- Compliance Report
- Evaluations Report
- Multi-Module Report
- Training Plan Report
- Training Report
- Transaction Report
- Transcript Report

In addition, fields are modified and added to the ILT Seat Allocation section for the following custom reports:

- Training Report
- Transaction Report
- Transcript Report

To create custom reports, go to **Reports > Custom Reports**. Then, select the custom report link from the **New** drop-down.

Permissions

Permission Name	Permission Description	Category
Custom Certification Report - Create	Grants ability to create and edit Custom Certification reports. This permission can be constrained by OU, User's OU, Self and Subordinates, and User.	Reports - Analytics
Custom Certification Report - View	Grants ability to view results of Custom Certification reports created by self or shared by others. This permission can be constrained by OU, User's OU, Self and Subordinates, and User.	Reports - Analytics
Custom Compliance Report - Create	Grants ability to create and edit Custom Compliance Reports. This permission should only be enabled if a client has not yet converted compliance certifications to the new certifications module.	Limited Use/Obsolete
Custom	Grants ability to view results of custom compliance reports	Limited

Compliance Report - View	created by self or others. This permission should only be enabled if a client has not yet converted compliance certifications to the new certifications module.	Use/Obsolete
Custom Evaluations Reports - Create	Grants ability to create and edit custom Evaluation reports (training evaluation levels 1, 2, and 3).	Reports - Analytics
Custom Evaluations Reports - View	Grants ability to view results of custom Evaluation reports (training evaluation levels 1, 2, and 3) created by self or shared by others.	Reports - Analytics
Custom Multi-Module Report - Create	Grants ability to create and edit custom Multi-Module reports. This permission works in conjunction with other Custom Report - Create permissions. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User.	Reports - Analytics
Custom Multi-Module Report - View	Grants ability to view results of custom Multi-Module reports created by self. This permission works in conjunction with other Custom Report - View permissions. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User.	Reports - Analytics
Custom Training Plan Report - Create	Grants ability to create and edit training plan (Training Demand Forecast) custom reports.	Reports - Analytics
Custom Training Plan Report - View	Grants ability to view results of training plan (Training Demand Forecast) custom reports created by self or shared by others. (Training Demand Forecast)	Reports - Analytics
Custom Training Reports - Create	Grants ability to create and edit Custom Training (Catalog) reports.	Reports - Analytics
Custom Training Reports - View	Grants ability to view results of Custom Training (Catalog) reports created by self or shared by others.	Reports - Analytics
Custom Transaction Reports - Create	Grants ability to create and edit Custom Transaction (Billing) reports.	Reports - Analytics
Custom Transaction Reports - View	Grants ability to view results of Custom Transaction (Billing) reports created by self or shared by others.	Reports - Analytics
Custom Transcript Reports - Create	Grants ability to create and edit Custom Transcript (Training Record) reports.	Reports - Analytics
Custom Transcript Reports - View	Grants ability to view results of Custom Transcript (Training Record) reports created by self or shared by	Reports - Analytics

	others.	

Training Section Fields

The following field is added to the Training section for the affected reports:

Field Name	Field Description	Field Type
Email Configuration	The email configuration selected for a learning object. The following are the possible values: • System Defaults • Custom Emails • No emails The values are localized for portals with multiple languages enabled.	Text

ILT Seat Allocation Fields

The following fields are modified or added to the ILT Seat Allocation section for the affected reports:

Field Name	Field Description	Field Type
Enrollment Restrictions	This field displays the enrollment option selected by the user. The following are the possible values: • Place Restrictions • Manage Reservations and Restrictions The values are localized for portals with multiple languages enabled.	Text
Include Subordinates	This field is updated to include the Session Defaults configured for an event. **Note:** *When the* Place Restrictions by OU Type *option is selected in the Enrollment section and an OU is chosen, this field indicates whether or not subordinates will be included. The field displays "Yes" or "No," depending on whether subordinates were selected*	Yes/No

Field Name	Field Description	Field Type
	to be included.	
Number of Seats Reserved	This field is updated to include the Session Defaults configured for an event. **Note:** *When the* <u>Manage reservations and restrictions</u> *option is selected in the Enrollment section, and an OU is chosen, this is the value entered for the number of reserved seats.*	Numeric
Number of Seats Restricted	This field is updated to include the Session Defaults configured for an event. **Note:** *When the* <u>Place Restrictions by OU Type</u> *option is selected in the Enrollment section and an OU type is chosen, then this field displays the number defined as the maximum number of people that can be enrolled in the session.* **Note:** *When either the* <u>Place Restrictions by OU Type</u> *or the* <u>Manage reservations and restrictions</u> *options are selected in the Enrollment section, and an OU is chosen, this field displays the value entered for the maximum number of seats allowed.*	Numeric
Order	This field displays the order defined for the OU when the <u>Manage reservations and restrictions</u> option is selected in the Enrollment section.	Numeric
Organizational Unit Reserved Organizational Unit Restricted	These fields are updated to include the Session Defaults configured for an event. **Note:** *When the* <u>Place Restrictions by OU Type</u> *option is selected in the Enrollment section, this field displays the OU selected in the option. If more than one OU is selected, then each OU appears on a separate row.* **Note:** *If* <u>All Users in [(OU Type) [OU Title)]</u> *is selected in the Enrollment section, then the "All users" text does not display in the report output. For example, All users in Division Managers would display in the report as "Managers."*	Text
Organizational Unit Type Reserved Organizational	These fields are updated to include the Session Defaults configured for an event. **Note:** *When the* <u>Place Restrictions by OU Type</u> *option is selected in the Enrollment section, this field displays the organizational unit*	Text

Field Name	Field Description	Field Type
Unit Type Restricted	*(OU) type selected from the drop-down.* **Note:** *When either the* Place Restrictions by OU Type *or the* Manage reservations and restrictions *options are selected in the Enrollment section, and an OU is chosen, this field displays the OU type for the OU selected. For example,* All users in Division Manager *would display in the report as "Division."*	

Reports Training Plans Co-Planners in Reporting

Training Plans Co-Planners in Reporting Overview

With this enhancement, training plan co-planners can now be reported on in custom reports and the Training Demand Forecast Summary standard report. New fields are added to custom Training Plan reports, and a Contributor Co-Planners column is added to the Training Demand Forecast Summary standard report output.

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
Custom Training Plan Report - Create	Grants ability to create and edit training plan (Training Demand Forecast) custom reports.	Reports - Analytics
Custom Training Plan Report - View	Grants ability to view results of training plan (Training Demand Forecast) custom reports created by self or shared by others. (Training Demand Forecast)	Reports - Analytics
Training Demand Forecast Summary Report	Grants access to the Training Demand Forecast Summary report, which enables the administrator to report on training plans and training need requests. This permission can be constrained by OU, User's OU, User's Self and Subordinates, and User.	Reports - Training

Training Demand Forecast Summary Report

A Contributor Co-Planners column is added to the Training Demand Forecast Summary standard report. This column displays all co-planners assigned by a plan contributor. The names displays as "Co-Planner1 Last Name, Co-Planner1 First Name; Co-Planner2 Last Name, Co-Planner2 First Name;", etc.

To create Training Demand Forecast Summary Reports, go to **Reports > Standard Reports**. From the Training page, click the *Training Demand Forecast Summary* link.

Permissions

Permission Name	Permission Description	Category
Training Demand Forecast Summary Report	Grants access to the Training Demand Forecast Summary report, which enables the administrator to report on training plans and training need requests. This permission can be constrained by OU, User's OU, User's Self and Subordinates, and User.	Reports - Training

Training Plan Custom Reports

With this enhancement, new fields are added to custom Training Plan Reports to report on training plan co-planners. The new fields display in the Training Plan section of the Fields panel on the Custom Report Builder page.

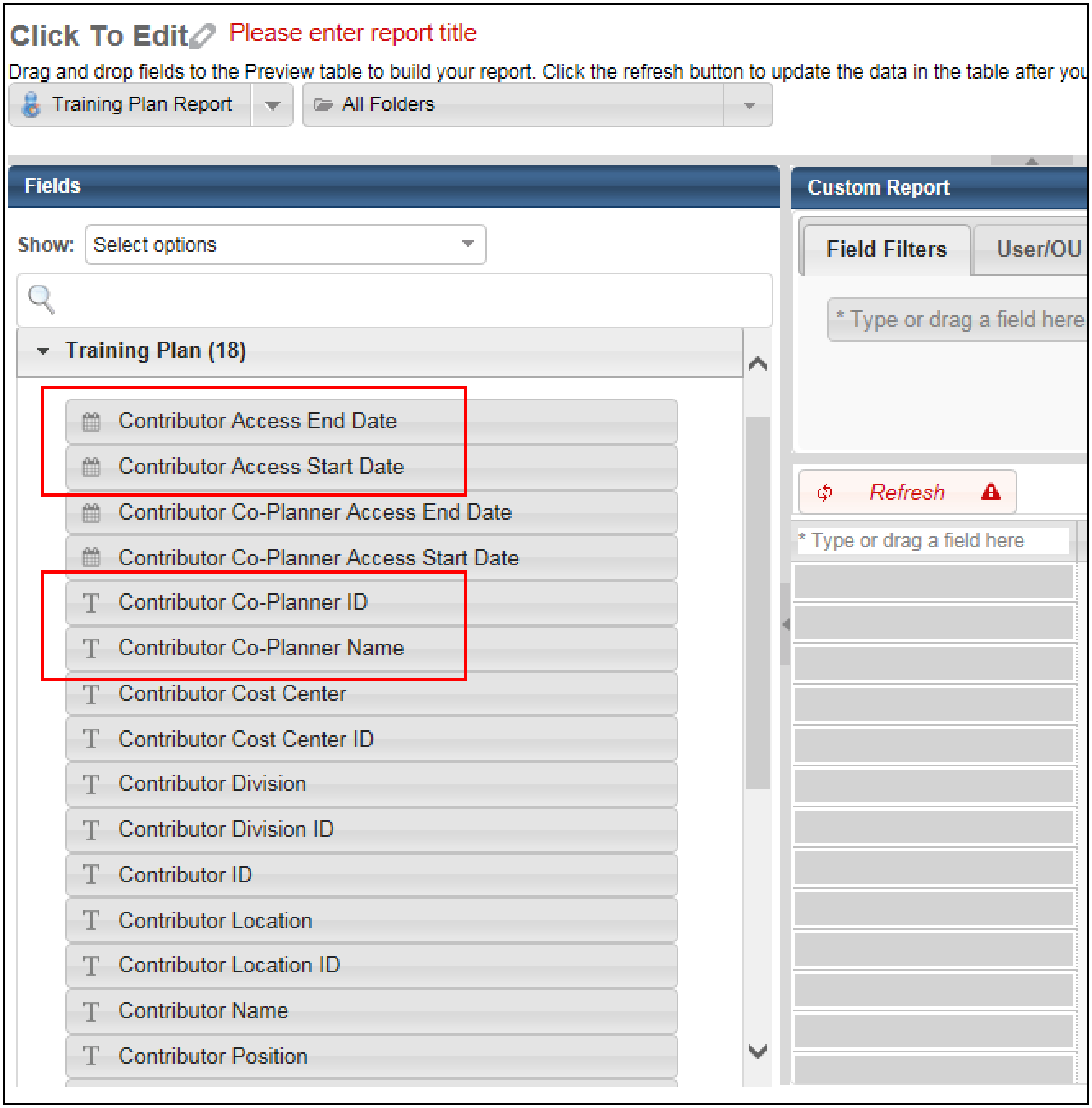
To create custom Training Plan Reports, go to **Reports > Custom Reports**. Then, select the *Training Plan Report* link from the New drop-down.

Permissions

Permission Name	Permission Description	Category
Custom Training Plan Report - Create	Grants ability to create and edit training plan (Training Demand Forecast) custom reports.	Reports - Analytics
Custom Training Plan Report - View	Grants ability to view results of training plan (Training Demand Forecast) custom reports created by self or shared by others. (Training Demand Forecast)	Reports - Analytics

The following new fields are available:

Field Name	Field Description	Field Type
Contributor Co-Planner Access End Date	The contributor co-planner access period end date. Multiple entries display in separate rows.	Date
Contributor Co-Planner Access Start Date	The contributor co-planner access period start date. Multiple entries display in separate rows.	Date
Contributor Co-Planner ID	The user ID of training plan contributor co-planner. Multiple entries display in separate rows.	Text
Contributor Co-Planner Name	The name of the training plan contributor co-planner. Multiple entries display in separate rows.	Text


Click To Edit
Please enter report title
Drag and drop fields to the Preview table to build your report. Click the refresh button to update the data in the table after you
Training Plan Report
All Folders
Fields
Show:
Select options
Training Plan (18)
Contributor Access End Date
Contributor Access Start Date
Contributor Co-Planner Access End Date
Contributor Co-Planner Access Start Date
Contributor Co-Planner ID
Contributor Co-Planner Name
Contributor Cost Center
Contributor Cost Center ID
Contributor Division
Contributor Division ID
Contributor ID
Contributor Location
Contributor Location ID
Contributor Name
Contributor Position
Custom Report
Field Filters
User/OU
* Type or drag a field here
Refresh
* Type or drag a field here

Reports Training Plans Deny Items in Reporting

Training Plans Deny Items in Reporting Overview

With this enhancement, training items that have been denied or approved for a training plan can be reported on in custom reports and the Training Demand Forecast Summary standard report. New fields are added to custom Training Plan reports, and Approval Status and Denial Comments columns are added to the Training Demand Forecast Summary standard report output.

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
Custom Training Plan Report - Create	Grants ability to create and edit training plan (Training Demand Forecast) custom reports.	Reports - Analytics
Custom Training Plan Report - View	Grants ability to view results of training plan (Training Demand Forecast) custom reports created by self or shared by others. (Training Demand Forecast)	Reports - Analytics
Training Demand Forecast Summary Report	Grants access to the Training Demand Forecast Summary report, which enables the administrator to report on training plans and training need requests. This permission can be constrained by OU, User's OU, User's Self and Subordinates, and User.	Reports - Training

Training Demand Forecast Summary Report

The following columns are added to the Training Demand Forecast Summary standard report:

- Approval Status - This column indicates whether or not a learning object (LO) has been denied or approved for a user or an organizational unit. The column displays Approved if the LO has been approved. The column displays Denied if the LO has been denied.
- Denial Comments - This column displays the comments entered when a training plan item is denied. The column is blank for approved training items.

2015 Training Needs

Group By Plan Contributor

Report Criteria

Training Plan:	2015 Training Needs
Plan Status:	In Progress
Plan Period:	1/15/2015 - 12/31/2015
Training Request Type:	All
Subject Request Included:	Yes
Training Title:	N/A
Subject:	N/A
Report Generated By:	Moore, Tasha
Report Date:	1/15/2015

Moore, Tasha (tmoore)

Title	Request Type	Provider	Parent Subject	Subject	Training Hours	Price	Contributor Co-Planners	OU Type	OU Name	Approval Status	Denial Comments	Estimated Users	Estimated Hours	Estimated Cost
Annual Security Awareness Test	Test	Internal			0	$ 0.0 0	Alvares, Tomas; Albert, Maria; Andrews, Janette; Andrews, Marissa	Division	Administration Division	Approved		53	0	$ 0.00
					Total							53	0	$ 0.00
10 Secrets of Time Management for Salespeople: Gain the Competitive Edge and Make Every Second	Publications	External Training			0	$ 0.0 0	Alvares, Tomas; Albert, Maria; Andrews, Janette; Andrews, Marissa	Division	Administration Division	Approved		53	0	$ 0.00
					Total							53	0	$ 0.00
Annual Corporate Security Training	Online Class	1st World Library			0	$ 0.0 0	Alvares, Tomas; Albert, Maria; Andrews, Janette; Andrews, Marissa	Division	Administration Division	Approved		53	0	$ 0.00
					Total							53	0	$ 0.00
Back Safety (Third Edition)	Online Class	Element K			0	$ 0.0 0	Alvares, Tomas; Albert, Maria; Andrews, Janette; Andrews, Marissa	Division	Administration Division	Denied	This training is not relevant to the user's	0	0	$ 0.00
					Total							0	0	$ 0.00
Basics of Effective Communication (Second Edition) (Includes Simulation)	Online Class	Element K			2.73	$ 0.0 0	Alvares, Tomas; Albert, Maria; Andrews, Janette; Andrews, Marissa	Division	Administration Division	Denied	User must complete other training prior to taking this course.	0	0	$ 0.00
					Total							0	0	$ 0.00
A Model Customer Service Program	Online Class	You Achieve.com			0.08	$ 0.0 0	Alvares, Tomas; Albert, Maria; Andrews, Janette; Andrews, Marissa	Division	Administration Division	Approved		53	4.24	$ 0.00
					Total							53	4.24	$ 0.00
Grand Total												212	4.24	$ 0.00

To create Training Demand Forecast Summary Reports, go to **Reports > Standard Reports**. From the Training page, click the *Training Demand Forecast Summary* link.

Permissions

Permission Name	Permission Description	Category
Training Demand Forecast Summary Report	Grants access to the Training Demand Forecast Summary report, which enables the administrator to report on training plans and training need requests. This permission can be constrained by OU, User's OU, User's Self and Subordinates, and User.	Reports - Training

Training Plan Custom Reports

With this enhancement, new fields are added to custom Training Plan Reports to report on training plan items that have been approved or denied. The new fields display in the Training Forecast section of the Fields panel on the Custom Report Builder page.

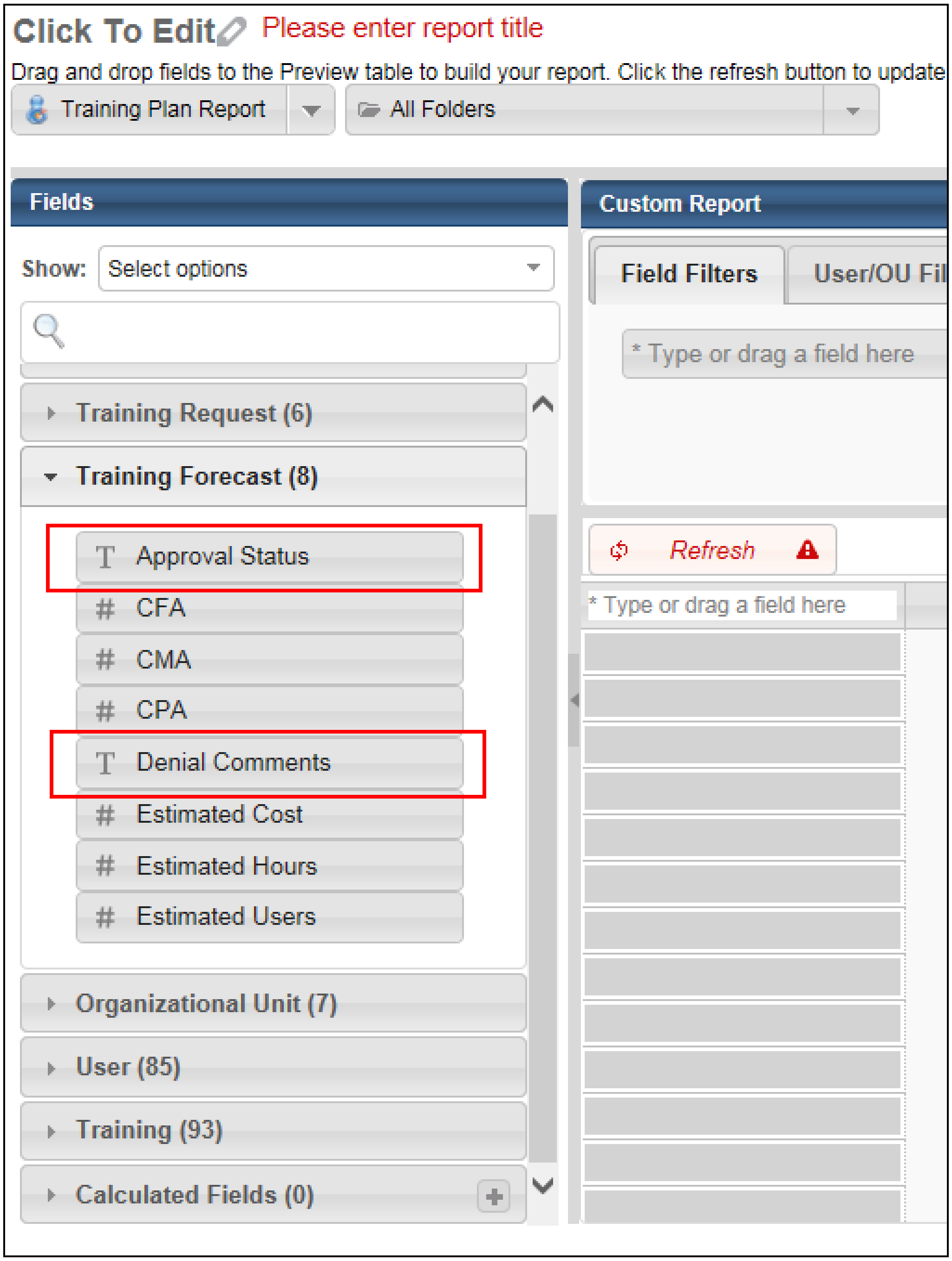
To create custom Training Plan Reports, go to **Reports > Custom Reports**. Then, select the *Training Plan Report* link from the New drop-down.

Permissions

Permission Name	Permission Description	Category
Custom Training Plan Report - Create	Grants ability to create and edit training plan (Training Demand Forecast) custom reports.	Reports - Analytics
Custom Training Plan Report - View	Grants ability to view results of training plan (Training Demand Forecast) custom reports created by self or shared by others. (Training Demand Forecast)	Reports - Analytics

The following new fields are available:

Field Name	Field Description	Field Type
Approval Status	The approval status of the training plan item, either Approved or Denied.	Text
Denial Comments	The comments entered when denying a training plan item.	Text



Click To Edit
Please enter report title
Drag and drop fields to the Preview table to build your report. Click the refresh button to update
Training Plan Report
All Folders
Fields
Show:
Select options
Training Request (6)
Training Forecast (8)
Approval Status
CFA
CMA
CPA
Denial Comments
Estimated Cost
Estimated Hours
Estimated Users
Organizational Unit (7)
User (85)
Training (93)
Calculated Fields (0)
Custom Report
Field Filters
User/OU Fil
* Type or drag a field here
Refresh
* Type or drag a field here

Reports Training Unit Key Code Custom Report Constraints

Training Unit Key Code Custom Report Constraints Overview

With this enhancement, constraints are added to the permissions for creating and viewing the Training Unit Key Code custom report. Prior to this enhancement, users with permission to create or view Training Unit Key Code custom reports could see all training unit assignments and key codes in the portal. This enhancement enables administrators to set constraints on the permissions to limit the visibility of report data to specific users or organizational units (OU).

In addition, a Training Unit Contact field is added to the Key Code section in the Fields panel to enable reporting on the training unit contact.

Use Case

1. Sam is an administrator at Acme Company. Sam creates a training unit assignment (Assignment 1) that will assign training units to key code ABC.
2. Sam's client, Acme Bank, will be assigning training to its users using key code ABC.
3. Acme Bank is in the Finance Division OU.
4. Sam sets the training unit contact for the assignment as Jane Jones. Jane Jones is in the Finance Division OU.
5. Sam assigns Jane the Training Unit Key Code Report - Create permission and adds the User's Division constraint.
6. Jane runs a Training Unit Key Code Report in custom reports and sees Assignment 1 in her report.

Security

Note: *Upon implementation of this enhancement, the permission descriptions will be updated in Online Help to display the permission constraints.*

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
Custom Training Unit Key Code Reports - Create	Grants access to view, create and edit the Training Unit Key Code Report in Analytics, which displays training unit information for key codes. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports.	Reports - Analytics
Custom Training Unit	Grants access to view the Training Unit Key Code Report in Analytics, which displays training unit information for key codes.	Reports - Analytics

Key Code Reports - View	This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports.	

Permission Constraints

With this enhancement, the following constraints are added to the permissions for creating and viewing the Training Unit Key Code custom report:

- Restrict to OU
- Restrict to User's OU
- Restrict to User Self and Subordinates
- Restrict to User
- Restrict to User's Self
- Restrict to User's Manager
- Restrict to User's Superiors
- Restrict to User's Subordinates
- Restrict to User's Direct Reports

Upon implementation of this enhancement, the permission descriptions will be updated in Online Help to display the permission constraints.

Permissions

Permission Name	Permission Description	Category
Custom Training Unit Key Code Reports - Create	Grants access to view, create and edit the Training Unit Key Code Report in Analytics, which displays training unit information for key codes. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports.	Reports - Analytics
Custom Training Unit Key Code Reports - View	Grants access to view the Training Unit Key Code Report in Analytics, which displays training unit information for key codes. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports.	Reports - Analytics

Training Unit Contact Field

The Training Unit Contact field is added to the Key Code section in the Fields panel for Training Unit Key Code custom reports. When included in the report, the field displays the training unit contact defined for the training unit assignment. When more than one training unit contact is defined for the training unit assignment, the contacts display in separate rows in the report output.

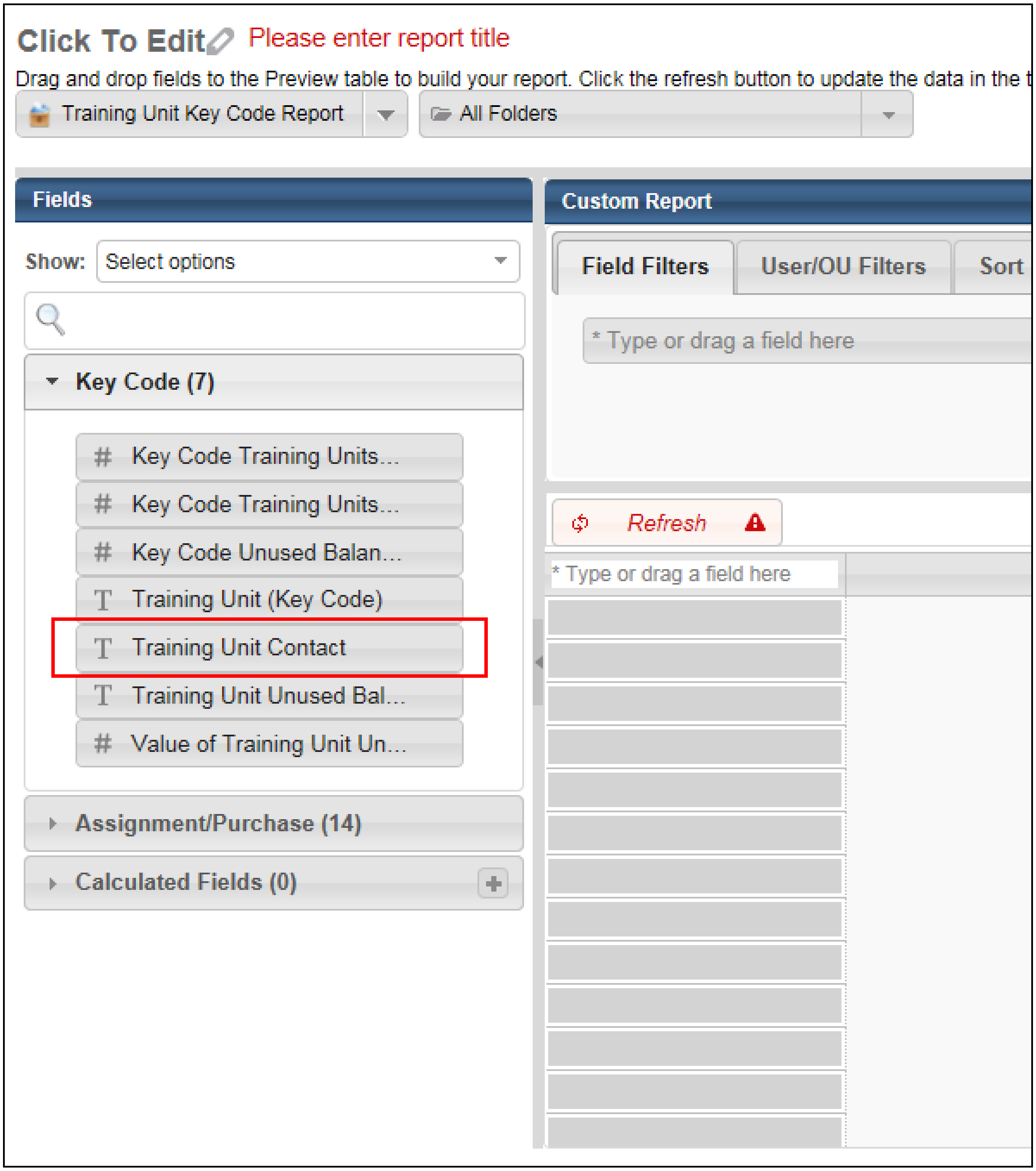
Note: *As part of this enhancement, with the constraints added to the permissions for creating and viewing Training Unit Key Code custom reports, the visibility of training unit assignments in the report output is dependent upon the user's permission constraints.*

To create Training Unit Key Code custom reports, go to **Reports > Custom Reports**. Then, select the *Training Unit Key Code Report* link from the New drop-down.

Permissions

Permission Name	Permission Description	Category
Custom Training Unit Key Code Reports - Create	Grants access to view, create and edit the Training Unit Key Code Report in Analytics, which displays training unit information for key codes. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports.	Reports - Analytics
Custom Training Unit Key Code Reports - View	Grants access to view the Training Unit Key Code Report in Analytics, which displays training unit information for key codes. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports.	Reports - Analytics

Note: *Upon implementation of this enhancement, the permission descriptions will be updated in Online Help to display the permission constraints.*

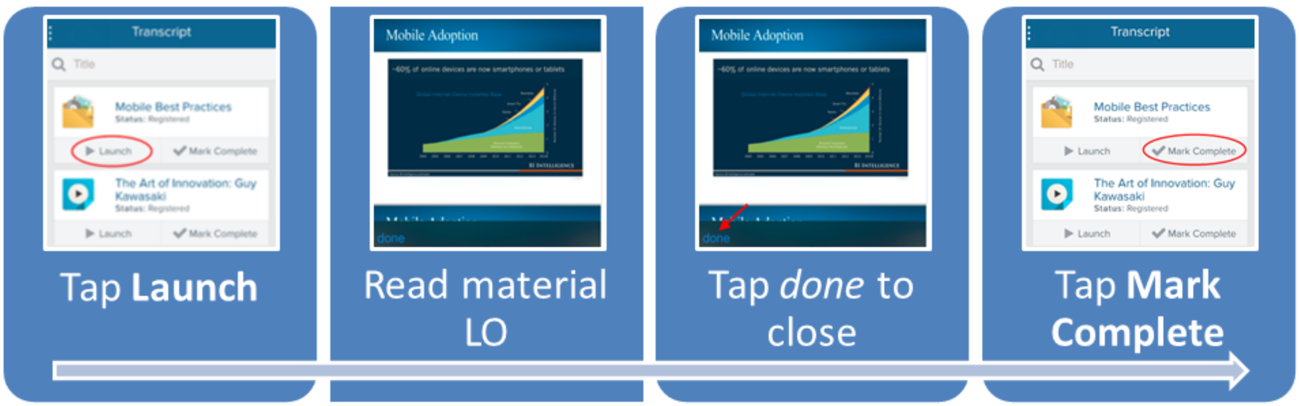

Click To Edit
Please enter report title
Drag and drop fields to the Preview table to build your report. Click the refresh button to update the data in the t
Training Unit Key Code Report
All Folders
Fields
Show:
Select options
Key Code (7)
Key Code Training Units...
Key Code Training Units...
Key Code Unused Balan...
Training Unit (Key Code)
Training Unit Contact
Training Unit Unused Bal...
Value of Training Unit Un...
Assignment/Purchase (14)
Calculated Fields (0)
Custom Report
Field Filters
User/OU Filters
Sort
* Type or drag a field here
Refresh
* Type or drag a field here

Mobile

Launch Mobile Material Learning Object

With this enhancement, users can now launch and complete material learning object (LO) types in Cornerstone Mobile®. The LO must be mobile-enabled by the administrator in Course Catalog in order for users to launch the LO in the app.

Launch Material LO



Availability

Material LO can be launched from the following operating systems:

- iOS
- Android

They are also available via the mobile web.

FAQs

What is the maximum file size for materials that can be launched in the app?

The maximum file size is 5MB.

What file types are acceptable for attachments?

- docx
- doc
- gif
- jpeg
- jpe
- jpg
- pdf

- pps
- pptx
- rtf
- txt
- xlsx
- xls

What browser is used to launch the material LOs?

When users tap the **Launch** button, the material opens in the user's native mobile browser document viewer.

What if the user's native document viewer does not support the file type of the material?

If the user's native document viewer does not support the file type, then a message displays in a pop up indicating that the user's device does not support the file type.

How do material LOs that are configured with an external link open in the app?

Material LO's configured with an external link open the URL in the native browser outside the app, such as a redirect to a website to download a book.

Are users able to acknowledge completion of the material using an acknowledgement form?

Yes. The administrator must configure the acknowledgement form in Course Catalog. The administrator must select to include the acknowledgement form and require completion of acknowledgement in order for the form to display in the app. The form displays when the user taps the **Mark Complete** button. Once the user taps the **Acknowledge** button on the acknowledgement form, the material is removed from the user's transcript or the completion goes through the completion approval process, if configured by the administrator.

What options are available to the user depending on the status of the material LO?

Status	Action Buttons	Expected Behavior
Approved	View Details	The View Details option displays until the user has successfully registered from the web app. Once registered, the **Launch** and **Mark Complete** action buttons display in the app.
Manage	View Details	Only the View Details option displays.
Pending Acknowledgement	Launch + Mark Complete	Users must complete the acknowledgement form in order for the LO to be in a Completed status. Once acknowledged/marked complete, the LO is removed from the mobile transcript, provided there is no completion approval process.
Pending Evaluation	Launch	The LO can only be launched and marked complete on the

Status	Action Buttons	Expected Behavior
		mobile web if an evaluation exists. Once the course has been evaluated/marked complete, the LO will be removed from the mobile transcript.
Pending Prerequisites	View Details	The **Launch** and **Mark Complete** action buttons will only display when all required prerequisites have been completed.
Pending Signature	View Details	The LO can only be launched, marked complete, and signed on the web app. Once signed/marked complete, the LO will be removed from the mobile transcript.
Post-Work	Launch + Mark Complete	The **Launch** and **Mark Complete** action buttons display.
Pre-Work	View Details	The **Launch** and **Mark Complete** action buttons will only display when all required pre-work has been completed.
Registered	Launch + Mark Complete	The **Launch** and **Mark Complete** action buttons display.

Mobile Device Management

Mobile Device Management Phase 1

For iOS devices, organizations that have a Mobile Device Management (MDM) provider can now remotely wipe the Cornerstone Mobile® app, localize and brand sign-in pages, and control mobile offline learning. Administrators have additional control and security over the Cornerstone Mobile® app on an employee's iOS device.

Implementation

This functionality is only available for the Cornerstone Mobile® iOS app, and does not apply to the mobile website.

Organizations must have a current MDM provider, such as MobileIron or Airwatch.

This requires organizations to download a configuration file, which is available on the Cornerstone Success Center upon release.

MDM - Remote Wipe

With this enhancement, the Cornerstone Mobile® app can now be managed via a Mobile Device Management (MDM) provider for iOS devices. With this enhancement, organizations can now remotely deactivate or remove the Cornerstone Mobile® app from the personal device of any user who downloaded the app from the organization's MDM app store.

MDM - Custom Branding of Login Pages

With this enhancement, the Cornerstone Mobile® app login pages can be customized via a Mobile Device Management (MDM) provider for iOS devices.

A custom configuration file can be uploaded via a MDM provider. In the configuration file, administrators can customize the following items:

- Login page button colors
- Login page background colors
- Localized language on login pages
- Corporation name on login pages

By default, the online system configurations are used for the mobile application. The custom configuration file overwrites the configurations that are used for the mobile app.

The following pages and action buttons can be customized:

- Home page
    - Sign In button
    - Log In with SSO button
    - Log In with PIN button
- Username/Password page
    - Sign In button
- Single Sign On page
    - Continue button
- Alias/PIN Log In page
    - Sign In button
- Register Device page
    - Register Device button

MDM - Offline Learning Objects

With this enhancement, via a Mobile Device Management (MDM) provider for iOS devices, administrators can choose to turn on or off mobile offline learning via the Cornerstone Mobile® app.

A custom configuration file can be uploaded via a MDM provider. In the configuration file, administrators can customize the following items:

- Enable/disable users from downloading offline content

The following LO types can be downloaded for offline learning:

- Online Course LO

By default, the online system configurations are used for the mobile application. The custom configuration file overwrites the configurations that are used for the mobile app.

MDM - Configuration File

With this enhancement, a custom configuration file can be uploaded via a Mobile Device Management (MDM) provider for iOS devices. In the configuration file, administrators can customize the following items for the Cornerstone Mobile® app:

- Login page button colors
- Login page background colors
- Localized language on login pages
- Corporation name on login pages
- Disable/enable mobile offline learning

By default, the online system configurations are used for the mobile application. The custom configuration file overwrites the configurations that are used for the mobile app.

This requires organizations to download a configuration file, which is available on the Cornerstone Success Center upon release. A custom configuration file must have a .plist extension (e.g., CustomConfiguration.plist).

The "key" fields in the configuration file cannot be modified. If these fields are modified, then the default setting from the system will apply to the mobile app. The "string" fields are the only fields that can be modified. If modifications to the "string" field are not properly formatted, then the default setting from the system will apply to the mobile app.

The following fields can be used in the custom configuration file:

Field Name	Field Usage
corp	<key>corp</key> <string>cornerstone</string>
language	<key>language</key> <string>fr-FR</string>
LEARNING	
disableMobileOfflineLearning	<key>disableMobileOfflineLearning</key> <true/>
HOME PAGE	
homeButtonColor	<key>homeButtonColor</key> <string>#0033FF</string>
homeBGColor	<key>homeBGColor</key> <string>#00CCFF</string>
LOGIN PAGE (Username/Password Page)	
loginButtonColor	<key>loginButtonColor</key> <string>#006600</string>
loginBGColor	<key>loginBGColor</key>

Field Name	Field Usage
	<string>#009900</string>
SSO PAGE	
ssoButtonColor	<key>ssoButtonColor</key> <string>#FF0000</string>
ssoBGColor	<key>ssoBGColor</key> <string>#FF6600</string>
DEVICE REGISTRATION PAGE	
drButtonColor	<key>drButtonColor</key> <string>#660099</string>
drBGColor	<key>drBGColor</key> <string>#996699</string>
DEVICE REGISTRATION LOGIN PAGE (Alias/PIN Page)	
drLoginButtonColor	<key>drLoginButtonColor</key> <string>#FF9933</string>
drLoginBGColor	<key>drLoginBGColor</key> <string>#FFCC33</string>

Search for Training

Mobile Search for Training

With this enhancement, within the Cornerstone Mobile® app, users can easily search for and request training to be added to their transcript. Users can also view training details, ratings, and reviews for all types of training to make informed decisions prior to learning. Managers can quickly search for and assign training to direct reports.

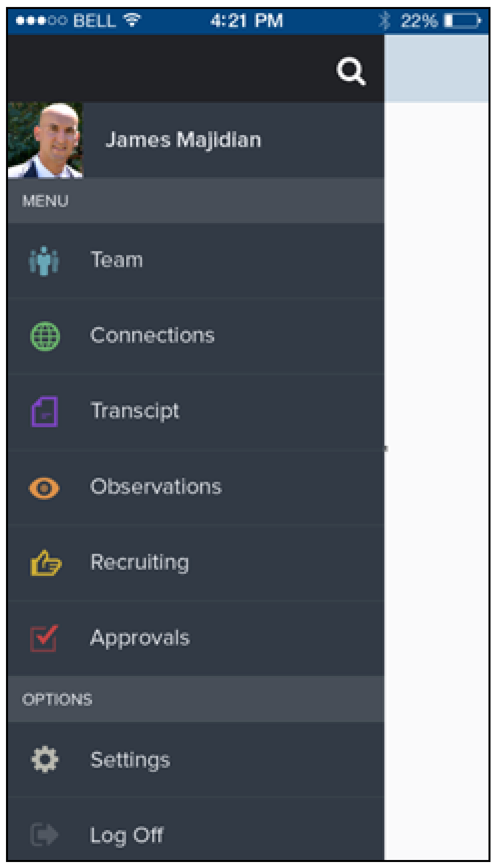
The Search functionality uses the same settings as Global Search within the system. The ability to search for training within the Cornerstone Mobile® app is automatically enabled if Training search is enabled in Search Preferences. In addition, the search results are displayed based on the Search Preferences within the system. *See Search Preferences for additional information.*

Mobile - Search for Training

With this enhancement, users can now search for all types of training within the Cornerstone Mobile® app. The Search functionality uses the same settings as Global Search within the system.

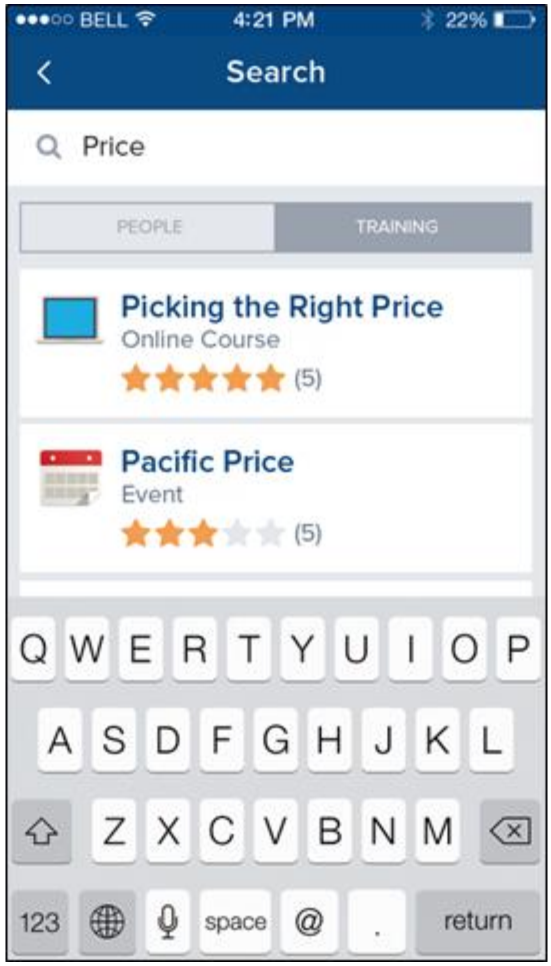
The ability to search for training within the Cornerstone Mobile® app is automatically enabled if Training search is enabled in Search Preferences. In addition, the search results are displayed based on the Search Preferences within the system. *See Search Preferences for additional information.*

Users can search for training by opening the slide out navigation panel and clicking the Search icon at the top of the menu. This opens the Search page with the People tab selected. The Search icon is only available if Training or People search is enabled in Search Preferences within the system.



If a Training filter is available, tap the Training filter, and then tap the Search field. In the Search field, enter the search terms, and then tap Search. The search results are displayed.

Users can tap a LO to open the Training Details page for the LO. *See* **Mobile - LO Details Page** *on* page 251 *for additional information.*


BELL
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Search
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TRAINING
Picking the Right Price
Online Course
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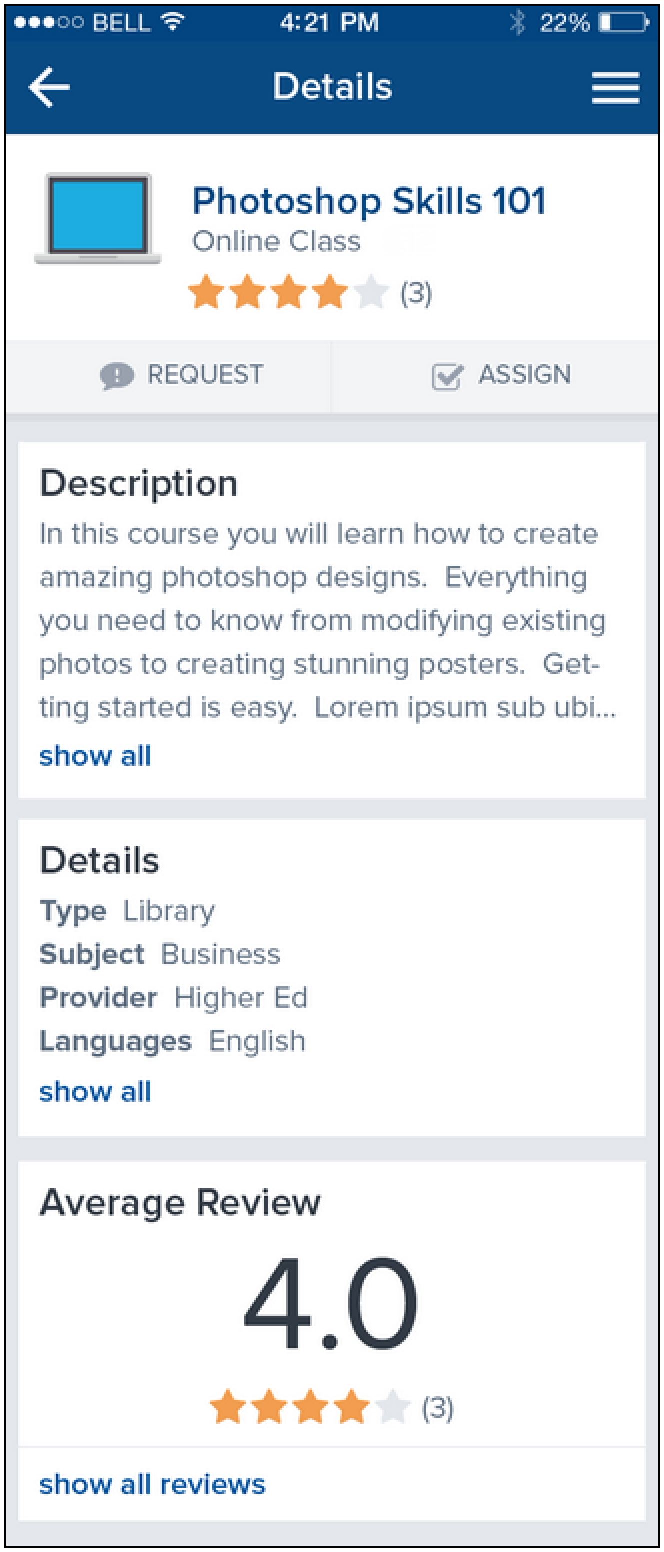
Mobile - LO Details Page

The Learning Object (LO) Details page provides a detailed summary of the LO and enables users and managers to request or assign the LO.

To view the LO Details page for a LO, you must first search for the appropriate LO. Then, tap the appropriate LO. *See* **Mobile - Search for Training** *on* page 249 *for additional information.*

From this page, users can request the LO, and managers can assign the LO.

- *See* **Mobile - Request Training** *on* page 256 *for additional information.*
- *See* **Mobile - Assign Training** *on* page 259 *for additional information.*


●●●○○ BELL
4:21 PM
22%
Details
Photoshop Skills 101
Online Class
(3)
REQUEST
ASSIGN
Description
In this course you will learn how to create amazing photoshop designs. Everything you need to know from modifying existing photos to creating stunning posters. Getting started is easy. Lorem ipsum sub ubi...
show all
Details
Type Library
Subject Business
Provider Higher Ed
Languages English
show all
Average Review
4.0
(3)
show all reviews

Mobile - Training Reviews

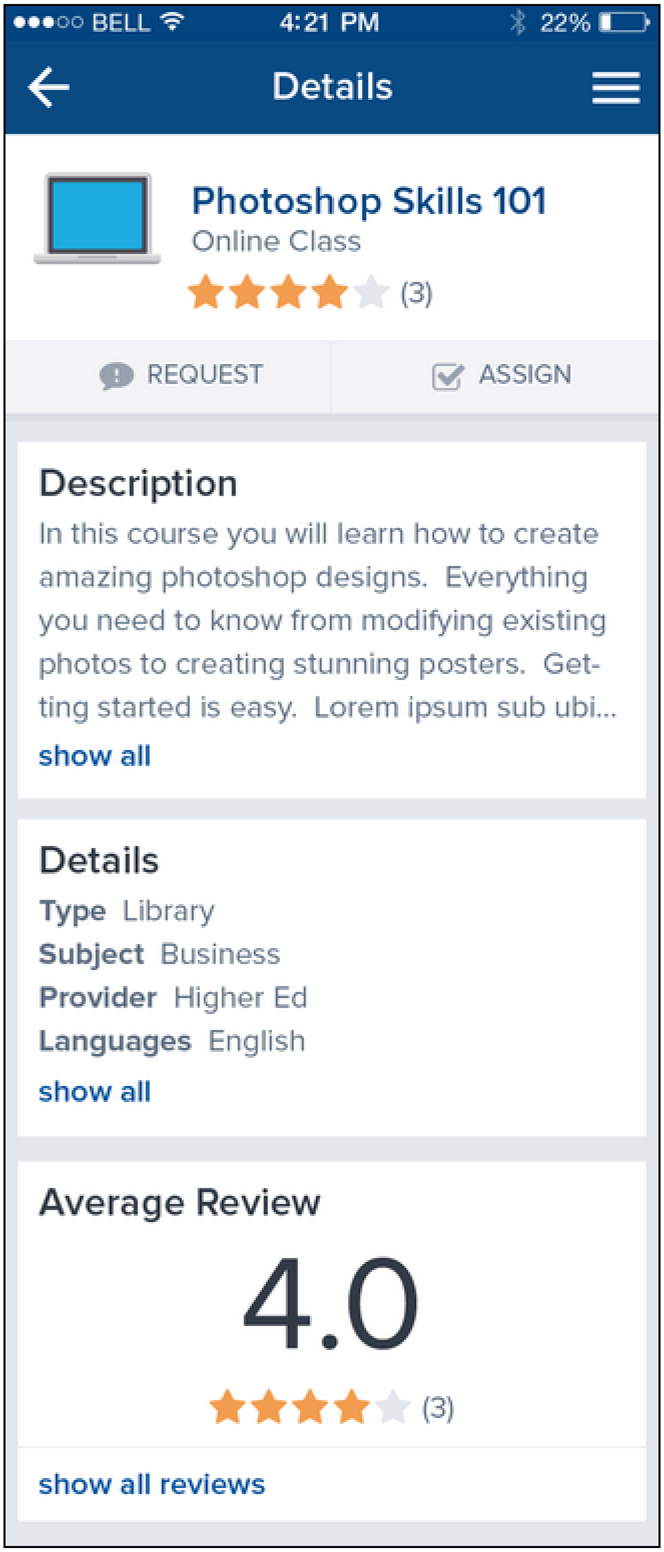
With this enhancement, users can now view and create reviews for learning objects (LOs) within the Cornerstone Mobile® app. The Ratings and Reviews functionality can be enabled and configured from the Course Ratings Preferences page within the system. *See Course Ratings Preferences for additional information.*

To view and create reviews for a LO, you must first search for and select the appropriate LO. *See* **Mobile - Search for Training** *on* page 249 *for additional information.*

When the appropriate LO is selected, this opens the LO Details page for the LO. The Ratings and Reviews section is only available on the LO Details page if the following are true:

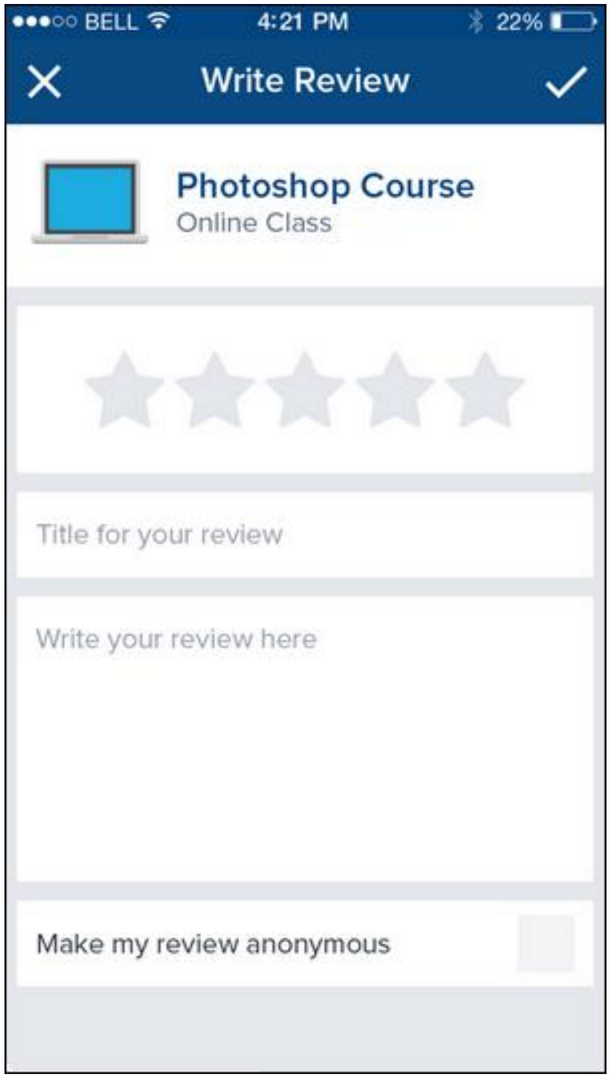
- Course ratings are enabled
- The user is able to view and apply course ratings for the selected LO

On the LO Details page, the Average Review section is displayed. Tap the Ratings tab from the page sub-menu or the *show all reviews* link in the *Average Review* section to open the Reviews screen.



If the user has completed the LO, but has not yet reviewed the LO, then the *Write Review* option is displayed. Tap the *Write Review* option to write a review for the LO.

After writing the review, tap the checkmark icon in the upper-right corner of the screen. **Note:** *Users cannot delete or edit their review from the mobile application.*

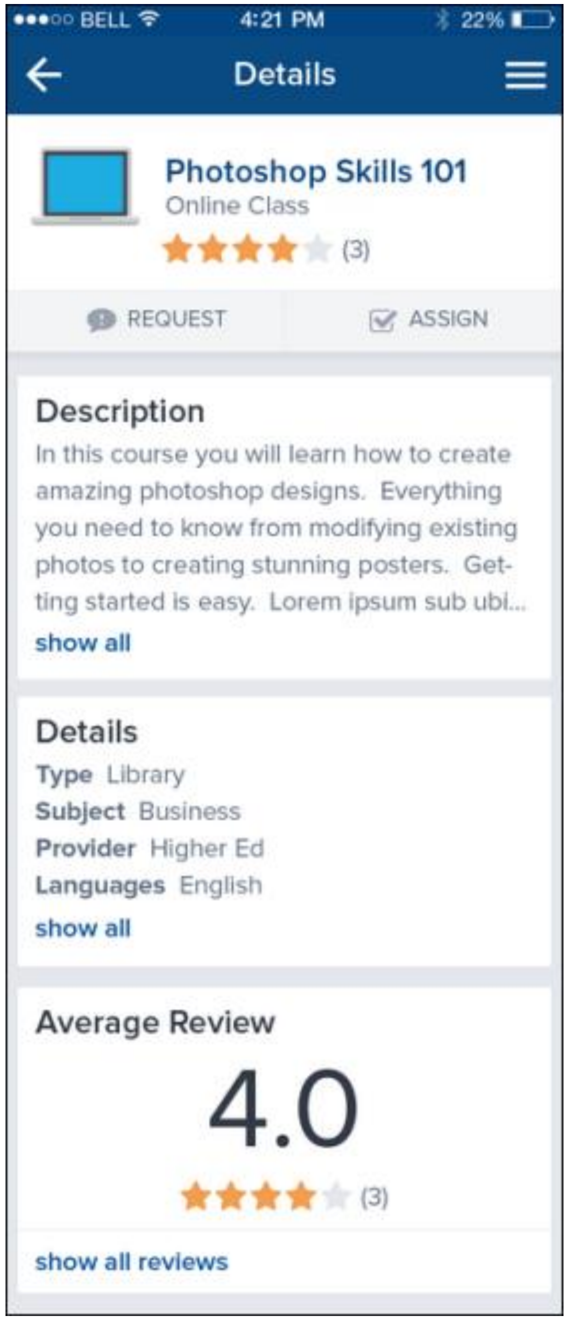


Mobile - Request Training

With this enhancement, users can now search for and request all types of training within the Cornerstone Mobile® app. The Search functionality uses the same settings as Global Search within the system.

To request training, you must first search for and select the appropriate learning object (LO). *See* **Mobile - Search for Training** *on* page 249 *for additional information.*

When the appropriate LO is selected, this opens the LO Details page for the LO. To request the LO, tap the *Request* option. If necessary, select the appropriate training purpose and confirm the request. After the request is completed, the LO appears on the user's Transcript.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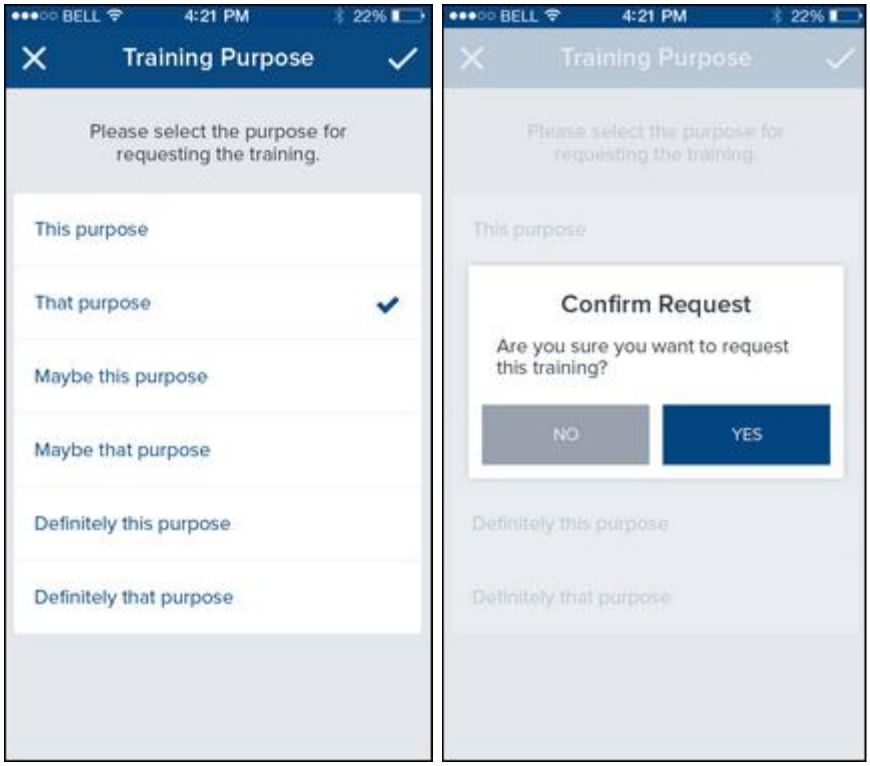
4:21 PM
22%
Details
Photoshop Skills 101
Online Class
(3)
REQUEST
ASSIGN
Description
In this course you will learn how to create amazing photoshop designs. Everything you need to know from modifying existing photos to creating stunning posters. Get-ting started is easy. Lorem ipsum sub ubi...
show all
Details
Type Library
Subject Business
Provider Higher Ed
Languages English
show all
Average Review
4.0
(3)
show all reviews


BELL
4:21 PM
22%
Training Purpose
Please select the purpose for requesting the training.
This purpose
That purpose
Maybe this purpose
Maybe that purpose
Definitely this purpose
Definitely that purpose
BELL
4:21 PM
22%
Training Purpose
Please select the purpose for requesting the training.
This purpose
Confirm Request
Are you sure you want to request this training?
NO
YES
Definitely this purpose
Definitely that purpose

Mobile - Assign Training

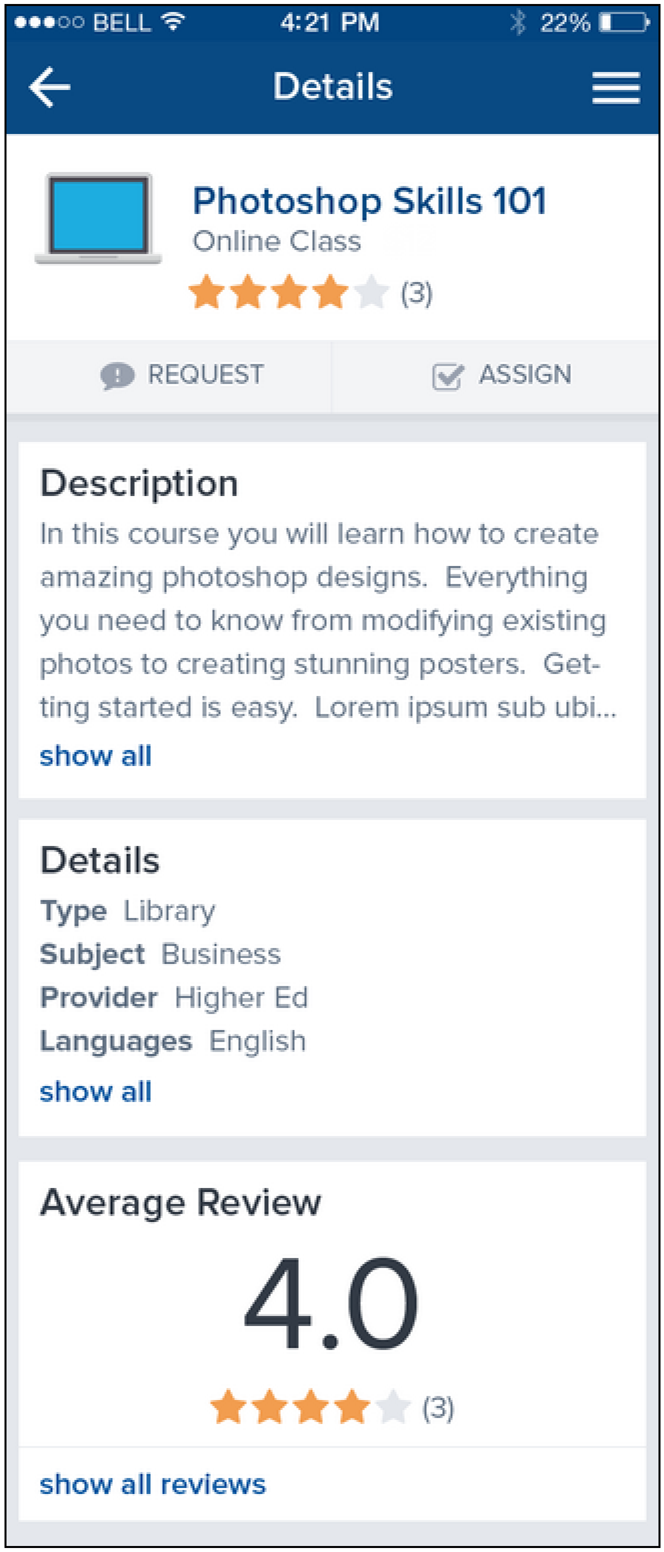
With this enhancement, managers can now search for and assign all types of training within the Cornerstone Mobile® app. The Search functionality uses the same settings as Global Search within the system.

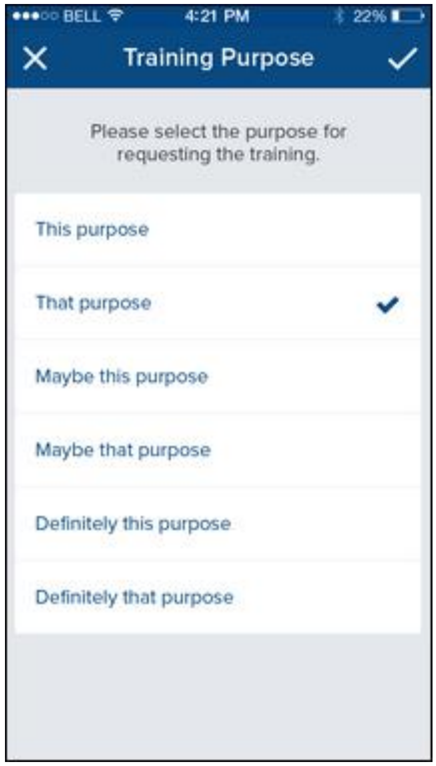
To assign training, you must first search for and select the appropriate learning object (LO). *See* **Mobile - Search for Training** *on* page 249 *for additional information.*

Permissions

Permission Name	Permission Description	Category
Assign Training	Grants ability to assign learning objects to the transcripts of those for whom the user is the assigned manager, approver or cost center approver. This is a manager/approver permission.	Learning

When the appropriate LO is selected, this opens the LO Details page for the LO. To assign the LO, tap the *Assign* option. This option is only available if you have direct reports.

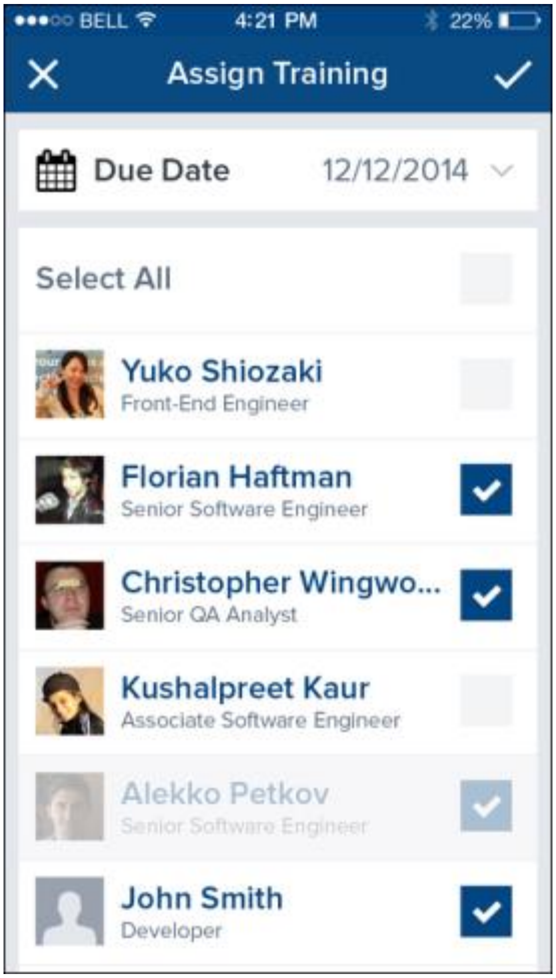

●●●○○ BELL
4:21 PM
22%
Details
Photoshop Skills 101
Online Class
(3)
REQUEST
ASSIGN
Description
In this course you will learn how to create amazing photoshop designs. Everything you need to know from modifying existing photos to creating stunning posters. Getting started is easy. Lorem ipsum sub ubi...
show all
Details
Type Library
Subject Business
Provider Higher Ed
Languages English
show all
Average Review
4.0
(3)
show all reviews

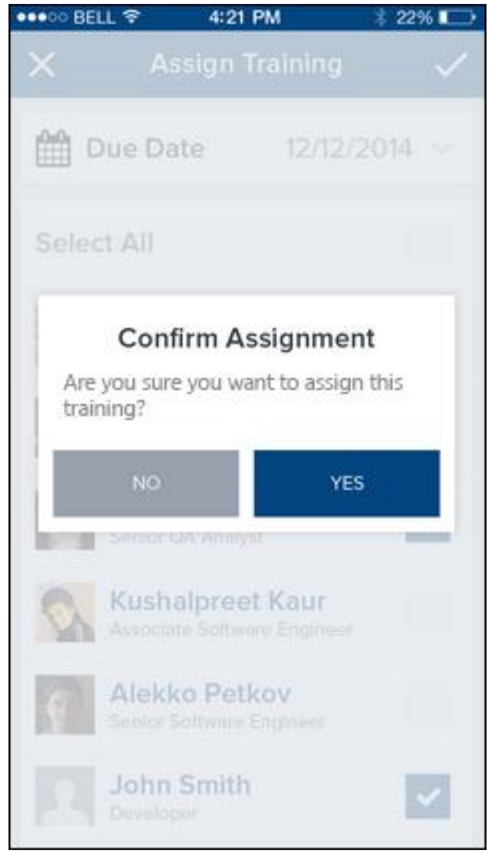


After selecting the training purpose, the Assign Training screen opens.

- Due Date - If enabled, the Due Date is displayed at the top of the screen. If necessary, tap the Due Date to select a different due date.
- Select Users - Select the users to whom the training should be assigned by tapping the box to the right of the user's name. When a user is selected, a checkmark appears in the box. Or, tap the Select All option to select all available direct reports.

After selecting the appropriate due date and users, click the checkmark in the upper-right corner of the screen to assign the training, and then confirm the assignment.


BELL
4:21 PM
22%
Assign Training
Due Date
12/12/2014
Select All
Yuko Shiozaki
Front-End Engineer
Florian Haftman
Senior Software Engineer
Christopher Wingwo...
Senior QA Analyst
Kushalpreet Kaur
Associate Software Engineer
Alekko Petkov
Senior Software Engineer
John Smith
Developer


BELL
4:21 PM
22%
Assign Training
Due Date
12/12/2014
Select All
Confirm Assignment
Are you sure you want to assign this training?
NO
YES
Kushalpreet Kaur
Associate Software Engineer
Alekko Petkov
Senior Software Engineer
John Smith
Developer

Session Timeout

With this enhancement, users are automatically logged out of the Cornerstone Mobile® app after the period of inactivity that is defined for the portal. Users are automatically logged out regardless of the method they used to log in to the app: single sign-on (SSO), user name and password, or device registration.

FAQs

Are users warned that they are about to be logged out?

Yes. A warning message display in the app to alert users that they will be automatically logged out if they remain idle. The user must tap the **OK** button in order to remain in the app. If the user does not tap the **OK** button within two minutes of the message displaying, then the user is logged out and directed to the log-in screen.

How soon before session timeout does the warning message display?

The session timeout message displays two minutes before users are automatically logged out. If the user does not tap the **OK** button within two minutes of the message displaying, then the user is logged out and directed to the log-in screen.

Can the administrator configure the session timeout warning message?

No. The session timeout warning message is hard-coded.

How does the app determine whether or not a user is active in the app?

Activity in the app is defined as any touch-enabled action.

Is the inactivity timer reset when the user taps the OK button in the session timeout warning message?

Yes. When the user taps the **OK** button in the session timeout warning message, the inactivity timer is reset. The session timeout warning message closes and the user remains on the current page in the app.

Performance

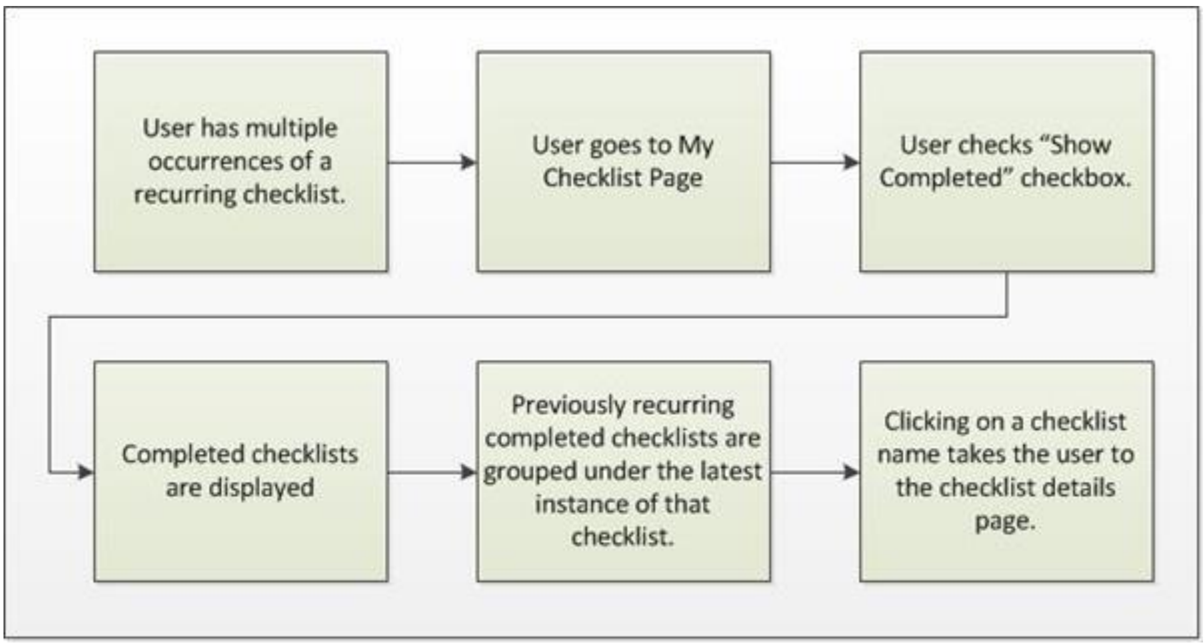
Display All Instances of Recurring Checklists

Display All Instances of Recurring Checklists

Prior to this enhancement, only the most recent instance of a recurring checklist appeared on the My Checklists page. There was no way for users who were assessed in a recurring checklist to view their previously completed recurring checklists from their My Checklists page.

With this enhancement, all instances of recurring checklists are available on the My Checklists page.

Workflow



Use Cases

An auditor asks a user to show a checklist that was completed at the end of last year. The user navigates to their My Checklists page and displays all previously completed checklists. The auditor easily verifies when the checklist was completed.

Implementation

Upon release, this functionality is automatically available in Stage and Live portals for all organizations using the Observation Checklist functionality.

My Checklists

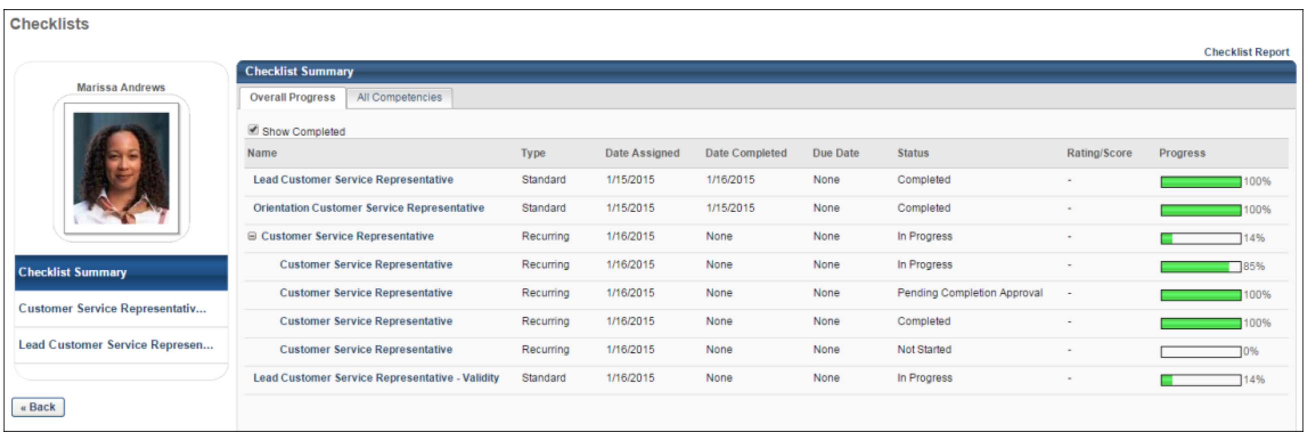
With this enhancement, all instances of recurring checklists are available on the My Checklists page.

To access the My Checklists page, go to **Performance > My Checklists**.

By default, only checklists that are not completed appear on the My Checklists page. To view all instances of recurring checklists, select the Show Completed option.

When completed checklists are displayed on the My Checklists page, all instances of a recurring checklist are grouped together under the most recent instance of the checklist, regardless of the status of the previous instance.

- Users can expand the recurring checklist to view all instances by clicking the Expand icon ⊞. The Expand icon is only available if the recurring checklist has multiple instances. All instances of a recurring checklist are sorted by Date Assigned with the most recently assigned checklist displayed first.
- A Date Completed column is displayed with the completion dates of any completed checklists.
- Users can click the name of any checklist to view the details of that instance of the checklist.



My Checklists - Checklist Report

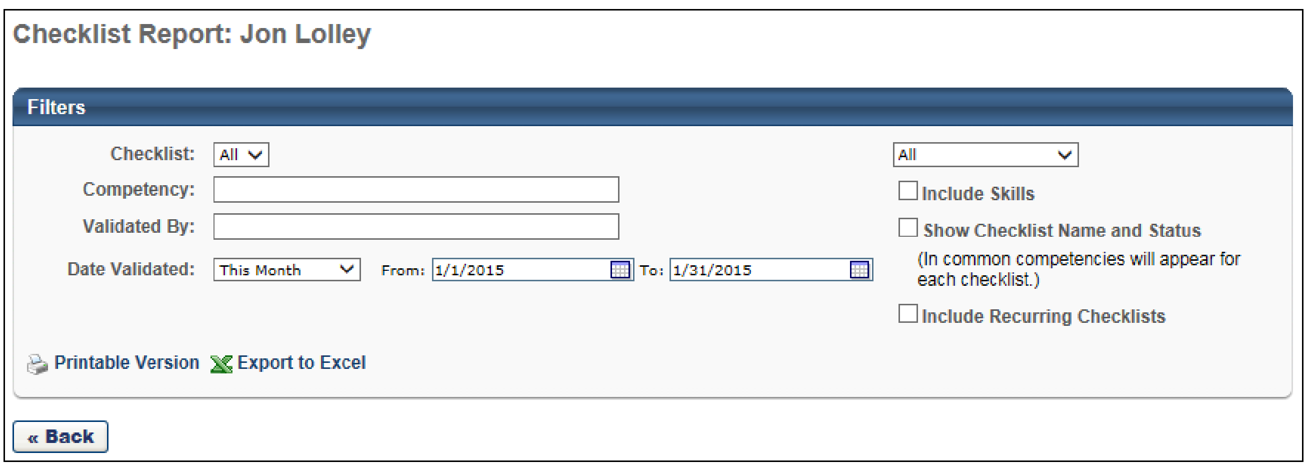
With this enhancement, all instances of recurring checklists are available in the Checklist Report that is accessed from the My Checklists page.

To access the My Checklists - Checklist Report page, go to **Performance > My Checklists**. Then, click the *Checklist Report* link in the upper-right corner of the page.

As previously implemented, only the latest instance of a recurring checklist is available from the Checklist drop-down menu.

An Include Recurring Checklists option is now available in the report criteria. When this option is selected, recurring checklists are included in the report output.

- If this option is selected and "All" is selected from the Checklist drop-down, then all instances of any recurring checklist that match the report criteria are included in the report output.
- If this option is selected and a specific checklist is selected from the Checklist drop-down, then all instances of the selected checklist that match the report criteria are included in the report output.



If recurring checklists are included and the Show Checklist Name and Status option is selected, then a new Occurrence column is included in the report output.

Print Checklist

Name: Elliot Jones
Division: CFS
Start Date: 12/1/2014
End Date: 1/1/2015
Checklist: All
Competency:
Report Date: 12/17/2014

Competency	Skills	Rating	Validated By	Date	Method	Due Date	Occurance	Checklist	Checklist Status
Client Focus Level 3 v1	**4/4**						1	Accounting Manager	In Progress
Looks for ways to add value beyond clients' immediate requests. v0			Andrews, Marissa	12/16/2014	Observation	None	1	Accounting Manager	In Progress
Client Focus Level 3 v1	**4/4**						2	Accounting Manager	In Progress
Looks for ways to add value beyond clients' immediate requests. v0			Andrews, Marissa	12/16/2014	Observation	None	2	Accounting Manager	In Progress

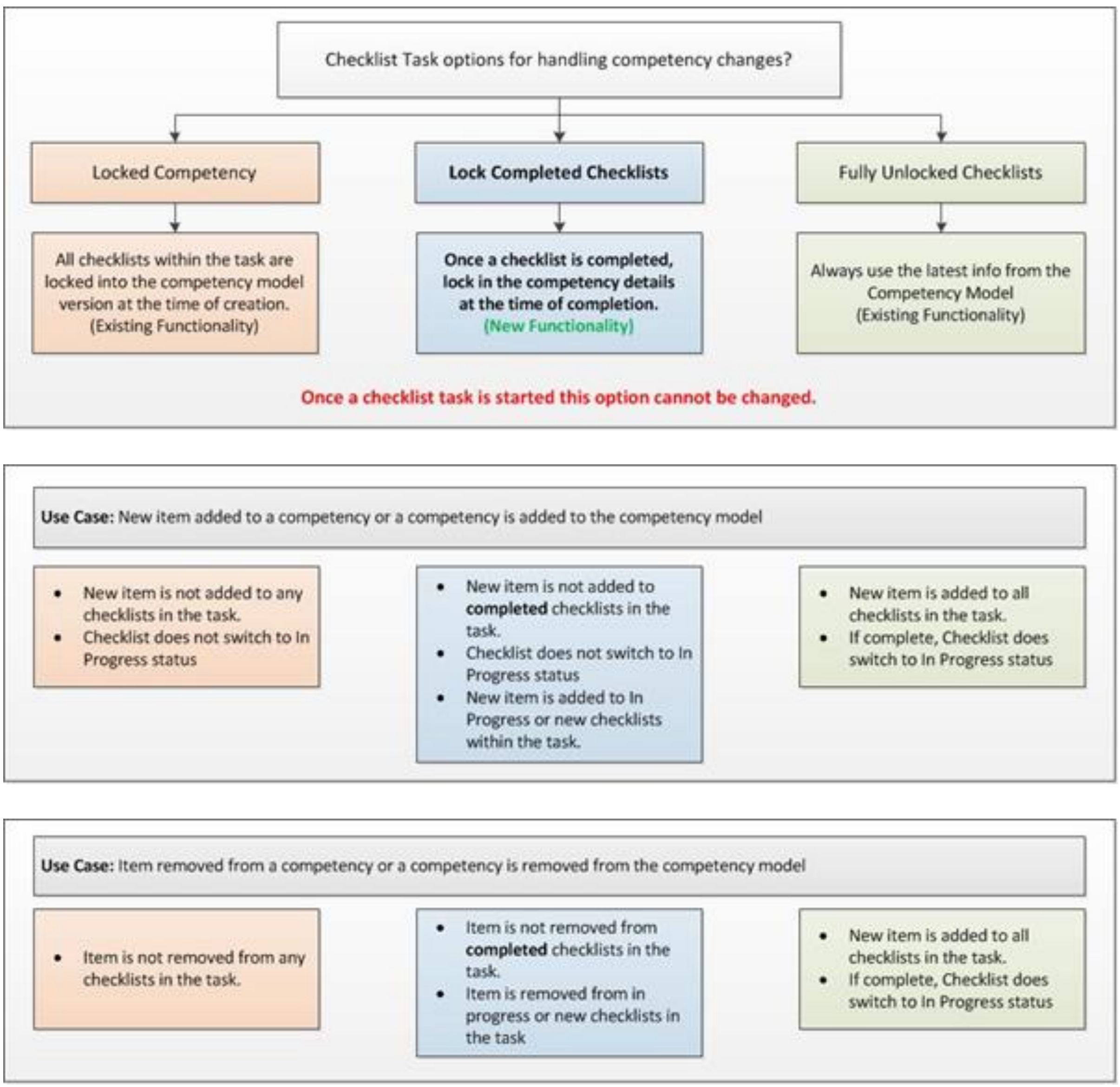
Lock Completed Checklists

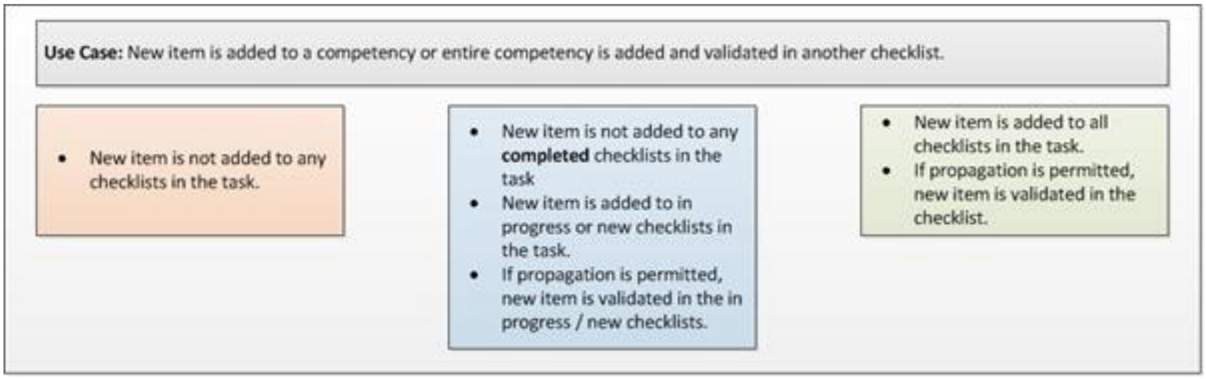
Option to Lock Completed Checklists

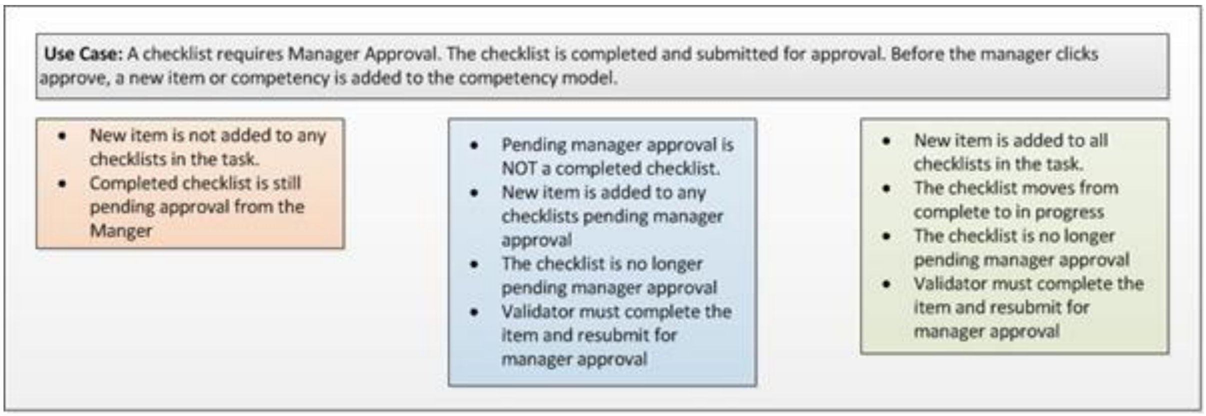
Prior to this enhancement, administrators only had the option to lock an observation checklist task, which never accepted any competency changes, or to unlock an observation checklist task, which applied competency changes to all instances of the observation checklist.

With this enhancement, administrators can configure an observation checklist task so that completed instances of the checklist are locked. This prevents the completed checklists from receiving new items, which would cause the checklist to switch from Completed status to In Progress. Similarly, checklists that are not completed would be updated with the new item.

Workflow







Use Cases

An Orientation checklist is created and assigned to new customer service employees. Over time, the Orientation checklist can be updated to reflect new requirements for new groups of employees. When these updates are made, the status of anyone who has completed the Orientation checklist will remain in a Completed status, and the completed checklists only display the items that were associated with the checklist at the time of completion. All employees who have not completed the Orientation checklist will receive all of the latest checklist items.

Considerations

Once a checklist is created, administrators cannot change the Competency Changes setting.

If Learning Object is selected as the checklist type on the Preferences step, then the checklist is automatically set to be locked, regardless of the Competency Changes setting that was selected on the General step.

A checklist that requires manager approval is not considered completed until the manager's approval is received and the checklist is in Completed status.

Implementation

Upon release, this functionality is automatically available in Stage and Live portals for all organizations using the Observation Checklist functionality.

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
Observation Checklist - Manage	Grants access to create and edit Observation Checklists, as well as view progress of users assigned to a given checklist and/or remove users from a checklist. This permission can be constrained by OU and User's OU. This is an administrator permission.	Performance - Administration
Observation Checklist Report	Grants access to the Observation Checklist report, which enables administrators to report on Observation Checklist data. This permission can be constrained by User Self and Subordinates, OU, User's OU, and User.	Reports - Performance

Observation Checklist - Create - General - Competency Changes

With this enhancement, administrators can configure an observation checklist task so that completed instances of the checklist are locked. This prevents the completed checklists from receiving new items, which would cause the checklist to switch from Completed status to In Progress. Similarly, checklists that are not completed would be updated with the new item.

To create an observation checklist, go to **Admin > Tools > Performance Management > Observation Checklists**. Then, click the *Create New Checklist* link.

Permissions

Permission Name	Permission Description	Category
Observation Checklist - Manage	Grants access to create and edit Observation Checklists, as well as view progress of users assigned to a given checklist and/or remove users from a checklist. This permission can be constrained by OU and User's OU. This is an administrator permission.	Performance - Administration

The Lock Competency option is removed and is replaced by a Competency Changes setting.

Competency Changes - Select one of the following lock options:

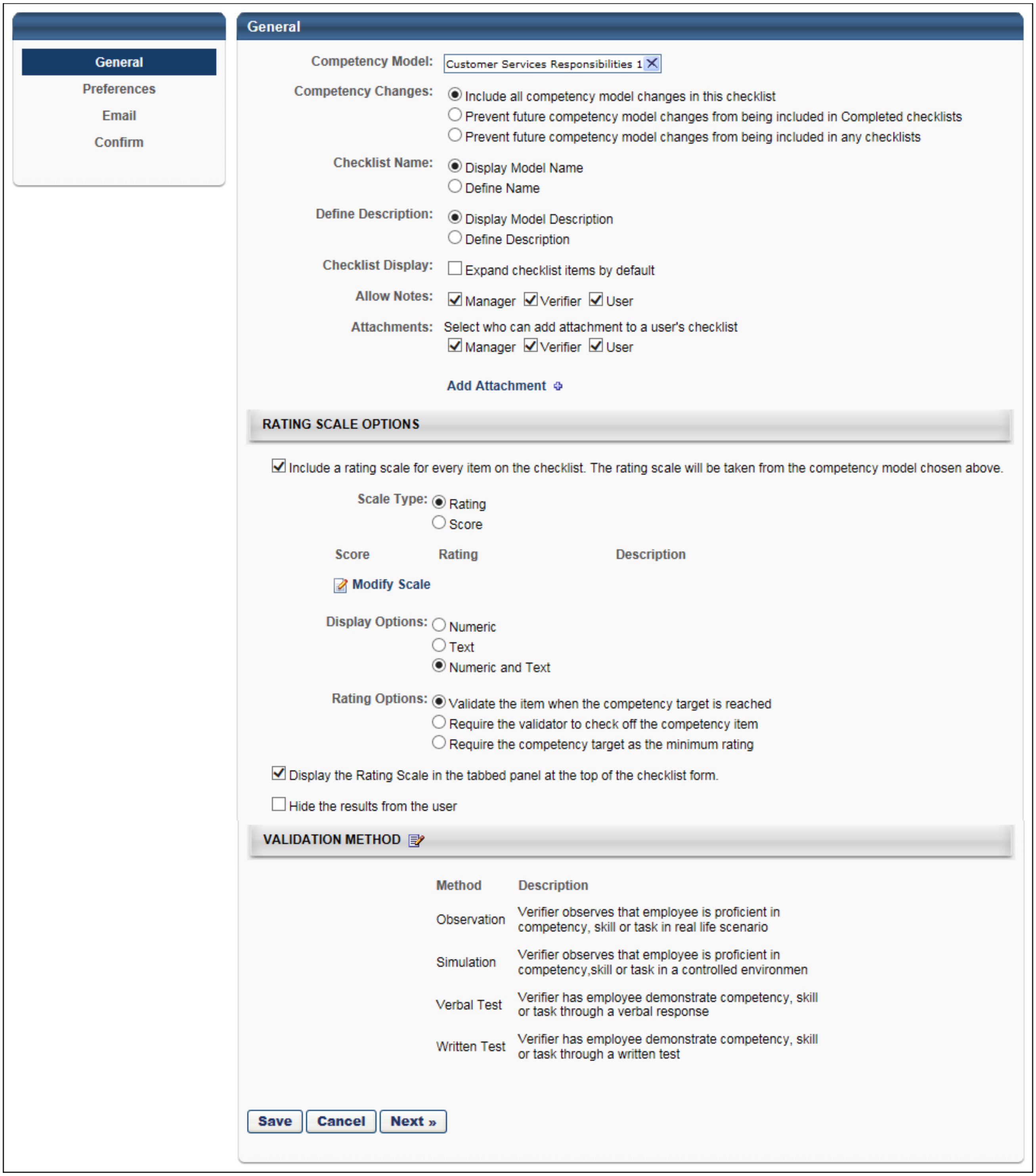
- Include all competency model changes in the checklist - This option is selected by default. When this option is selected, all instances of the checklist are unlocked and function as though the previously existing Lock Competency option was unselected.
- Prevent future competency model changes from being included in Completed checklists - When this option is selected, completed instances of the checklist are locked and do not accept any updates to the checklist competencies. Instances of the checklist that are not completed are unlocked and do accept updates to the checklist competencies.
    - If an observation checklist is pending manager approval, then this checklist is not considered completed. In this situation, any changes to the checklist's competency model are propagated to the checklist. If an item or competency is added to the competency model, the user must complete the new item or competency and resubmit the checklist for manager approval.
- Prevent future competency model changes from being included in any checklist - When this option is selected, all instances of the checklist are fully locked and function as though the previously existing Lock Competency option was selected.

When an observation checklist is locked, the following competency model changes do not affect an observation checklist:

- Adding or removing an item or behavior from a competency within the checklist's competency model.
- Adding or removing a competency from the checklist's competency model.

Once the observation checklist is deployed to users, the Competency Changes option cannot be changed.

If Learning Object is selected as the checklist type on the Preferences step, then the checklist is automatically set to be locked, regardless of the selected Competency Changes setting.



Checklist Details Page

When an observation checklist is locked upon completion, then any changes to a competency or competency model associated with the observation checklist task are not added to any completed instances of the checklist.

- Whenever a checklist is completed, the necessary competency version information is stored within the system for auditing purposes.
- If the rating scale is changed on the checklist's competency model, the change is recorded within the system for auditing purposes.

To access the Checklist Details page, go to **Performance > Observation Checklists**.

My Checklists - Checklist Report

When an observation checklist is locked upon completion, the completed checklists within the Checklist Report display the competency and competency model information from the time the corresponding checklists were completed.

- If an observation checklist is pending manager approval, then this checklist is not considered completed. In this situation, any changes to the checklist's competency model are propagated to the checklist. If an item or competency is added to the competency model, the user must complete the new item or competency and resubmit the checklist for manager approval.

To access the My Checklists - Checklist Report page, go to **Performance > My Checklists**. Then, click the *Checklist Report* link in the upper-right corner of the page.

Observation Checklist Report

When an observation checklist is locked upon completion, the completed checklists within the Observation Checklist Report display the competency and competency model information from the time the corresponding checklists were completed.

- If an observation checklist is pending manager approval, then this checklist is not considered completed. In this situation, any changes to the checklist's competency model are propagated to the checklist. If an item or competency is added to the competency model, the user must complete the new item or competency and resubmit the checklist for manager approval.

To access the Observation Checklist Report, go to **Reports > Standard Reports**. From the Performance tab, click the *Observation Checklist Report* link.

Permissions

Permission Name	Permission Description	Category
Observation Checklist Report	Grants access to the Observation Checklist report, which enables administrators to report on Observation Checklist data. This permission can be constrained by User Self and Subordinates, OU, User’s OU, and User.	Reports - Performance

Observation Checklist Validity Period

Observation Checklist Validity Period

With this enhancement, when creating an observation checklist, administrators can designate a validity period for previously validated competencies. The validity period for a checklist is the amount of time a previously validated competency is considered valid towards the checklist. This enables administrators to ensure that certain competencies are being validated on a regular basis.

The Validity Period options are available for all checklist types, excluding recurring checklists. Prior to this enhancement, no previously validated competencies were automatically validated within a Learning Object checklist.

Use Cases

Three years ago, Mike was validated performing procedures in his role as a nurse. Mike was transferred to a new role and is now transferred back. If a standard or ad hoc observation checklist task is launched, Mike will appear validated, even though new validation is required. The validity period options enable the hospital to limit a competency's validity to an appropriate amount of time, requiring employees to become validated for certain competencies after a certain amount of time.

Considerations

- This enhancement only impacts competency validation within the checklist task. Competency or checklist validations are not impacted outside the checklist task.
- The All Competencies page still displays the user's competencies for which the user has been validated.
- The option to set the validity period for previously validated competencies is not editable after the task is created.
- The validity period options are not available in recurring checklists.
- The validity period options do not apply to existing checklists.

Implementation

Upon release, this functionality is automatically available in Stage and Live portals for all organizations using the Observation Checklist functionality.

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
Observation	Grants access to create and edit Observation Checklists, as	Performance -

Checklist - Manage	well as view progress of users assigned to a given checklist and/or remove users from a checklist. This permission can be constrained by OU and User's OU. This is an administrator permission.	Administration

Observation Checklist - Create - Preferences - Validity Period

When creating an observation checklist, administrators can designate a validity period for previously validated competencies. The validity period for a checklist is the amount of time a previously validated competency is considered valid towards the checklist. This enables administrators to ensure that certain competencies are being validated on a regular basis.

To create an observation checklist, go to **Admin > Tools > Performance Management > Observation Checklists**. Then, click the *Create New Checklist* link.

Permissions

Permission Name	Permission Description	Category
Observation Checklist - Manage	Grants access to create and edit Observation Checklists, as well as view progress of users assigned to a given checklist and/or remove users from a checklist. This permission can be constrained by OU and User's OU. This is an administrator permission.	Performance - Administration

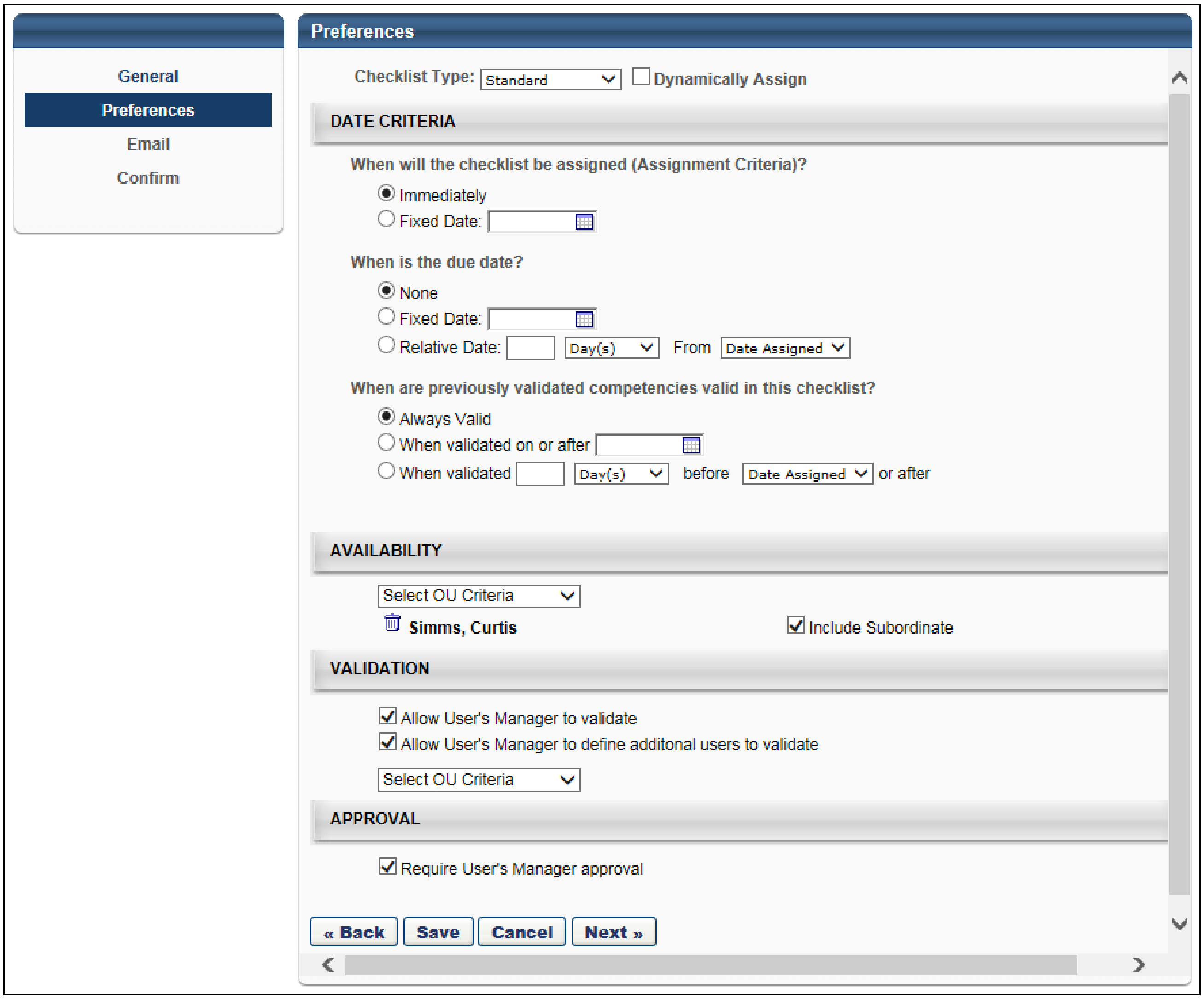
The Validity Period options are available for all checklist types, excluding recurring checklists.

When are previously validated competencies valid on this checklist? - This option determines the validity period for previously validated competencies. The validity period for a checklist is the amount of time a validated competency is considered valid towards the completion of the checklist. This enables administrators to ensure that certain competencies are being validated on a regular basis. **Note:** *This option is not available in recurring checklists. Also, this option is not available if the Rating Option is set to "Require the competency target as the minimum rating" on the General page.*

- Always Valid - When this option is selected, any competency in the checklist that has previously been validated for the assessee is automatically validated within this checklist. For example, if the Public Speaking competency was validated for John Smith four years ago and is assigned to John Smith again in an observation checklist that has this option selected, then the Public Speaking competency is automatically validated within this checklist because the competency is always valid for the checklist.
- When validated on or after XX - When this option is selected, the validity period is relative to a specific date. Any competency in the checklist that has been previously validated for the assessee on or after the selected date is automatically validated within this checklist. If the competency was validated before the selected date, then the competency must be re-validated. For example, if the Public Speaking competency was validated for John Smith on January 1, 2013 and is assigned to John Smith again in an observation checklist with this option selected and set to February 1, 2013, then this competency is not validated within this checklist because the competency was previously validated outside of the validity period.
- When validated XX days/months/years before XX or after - When this option is selected, the validity period is relative to a specific event, such as Date Assigned or Hire Date. Any competency in the checklist that has been previously validated for the assessee on or after

the selected relative date is automatically validated within this checklist. If the competency was validated before the selected relative date, then the competency must be re-validated. For example, an ad hoc checklist is set to allow previously validated competencies "1 year before Date Assigned or after." In this example, the validity period is relative to when the checklist is assigned. If the checklist is assigned on January 1, 2015, then the validity period begins one year before that date (i.e., January 1, 2014). Only items that were validated on or after January 1, 2014 are automatically validated in the checklist.

- The relative date options drop-down automatically contains Date Assigned and Hire Date. This drop-down also contains any user record custom fields that have a Date Field type.
- If a relative date value does not exist (e.g., no hire date on record), then there is no validity period, and all competencies must be validated.



Skills Matrix - Additional Competency Information

Skills Matrix - Additional Competency Information

Prior to this enhancement, the only information about the competency that was displayed on the Role Details page was the competency title.

With this enhancement, administrators now have the option to include additional competency details on the Role Details page when creating or editing a role. The additional competency details include the competency description, items, and behaviors.

Use Cases

After viewing the Skills Matrix for their team, the manager identifies a role that has skill gaps and selects an In Progress employee to see what requirements they have left to fulfill. Being able to view the competency details gives the manager the ability to focus on qualifying employees they think are most capable for the role.

After looking at their roles in the Skills Matrix, the user sees which roles they are not qualified for, but they want to understand what is included in the competency. With the additional competency information, the user is able to better understand if they are ready to be assessed and on which specific items they should focus.

Considerations

- The Role Details page will not display any status information about the user with regards to the competency.
- Administrators cannot define what information is included in the competency details.

Implementation

Upon release, this functionality is automatically enabled in Stage and Live portals for all organizations using the Skills Matrix functionality.

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
Role Management	Grants ability to view, edit, and copy roles. When editing or copying a role, administrators can delete or modify an assignment. However, this permission does not grant the ability to select assignment criteria for a role. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Subordinates, and User's Direct Reports. These permission constraints limit the users to whom administrators can assign a role.	Performance

Skills Matrix	Grants access to the Skills Matrix page. This permission can be constrained by OU, User's OU, User's Direct Reports, User, User's Subordinates Only, and User Self and Subordinates. The permission constraints determine which users are available to view in the Skills Matrix.	Performance

Create/Edit Role - Competencies

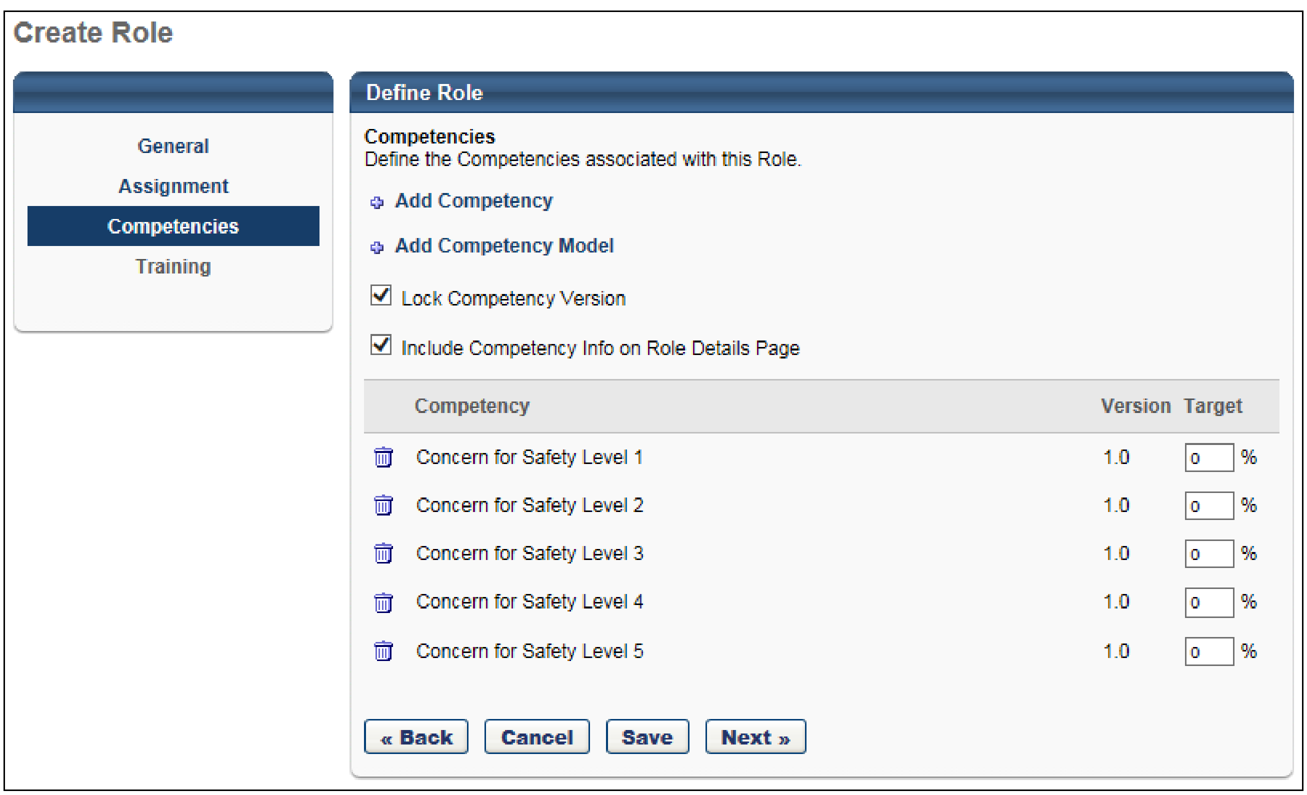
With this enhancement, administrators now have the option to include additional competency details on the Role Details page when creating or editing a role. The additional competency details include the competency description, items, and behaviors.

To create a role, go to **Admin > Tools > Performance Management > Manage Roles**. Then, click the *Create New* link.

Permissions

Permission Name	Permission Description	Category
Role Management	Grants ability to view, edit, and copy roles. When editing or copying a role, administrators can delete or modify an assignment. However, this permission does not grant the ability to select assignment criteria for a role. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Subordinates, and User's Direct Reports. These permission constraints limit the users to whom administrators can assign a role.	Performance

Include Competency Info on Role Details Page - Select this option to include additional competency details on the Role Details page. The additional competency details include the competency description, items, and behaviors. **Note:** *Modifications to this option are not stored in Modification History.*



Role Details Page - Additional Competency Details

With this enhancement, administrators now have the option to include additional competency details on the Role Details page when creating or editing a role. The additional competency details include the competency description, items, and behaviors.

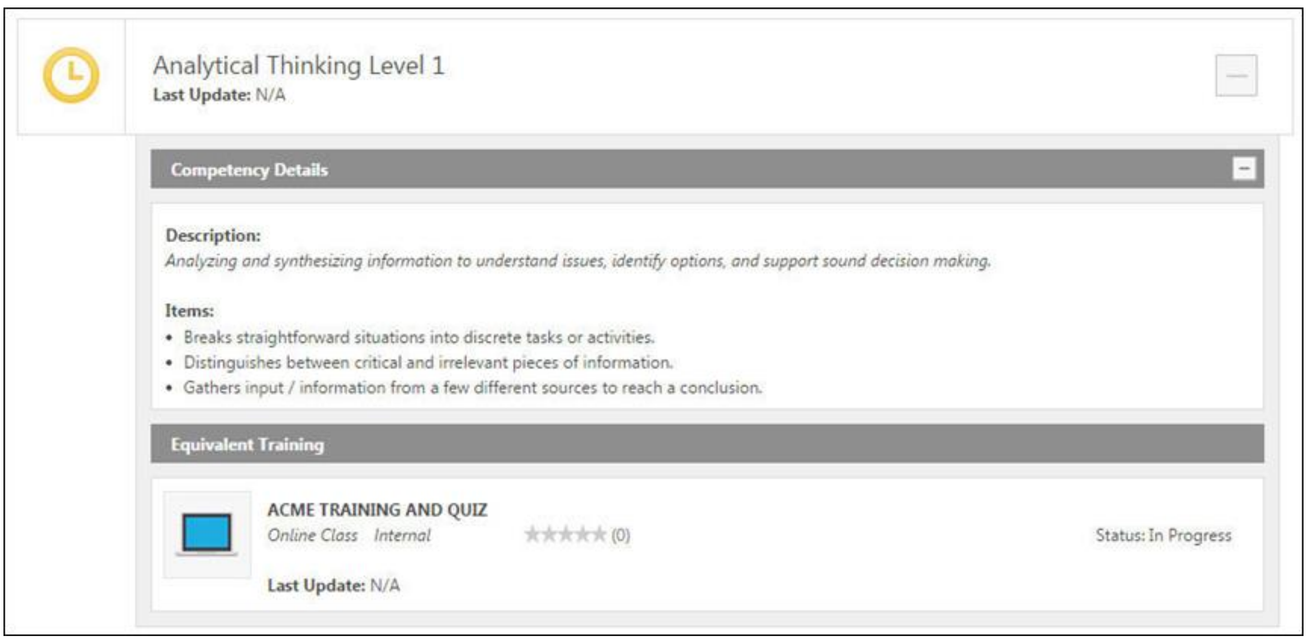
To access the Role Details page for a user and a role, click the cell in the Skills Matrix where the user's row intersects with the appropriate role. **Note:** *This functionality is not available if the user has not been assigned the role.*

Permissions

Permission Name	Permission Description	Category
Skills Matrix	Grants access to the Skills Matrix page. This permission can be constrained by OU, User's OU, User's Direct Reports, User, User's Subordinates Only, and User Self and Subordinates. The permission constraints determine which users are available to view in the Skills Matrix.	Performance

The Competency Details section only appears when enabled by the administrator. This section displays the competency description, items, and behaviors. This section is collapsed by default.

Click the Expand icon to view the competency details.



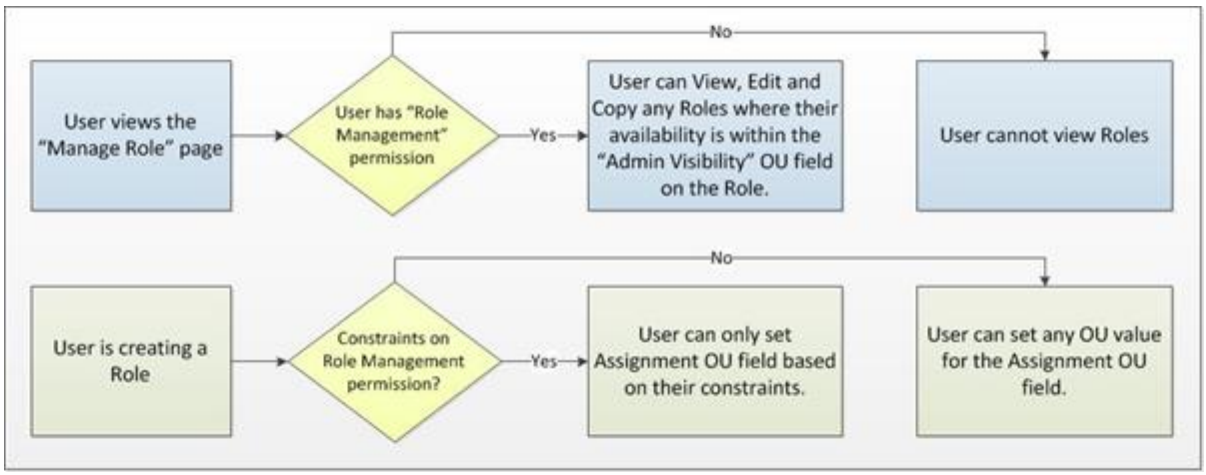
Skills Matrix - Role Availability for Administrators

Skills Matrix - Role Availability for Administrators

Prior to this enhancement, there was no way to restrict an administrator's access when viewing or managing roles.

With this enhancement, when an administrator is creating a role, administrator availability can be set for the role. When administrator availability is set, this determines which administrators can view and manage the role. In addition, permission constraints are now available for the Role Management permission. Administrators can now only assign roles to users within their permission constraints.

Workflow



Use Cases

1. Julie, Emily, and Jack are administrators for an organization.
2. Julie is a super administrator who creates a number of top-level roles that generally apply to all divisions. Julie enables Emily and Jack to duplicate these roles for their divisions and modify their copies.
3. Emily is an administrator for the Los Angeles division and only needs to manage roles in her location. She cannot view or manage any roles outside of her division.

Considerations

- Users with the Role Management permission can edit, view, and copy any other roles within their availability.
- If constraints are applied to the Role Management permission, the constraints only apply to their ability to assign a role. These constraints do not apply to the Admin Visibility or User Visibility fields.

Implementation

Upon release, this functionality is automatically enabled in Stage and Live portals for all organizations using the Skills Matrix functionality.

Security

The Role Management permission is enhanced with the following additional constraints:

Restrict to OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Subordinates, and User's Direct Reports.

These permission constraints limit the users to whom administrators can assign a role.

The new permission description will be reflected throughout Online Help with the February 2015 release.

Permission Name	Permission Description	Category
Role Management	Grants ability to view, edit, and copy roles. When editing or copying a role, administrators can delete or modify an assignment. However, this permission does not grant the ability to select assignment criteria for a role. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Subordinates, and User's Direct Reports. These permission constraints limit the users to whom administrators can assign a role.	Performance

The following existing permission applies to this functionality:

Permission Name	Permission Description	Category
Skills Matrix	Grants access to the Skills Matrix page. This permission can be constrained by OU, User's OU, User's Direct Reports, User, User's Subordinates Only, and User Self and Subordinates. The permission constraints determine which users are available to view in the Skills Matrix.	Performance

Create/Edit Role - General

With this enhancement, administrators now have the ability to set the administrator availability when creating or editing a role. The administrator availability determines which administrators are able to view and manage the role. Administrators must also have permission to view and manage roles.

In addition, the Visibility setting is renamed as User Visibility. This setting determines which users can access the role in the Skills Matrix and in reporting.

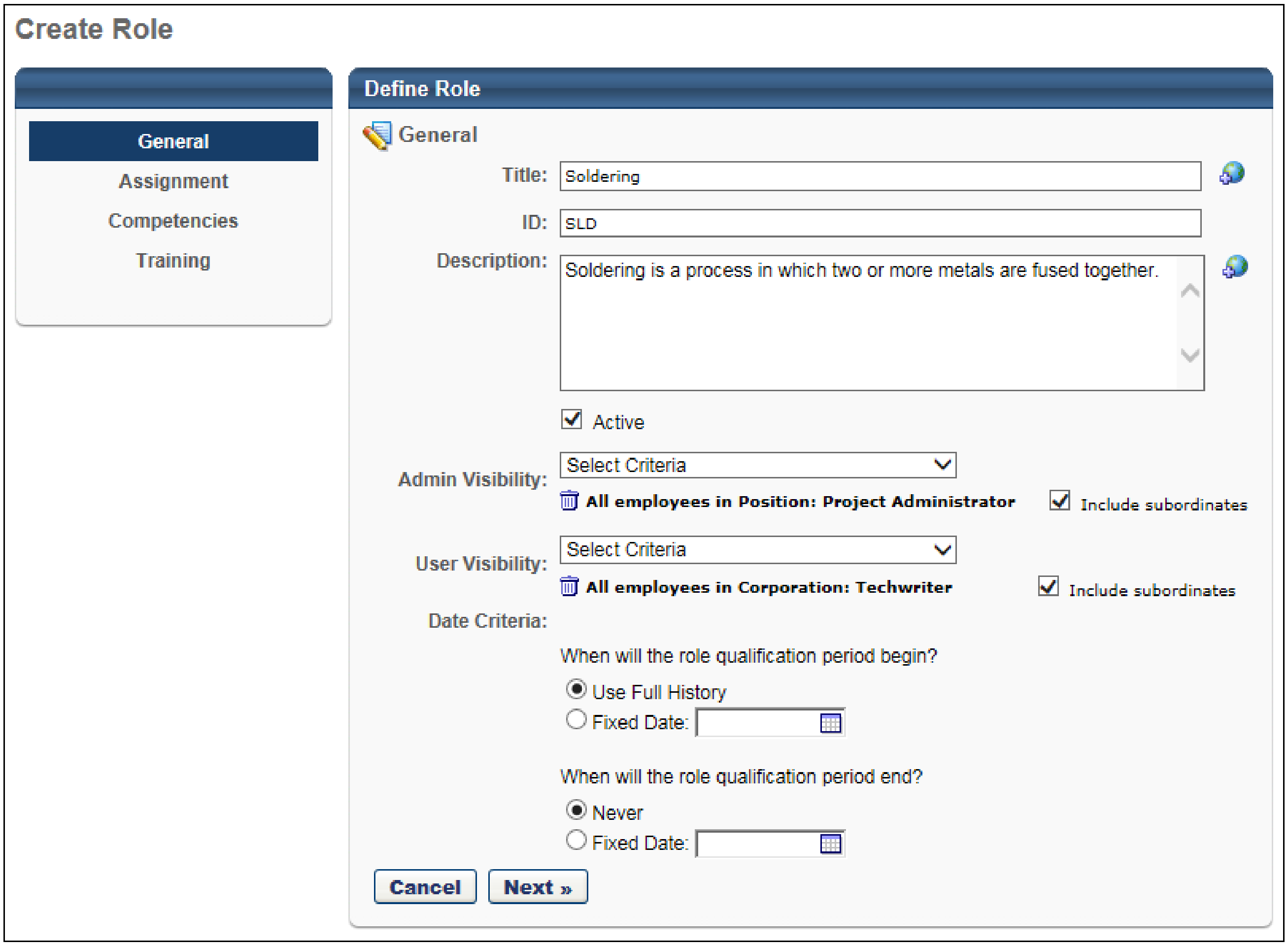
To create a role, go to **Admin > Tools > Performance Management > Manage Roles**. Then, click the *Create New* link.

Permissions

Permission Name	Permission Description	Category
Role Management	Grants ability to view, edit, and copy roles. When editing or copying a role, administrators can delete or modify an assignment. However, this permission does not grant the ability to select assignment criteria for a role. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Subordinates, and User's Direct Reports. These permission constraints limit the users to whom administrators can assign a role.	Performance

<u>Admin Visibility</u> - This setting determines which administrators are able to view and manage the role. Administrators must also have permission to view and manage roles. Visibility can be set by organizational unit (OU), group, specific users, and custom OUs. If visibility is not defined, then it defaults to all employees.

<u>User Visibility</u> - This setting was previously named Visibility. The functionality of this setting has not changed.


Create Role
General
Assignment
Competencies
Training
Define Role
General
Title:
Soldering
ID:
SLD
Description:
Soldering is a process in which two or more metals are fused together.
Active
Admin Visibility:
Select Criteria
All employees in Position: Project Administrator
Include subordinates
User Visibility:
Select Criteria
All employees in Corporation: Techwriter
Include subordinates
Date Criteria:
When will the role qualification period begin?
Use Full History
Fixed Date:
When will the role qualification period end?
Never
Fixed Date:
Cancel
Next »

Create/Edit Role - Assignment

With this enhancement, permission constraints are now available for the Role Management permission. Administrators can now only assign roles to users within their permission constraints.

When an administrator creates a role, the administrator's Role Management permission constraints are applied to the role. Only users within the administrator's Role Management permission constraints are included in the assignment.

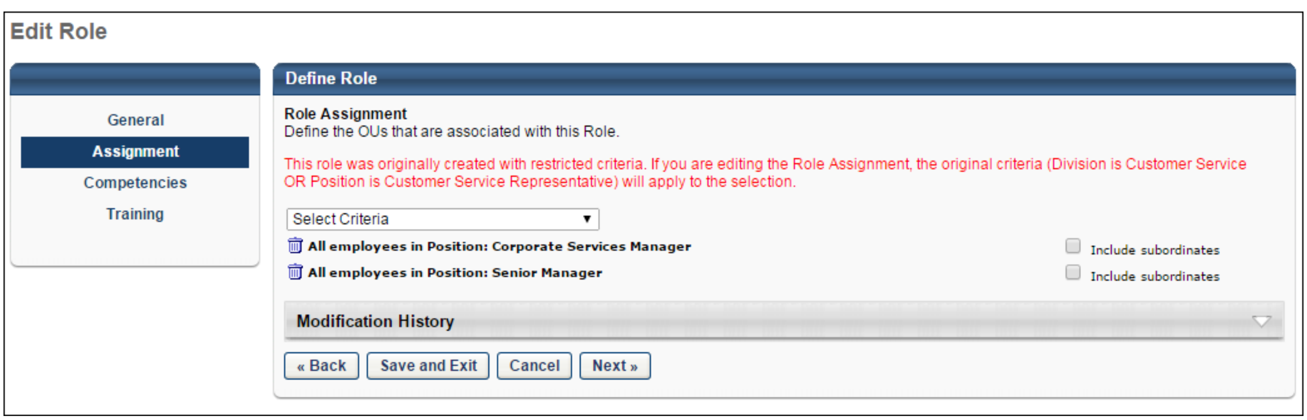
When editing an existing role, the permission constraints of the administrator who created the role continue to apply to the role assignment, even if the assignment criteria are edited. The administrator's constraints are displayed above the Role Assignment criterion.

When duplicating an existing role, all of the role information is copied. However, the new administrator's Role Management permission constraints are applied to the role.

To create a role, go to **Admin > Tools > Performance Management > Manage Roles**. Then, click the *Create New* link.

Permissions

Permission Name	Permission Description	Category
Role Management	Grants ability to view, edit, and copy roles. When editing or copying a role, administrators can delete or modify an assignment. However, this permission does not grant the ability to select assignment criteria for a role. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Subordinates, and User's Direct Reports. These permission constraints limit the users to whom administrators can assign a role.	Performance



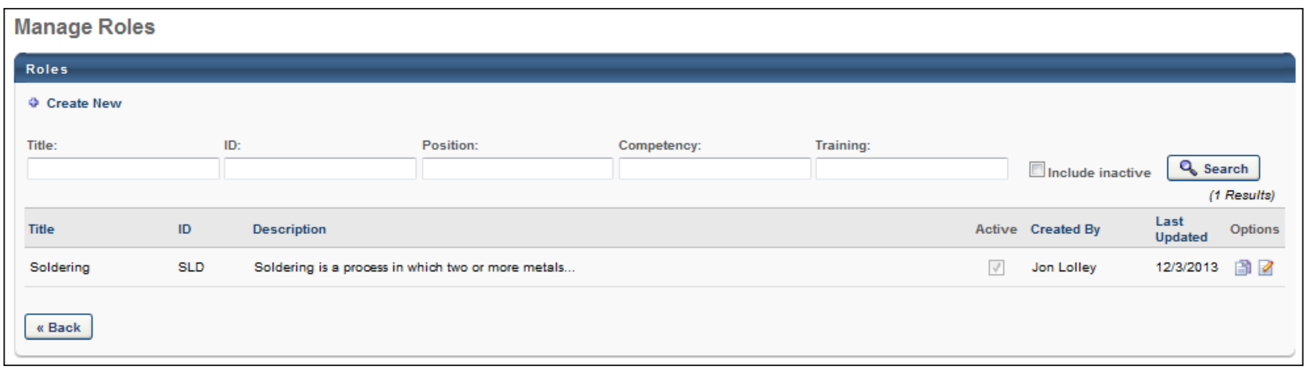
Manage Roles

On the Manage Roles page, administrators can now only view and manage roles if the administrator is within the role's Admin Visibility settings.

To access the Manage Roles page, go to **Admin > Tools > Performance Management**. Then, click the *Manage Roles* link in the *Role Management* section.

Permissions

Permission Name	Permission Description	Category
Role Management	Grants ability to view, edit, and copy roles. When editing or copying a role, administrators can delete or modify an assignment. However, this permission does not grant the ability to select assignment criteria for a role. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Subordinates, and User's Direct Reports. These permission constraints limit the users to whom administrators can assign a role.	Performance



Skills Matrix - Include all LO Versions

Skills Matrix - Include all Learning Object Versions

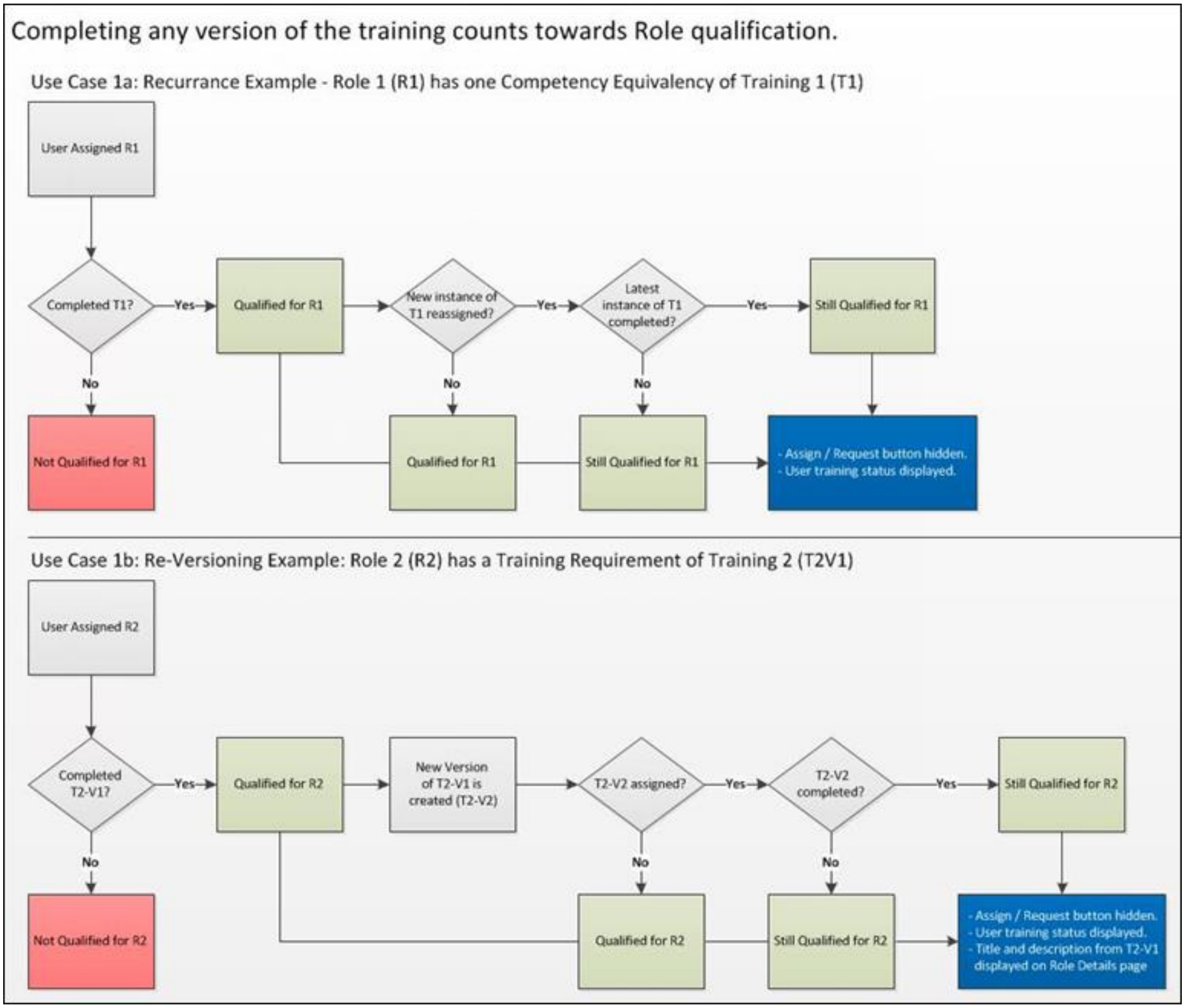
Prior to this enhancement, the learning object (LO) version was locked when it was added to a role as a training requirement or as a training equivalency for a competency requirement. If a LO was updated, users could no longer request or assign the LO from the Role Details page.

With this enhancement, users now receive credit towards role qualification for completing any version of the required LOs. Users can request or assign the latest version of the LO from the Role Details page.

Use Cases

1. A role in the Skills Matrix is created for running the cash register. The Cash Register LO is added as a training requirement for this role.
2. James completes this training and is qualified to run the cash register.
3. Two months later, the Cash Register LO is updated by the training administrator.
4. James is actively using the cash register and does not need to complete the updated training. Even though the training has been updated, James completed the original version, so he will stay qualified for the role in the Skills Matrix.
5. Today, Mike starts working at the restaurant and is assigned the Cash Register role. On the Role Details page, Mike is assigned the latest version of the Cash Register LO. Mike completes the training and is qualified for the Cash Register role.
6. James is assigned the latest version of the Cash Register LO. He remains qualified for the Cash Register role in the Skills Matrix. On James' transcript, it shows that he completed the original version of the training and is In Progress for completing the latest version of the Cash Register LO.

Workflow



Considerations

The title and description of the LO will always be from the latest version of the LO, regardless of the title or description in the assigned version of the LO.

This enhancement does not apply to the Skills Matrix Report. This report will continue to utilize only the version of the LO that was originally added as a training requirement for the role or as a training equivalency for a competency requirement for the role.

Only the following LO types support versioning:

- Curriculum
- Test

- Online Class

Implementation

Upon release, this functionality is automatically enabled in Stage and Live portals for all organizations using the Skills Matrix functionality.

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
Competency Assessment Model	Grants ability to create and edit competencies and competency models for use in assessments, checklists and performance reviews. This permission cannot be constrained. This is an administrator permission.	Performance - Administration
Request Roles	Grants ability to request a role from the Skills Matrix. Users can only request roles for which they are within the availability. This permission cannot be constrained. This is an end user permission.	Performance
Role Management	Grants ability to view, edit, and copy roles. When editing or copying a role, administrators can delete or modify an assignment. However, this permission does not grant the ability to select assignment criteria for a role. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Subordinates, and User's Direct Reports. These permission constraints limit the users to whom administrators can assign a role.	Performance
Skills Matrix	Grants access to the Skills Matrix page. This permission can be constrained by OU, User's OU, User's Direct Reports, User, User's Subordinates Only, and User Self and Subordinates. The permission constraints determine which users are available to view in the Skills Matrix.	Performance

Role Details Page

With this enhancement, users now receive credit towards role qualification for completing any version of the required learning objects (LOs). Users can request or assign the latest version of the LO from the Role Details page.

In addition, if a user is assigned a LO via a role assignment and the LO becomes inactive, this is now clearly labeled in the Competencies and Training section of the Role Details page.

To access the Role Details page for a user and a role, click the cell in the Skills Matrix where the user's row intersects with the appropriate role. **Note:** *This functionality is not available if the user has not been assigned the role.*

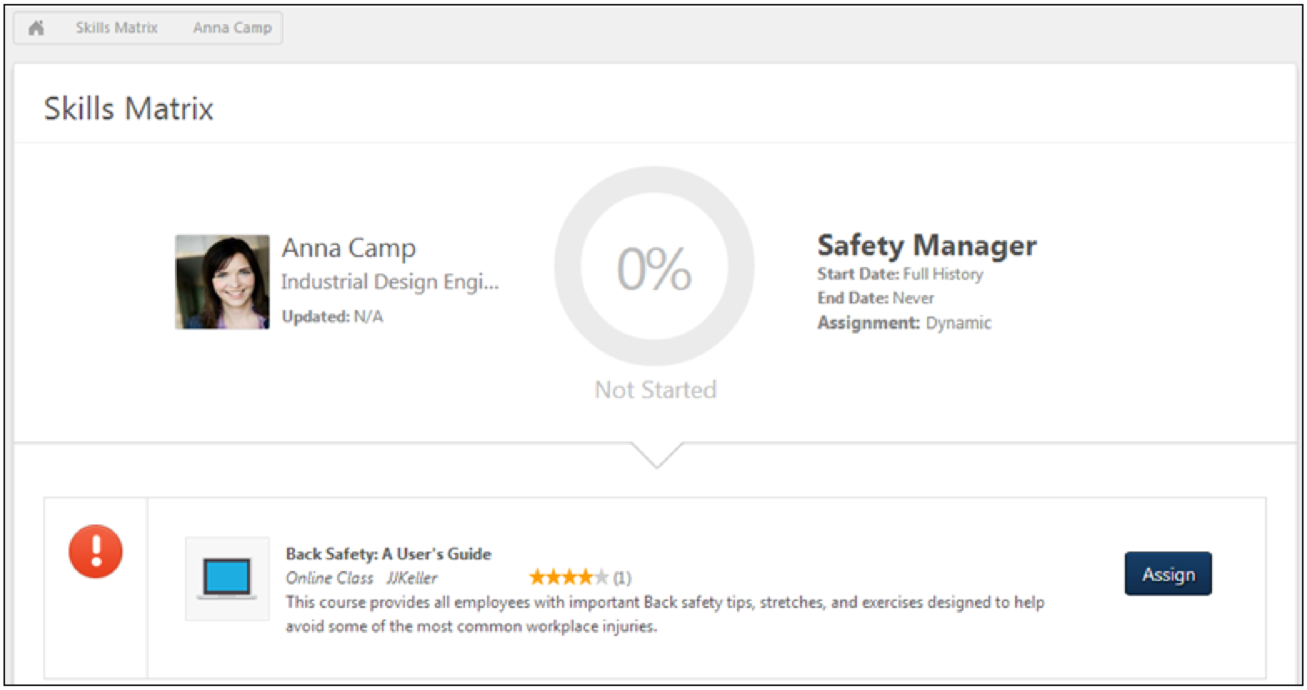
Permissions

Permission Name	Permission Description	Category
Request Roles	Grants ability to request a role from the Skills Matrix. Users can only request roles for which they are within the availability. This permission cannot be constrained. This is an end user permission.	Performance
Skills Matrix	Grants access to the Skills Matrix page. This permission can be constrained by OU, User's OU, User's Direct Reports, User, User's Subordinates Only, and User Self and Subordinates. The permission constraints determine which users are available to view in the Skills Matrix.	Performance

If the equivalent training LO is available to the user, the equivalent training can always be requested or assigned, regardless of the version of the LO. The most recent version is always requested or assigned.

If the user has completed any version of the LO, then the training requirement or the competency with the training equivalency will appear as Completed. When the LO is completed, the **Request** and **Assign** buttons are hidden.

The title and description of the LO will always be from the latest version of the LO, regardless of the title or description in the assigned version of the LO.


Skills Matrix
Anna Camp
Skills Matrix
Anna Camp
Industrial Design Engi...
Updated: N/A
0%
Not Started
Safety Manager
Start Date: Full History
End Date: Never
Assignment: Dynamic
Back Safety: A User's Guide
Online Class JJKeller
(1)
This course provides all employees with important Back safety tips, stretches, and exercises designed to help avoid some of the most common workplace injuries.
Assign

Localize Performance Review Custom Fields in Analytics

With this enhancement, the translated values that are defined in the Options section for the following Performance Review custom field types now display when creating and viewing custom Performance Review Reports:

- Checkbox
- Dropdown
- Radio Button

Previously, if the options configured in the Options section for the field were translated, the translated values did not display in custom reports. **Note:** *The values for the options are defined by the administrator in the Options section when configuring custom fields in Custom Field Administration.*

When users create custom Performance Review Reports that include translated options values for checkbox, dropdown, or radio button custom fields, the values display in the user's language, if available. If the user's language is not available, then the values display in the default language for the portal.

For shared reports, when the report is refreshed, the translated options values for the custom report fields display in the user's language, if available.

Use Case

1. James is an administrator for Acme Corp. He creates a Checkbox performance review custom and sets the availability to users in Division A.
2. He translates the Name field into Russian and Spanish. He also translates each checkbox option in the Options section into Russian and Spanish.
3. Valerie is a manager in Division A. Her display language is set to Russian.
4. Valerie creates a Performance Review Custom Report that includes the Checkbox custom field that James created.
5. The translated values for the custom field display in Russian, since this is Valerie's display language. The values display when Valerie is creating the custom report, as well as when viewing the report output.

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
Custom Performance	Grants ability to create and edit custom Performance Review	Reports -

Review Report - Create	reports. This permission can be constrained by OU, User's OU, User's Self and Subordinates, and User's Subordinates.	Analytics

Custom Performance Review Report - View	Grants ability to view results of custom Performance Review reports created by self or shared by others. This permission can be constrained by OU, User's OU, User's Self and Subordinates, and User's Subordinates.	Reports - Analytics

Reports Observation Checklist in Analytics

Observation Checklist in Analytics Overview

This enhancement adds the ability to report on observation checklist data in custom reporting. This provides greater flexibility when creating reports and extracting data generated from those reports. Users have the ability to filter results based on fields and define which fields to include in the report. In addition, the report can be exported to Excel.

Use Case 1

Jeffery works for Acme Inc. He needs to run a report to see all users inside Division A who have checklists that are in an In Progress status. He launches the Custom Report Builder and sets the filters to the following:

- Users in Division A
- The field Checklist Status is not equal to Completed

He adds the following fields to the columns for the report:

- User First Name
- User Last Name
- Checklist Name
- Checklist Status

When running the report, he is able to see all the users who have checklists that are in an Incomplete status. With the Excel version of the report, he sorts the data by checklist name and manually reorders the checklists that are most important.

Finally, he emails the report to the checklist validators so that they can focus on wrapping up the priority checklists first.

Use Case 2

Joanne works for Betadyne Medical Centers. There are statewide regulations that require all nurses to have completed an Infection Prevention checklist before they can care for post-operative patients in Wards A, B, and C. The state regulator schedules a visit with Joanne and requests to see verification that all nurses in the wards have completed the Infection Prevention checklist. Joanne access the Custom Report Builder and creates a report showing all nurses in Wards A, B, and C (which are configured as organizational units) to confirm that the hospital is in compliance.

Lock Completed Checklist

A separate enhancement for the February '15 release now enables administrators to configure a checklist task where completed checklists are locked and do not accept new items or switch from the Compete status to an In Progress status.

If a completed checklist is locked, the checklist remains in a Completed status if new items are added to the competency model.

For more information about the Lock Completed Checklist enhancement, see the Lock Completed Checklist Overview topic in Online Help.

Security

The following new permissions apply to this functionality:

Permission Name	Permission Description	Category
Custom Observation Checklist Report - Create	Grants ability to create and edit Observation Checklist Reports in Analytics. This permission can be constrained by OU, User's OU, User, User's Self, User's Manager, User's Subordinates, User's Direct Reports, User's Superiors, and User Self and Subordinates.	Reports - Analytics
Custom Observation Checklist Report - View	Grants ability to view Observation Checklist Reports in Analytics. This permission can be constrained by OU, User's OU, User, User's Self, User's Manager, User's Subordinates, User's Direct Reports, User's Superiors, and User Self and Subordinates.	Reports - Analytics

Create Custom Observation Checklist Report

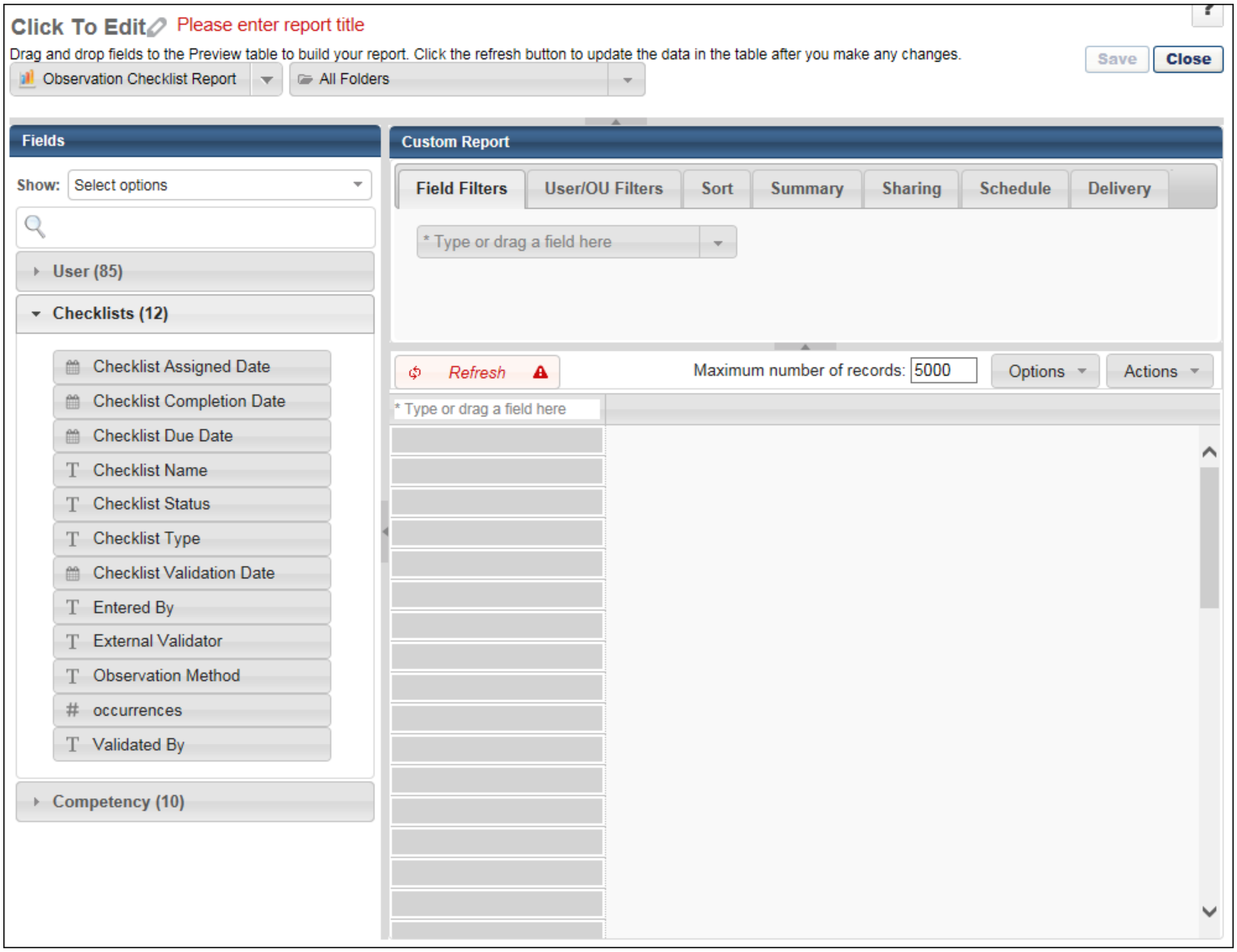
Custom Observation Checklist Reports enable users to report on observation checklist data. Custom reports provide greater flexibility when creating reports and extracting data generated from those reports. Users have the ability to filter results based on fields and define which fields to include in the report. In addition, the report can be exported to Excel.

For detailed information about creating custom reports, see the Create Custom Report Overview topic in Online Help.

To create custom Observation Checklist Reports, go to **Reports > Custom Reports**. Then, select the *Observation Checklist Report* link from the New drop-down.

Permissions

Permission Name	Permission Description	Category
Custom Observation Checklist Report - Create	Grants ability to create and edit Observation Checklist Reports in Analytics. This permission can be constrained by OU, User's OU, User, User's Self, User's Manager, User's Subordinates, User's Direct Reports, User's Superiors, and User Self and Subordinates.	Reports - Analytics
Custom Observation Checklist Report - View	Grants ability to view Observation Checklist Reports in Analytics. This permission can be constrained by OU, User's OU, User, User's Self, User's Manager, User's Subordinates, User's Direct Reports, User's Superiors, and User Self and Subordinates.	Reports - Analytics



Add Fields

The following field sections are available for custom Observation Checklist Reports:

User

The fields that are available in the User section are the standard User fields that are available for custom reports.

Checklists

The Checklists section is a new section that is added for custom Observation Checklist Reports. The following fields are available:

Field Name	Field Description	Field Type
Checklist	Date the checklist was assigned.	Date

Field Name	Field Description	Field Type
Assigned Date		
Checklist Completion Date	The date the entire checklist was completed.	Date
Checklist Due Date	Date the checklist is due. The value is "None" if the checklist does not have a due date.	Date
Checklist Name	Name defined for the checklist.	Text
Checklist Status	The status of the checklist: Completed, Denied, In-Progress, Past Due, Pending Completion Approval.	Text
Checklist Type	The type of checklist: Ad Hoc, Learning Object, Recurring, Standard.	Text
Checklist Validation Date	Date the competency item was completed.	Date
Entered By	The user’s full name who entered the data. This could be the same as the validator, or this data could be entered by an administrator on behalf of the validator. The name displays as last name, first name.	Text
External Validator	The user’s full name who entered the data. This could be the same as the validator, or this data could be entered by an administrator on behalf of the validator. The name displays as last name, first name.	Text
Observation Method	The method used by the validator to confirm the observation. This is an option from a list the administrator defines for each checklist, and the method applies to each competency item within the checklist.	Text
Occurrences	The number of times a recurring checklist has been assigned to a user. The value is "0" if the checklist is not a recurring checklist.	Numeric
Validated By	The user’s full name who validated the item. The name displays as last name, first name.	Text

Competency

The fields that are available in the Competency section are the standard Competency fields that are available for other custom reports. In addition, the following fields are available:

Field Name	Field Description	Field Type
Competency Item	The name of the competency item	Text
Competency Item Rating	The rating for the competency item	Text

Field Name	Field Description	Field Type
Skills Competed	The number of skills completed in the competency. The value displays as [(number of skills completed) of (number of skills available to complete)]	Text

Filter/Sort/Summarize

The fields available for custom Observation Checklist Reports can be used to filter the report, as well as for sorting and summarizing.

Note: When including the Competency Name and Competency Item fields in the report, then the same competency name may appear multiple times in the report, since multiple competency items can be configured by the administrator for a single competency in the Competency Bank.

Output

User Full Name	Observation Completed Date	Skill Name	Competency Name	Checklist Name	Checklist Version	Validated By	Rating	Method	Occurence Number
Camp, Anna	11/23/2011 07:26	Skill 1	Client Focus Level 1	Core Competencies for 2011	1	Martin, Richard	4.0 / 5.0	Observation	1
Camp, Anna	11/23/2011 07:26	Skill 2	Client Focus Level 1	Core Competencies for 2011	1	Martin, Richard		Observation	5
Camp, Anna	11/23/2011 07:26	Skill 3	Client Focus Level 1	Core Competencies for 2011	1	Martin, Richard	3.0 / 5.0	Observation	2
Camp, Anna		Skill 1	Continuous Learning Level 1	Core Competencies for 2011	1	Martin, Richard			
Camp, Anna		Skill 2	Continuous Learning Level 1	Core Competencies for 2011	1	Martin, Richard			
Camp, Anna	11/23/2011 07:26	Skill 3	Continuous Learning Level 1	Core Competencies for 2011	1	Martin, Richard	4.1 / 5.0	Simulation	2
Camp, Anna		Skill 4	Continuous Learning Level 1	Core Competencies for 2011	1	Martin, Richard			
Jackson, David	11/23/2011 07:26	Skill 1	Client Focus Level 1	Core Competencies for 2011	1	Martin, Richard	4.0 / 5.0	Observation	2
Jackson, David	11/23/2011 07:26	Skill 2	Client Focus Level 1	Core Competencies for 2011	1	Martin, Richard		Observation	5
Jackson, David	11/23/2011 07:26	Skill 3	Client Focus Level 1	Core Competencies for 2011	1	Martin, Richard	3.0 / 5.0	Observation	3
Jackson, David	11/23/2011 07:26	Skill 1	Continuous Learning Level 1	Core Competencies for 2011	1	Martin, Richard		Observation	2
Jackson, David	11/23/2011 07:26	Skill 2	Continuous Learning Level 1	Core Competencies for 2011	1	Martin, Richard		Observation	1
Jackson, David	11/23/2011 07:26	Skill 3	Continuous Learning Level 1	Core Competencies for 2011	1	Martin, Richard	4.1 / 5.0	Verbal Test	1
Jackson, David	11/23/2011 07:26	Skill 4	Continuous Learning Level 1	Core Competencies for 2011	1	Martin, Richard		Simulation	1

Platform

Admin User Page Optimization - Delayed

This enhancement has been delayed until the May 2015 release.

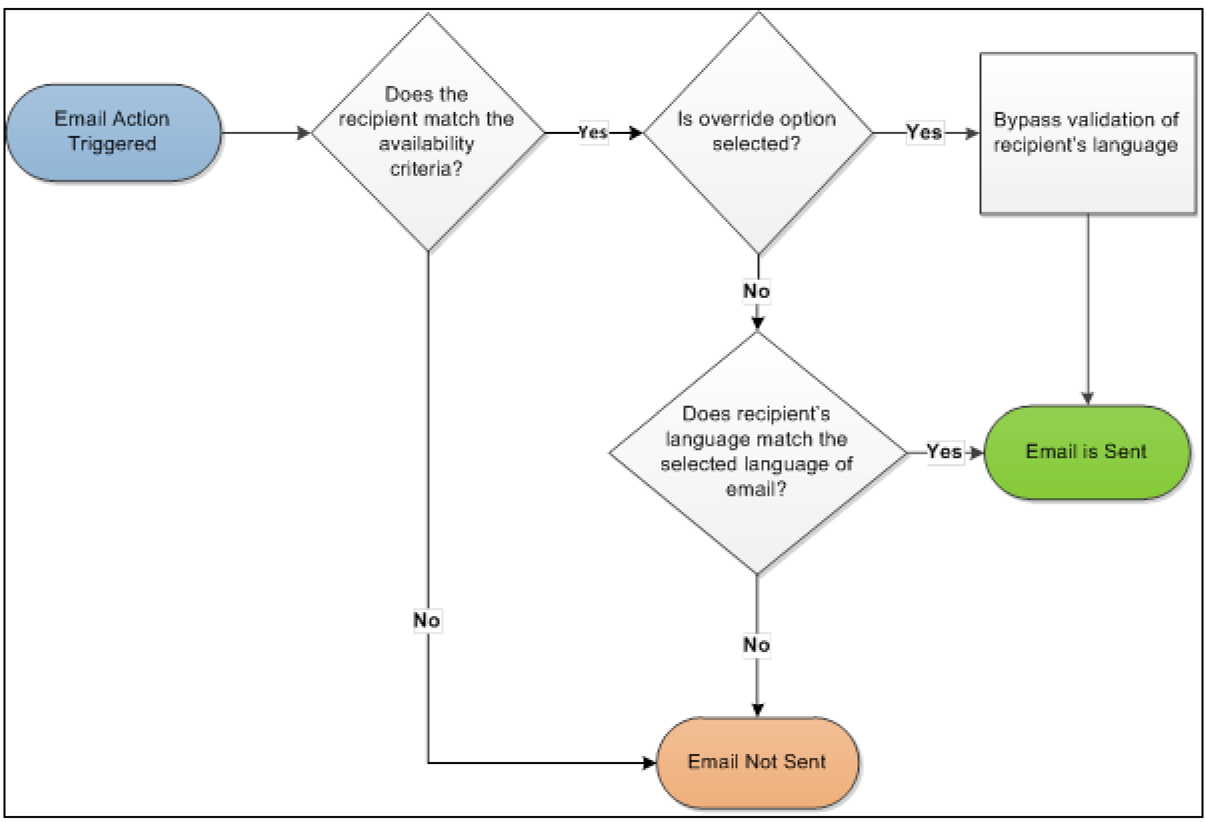
Emails - Include Recipients of All Languages

Emails - Include Recipients of All Languages

With this enhancement, administrators of multi-language portals can now create a single email trigger that will be sent regardless of the user's configured language. When this new language override option is selected, an email that is created in English (UK) will be sent to recipients of any language configured for the portal (e.g., English (US), Japanese, Polish, Thai) that meet the selected availability criteria.

When utilizing this enhancement, the subject and message of the email are not translated to the recipient's language. If multiple emails are configured for the same trigger such as one in English (UK) and one in Polish, and one trigger has this option selected, it is possible for some users to receive multiple emails for the same action. This duplication can be prevented by adjusting the availability of the email with this language override option selected.

Workflow



Use Cases

An administrator wants to configure a single set of email triggers for users who use different dialects of the same language, such as English (US) and English (UK).

An administrator wants to set up a single email trigger, marketing email, or marketing email template that will be sent to all users within the selected availability, regardless of the recipient's configured display language.

An administrator wants to configure custom emails for a new course that will be presented in English and will be taken by all employees, including users who speak Spanish, English, and French.

Considerations

- Upon release, this enhancement does not impact existing email triggers because this option is unselected by default. This option can be modified when creating new email triggers or editing existing email triggers.
- Localized translation within a single email trigger is not included in this enhancement. Administrators must create a separate email trigger if a localized translation is required.
- This enhancement does not include logic to supersede existing triggers and does not validate if users would receive multiple emails for similar triggers. If a single email needs to be sent to global recipients except for a specific group of users (e.g., employees using Chinese (Traditional)) within the same organizational units, the administrator must use additional OUs in the availability settings to ensure the correct users are excluded.
- Email tags with localized values will resolve in the language that is configured for the email. For example, if an email is configured in English (UK) with the language override enabled, the email tags will resolve in English (UK) even if the recipient's display language is German.

Implementation

Upon release, this functionality is automatically available in Stage and Live portals for all organizations.

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
Applicants: Send Email	Grants ability to send email to candidates.	Recruiting
Emails by Learning Object - Manage	Grants access to create, edit and delete custom email templates/triggers at the learning object level. This permission can be constrained by OU, User's OU, User's Self and Subordinates, and User. This is an administrator permission.	Learning - Administration
Global Email Administration - Manage	Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows. This permission can be constrained	Core Administration

	by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	

Log In Message - Manage	Grants access to create a message that appears upon portal login to all users or a selected group/subset of users. This is an administrator permission. This permission can be constrained by OU and User's OU.	Core Administration

Marketing Email Templates - Manage	Grants ability to create and save Marketing Email Templates, which can be reused to send future marketing email messages to users. This is an administrator permission.	Core Administration

Marketing Emails - Manage	Grants ability to create and send ad hoc emails to populations of users based on their assigned org units, groups, or by user name. This is an administrator permission.	Core Administration

Observation Checklist - Manage	Grants access to create and edit Observation Checklists, as well as view progress of users assigned to a given checklist and/or remove users from a checklist. This permission can be constrained by OU and User's OU. This is an administrator permission.	Performance - Administration

Performance Review Task Administration	Grants ability to create/assign performance review tasks and manage activity within those tasks. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User.	Performance - Administration

Proxy Enrollment Custom Email - Manage	Grants ability to edit and substitute custom emails for standard email triggers when creating a proxy enrollment request.	Learning - Administration

Roster - Email Registered Users	Grants ability to send a custom email message to all students listed on the roster for an instructor led training session. An additional link appears on ILT roster page for sending such messages. This is an administrator/ILT instructor permission.	Learning - Administration

Sessions - Create	Grants ability to create new instructor led training sessions. This permission works in conjunction with Events - View and Sessions - View permissions. Administrators can only create sessions for events for which they have the availability to view. This permission can be constrained by OU, User's OU, Instructor, User as Instructor, Facility, Facilities Owned by User, ILT Provider, User's ILT Provider, User, and User Self and Subordinates. This is an administrator permission.	Learning - Administration

Sessions	Grants ability to edit/update existing instructor led training	Learning -

- Edit	sessions. This permission works in conjunction with Events - View and Sessions - View permissions. Administrators can only edit sessions for which they have the availability to view and edit. This permission can be constrained by OU, User's OU, Instructor, User as Instructor, Facility, Facilities Owned by User, ILT Provider, User's ILT Provider, User, and User Self and Subordinates. This is an administrator permission.	Administration

Email Administration - Add/Edit Email

With this enhancement, administrators of multi-language portals now have the ability to override the current language restrictions within an email trigger.

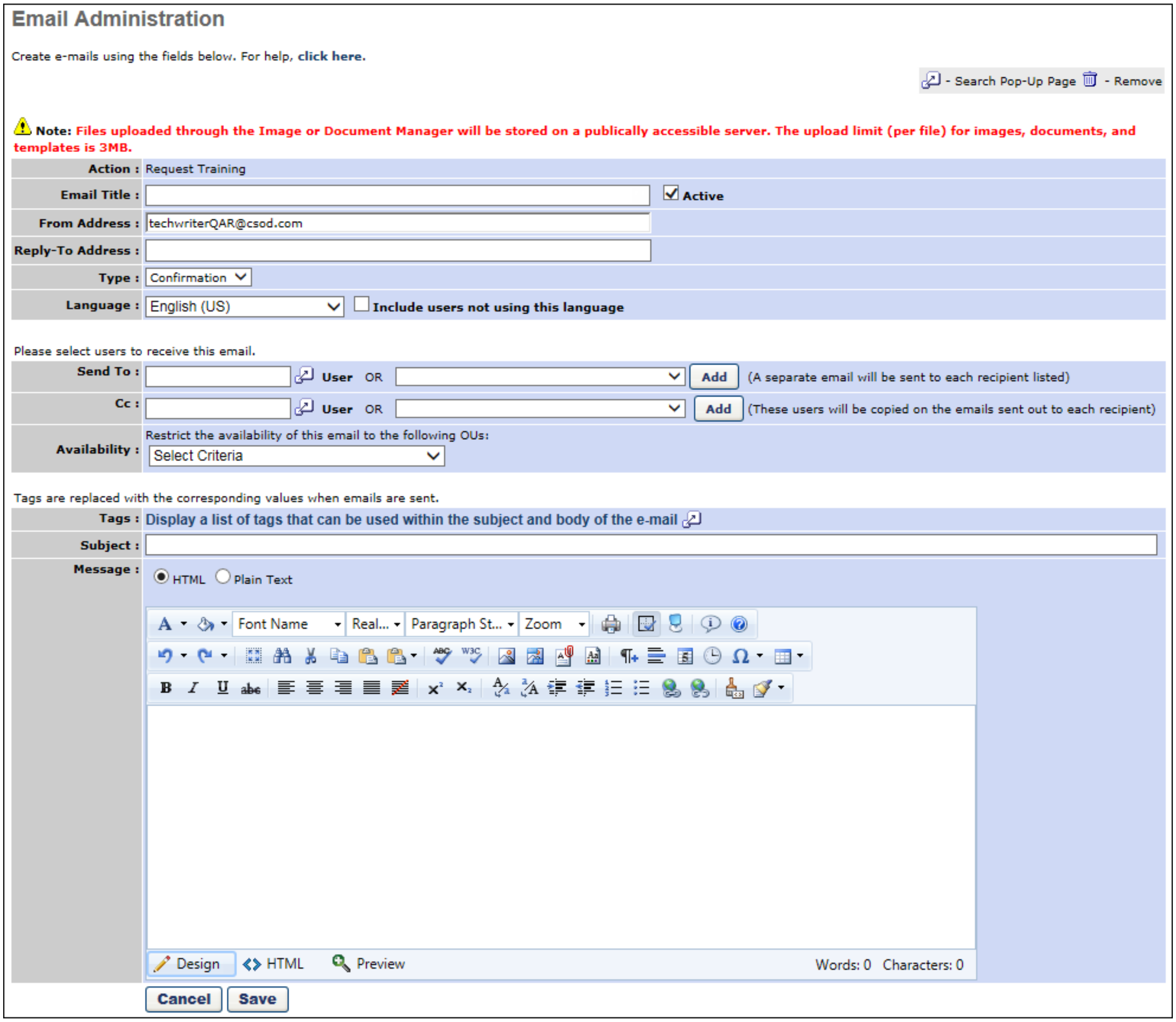
To create an email, go to **Admin > Tools > Core Functionality > Email Management**. Then, click the Add Email icon in the Options column of the email action for which you would like to create an email. This opens the Create New Email page.

Permissions

Permission Name	Permission Description	Category
Global Email Administration - Manage	Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration

Include users not using this language - This option is unselected by default. This option is only available when multiple languages are enabled for the portal.

- When this option is selected, the system does not validate the recipient's display language before sending the email. This enables administrators to create a single email trigger that will be sent to recipients regardless of their configured language. For example, an email that is created in English (UK) will be sent to recipients of any language configured for the portal (e.g., English (US), Japanese, Polish, Thai) that meet the selected availability criteria. **Important:** *The subject and message of the email are not translated to the recipient's language. If multiple emails are configured for the same trigger such as one in English (UK) and one in Polish, and one trigger has this option selected, it is possible for some users to receive multiple emails for the same action. This duplication can be prevented by adjusting the availability of the email with this language override option selected.*
- When this option is not selected, the recipient only receives the email if they meet the availability criteria for the email trigger and if the recipient's display language matches the language configured for the email trigger.
- When editing an existing email and changing this option setting, all future emails including those that are currently queued will respect the updated setting.


Email Administration
Create e-mails using the fields below. For help, click here.
- Search Pop-Up Page - Remove
Note: Files uploaded through the Image or Document Manager will be stored on a publically accessible server. The upload limit (per file) for images, documents, and templates is 3MB.
Action : Request Training
Email Title :
Active
From Address : techwriterQAR@csod.com
Reply-To Address :
Type : Confirmation
Language : English (US)
Include users not using this language
Please select users to receive this email.
Send To : User OR Add (A separate email will be sent to each recipient listed)
Cc : User OR Add (These users will be copied on the emails sent out to each recipient)
Availability : Restrict the availability of this email to the following OUs:
Select Criteria
Tags are replaced with the corresponding values when emails are sent.
Tags : Display a list of tags that can be used within the subject and body of the e-mail
Subject :
Message : HTML Plain Text
Font Name Real... Paragraph St... Zoom
Design HTML Preview Words: 0 Characters: 0
Cancel Save

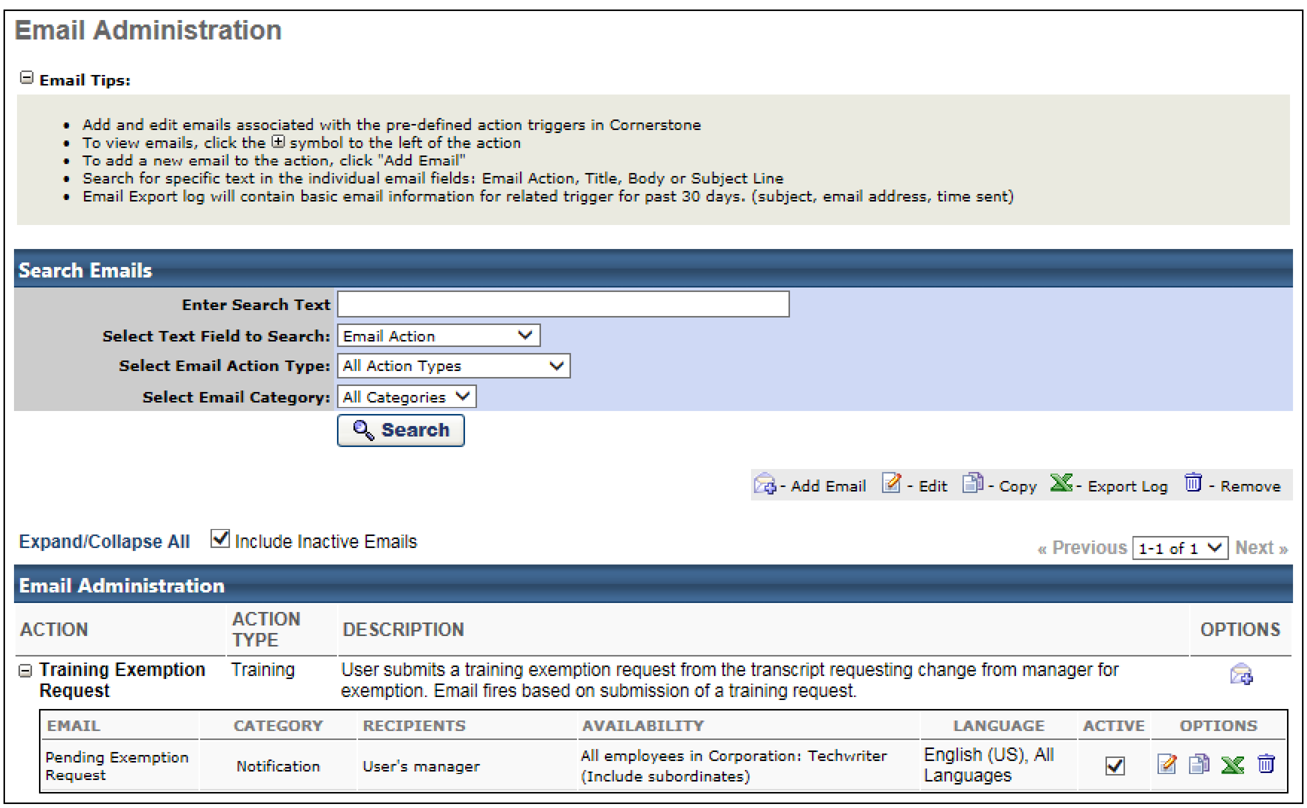
Email Administration

With this enhancement, administrators of multi-language portals now have the ability to override the current language restrictions within an email trigger. When the language restriction for an email trigger is overridden, "All Languages" is listed in the Language column on the Email Administration page along with the specific language in which the email is configured. For example, if the email is configured in English (US) and the language restriction is overridden, then "English (US), All Languages" is displayed in the Language column.

To create an email, go to **Admin > Tools > Core Functionality > Email Management**. Then, click the Add Email icon in the Options column of the email action for which you would like to create an email. This opens the Create New Email page.

Permissions

Permission Name	Permission Description	Category
Global Email Administration - Manage	Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration



Marketing Communications - Add/Edit Email or Email Template

With this enhancement, administrators of multi-language portals now have the ability to override the current language restrictions within an email trigger or email template.

To create a marketing email, go to **Admin > Tools > Core Functions > Marketing Communications**. Then, click the *Create New Email* link.

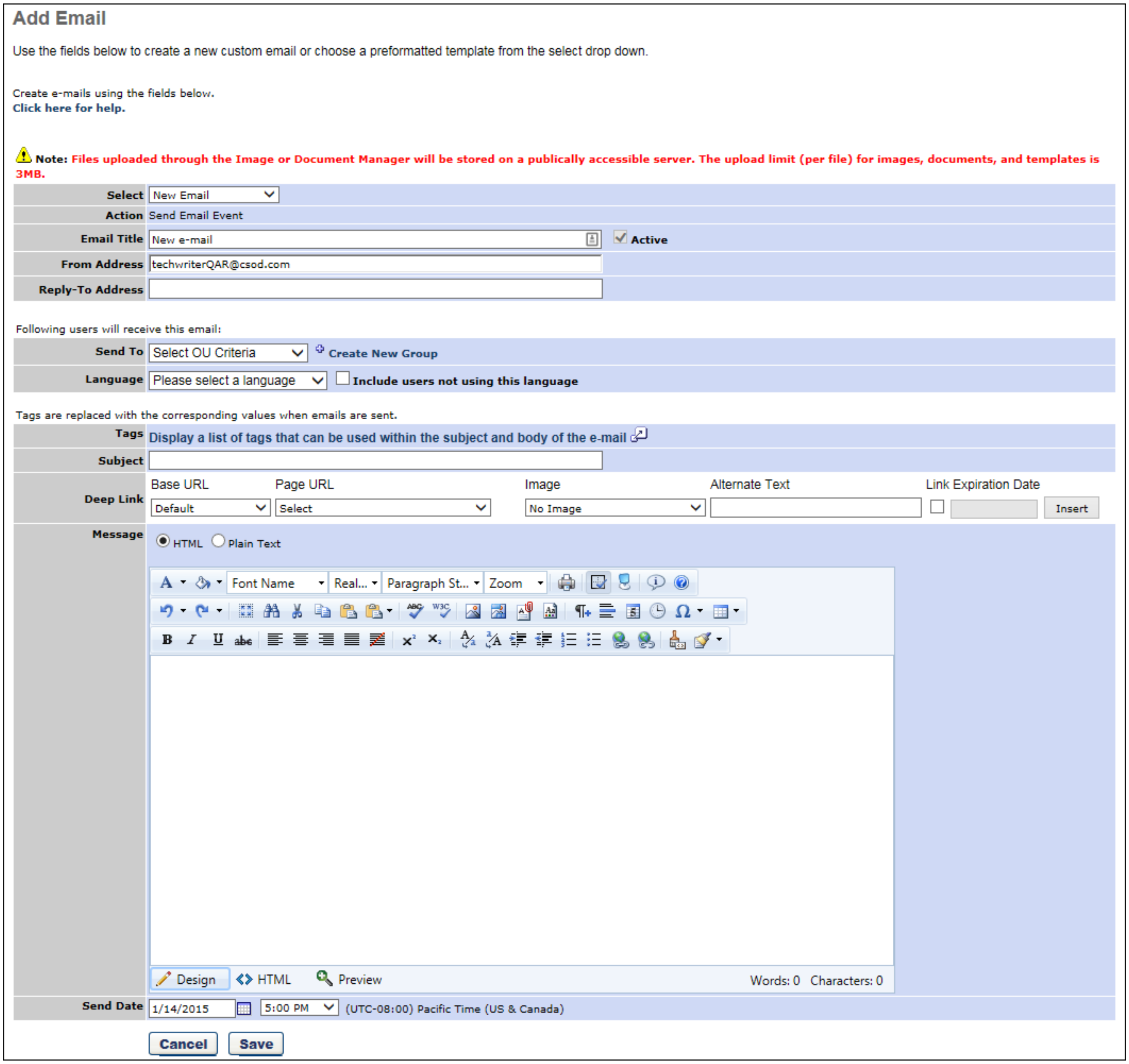
To create a marketing email template, go to **Admin > Tools > Core Functions > Marketing Communications**. Then, click the *Create Email Template* link.

Permissions

Permission Name	Permission Description	Category
Marketing Email Templates - Manage	Grants ability to create and save Marketing Email Templates, which can be reused to send future marketing email messages to users. This is an administrator permission.	Core Administration
Marketing Emails - Manage	Grants ability to create and send ad hoc emails to populations of users based on their assigned org units, groups, or by user name. This is an administrator permission.	Core Administration

Include users not using this language - This option is unselected by default. This option is only available when multiple languages are enabled for the portal.

- When this option is selected, the system does not validate the recipient's display language before sending the email. This enables administrators to create a single email trigger that will be sent to recipients regardless of their configured language. For example, an email that is created in English (UK) will be sent to recipients of any language configured for the portal (e.g., English (US), Japanese, Polish, Thai) that meet the selected availability criteria. **Important:** *The subject and message of the email are not translated to the recipient's language. If multiple emails are configured for the same trigger such as one in English (UK) and one in Polish, and one trigger has this option selected, it is possible for some users to receive multiple emails for the same action. This duplication can be prevented by adjusting the availability of the email with this language override option selected.*
- When this option is not selected, the recipient only receives the email if they meet the availability criteria for the email trigger and if the recipient's display language matches the language configured for the email trigger.
- When editing an existing email and changing this option setting, all future emails including those that are currently queued will respect the updated setting.


Add Email
Use the fields below to create a new custom email or choose a preformatted template from the select drop down.
Create e-mails using the fields below.
Click here for help.
Note: Files uploaded through the Image or Document Manager will be stored on a publically accessible server. The upload limit (per file) for images, documents, and templates is 3MB.
Select
New Email
Action
Send Email Event
Email Title
New e-mail
Active
From Address
techwriterQAR@csod.com
Reply-To Address
Following users will receive this email:
Send To
Select OU Criteria
Create New Group
Language
Please select a language
Include users not using this language
Tags are replaced with the corresponding values when emails are sent.
Tags
Display a list of tags that can be used within the subject and body of the e-mail
Subject
Deep Link
Base URL
Page URL
Image
Alternate Text
Link Expiration Date
Default
Select
No Image
Insert
Message
HTML
Plain Text
Font Name
Real...
Paragraph St...
Zoom
Design
HTML
Preview
Words: 0 Characters: 0
Send Date
1/14/2015
5:00 PM
(UTC-08:00) Pacific Time (US & Canada)
Cancel
Save

Custom Email Administration

With this enhancement, administrators of multi-language portals now have the ability to override the current language restrictions within an email trigger. When the language restriction for an email trigger is overridden, "All Languages" is listed in the Language column along with the specific language in which the email is configured. For example, if the email is configured in English (US) and the language restriction is overridden, then "English (US), All Languages" is displayed in the Language column.

Custom emails can be configured or selected in the following areas of the system:

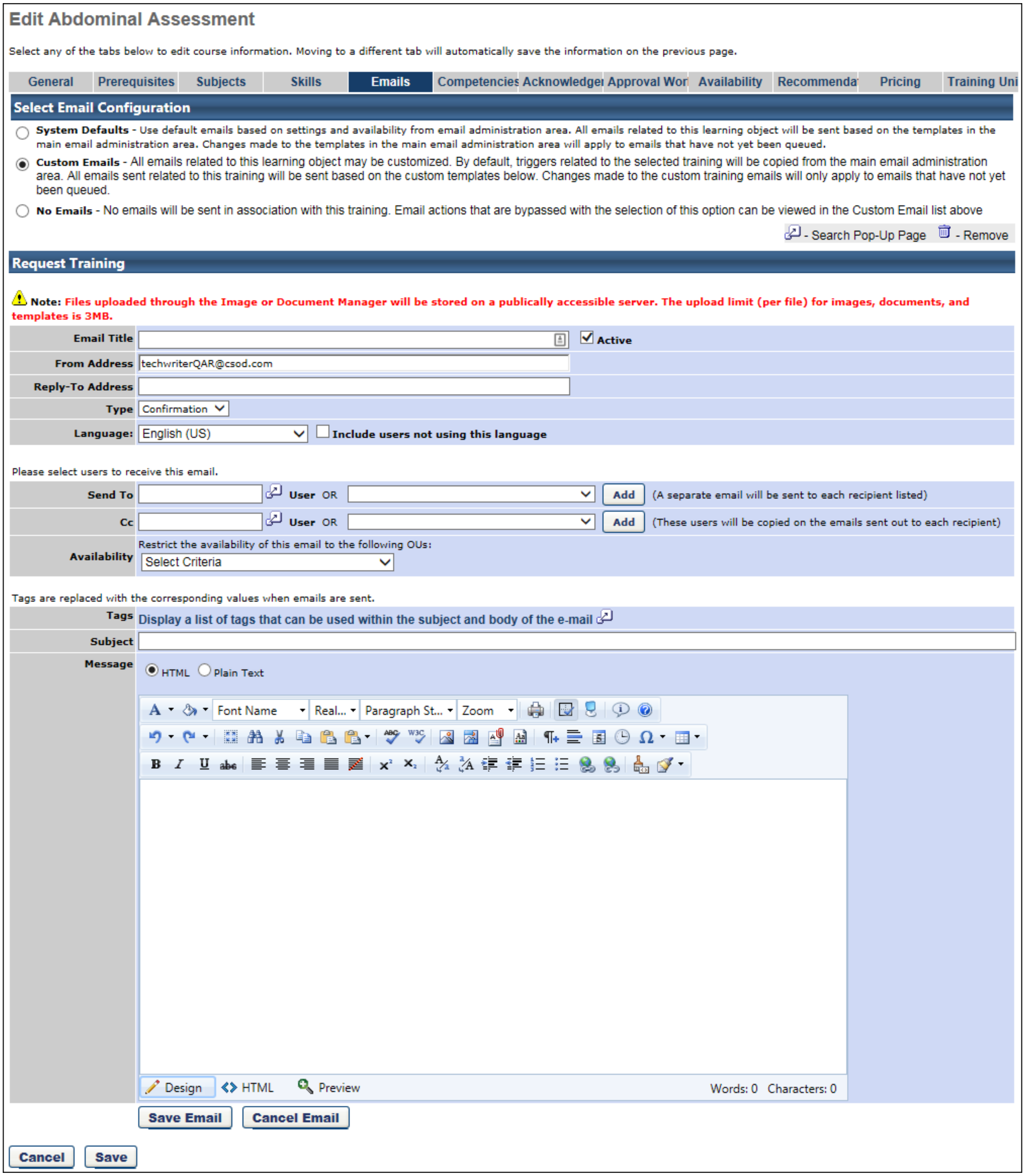
- Platform:
    - Login Message Preferences > Create Login Message > Actions > Send Email
- Recruiting:
    - Manage Requisitions > Manage Applicants > Applicant Profile > Send Email
- Performance:
    - Create Performance Review > Review Workflow > Custom Emails
    - Create Observation Checklist > Custom Emails
- Learning:
    - Course Catalog > Edit > Emails > Custom Emails
    - Create Certification > Emails > Custom Emails
    - Create Curriculum > Emails > Custom Emails
    - Create Session > Emails > Custom Emails
    - Training Request Forms > Emails
    - Create Training Plan > Emails > Custom Emails
    - Create Proxy Enrollment > Emails > Proxy Emails

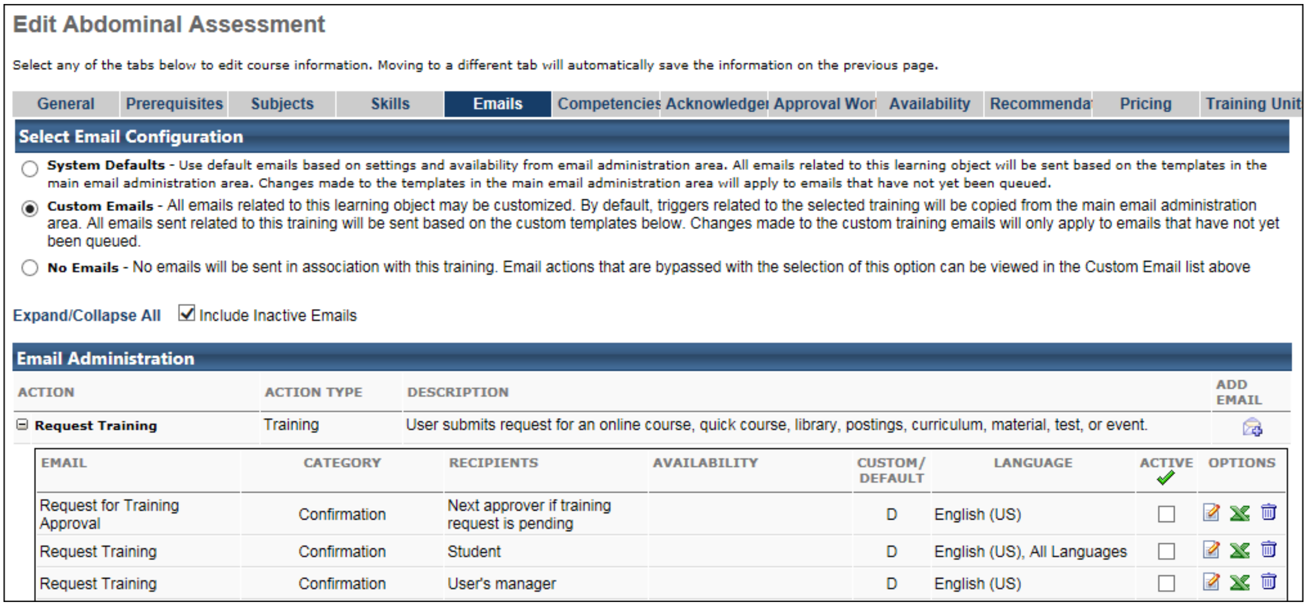
Permissions

Permission Name	Permission Description	Category
Course Catalog - Update	Grants ability to manage/edit learning objects listed in the Course Catalog. This permission can be constrained by OU, User's OU, Training Type, Training Item, Provider, ILT Provider, User's ILT Provider, User, User Self and Subordinates, and User's LO Availability. This is an administrator permission.	Learning - Administration
Emails by Learning Object - Manage	Grants access to create, edit and delete custom email templates/triggers at the learning object level. This permission can be constrained by OU, User's OU, User's Self and Subordinates, and User. This is an administrator permission.	Learning - Administration

Include users not using this language - This option is unselected by default. This option is only available when multiple languages are enabled for the portal.

- When this option is selected, the system does not validate the recipient's display language before sending the email. This enables administrators to create a single email trigger that will be sent to recipients regardless of their configured language. For example, an email that is created in English (UK) will be sent to recipients of any language configured for the portal (e.g., English (US), Japanese, Polish, Thai) that meet the selected availability criteria. **Important:** *The subject and message of the email are not translated to the recipient's language. If multiple emails are configured for the same trigger such as one in English (UK) and one in Polish, and one trigger has this option selected, it is possible for some users to receive multiple emails for the same action. This duplication can be prevented by adjusting the availability of the email with this language override option selected.*
- When this option is not selected, the recipient only receives the email if they meet the availability criteria for the email trigger and if the recipient's display language matches the language configured for the email trigger.
- When editing an existing email and changing this option setting, all future emails including those that are currently queued will respect the updated setting.


Edit Abdominal Assessment
Select any of the tabs below to edit course information. Moving to a different tab will automatically save the information on the previous page.
General | Prerequisites | Subjects | Skills | Emails | Competencies | Acknowledge | Approval Wor | Availability | Recommenda | Pricing | Training Uni
Select Email Configuration
System Defaults - Use default emails based on settings and availability from email administration area. All emails related to this learning object will be sent based on the templates in the main email administration area. Changes made to the templates in the main email administration area will apply to emails that have not yet been queued.
Custom Emails - All emails related to this learning object may be customized. By default, triggers related to the selected training will be copied from the main email administration area. All emails sent related to this training will be sent based on the custom templates below. Changes made to the custom training emails will only apply to emails that have not yet been queued.
No Emails - No emails will be sent in association with this training. Email actions that are bypassed with the selection of this option can be viewed in the Custom Email list above
- Search Pop-Up Page - Remove
Request Training
Note: Files uploaded through the Image or Document Manager will be stored on a publically accessible server. The upload limit (per file) for images, documents, and templates is 3MB.
Email Title
Active
From Address techwriterQAR@csod.com
Reply-To Address
Type Confirmation
Language: English (US) Include users not using this language
Please select users to receive this email.
Send To User OR Add (A separate email will be sent to each recipient listed)
Cc User OR Add (These users will be copied on the emails sent out to each recipient)
Availability Restrict the availability of this email to the following OUs:
Select Criteria
Tags are replaced with the corresponding values when emails are sent.
Tags Display a list of tags that can be used within the subject and body of the e-mail
Subject
Message HTML Plain Text
Font Name Real... Paragraph St... Zoom
Design HTML Preview Words: 0 Characters: 0
Save Email Cancel Email
Cancel Save


Edit Abdominal Assessment
Select any of the tabs below to edit course information. Moving to a different tab will automatically save the information on the previous page.
General
Prerequisites
Subjects
Skills
Emails
Competencies
Acknowledge
Approval Wor
Availability
Recommenda
Pricing
Training Unit
Select Email Configuration
System Defaults - Use default emails based on settings and availability from email administration area. All emails related to this learning object will be sent based on the templates in the main email administration area. Changes made to the templates in the main email administration area will apply to emails that have not yet been queued.
Custom Emails - All emails related to this learning object may be customized. By default, triggers related to the selected training will be copied from the main email administration area. All emails sent related to this training will be sent based on the custom templates below. Changes made to the custom training emails will only apply to emails that have not yet been queued.
No Emails - No emails will be sent in association with this training. Email actions that are bypassed with the selection of this option can be viewed in the Custom Email list above
Expand/Collapse All
Include Inactive Emails
Email Administration
ACTION
ACTION TYPE
DESCRIPTION
ADD EMAIL
Request Training
Training
User submits request for an online course, quick course, library, postings, curriculum, material, test, or event.
EMAIL
CATEGORY
RECIPIENTS
AVAILABILITY
CUSTOM/ DEFAULT
LANGUAGE
ACTIVE
OPTIONS
Request for Training Approval
Confirmation
Next approver if training request is pending
D
English (US)
Request Training
Confirmation
Student
D
English (US), All Languages
Request Training
Confirmation
User's manager
D
English (US)

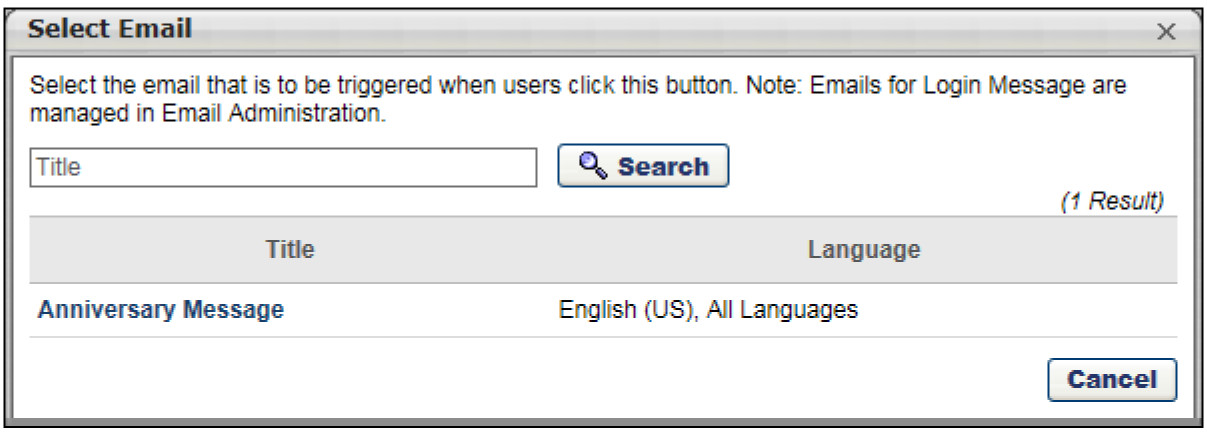
Login Message Preferences - Select Email

With this enhancement, administrators of multi-language portals now have the ability to override the current language restrictions within an email trigger. When the language restriction for an email trigger is overridden, "All Languages" is listed in the Language column on the Select Email pop-up along with the specific language in which the email is configured. For example, if the email is configured in English (US) and the language restriction is overridden, then "English (US), All Languages" is displayed in the Language column.

To create a login message, go to **Admin > Preferences**. Then, click the *Login Message (by Division)* link in the System Preferences column. On the Login Message Administration page, click the *Create Login Message* link.

Permissions

Permission Name	Permission Description	Category
Log In Message - Manage	Grants access to create a message that appears upon portal login to all users or a selected group/subset of users. This is an administrator permission. This permission can be constrained by OU and User's OU.	Core Administration



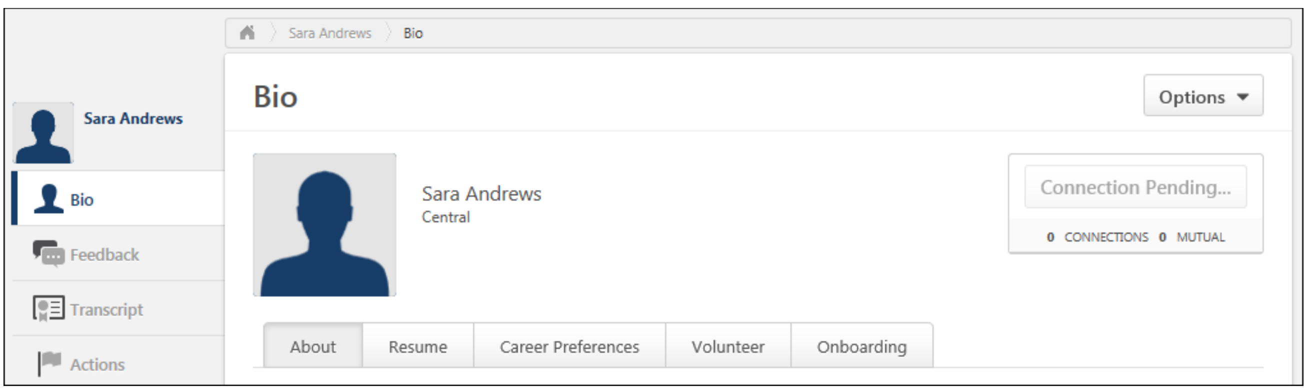
Gender Neutral Default Photo

The system displays a default photo for users who do not have a custom photo loaded.

With this enhancement, a new gender neutral default photo is used throughout all new user interface (UI) pages for users who do not have a custom photo loaded.

This default photo may appear on any page within the new UI where a user photo is displayed, including the following areas:

- Universal Profile
- My Account
- Connect
- Performance Reviews
- Compensation
- Recruiting



Implementation

Upon release, this functionality is automatically available on all new UI pages for all organizations.

Help Videos

Help Videos on Administrator Pages Phase 2

With this enhancement, additional in-line help videos are available if in-line help videos are enabled. These videos provide a simple and visual demonstration of how to use the administration pages. The videos are available directly on the page, making the information easy to view while using the page.

Use Case

An administrator is responsible for determining how the entire organization determines compensation adjustments for the review year. There are several steps in this process and the administrator is unsure of best practices and all of the functionality that is available. As a quick solution, the administrator has the option to view a video on how to set up adjustment guidelines directly within the system. The video quickly and efficiently informs the administrator how to set up the guidelines, giving the administrator time to focus on other tasks.

Implementation

Upon release, the additional in-line help videos are automatically available for organizations that have the in-line help videos enabled.

In-line help videos are available for all organizations by default. However, organizations can choose to disable them. The availability of this functionality is controlled by a backend setting and is available upon request. When enabled, all in-line help videos are enabled on all available administration pages.

Considerations

Currently, help videos are only available in English.

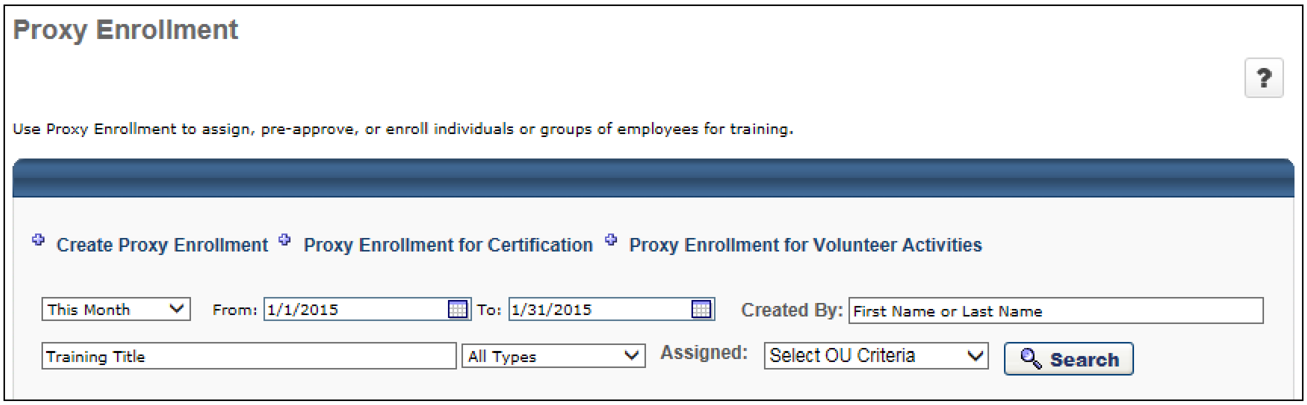
This functionality is only available in the following browsers:

- IE 8 and above
- Firefox
- Chrome

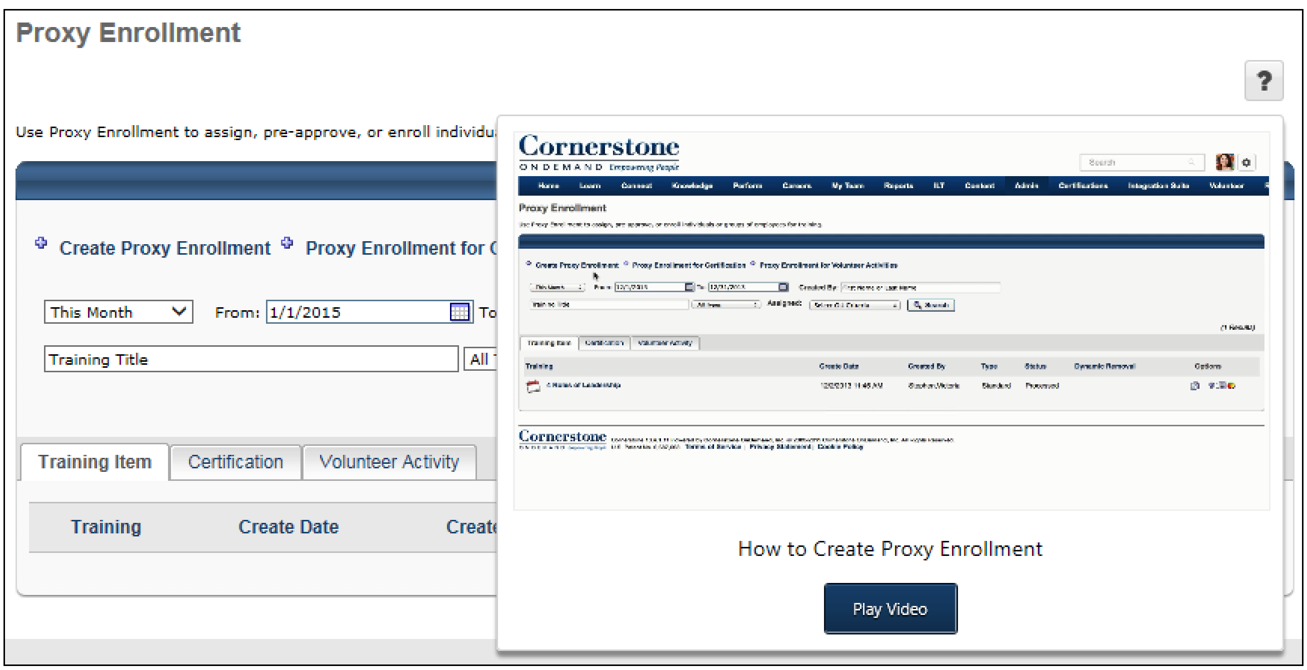
Help Video

In-line help videos are available on select administration pages in the portal. When a help video guides the user through multiple pages and steps as part of a single process, the same video appears on all appropriate pages.

When viewing a page that has an available help video, the question mark icon  appears in the upper-right corner of the page.



When the question mark icon is clicked, the Help Video widget expands to display the video. The video title is displayed below the video. Click the **Play Video** button within the widget to play the video in a pop-up.



Available Help Videos

The following videos are now available on the corresponding pages:

Video Title	Video Page
How to set up general preferences for a Security Role	Security Role Administration > Create New Role > General Security Role Administration > Edit Role > General
How to set up Permissions for a Security Role	Security Role Administration > Create New Role > Permissions Security Role Administration > Edit Role > Permissions
How to set up Constraints for a Security Role	Security Role Administration > Create New Role > Constraints Security Role Administration > Edit Role > Constraints
How to Configure Transcript Preferences	Learning Preferences > Transcript Preferences
How to manage the Course Catalog	Catalog Management > Course Catalog
How to Build a Curriculum Structure	Curricula Administration > Create Curriculum > Structure
How to Identify Team Qualifications in Skills Matrix	Performance Management > Manage Roles Performance > Skills Matrix
How to Build a Succession PowerPoint Template Report	Standard Reports > Succession > SMP PowerPoint Template
How to Set Up the Step Workflow of Performance Review Tasks	Performance Review Task Administration > Create Task > Review Workflow
How to Configure the Step Details in Performance Review Tasks	Performance Review Task Administration > Create Task > Review Workflow > Add Step Performance Review Task Administration > Create Task > Review Workflow > Edit Step
How to Configure Visibility of Performance	Performance Review Task Administration > Create

Video Title	Video Page
Review Data to Reviewees	Task > Visibility
How to Configure General Search Preferences	Core Preferences > Search Preferences
How to Refund a Training Purchase	E-Commerce > Manage Transactions
How to Customize the Shopping Cart	E-Commerce > Shopping Cart

The following videos were made available with the June 2014 release:

Video Title	Video Page
How to Define Compensation Adjustment Guidelines	Compensation Management > Create New Adjustment Guideline
How to Configure Goal Preferences	Preferences > Goal Preferences
How to Create and Edit a Certification	Certification Administration > Create New Certification (All pages)
How to Create and Manage Applicant Statuses	Recruitment > Applicant Statuses
How to Manage Session Rosters for ILT	Manage Events and Sessions > Session Roster (All pages)
How to Configure Universal Profile - Snapshot	Preferences > Snapshot Preferences
How to Configure Proxy Enrollment Emails	Create New Proxy Enrollment > Emails
How to Build a Custom Report	Reports > Analytics (All pages)
How to Create a Proxy Enrollment	Proxy Enrollment > Create New Proxy Enrollment (All pages)
Competency Versioning Overview	Competency Assessments > Competency Bank
How to Configure Login Message Preferences	Preferences > Login Message Preferences
How to Configure Welcome Page Preferences	Preferences > Welcome Page Preferences
How to Create Development Plan Templates	Development Plans > Plan Templates
How to Define and Configure Custom Fields	Custom Field Administration

Inherited Permission Constraint Clarification

Inherited Permission Constraint Clarification

Within the system, parent security roles inherit any permissions that are added to a child role. However, any constraints that are added to the child role are not inherited by the parent role.

With this enhancement, when editing a parent role that has inherited a permission from a child role, administrators do not have the option to add constraints to any permission that was inherited from a child role. The instructions on the Create/Edit Role - General, Permissions, and Constraints pages are updated to more accurately reflect how permissions, constraints, and inheritance function within security roles.

If an inherited permission within the parent security role needs to be constrained, the permission should first be removed from the child role. The permission should then be directly added to the parent role with the applicable constraints. The permission can then be re-added to the child role.

Constraints

If general constraints are applied to a security role that has inherited permissions, the general constraints are not applied to the inherited permissions. This is previously existing functionality.

Use Cases

1. An administrator is editing the permissions for the Agency Recruiter security role, which is a child role under the Recruiter role.
2. The administrator adds the Custom Recruiting Report - View permission to the child role, which does not exist within the parent role.
3. The administrator constrains the permission by location.
4. The administrator saves the Agency Recruiter child security role.
5. As a result, the following occurs:
    1. The Custom Recruiting Report - View permission is inherited by the Recruiter parent security role. This is previously existing functionality.
    2. The location constraint that was added to the Agency Recruiter child security role is not inherited by the Recruiter parent security role. This is previously existing functionality.
    3. When editing the Recruiter parent security role, the administrator does not have the option to add constraints to the Custom Recruiting Report - View permission.

Implementation

Upon release, this functionality is automatically enabled in Stage and Live portals for all organizations.

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
Security Administration - General Constraints	Grants access to apply general constraints to permissions when creating/editing a security role. This permission works in conjunction with the Security Administration - Manager permission. This is an administrator permission.	Core Administration
Security Administration - Manage	Grants ability to create, modify and constrain security roles within the portal, and assign users to those security roles. This permission can be constrained by OU, User's OU, User, and User Self and Subordinates. This is an administrator permission.	Core Administration

Create/Edit Role - Constraints

With this enhancement, when editing a parent role that has inherited a permission from a child role, administrators do not have the option to add constraints to any permission that was inherited from a child role.

If an inherited permission within the parent security role needs to be constrained, the permission should first be removed from the child role. The permission should then be directly added to the parent role with the applicable constraints. The permission can then be re-added to the child role.

To create a security role, go to **Admin > Security**. Then, click the *Create New Role* link.

Permissions

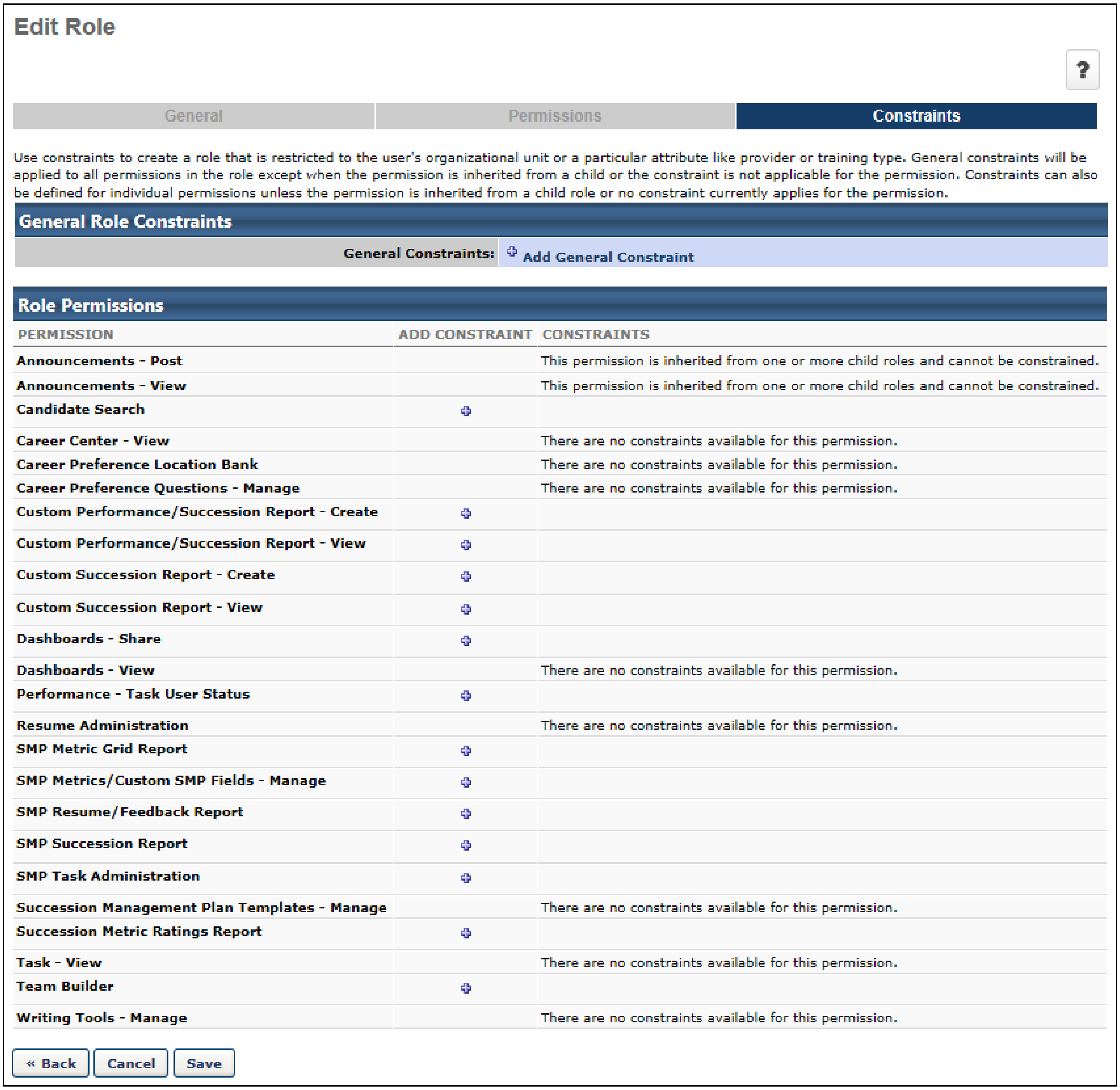
Permission Name	Permission Description	Category
Security Administration - General Constraints	Grants access to apply general constraints to permissions when creating/editing a security role. This permission works in conjunction with the Security Administration - Manager permission. This is an administrator permission.	Core Administration
Security Administration - Manage	Grants ability to create, modify and constrain security roles within the portal, and assign users to those security roles. This permission can be constrained by OU, User's OU, User, and User Self and Subordinates. This is an administrator permission.	Core Administration

If a role has inherited a permission from a child role, the administrator cannot add constraints to the inherited permission.

- Any constraints that are added to the permission within the child role are not inherited by the permission within the parent role. Also, the Add Constraint icon is not available for the permission.
- The following notification is displayed in the Constraints column to indicate that the administrator cannot constrain the inherited permission: "This permission is inherited from one or more child role and cannot be constrained."
- If an inherited permission within the parent security role needs to be constrained, the permission should first be removed from the child role. The permission should then be directly added to the parent role with the applicable constraints. The permission can then be re-added to the child role.
- If general constraints are applied to a security role that has inherited permissions, the general constraints are not applied to the inherited permissions.

If a permission exists in the parent role and is later added to the child role, then the permission can be constrained within the parent role.

If a permission does not have any applicable constraints, then the following notification is displayed in the Constraints column: "There are no constraints available for this permission."



Edit Role

General | Permissions | Constraints

Use constraints to create a role that is restricted to the user's organizational unit or a particular attribute like provider or training type. General constraints will be applied to all permissions in the role except when the permission is inherited from a child or the constraint is not applicable for the permission. Constraints can also be defined for individual permissions unless the permission is inherited from a child role or no constraint currently applies for the permission.

General Role Constraints

General Constraints: Add General Constraint

Role Permissions

PERMISSION	ADD CONSTRAINT	CONSTRAINTS
Announcements - Post		This permission is inherited from one or more child roles and cannot be constrained.
Announcements - View		This permission is inherited from one or more child roles and cannot be constrained.
Candidate Search		
Career Center - View		There are no constraints available for this permission.
Career Preference Location Bank		There are no constraints available for this permission.
Career Preference Questions - Manage		There are no constraints available for this permission.
Custom Performance/Succession Report - Create		
Custom Performance/Succession Report - View		
Custom Succession Report - Create		
Custom Succession Report - View		
Dashboards - Share		
Dashboards - View		There are no constraints available for this permission.
Performance - Task User Status		
Resume Administration		There are no constraints available for this permission.
SMP Metric Grid Report		
SMP Metrics/Custom SMP Fields - Manage		
SMP Resume/Feedback Report		
SMP Succession Report		
SMP Task Administration		
Succession Management Plan Templates - Manage		There are no constraints available for this permission.
Succession Metric Ratings Report		
Task - View		There are no constraints available for this permission.
Team Builder		
Writing Tools - Manage		There are no constraints available for this permission.

« Back | Cancel | Save

Create/Edit Role - Instructions

When creating or editing a security role, the instructions on all pages of the process (i.e., General, Permissions, Constraints) are updated to more accurately reflect how inheritance, permissions, and constraints function.

On the General page, the following instructions are now displayed: "Enter the name, description, and parent for this role. The parent will inherit any permissions added to this role that do not already exist in the parent."

On the Permissions page, the following instructions are now displayed: "Add the appropriate permissions for this role. If a permission exists in one or more child role, it cannot be removed from the parent role directly."

On the Constraints page, the following instructions are now displayed:

"Use constraints to create a role that is restricted to the user's organizational unit or a particular attribute like provider or training type.

General constraints will be applied to all permissions in the role except when the permission is inherited from a child or the constraint is not applicable for the permission. Constraints can also be defined for individual permissions unless the permission is inherited from a child role or no constraint currently applies for the permission."

Language Pack Updates to Thai and Spanish (Spain)

With this enhancement, the language packs are updated for Thai and Spanish (Spain). These improved strings will enhance the user experience with clearer phrases and words.

Implementation

Upon release, this functionality is automatically enabled for all portals using the Thai or Spanish (Spain) language pack.

SOAP Web Services Throttling

To increase the performance and reliability of the system, throttling is implemented on all existing SOAP Web Services for all organizations using SOAP Web Services. The maximum request rate for all SOAP services is now 35K requests per hour per organization, meaning that an organization cannot make more than 35K requests within an hour. Other limits include:

- The maximum throttle rate for the GetTranscriptandTask SOAP Service is 2K requests per hour per organization.
- The maximum throttle rate for the Learning Object Web Service (LOWS) is 2K requests per hour per organization.

If the request count exceeds the request threshold, the SOAP Web Service does not execute any action, and "Throttle rate exceeded" is displayed in the web service response. The request count is reset an hour after the initial request.

This only impacts organizations using SOAP Web Services.

The following SOAP Web Services are currently available:

- Echo OUs
- Set OUs
- Reconcile OUs
- Echo Users
- Set Users
- Reconcile Users
- Catalog Search
- Catalog Details
- Request
- Register
- Launch
- Complete
- Withdraw
- Remove
- Get Transcript and Task
- Transcript Search
- Get Certificate Details
- Get Certificate Transcript

Analytics - Added Fields in User Section

With this enhancement, two existing fields are modified and new fields are added to the User section for all reports that include a User section.

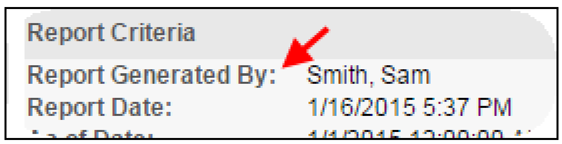
Field Name	Field Description	Field Type
Address Line 1	This is an existing field that is updated to change the character limit to 220 to reflect database limit.	Text
City	The city entered for a user on the user record.	Text
Mailstop	The Mailstop on the user record.	Text
Postal Code	The zip code entered for a user on the User Record.	Text
State/Province	The State or Province entered for a user on the User Record.	Text
User Fax Number	The user’s fax number entered on the user record.	Text
User Mobile Number	The user’s cell phone number entered on the user record.	Text
User Phone Number	This is an existing field that is renamed from *User Phone* to *User Phone Number*.	Text

Colon Added to Criteria Items in Reporting

With this enhancement, a colon is added to the end of each criteria item label in the header of the criteria for non-Excel output report views for custom and standard reporting. This creates consistency between the report outputs, as a colon is already used at the end of each criteria item label in the header for reports when viewing the Excel output.

Header Labels Before Enhancement

Header Labels After Enhancement



Recruiting

Anonymous Reference Letters

Anonymous Reference Letters Overview

Prior to this enhancement, reference letters were submitted by the applicant, and a verification process was not available to ensure the references were created by the referrer. Recruiters also had to manually add the reference letters to the applicant's profile, which was a time consuming process.

With this enhancement, reference letters can now be sent directly from an applicant's referrers and automatically added to the applicant's Applicant Profile page. The recruiter sends the applicant a new Reference Letter Request task, and the applicant provides the names and email addresses of each referrer. When the applicant submits the task, the referrers are sent an email containing a link to a reference letter form. Once the reference letter form is submitted, the letter is automatically added to the applicant's Documents tab in their applicant profile.

Upon implementation, this enhancement is controlled by a backend setting that is disabled by default. To enable this functionality, contact your Client Success Manager or Global Product Support.

Workflow

1. An administrator creates a reference letter form in Form Management > Manage Forms. The form will be sent to referrers when requesting references from applicants. **Note:** *If the administrator would like to allow the referrer to copy and paste letter text directly into the form, a question must be created with the field type as Text and the advanced options as field display = Multiline and character max = 10,000.*
2. The administrator configures the Request References email (for applicants), the Reference Letter Request email (for external referrers), and the Reference Letter Form Complete (for recruiters) in Email Administration.

   The Reference Letter Request email must be configured with the following:

   - The email must the contain link to launch the form: FORM.LINK (NEW)
   - Email Recipient "External Reference" must be selected in order to send the email to the external reference
3. A recruiter accesses the Manage Applicants page and requests reference letters from an external applicant using the Request Reference Letter action. The action assigns the Reference Letter Request task to the applicant.
4. The applicant accesses the task from their My Profile page on the career site. **Note:** *Internal applicants access the task from Career Center.*
5. The applicant launches the task and enters the names and email addresses of each referrer.
6. The applicant submits the task. This triggers the Reference Letter Request email to be sent to each referrer.
7. A referrer receives the Reference Letter Request email. The email contains a link to the reference letter form that was created by the administrator in step 1. The referrer clicks the link for the form, and then completes and submits the reference letter.

8. The recruiter views the completed reference letter from the Reference Forms section on the Documents tab of the Applicant Profile page.

Security

The following new permission applies to this functionality:

Permission Name	Permission Description	Category
Request Reference Letter	Grants access to request references from an applicant and assign a reference letter form in Manage Applicants. This permission cannot be constrained.	Recruiting

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
Forms - Manage	Grants access to the Form Management Administration functionality. This permission can be constrained by OU and User's OU. This is an administrator permission. **Note:** *This permission enables access to the Form Management functionality that is part of the Onboarding module. This permission does not grant access to the Old Forms Management functionality.*	Forms Management Administration
Global Email Administration - Manage	Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration
Global Email Administration - View	Grants view only access to email templates/triggers and email logs at the global level for the portal. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration
Question Bank - Manage	Grants access to the Question Bank Management functionality on the Form Management page. This permission can be constrained by OU and User's OU. This is an administrator permission.	Forms Management Administration

Recruiting Forms - Assign	Grants access to assign forms in Recruiting. This permission cannot be constrained.	Recruiting
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note****: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the* **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*	Recruiting
Requisition: Reviewer	Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained. **Note:** *This is a dynamically assigned permission that is not available in Security Role Administration. Once a requisition is in a Closed or Cancelled status or if the user is removed as a reviewer, the permission is revoked for the associated requisition. This permission cannot be manually assigned.* **Note:** *If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the* **Requisition: Reviewer** *permission is revoked for the associated requisition. However, if the reviewer was also added as a reviewer via the General tab when creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the* **Requisition: Reviewer** *permission. See Applicant Profile Page Overview for more information about duplicate reviewer instances.*	Recruiting

Create Reference Letter Form

With this enhancement, reference letters can now be sent directly from an applicant's referrers. In order for referrers to be able to submit reference letters, a reference letter form must be created by the administrator in Manage Forms.

As a best practice, it is recommended that the form include a Text field type. The text field allows referrers to copy and paste a reference letter into the field. The text field may need to be created in the Question Bank by the administrator if the field has not already been created. Text fields used for large amounts of data should be set up as *multiline* with character max set to *10,000*.

Note: *Forms that require an e-signature cannot be used for the Request Reference Letter action.*

To create a form, go to **Admin > Configuration Tools > Core Functions**. Then select the *Form Management* link. From the Form Management page, select the *Manage Forms* link. Then, from the Manage Forms page, select the **Create Form** button.

Permissions

Permission Name	Permission Description	Category
Forms - Manage	Grants access to the Form Management Administration functionality. This permission can be constrained by OU and User's OU. This is an administrator permission. **Note:** *This permission enables access to the Form Management functionality that is part of the Onboarding module. This permission does not grant access to the Old Forms Management functionality.*	Forms Management Administration

Email Administration

With this enhancement, new emails are added to Email Administration that trigger when a reference letter request is assigned to an applicant, when references are requested from a referrer, and when the referrer completes their reference letter.

Permissions

Permission Name	Permission Description	Category
Global Email Administration - Manage	Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration
Global Email Administration - View	Grants view only access to email templates/triggers and email logs at the global level for the portal. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration

The following new emails are added:

Request References

Action	Description/Trigger
Request References	This email is triggered when the Reference Letter Request task is assigned to an applicant. The email can be sent to Applicant, Hiring Manager, Requisition Owner(s), Requisition Reviewer(s), or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Administration. Use Case: Use this trigger to notify applicants that they have been assigned the Reference Letter Request task.

The following tags are available for the Request References email (new tags display in red):

Tag Name	Description
ACTION.DATE	Date that the action took place that triggers the email.
APPLICANT.STATUS	Applicant's status.
APPLICANT.STATUS.CHANGE.DATE	Most recent date on which the applicant's

Tag Name	Description
	status changed.
APPLICATION.DATE	Date the application was submitted.
APPLICATION.REVIEW.LINK	Link to the Talent Profile page for a specific application.
COMPANY.NAME	Name of the company.
JOB.AD	Internal or external job ad, depending on the recipient.
JOB.COMPENSATION.CURRENCY.SYMBOL	Currency type defined for the job requisition.
JOB.COMPENSATION.RANGE.MAX	Payment maximum range for the job. **Note:** *This tag is only available to users who have permission to view and edit the salary range for requisitions. For users who do not have salary range permission, the tag is not visible in the tags pop-up.*
JOB.COMPENSATION.RANGE.MIN	Payment minimum range for the job. **Note:** *This tag is only available to users who have permission to view and edit the salary range for requisitions. For users who do not have salary range permission, the tag is not visible in the tags pop-up.*
JOB.COMPENSATION.TYPE	Compensation type defined for the job requisition.
JOB.DESCRIPTION	Internal or external job description, depending on the recipient.
JOB.DETAILS.LINK	Link to the specific Job Details page on which the requisition is located.
JOB.EMPLOYMENT.TYPE	Employment type defined on the requisition form.
JOB.IDEAL.QUALIFICATIONS.HTML	Ideal qualifications defined on the requisition form (in HTML format).
JOB.IDEAL.QUALIFICATIONS.TEXT	Ideal qualifications defined on the requisition form (in text format).
JOB.MINIMUM.QUALIFICATIONS	Minimum qualifications defined for the requisition.
JOB.OPENINGS.NUMBER	Number of openings defined on the requisition form.
JOB.OU.DIVISION.TITLE	Division selected for the requisition.
JOB.OU.GRADE.TITLE	Grade selected for the requisition.
JOB.OU.LOCATION.ADDRESS	Facility Address defined for the location defined on the job requisition.
JOB.OU.LOCATION.TITLE	Location selected for the requisition.

Tag Name	Description
JOB.REQUISITION.HIRING.MANAGER.LIST.HTML	User(s) listed as the Hiring Manager(s) for an organizational unit (OU) (in HTML format).
JOB.REQUISITION.HIRING.MANAGER.LIST.TEXT	User(s) listed as the Hiring Manager(s) for an OU (in text format).
JOB.REQUISITION.ID	Requisition ID.
JOB.REQUISITION.OWNER.LIST.HTML	A list of the owners for the requisition (in HTML format).
JOB.REQUISITION.OWNER.LIST.TEXT	A list of the owners for the requisition (in text format).
JOB.REQUISITION.PRIMARY.OWNER.NAME.FULL	Displays the user defined in the Primary Owner field on the General tab when creating, editing, and copying requisition templates, default requisition templates, and job requisitions.
JOB.RESPONSIBILITIES.LIST.HTML	Job responsibilities defined for the position OU (in HTML format).
JOB.RESPONSIBILITIES.LIST.TEXT	Job responsibilities defined for the position OU (in text format).
JOB.TARGET.HIRE.DATE	Target hire date defined on the job requisition form.
JOB.TITLE	Job title defined on the requisition form.
MY.PROFILE.LINK	Link to applicant's My Profile page.
PROFILE.USER.EMAIL	Email address associated with an applicant profile.
PROFILE.USER.NAME.FIRST	First name associated with an applicant profile.
PROFILE.USER.NAME.LAST	Last name associated with an applicant profile.
PROFILE.USER.PREFIX	This tag displays the prefix the applicant uses when addressing marital status. The prefix is defined in the Prefix field by applicants when completing their profile or by recruiters when defining the applicant's contact details in Manage Applicants.
RECIPIENT.DIVISION	Recipient's division.
RECIPIENT.FIRST.NAME	Recipient's first name.
RECIPIENT.LAST.NAME	Recipient's last name.
RECIPIENT.PHONE	Recipient's phone.
RECIPIENT.POSITION	Recipient's position.
TASK.DATE.ASSIGNED	The date the task was assigned to the applicant.

Reference Letter Request

Action	Description/Trigger
Reference Letter Request	This email is triggered when the Reference Letter Request task is completed by an applicant in order to send a reference letter request to the external references. When configuring this email, the email must contain the FORM.LINK tag. If the tag is not included, then referrers will not have a link in the email that opens the reference letter form from which the referrer completes and submits their reference letter. **Note:** *The link to the reference letter form is only valid for the current applicant and cannot be reused or resubmitted for a different applicant.* The email can be sent to External Reference, Hiring Manager, Requisition Owner(s), Requisition Reviewer(s), or a specific user. When configuring this email, the External Reference email recipient must be selected. If this recipient is not selected, then the email will not be sent to the referrer. This email can be configured as a Notification or Reminder type email. This email is active by default and can be found in the Recruitment action type section of Email Administration. Use Case: Use this trigger to notify referrers that a reference letter has been requested of them. Reminders can also be set for this email to remind referrers to complete and submit a reference letter for the applicant.

The following tags are available for the Reference Letter Request email (new tags display in red):

Tag Name	Description
ACTION.DATE	Date that the action took place that triggers the email.
APPLICATION.DATE	Date the application was submitted.
COMPANY.NAME	Name of the company.
FORM.DESCRIPTION	Description of the form.
FORM.LINK	Link that the referrer clicks in the email to launch the reference letter form.
FORM.TITLE	Title of the form.
JOB.AD	Internal or external job ad, depending on the recipient.
JOB.DESCRIPTION	Internal or external job description, depending on the recipient.
JOB.DETAILS.LINK	Link to the specific Job Details page on which the requisition is located.
JOB.EMPLOYMENT.TYPE	Employment type defined on the requisition form.

Tag Name	Description
JOB.IDEAL.QUALIFICATIONS.HTML	Ideal qualifications defined on the requisition form (in HTML format).
JOB.IDEAL.QUALIFICATIONS.TEXT	Ideal qualifications defined on the requisition form (in text format).
JOB.MINIMUM.QUALIFICATIONS	Minimum qualifications defined for the requisition.
JOB.OU.DIVISION.TITLE	Division selected for the requisition.
JOB.OU.GRADE.TITLE	Grade selected for the requisition.
JOB.OU.LOCATION.ADDRESS	Facility Address defined for the location defined on the job requisition.
JOB.OU.LOCATION.TITLE	Location selected for the requisition.
JOB.REQUISITION.ID	Requisition ID.
JOB.RESPONSIBILITIES.LIST.HTML	Job responsibilities defined for the position OU (in HTML format).
JOB.RESPONSIBILITIES.LIST.TEXT	Job responsibilities defined for the position OU (in text format).
JOB.TARGET.HIRE.DATE	Target hire date defined on the job requisition form.
JOB.TITLE	Job title defined on the requisition form.
PROFILE.USER.NAME.FIRST	First name associated with an applicant profile.
PROFILE.USER.NAME.LAST	Last name associated with an applicant profile.
REFERENCE.FIRST.NAME	First name of the referrer.
REFERENCE.LAST.NAME	Last name of the referrer.

Reference Letter Form Complete

Action	Description/Trigger
Reference Letter Form Complete	This email is triggered when a reference letter form is submitted by the referrer. The email can be sent to Applicant, Hiring Manager, Requisition Owner(s), Requisition Reviewer(s), or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Administration. Use Case: Use this trigger to notify recipients that the referrer has submitted the reference letter.

The following tags are available for the Reference Letter Form Complete email (new tags display in red):

Tag Name	Description

Tag Name	Description
ACTION.DATE	Date that the action took place that triggers the email.
APPLICANT.STATUS	Applicant's status.
APPLICANT.STATUS.CHANGE.DATE	Most recent date on which the applicant's status changed.
APPLICATION.DATE	Date the application was submitted.
APPLICATION.REVIEW.LINK	Link to the Talent Profile page for a specific application.
COMPANY.NAME	Name of the company.
FORM.COMPLETED.DATE	The date the form was completed by the referrer.
FORM .DESCRIPTION	Description of the form.
FORM.TITLE	Title of the form.
JOB.AD	Internal or external job ad, depending on the recipient.
JOB.COMPENSATION.CURRENCY.SYMBOL	Currency type defined for the job requisition.
JOB.COMPENSATION.RANGE.MAX	Payment maximum range for the job. **Note:** *This tag is only available to users who have permission to view and edit the salary range for requisitions. For users who do not have salary range permission, the tag is not visible in the tags pop-up.*
JOB.COMPENSATION.RANGE.MIN	Payment minimum range for the job. **Note:** *This tag is only available to users who have permission to view and edit the salary range for requisitions. For users who do not have salary range permission, the tag is not visible in the tags pop-up.*
JOB.COMPENSATION.TYPE	Compensation type defined for the job requisition.
JOB.DESCRIPTION	Internal or external job description, depending on the recipient.
JOB.DETAILS.LINK	Link to the specific Job Details page on which the requisition is located.
JOB.EMPLOYMENT.TYPE	Employment type defined on the requisition form.
JOB.IDEAL.QUALIFICATIONS.HTML	Ideal qualifications defined on the requisition form (in HTML format).
JOB.IDEAL.QUALIFICATIONS.TEXT	Ideal qualifications defined on the requisition form (in text format).
JOB.MINIMUM.QUALIFICATIONS	Minimum qualifications defined for the

Tag Name	Description
	requisition.
JOB.OPENINGS.NUMBER	Number of openings defined on the requisition form.
JOB.OU.DIVISION.TITLE	Division selected for the requisition.
JOB.OU.GRADE.TITLE	Grade selected for the requisition.
JOB.OU.LOCATION.ADDRESS	Facility Address defined for the location defined on the job requisition.
JOB.OU.LOCATION.TITLE	Location selected for the requisition.
JOB.REQUISITION.HIRING.MANAGER.LIST.HTML	User(s) listed as the Hiring Manager(s) for an organizational unit (OU) (in HTML format).
JOB.REQUISITION.HIRING.MANAGER.LIST.TEXT	User(s) listed as the Hiring Manager(s) for an OU (in text format).
JOB.REQUISITION.ID	Requisition ID.
JOB.REQUISITION.OWNER.LIST.HTML	A list of the owners for the requisition (in HTML format).
JOB.REQUISITION.OWNER.LIST.TEXT	A list of the owners for the requisition (in text format).
JOB.REQUISITION.PRIMARY.OWNER.NAME.FULL	Displays the user defined in the Primary Owner field on the General tab when creating, editing, and copying requisition templates, default requisition templates, and job requisitions.
JOB.RESPONSIBILITIES.LIST.HTML	Job responsibilities defined for the position OU (in HTML format).
JOB.RESPONSIBILITIES.LIST.TEXT	Job responsibilities defined for the position OU (in text format).
JOB.TARGET.HIRE.DATE	Target hire date defined on the job requisition form.
JOB.TITLE	Job title defined on the requisition form.
MY.PROFILE.LINK	Link to applicant's My Profile page.
PROFILE.USER.EMAIL	Email address associated with an applicant profile.
PROFILE.USER.NAME.FIRST	First name associated with an applicant profile.
PROFILE.USER.NAME.LAST	Last name associated with an applicant profile.
RECIPIENT.DIVISION	Recipient's division.
RECIPIENT.FIRST.NAME	Recipient's first name.
RECIPIENT.LAST.NAME	Recipient's last name.

Tag Name	Description
RECIPIENT.PHONE	Recipient's phone.
RECIPIENT.POSITION	Recipient's position.
TASK.DATE.ASSIGNED	Date the Reference Letter Request task was assigned to the applicant.

Manage Applicants

With this enhancement, a Request Reference Letter action is added to the Manage Applicants page. This action can be performed for one applicant or a single group of applicants. The action sends the Reference Letter Request task to the applicant. The task is hard-coded and includes name and email address fields in which the applicant enters their referrer information.

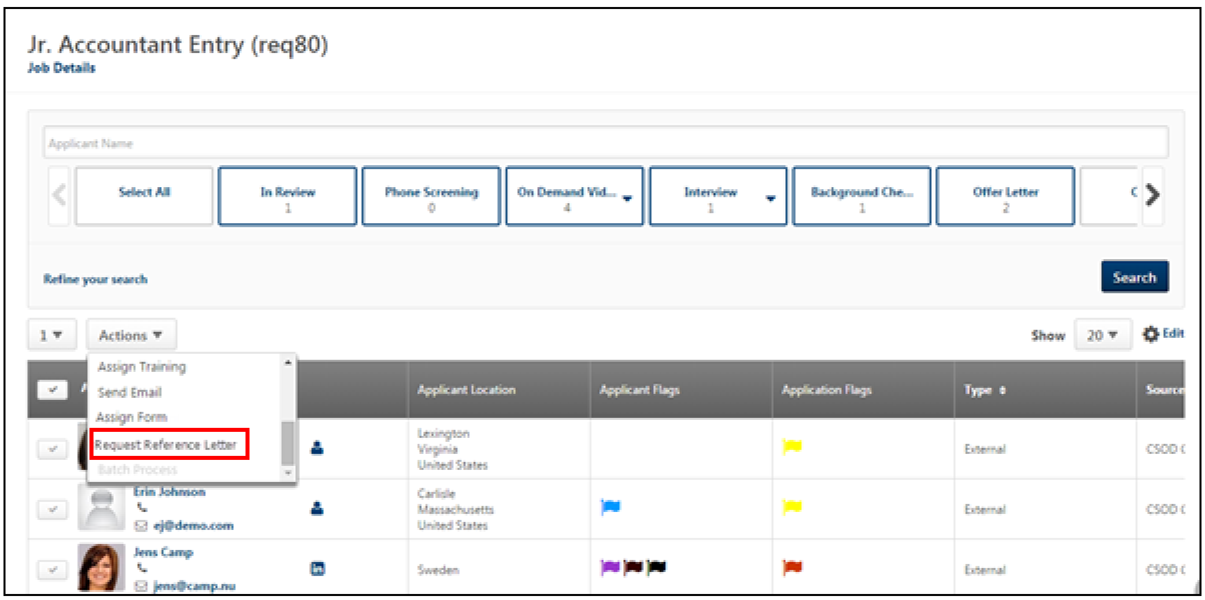
Configuration Note: *A form for completing reference letters must be available in order to use the Request Reference Letter action properly. Forms are created by the administrator in the Manage Forms area of the Form Management functionality.*

To access the Manage Applicants page, go to **Recruit > Manage Requisition**. On the Manage Job Requisitions page, locate the requisition for which you would like to manage candidates. From there, click the linked number of candidates in the Applicants column.

Permissions

Permission Name	Permission Description	Category
Request Reference Letter	Grants access to request references from an applicant and assign a reference letter form in Manage Applicants. This permission cannot be constrained.	Recruiting
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note****: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the* **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*	Recruiting

Requisition: Reviewer	Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained. **Note:** *This is a dynamically assigned permission that is not available in Security Role Administration. Once a requisition is in a Closed or Cancelled status or if the user is removed as a reviewer, the permission is revoked for the associated requisition. This permission cannot be manually assigned.* **Note:** *If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the* **Requisition: Reviewer** *permission is revoked for the associated requisition. However, if the reviewer was also added as a reviewer via the General tab when creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the* **Requisition: Reviewer** *permission. See Applicant Profile Page Overview for more information about duplicate reviewer instances.*	Recruiting



Request Reference Letter

The Request Reference Letter action allows recruiters to request reference letters from an applicant. The request process works in conjunction with the Form Management functionality by sending a reference letter form the referrers that the applicant specifies when completing the Request Reference Letter task. A reference letter form must first be created by the administrator and available to the recruiter in order to properly use the Request Reference Letter action. The Reference Letter Request (to External References) email trigger must also be set up.

To request reference letters from an applicant:

1. Select one or more applicants from whom to request references.
2. Select the *Request Reference Letter* action from the Actions drop-down. This opens the Select Form pop-up.
3. Select the appropriate form from the pop-up. This refreshes the pop-up to display the **Request References** button. **Note:** *The forms in the pop-up are the forms for which the recruiter meets the availability criteria. The recruiter must choose the appropriate form. Forms that require an e-signature cannot be used for the Request Reference Letter action.*
4. Select the **Request References** button. This opens the Applicant Action Results pop-up to indicate whether or not the action was successful. The following occurs if the action is successful:
    - The Request Reference Letter task is assigned to the applicant.
    - The Reference Letter Request email is triggered, if the email is configured by the administrator in Email Administration.
    - The Assigned Forms column on the Manage Applicants page indicates that the form has been assigned by increasing the existing number of assigned forms by one.

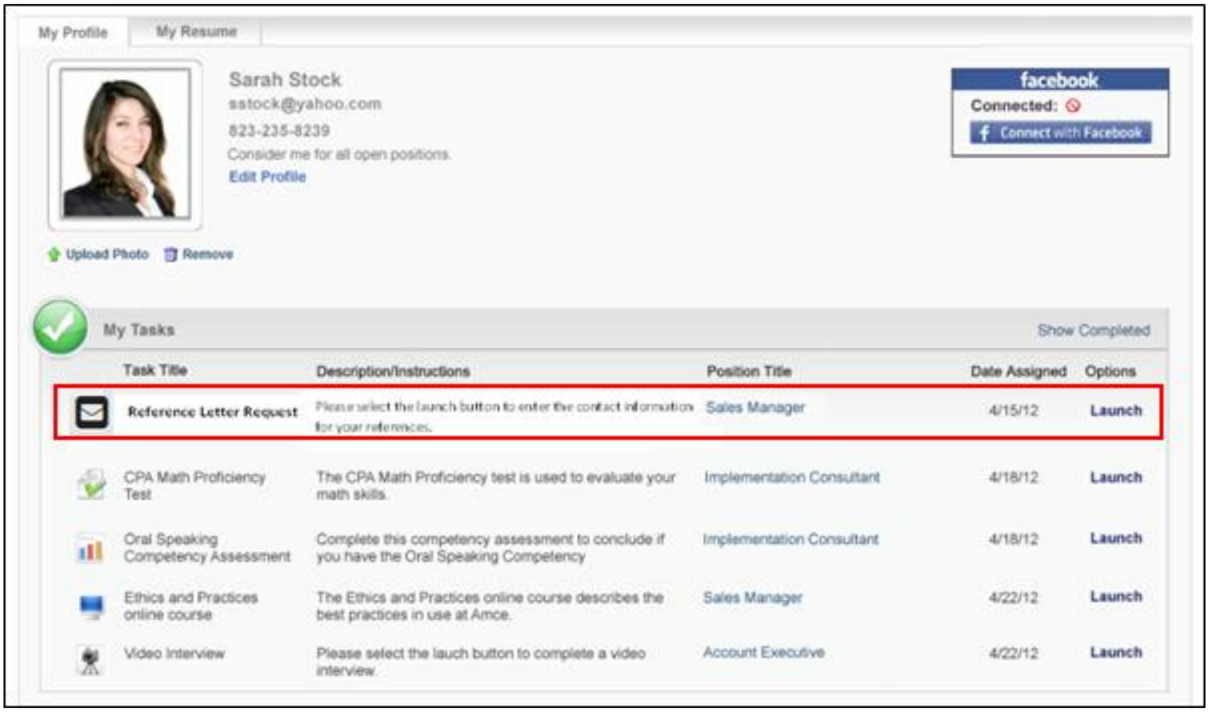
    If the action is not successful for one or more applicants, this will be noted in the Applicant Action Results pop-up. The Request Reference Letter task is not sent to the applicant, and the Reference Letter Request email is not triggered.

    If references have already been requested for an applicant, then "Already Requested" displays in the Details column in the pop-up.

    To cancel requesting references, click the **Cancel** button in the Select Form pop-up. This closes the pop-up without assigning the form task.

Reference Letter Request Task for Applicants

When applicants are assigned the Reference Letter Request task, the task is added to the applicant's My Tasks panel as a pending task. For external applicants, the task is launched from the My Profile page on the career site. For internal applicants, the task is launched from the Applications tab in Career Center.



Reference Letter Request - Pending Task

The Reference Letter Request task displays as a pending task. The following information displays in the panel for the task:

- Task Title - This column displays the task title.
- Description/Instructions - This column displays the instructions for completing the task. The instructions are system-defined and cannot be modified by the administrator or recruiter.
- Position Title - This column displays the linked job title for the requisition. Selecting the link opens the Job Details page for the requisition.
- Date Assigned - This column displays the date on which the Reference Letter Request task was assigned to the applicant.
- Options - Select the *Launch* link to launch the Reference Letter Request task. This opens the Reference Letter Request page from which the applicant enters the name and email address for each reference and submits the task. Once the task is submitted, the referrer information cannot be modified by the applicant. *See* **Reference Letter Request Page** *on* page 363 *for additional information.*

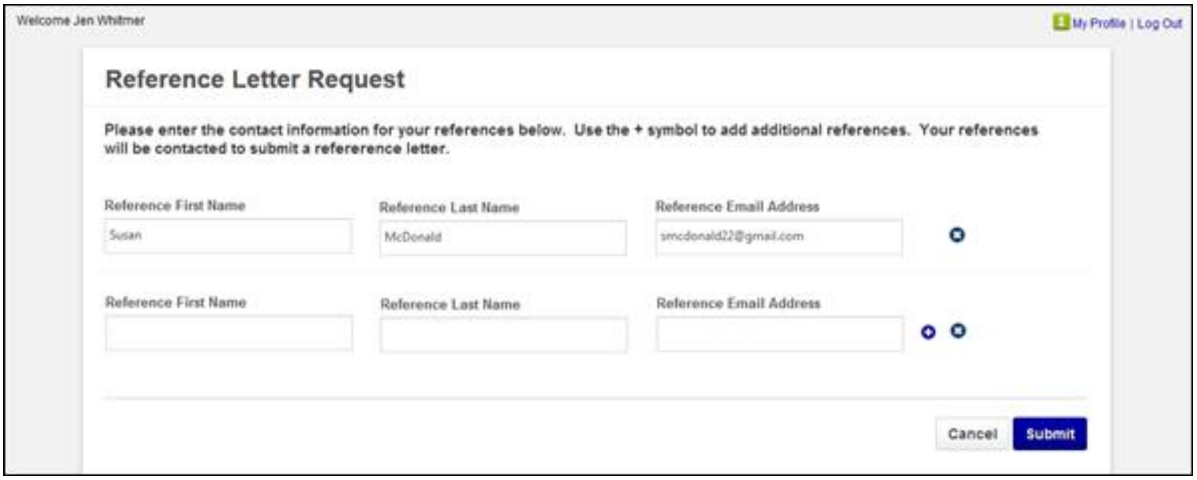
Reference Letter Request - Completed Task

Once the Reference Letter Request task is completed or the applicant is placed into a disposition that automatically completes the task, the task appears on the completed tasks panel. The following information displays in the panel for the task:

- Task Title - This column displays the task title.
- Description/Instructions - This column displays the instructions for completing the task. The instructions are system-defined and cannot be modified by the administrator or recruiter.
- Position Title - This column displays the linked job title for the requisition. Selecting the link opens the Job Details page for the requisition.
- Date Assigned - This column displays the date on which the Reference Letter Request task was assigned to the applicant.
- Date Completed - This column displays the date on which the applicant completed the task.
- View Details - Select the View Details link to view the completed task. This opens the Reference Letter Request page as read-only.

Reference Letter Request Page

The Reference Letter Request page allows applicants to enter name and email address information for their referrers. This page is accessed by selecting the *Launch* link in the options column for Reference Letter Request tasks. The fields and instructions on the Reference Letter Request page are hard-coded and cannot be modified by the administrator or recruiter.



When applicants first launch the task, a single row of reference contact information fields display. Applicants can add up to four additional rows by selecting the Add Reference icon. Applicants can delete rows by selecting the Remove Reference icon. At least one reference must be provided. The first row cannot be removed.

Applicants complete the following information on the page:

- Reference First Name - Enter the first name of the reference, up to 100 characters.
- Reference Last Name - Enter the last name of the reference, up to 100 characters.
- Reference Email Address - Enter the complete email address of the reference, up to 100 characters.

Once the references are entered, click **Submit**. This triggers the Reference Letter Request email that is sent to the referrers, provided that the email is configured by the administrator in Email Administration. The task is moved to the completed tasks panel.

Selecting **Cancel** returns the applicant to the pending tasks panel, and the task is not completed.

Reference Letter Form for Referrers

When applicants complete the Reference Letter Request task, the referrers they name in the task are sent the Reference Letter Request email, provided that the email is configured by the administrator in Email Administration. The email must be configured to include a link to launch the reference letter form, which referrers use to access and submit their reference letter.

Note: *The email that is sent to referrers is not sent to the applicant.*

Launch & Submit Reference Letter

To create and submit a reference letter, the referrer clicks the form link in the email. This launches the form. The information that displays on the form is dependent upon the configuration of the form by the administrator. The form may contain a text box into which the referrer can type or paste their reference letter.

Once the referrer has written the reference letter, they click **Submit**. A message displays, indicating that the reference letter has been successfully submitted. The letter is automatically added to the Documents tab on the Applicant Profile page for the applicant. The Reference Form Completed email is triggered, if configured by the administrator in Email Administration.

The referrer can click the **Cancel** button to cancel creating the reference letter.

Link Validity

The form is only valid for the current applicant and cannot be reused or resubmitted for a different applicant.

Link Expiration

The link to the reference letter form expires within 30 days of the Reference Letter Request email being sent.

Applicant Profile - Documents Tab

A new Reference Forms section is added to the Documents tab on the Applicant Profile page. This section provides recruiters with access to reference letters submitted by an applicant's referrers. The Reference Forms section allows recruiters to track the details of a reference letter, indicating the assigned date and when the letter was completed by the referrer.

In addition to viewing reference letters submitted by referrers, the Reference Forms section also displays information for the Reference Letter Request task. When the task is assigned to the applicant, the task is added to the Reference Forms section.

The Reference Forms section only displays if the reference letter functionality is enabled for the portal. To enable this functionality, contact your Client Success Manager or Global Product Support.

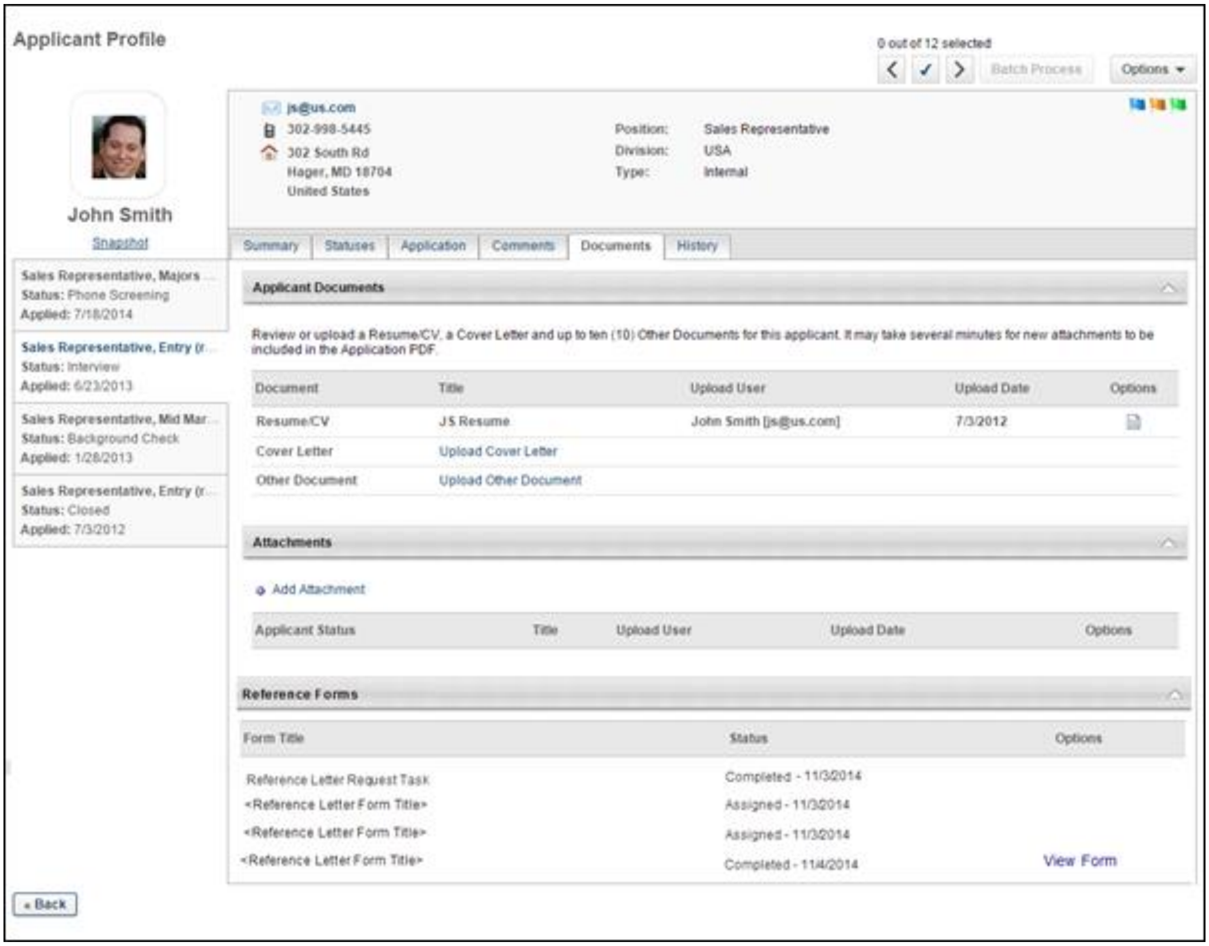
To access the Applicant Profile page, click the applicant's name from any of the following pages:

- Manage Job Requisitions >
    - Requisition Snapshot
    - New Submissions
    - New Submissions > Advance Tab
    - New Submissions > Pass Tab
    - Manage Applicants
- Recruit > Interview Manager
- Recruit > Review Applicants

Permissions

Permission Name	Permission Description	Category
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note***: *This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner,*	Recruiting

	the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*	
Requisition: Reviewer	Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained. **Note:** *This is a dynamically assigned permission that is not available in Security Role Administration. Once a requisition is in a Closed or Cancelled status or if the user is removed as a reviewer, the permission is revoked for the associated requisition. This permission cannot be manually assigned.* **Note:** *If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the* **Requisition: Reviewer** *permission is revoked for the associated requisition. However, if the reviewer was also added as a reviewer via the General tab when creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the* **Requisition: Reviewer** *permission. See Applicant Profile Page Overview for more information about duplicate reviewer instances.*	Recruiting



Reference Forms Section

The Reference Forms section allows recruiters to view each reference letter submitted by an applicant's referrers. Additional details display that allow recruiters to track the details of the letter, including the assigned date and when the letter was completed by the referrer.

The following information displays in this section:

- Form Title - For the Reference Letter Request task assigned to the applicant, this column displays the title of the task. For reference letters submitted by a referrer, this column displays the title of the reference letter form. The number of reference letter rows that display is dependent upon the number of referrers for whom the applicant provided contact information when completing the Reference Letter Request task. A separate row displays for each reference letter requested from a referrer. Up to five reference letter rows display.
- Status - This column displays the status of the task or reference letter, either Assigned or Completed. The date of assignment or completion displays to the right of the status in MM/DD/YYYY format. When a task or reference letter is assigned, the column displays Assigned. When a task or reference letter has been submitted, the column displays Completed.
- Options - This column displays an option to view the reference letter completed by the referrer. This option is only available once the reference letter has been submitted and is in

a Completed status. The column is blank if the reference letter is in an Assigned status. Options are not available for the Reference Letter Request task. To view the reference letter, click the *View Form* link.

Applicant Profile - History Tab

With this enhancement, the History tab of the Applicant Profile page displays the email event for the following new emails:

- Request References
- Reference Letter Request
- Reference Letter Form Complete

The following information displays for each email event:

Column Name	Description
Event	This column displays "Email Sent" as the event name.
Details	This column displays the title of the email.
User	This column displays the username of the user who sent the email.
Date and Time	This column displays date and time at which the email was sent. The date displays in M/D/YYYY format.

Candidate Search Improvements

Search Candidates Enhancements Overview

With this enhancement, the following improvements are made to the Search Candidates feature:

- Recruiters can search for candidates by geographical location
- Search Candidates page now displays all search options by default

Upon implementation of this enhancement, the physical address for all existing users with complete address entries in their user record will be mapped to enable their location to be searchable by geographical location. The physical address for external applicants will also be mapped to enable searchability by geographical location.

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
Recruiting: Search Candidates	Grants ability to access Candidate Search page for recruiting, which enables searching for internal candidates and external candidates who have applied for open positions. This permission also enables the Invite to Apply action item to appear in the Actions drop-down on the Search Candidates - Search Results page. This permission can be constrained by OU and User's OU.	Recruiting Administration
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note**: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the* **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition*	Recruiting

	owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.	

Requisition: Reviewer	Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained. **Note:** *This is a dynamically assigned permission that is not available in Security Role Administration. Once a requisition is in a Closed or Cancelled status or if the user is removed as a reviewer, the permission is revoked for the associated requisition. This permission cannot be manually assigned.* **Note:** *If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the* **Requisition: Reviewer** *permission is revoked for the associated requisition. However, if the reviewer was also added as a reviewer via the General tab when creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the* **Requisition: Reviewer** *permission. See Applicant Profile Page Overview for more information about duplicate reviewer instances.*	Recruiting

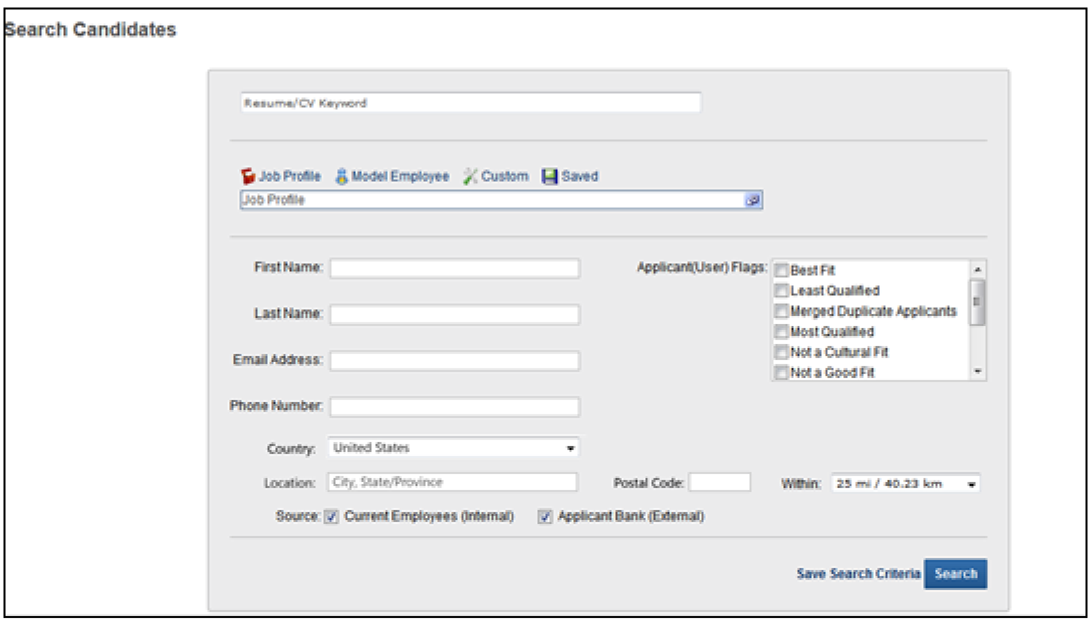
Search Candidates - Default View

With this enhancement, the Search Candidates page now displays all search options by default when accessing the page. Previously, the only search option that displayed when accessing the page was the Resume/CV Keyword search. Recruiters had to select the *More search options* link in order to view the additional search options. The *More search options* link is now removed with this enhancement.

To access the Search Candidates page, go to **Recruit > Search Candidates**.

Permissions

Permission Name	Permission Description	Category
Candidate Search	Grants ability to create, save and manage Candidate Searches, a search for users by various criteria such as performance and succession ratings, resume data, etc. The constraints that are applied to this permission determine the users that are available within a candidate search. This is an administrator permission.	Talent/Succession - Administration



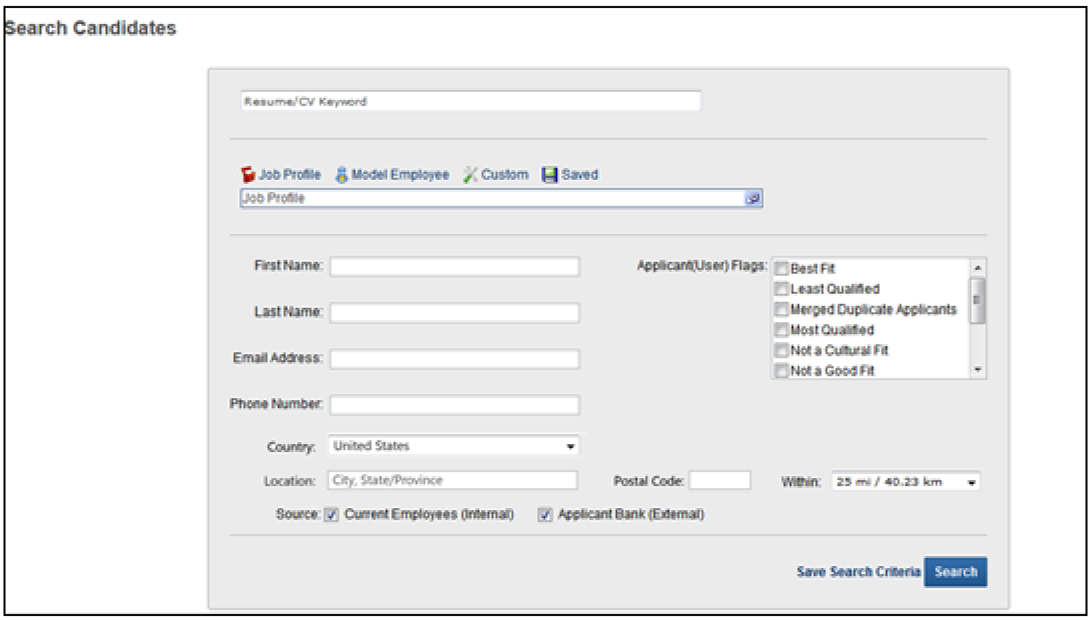
Search Candidates - Location Search

With this enhancement, country, location, postal code, and radius search fields are added to the Search Candidates page to enable recruiters to search for candidates by geographical location. Recruiters can also search within a certain radius of the candidate's location.

To access the Search Candidates page, go to **Recruit > Search Candidates**.

Permissions

Permission Name	Permission Description	Category
Candidate Search	Grants ability to create, save and manage Candidate Searches, a search for users by various criteria such as performance and succession ratings, resume data, etc. The constraints that are applied to this permission determine the users that are available within a candidate search. This is an administrator permission.	Talent/Succession - Administration



Country Field

This field allows recruiters to search for candidates by country. Select a country from the drop-down to search by country. Completing the Location field is required when a country is selected. Depending on the country selected, a Postal Code field displays to the right of the Location field, which allows recruiters to further define the search criteria.

When using this field, the search results display candidates who are in the selected country, location, and postal code if defined (in addition to other search options if defined, such as first and last name). If a radius is defined, then the results display candidates who are within the selected distance to the location within the selected country.

Location Field

This field allows recruiters to search for candidates by city/state/province. Enter a location, up to 20 characters.

When using this field, the search results display candidates who are in the location in the selected country and within the postal code if defined.

Best Practice: *As a best practice, enter the City, State/Province to improve the accuracy of the location search.*

Postal Code Field

This field only displays if one of the following countries is selected in the Country field:

- Austria
- Belgium
- Canada
- Czech Republic
- Denmark
- Finland
- France
- Germany
- Greece
- Hungary
- Italy
- Luxembourg
- Mexico
- Netherlands
- Norway
- Poland
- Portugal
- Spain
- Sweden
- Switzerland
- United Kingdom
- United States

This is not a required field. Enter a postal code in the field, up to 20 characters.

When using this field, the search results display candidates who are within this postal code in the location in the selected country (in addition to other search options if defined, such as first and last name).

Radius Field

Recruiters can search for candidates within a certain radius of the location. The Within field allows recruiters to select a radius. The following options are available:

- 10 mi / 16.09 km
- 25 mi / 40.23 km
- 50 mi / 80.47 km
- 100 mi / 160.93 km

By default, the 25 mi / 40.23 km option is selected. Clicking the **Search** button displays results for candidates who live within the selected radius of the location in the selected country.

If a country and location are not defined, then the Radius field is ignored when searching for candidates.

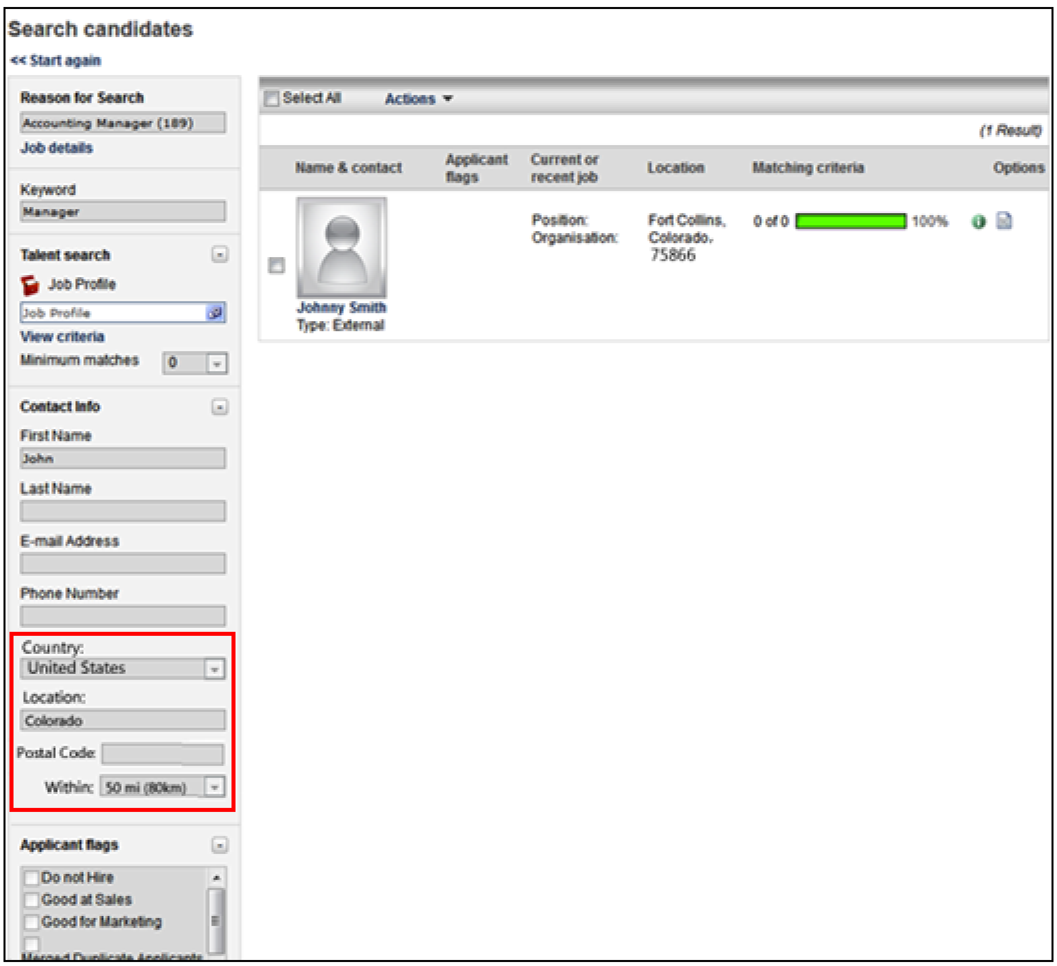
Search Candidates - Search Results

With this enhancement, country, location, postal code, and radius options are added to the search criteria panel. In addition, if using geographical location search options when defining the search criteria, the search results display in order of relevance to the geographical location defined.

As with existing functionality for the ability to modify the search results, the fields cannot be modified if the Allow search criteria and filter modification from Candidate Search results field is not selected by the administrator in Compliance Enablement Preferences.

Permissions

Permission Name	Permission Description	Category
Candidate Search	Grants ability to create, save and manage Candidate Searches, a search for users by various criteria such as performance and succession ratings, resume data, etc. The constraints that are applied to this permission determine the users that are available within a candidate search. This is an administrator permission.	Talent/Succession - Administration



Note: *The search options are disabled in the example screenshot above because Compliance Enablement Preferences are configured for the portal to require OFCCP compliance enablement functionality.*

Country

The Country field allows recruiters to search for candidates by country. If a country was previously selected on the Search Candidates page, then the selection displays in the field. Select a country from the drop-down to define a country or change the previously selected country. This is a required field if a location is entered in the Location field.

Location

The Location field allows recruiters to search for candidates by location. If a location was previously entered on the Search Candidates page, then the entry displays in the field. If a location was not entered on the Search Candidates page, then the field is blank. Recruiters can enter or edit the location. This is a required field if a country is entered in the Country field.

The system uses the candidate's location based on their user record to search for matching results.

Postal Code

The Postal Code field only displays for certain countries selected in the Country field. If a postal code was previously entered on the Search Candidates page, then the entry displays in the field. If a postal code was not entered on the Search Candidates page, then the field is blank. Recruiters can enter or edit the postal code.

Radius

The Within field allows recruiters to select a radius that searches for candidates within a certain distance from the location. If a radius was previously selected on the Search Candidates page, then the selection displays in the field. If a selection was not made, then the 25 mi / 40.23 km option is selected by default.

The following options are available:

- 10 mi / 16.09 km
- 25 mi / 40.23 km
- 50 mi / 80.47 km
- 100 mi / 160.93 km

Save Search Criteria

When using the *Save Search Criteria* option, the information defined in the Country, Location, Postal Code, and radius fields is not saved for the search.

Internal External Applicant Email Availability

Internal/External Applicant Email Availability Overview

With this enhancement, options are added to Recruitment emails to allow administrators to specify the type of applicant recipient. Previously, Recruitment emails could be sent to Applicant, but this option did not allow administrators to specify whether the applicant was internal or external. This enhancement removes the Applicant option and replaces it with separate External Applicant and Internal Applicant options. Administrators can select to send an email to internal recipients or external applicants or select both as recipients.

In addition, when defining availability for emails that are configured to be sent to Internal Applicant recipients, the Internal Applicant recipients who receive the email are the recipients that are part of the organizational unit (OU) that is defined for the job requisition to which the applicant applied. Previously, the availability setting for the email applied to the OU in which the user was defined.

Use Case

- An administrator is creating email templates for the Application Confirmation email. The administrator would like to create separate templates for current employees and for external applicants so that she can include different information for employees and external applicants. She would also like to create a template that includes information specific to the London Location OU.
- Jane is an internal applicant in the Chicago Division OU who applies for a job with the New York Division OU. Jane will only receive applicable emails for which the availability is set to the New York Division OU. She will not receive applicable emails for which the availability is set to the Chicago Division OU, unless the New York Division OU is also included in the availability setting for the email.

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
Email - Edit From Address	Grants ability to edit the "from" address when creating or modifying an email trigger. In addition, the Allow user to change email address option must be selected in Email Preferences. This permission works in conjunction with the Global Email Administration - Manage permission. This is an administrator permission.	Core Administration
Global Email Administration - Manage	Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User.	Core Administration

	This is an administrator permission.	

Global Email Administration - View	Grants view only access to email templates/triggers and email logs at the global level for the portal. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration

Affected Emails

The following Recruitment type emails now include External Applicant and Internal Applicant options in the Send To field:

Email	Description
Application Confirmation	Triggered when a user submits an application.
Assign Applicant Assessment	Triggered when assessment is assigned to an applicant.
Disposition	Triggered when an applicant is passed on.
Review Applicant	Triggered when an applicant's status is changed to In Review.
Add Applicant	Triggered when an applicant is added to a requisition.
Email Applicant	Triggered when a user manually emails to an applicant.
Assign Applicant Training	Triggered when training is assigned to an applicant.
Email Offer to Candidate	Triggered when an offer is emailed to a candidate.
Send Offer to Candidate Profile	Triggered when an offer is emailed to a candidate.
Voluntary Withdrawal	Triggered when an offer is emailed to a candidate.
Agency Submission Confirmation	Triggered when a Recruiting Agency submits an applicant.
Submission Accepted as Applicant	Triggered when a submission is accepted as a qualified applicant.
Background Check Complete	Triggered when background check is completed.
Onboarding Notifications	Triggered when a user manually sends onboarding notifications.
OnDemand Video Interview Assigned	Triggered when an OnDemand Video Interview is assigned to an applicant.
Interview Scheduling Notification - Applicant	Triggered when an interview scheduling notification is sent to an applicant.
Background Check Assigned	Triggered when a background check is assigned to an applicant.
Applicant Status Change	Triggered when a background check is assigned to an applicant.
SHL Assessment Assigned	Triggered when an SHL Assessment is assigned to an applicant.
Invitation to Interview Event (Applicant Self Schedule)	Triggered when a user sends an interview event invitation to an applicant.
Assign Applicant Form	Triggered when a form is assigned to an applicant.
Applicant Form Complete	Triggered when a form is completed and submitted by an applicant.
Notify Applicant Prior to Archiving	Triggered before applicant's data gets archived.

Email	Description
OnDemand Video Interview Completed	Triggered when an applicant completes an On Demand Video interview.
SHL Assessment Completed	Triggered when an SHL assessment is completed by an applicant within the vendor integration site.
Reference Letter Form Complete	Notification of reference letter form completion.
Request References	Notification of task assignment to an applicant.

Note: *The Notify Applicant Prior to Archiving email does not apply. This email cannot be sent to internal applicants.*

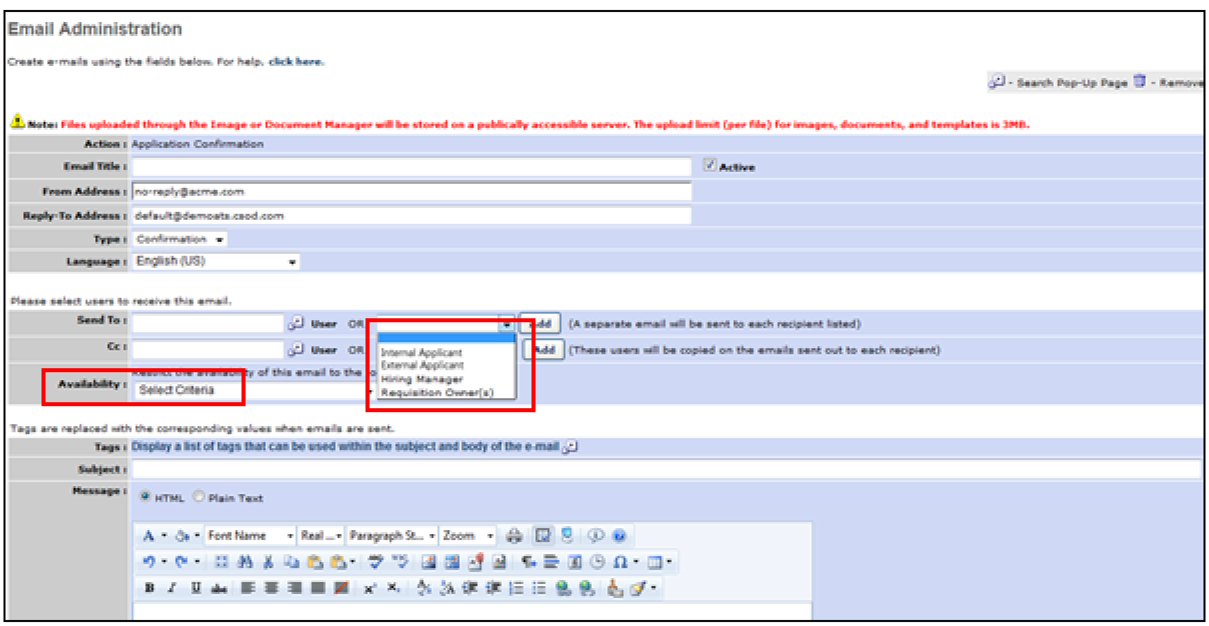
Email Administration - Recruitment Emails

With this enhancement, the Applicant option in the Send To field is replaced with External Applicant and Internal Applicant. Breaking the Applicant option into applicant types allows administrators to specify which applicant type should receive the email.

In addition, the availability setting defined for emails sent to Internal Applicants is now associated with the organizational unit (OU) defined for the job requisition to which the internal applicant applied.

Permissions

Permission Name	Permission Description	Category
Global Email Administration - Manage	Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration
Global Email Administration - View	Grants view only access to email templates/triggers and email logs at the global level for the portal. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration



Send To Field

The External Applicant and Internal Applicant options are available to select in the Send To and Cc fields when configuring emails. Select the External Applicant option to include external applicants as recipients. Select the Internal Applicant option to include internal applicants as recipients.

Availability Field

Instruction Text

For all emails that are impacted by this enhancement, the instruction text for the Availability field is updated to indicate that setting availability restricts the email to the selected OUs in relation to the OU defined for the job requisition to which the applicant has applied.

For the Notify Applicant Prior to Archiving email, the instruction text for the Availability field is updated to indicate that the availability settings do not apply to external users when External User is added as a recipient.

Defining Availability

For emails that are configured to be sent to internal users, the availability defined in the Availability field applies to the OU/Division to which the internal user applies. This is the OU/Division that is defined for the job requisition to which the internal user applies.

For emails configured to be sent to internal users (not applicants), such as Hiring Manager or Requisition Owner, the availability is based on the Division OU to which the user belongs.

As a best practice when configuring the Availability field, it is best to account for the role of the recipient as well as availability setting to ensure that internal applicants, external applicants, and internal users receive the appropriate emails.

Availability Rules by OU

The following availability rules apply by OU:

General Rule: Availability settings use OR rules.	
Organizational Unit	**Availability Rules**
Cost Center	• All internal users that belong to the added Cost Center will receive the email • All internal applicants that have applied to the requisition will receive the user is part of the Cost Center group • All external applicants that have applied to the requisition will not receive the email as Cost Center as external users cannot be added to

General Rule: Availability settings use OR rules.	
Organizational Unit	**Availability Rules**
	Cost Center
Custom Group	• All internal users that belong to the added Custom Group will receive the email • All internal applicants that belong to the added Custom Group will receive the email • All external applicants that have applied to the requisition will not receive the email as external users cannot be added to the Custom Group
Division	• All internal users that belong to added division will receive the email • All internal applicants that have applied to that division will receive the email (Application Requisition OU) • All external applicants that have applied to that division will receive the email (Application Requisition OU)
Grade	• All internal users that belong to the added Grade will receive the email • All internal applicants that have applied to the added Grade will receive the email (Application Requisition OU) • All external applicants that have applied to the added Grade will receive the email (Application Requisition OU)
Location	• All internal users that belong to added location will receive the email • All internal applicants that have applied to the added location will receive the email (Application Requisition OU) • All external applicants that have applied to the added location will receive the email (Application Requisition OU)
Position	• All internal users that are in the added position will receive the email • All internal applicants that have applied to the added position will receive the email (Application Requisition OU) • All external applicants that have applied to the added position will receive the email (Application Requisition OU)

General Rule: Availability settings use OR rules.	
Organizational Unit	**Availability Rules**
Self-Registration	• All internal users that belong to the added Self-Registration group will receive the email • All internal applicants that belong to the added Self-Registration group will receive the email • All external applicants that have applied to the requisition will not receive the email as external users cannot be added to the Self-Registration group
User	• All internal users that are added individually • All internal applicants that are added individually as users • All external applicants will not receive the email as they cannot be added to the availability as external users

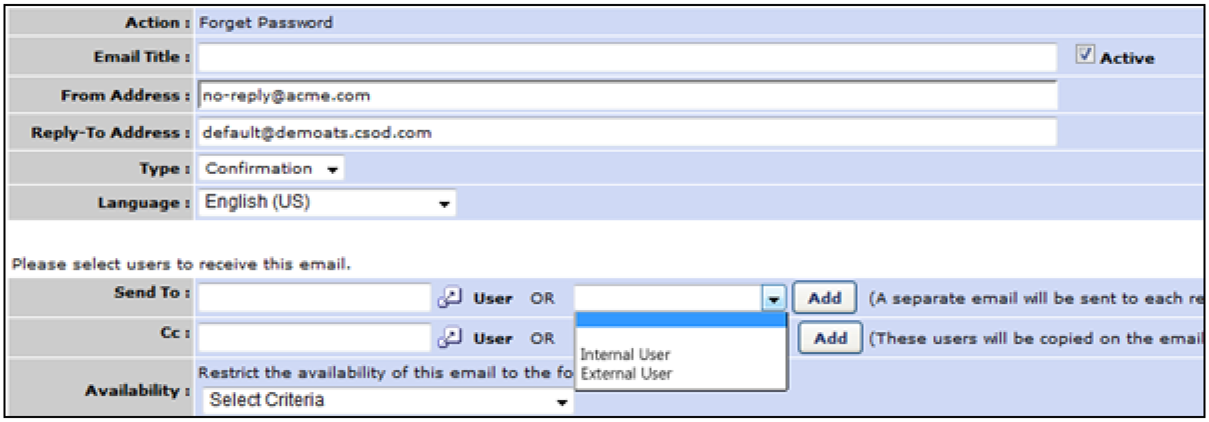
Availability Rules by Recipient

The following availability rules apply by recipient:

External Applicant	Internal Applicant	Hiring Manager/Requisition Owner
Division of the requisition applicant applied to	Cost Center if applicant is part of the Cost Center	Cost Center if user is part of the Cost Center
Location of the requisition applicant applied to	Custom group is applicant is part of the group	Custom group if user is part of the Custom Group
Grade of the requisition applicant applied to	Division of the requisition applicant applied to	Division user belongs to
	Grade of the requisition applicant applied to	Grade user belongs to
Position of the requisition applicant applied to	Location of the requisition applicant applied to	Location user belongs to
	Position of the requisition applicant applied to	Position user belongs to
	Self-Registration group if user is part of the group	Self-Registration group if user is part of the group
	User if applicant is added individually	User if user is added individually

Email Administration - Forgot Password Email

With this enhancement, the User option in the Send To field is replaced with External User and Internal User. Breaking the User option into user types allows administrators to specify which user type to include as a recipient.



Send To Field

Administrators can add either External User or Internal User as a recipient in the Send To field, or the administrator can include both options.

If External User is added as a recipient, then the email will be sent to external users, such as external applicants who apply to job requisitions from the career site. If Internal User is added as a recipient, then the email will be sent to internal users, such as internal applicants who apply to job requisitions from the Career Center.

Availability Field

Instruction Text

The instruction text for the Availability field is updated to indicate that the availability settings do not apply to external users when External User is added as a recipient in the Send To field.

Defining Availability

When Internal User is added to the Send To field, the availability settings defined in the Availability field apply to internal users based on the organizational unit (OU) to which they belong. The following rules apply by OU:

Organizational Unit	Rule
Cost Center	Cost Center if user is part of the Cost Center
Custom Group	Custom group if user is part of the Custom Group

Organizational Unit	Rule
Division	Division user belongs to
Grade	Grade user belongs to
Location	Location user belongs to
Position	Position user belongs to
Self-Registration Group	Self-Registration group if user is part of the group
User	User if user is added individually

Job Search Enhancements

Job Search Enhancements Overview

With this enhancement, applicants can now search for jobs on the career site by geographical location (geolocation). Prior to this enhancement, applicants could only search for jobs by selecting a specific location, such as a city or state. In addition, applicants can view their job search results on a map and in a table that offers sorting options.

Data Migration Requirement

In order to use geolocation search, a data migration is required to set the geocodes for all existing Requisitions (and Candidate addresses – this needs to be pointed out in the Candidate Search project release notes as well). The data migration will be run automatically for all Recruiting customers' production data on the night of the release. However, in order to test this feature during UAT or to use this feature in Pilot, the data migration must be requested for Staging and Pilot environments. The request can be made via CRT. If the data migration is not requested, geocodes will not be stored for existing requisitions. Existing requisitions will not be found via geolocation search.

There is no need to make a request for new data. When new requisitions are added or addresses manually updated, the geocode will automatically be stored.

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
Career Site - Manage	Grants ability to access and manage Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration
Career Site - View	Grants ability to access and view Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile	Recruiting

	page. This permission cannot be constrained. ***Note**: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the* **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*	
Requisition: Reviewer	Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained. **Note:** *This is a dynamically assigned permission that is not available in Security Role Administration. Once a requisition is in a Closed or Cancelled status or if the user is removed as a reviewer, the permission is revoked for the associated requisition. This permission cannot be manually assigned.* **Note:** *If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the* **Requisition: Reviewer** *permission is revoked for the associated requisition. However, if the reviewer was also added as a reviewer via the General tab when creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the* **Requisition: Reviewer** *permission. See Applicant Profile Page Overview for more information about duplicate reviewer instances.*	Recruiting
Requisition Request: Submit Request	Grants ability to create requisition requests. This permission can be constrained by OU and User's OU.	Recruiting
Requisition Template - Manage	Grants ability to access and view Requisition Templates. This permission cannot be constrained. This is an administrator permission.	Recruiting Administration
Requisition Template - View	Grants ability to access and view Requisition Templates. This is an administrator permission.	Recruiting Administration

Career Site Administration - Search Jobs Widget

With this enhancement, the following new options are added to the Widget Settings pop-up for the Search Jobs widget when configuring career sites:

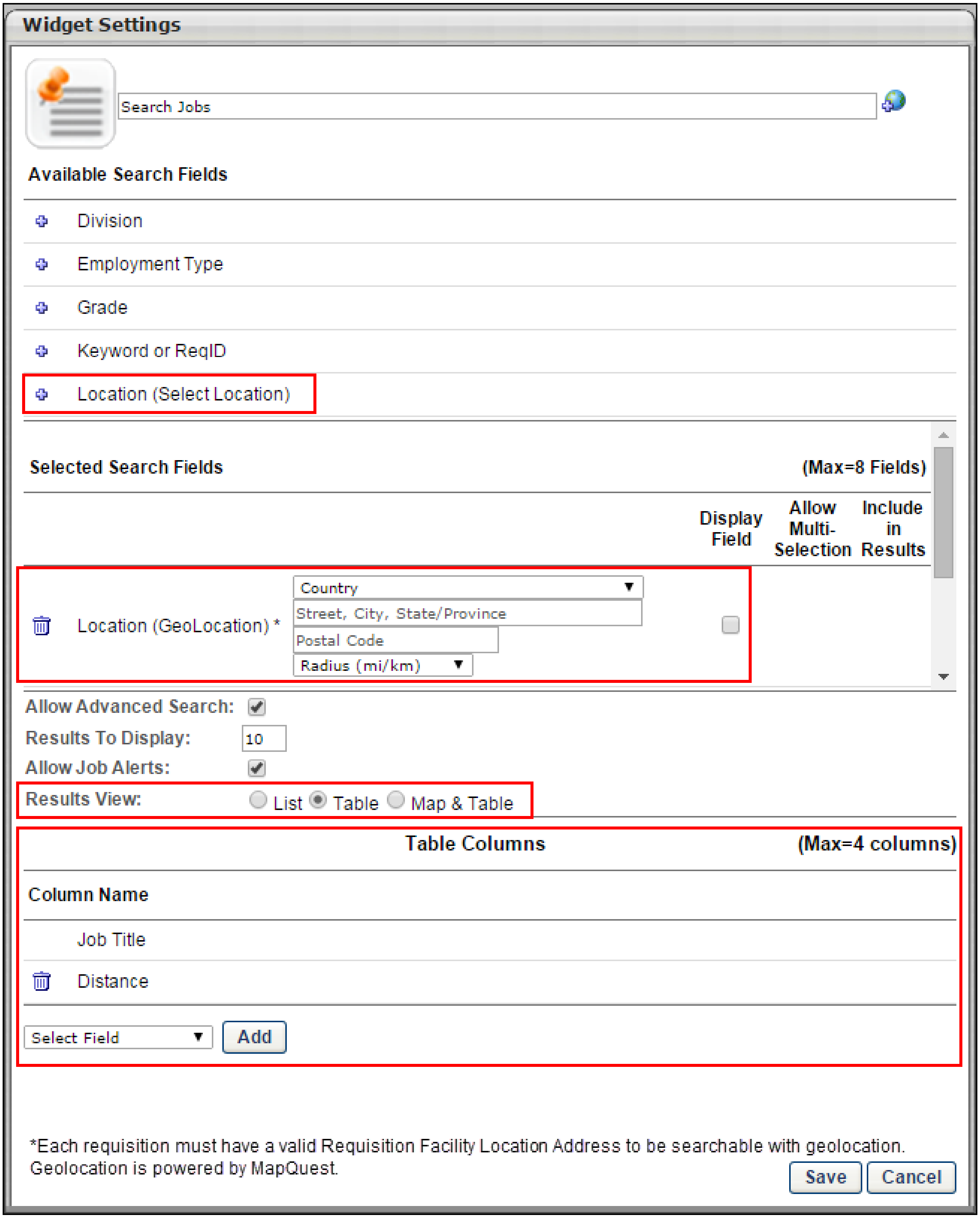
- Location (GeoLocation)
- Results View

In addition, the name of the Location search filter is changed to Location (Select Location). Upon implementation of this enhancement, the name change will be reflected on new and existing career site job search widgets.

To manage career sites, go to **Admin > Configuration Tools > Recruit**. Then, select the *Career Sites* link in the Sourcing section.

Permissions

Permission Name	Permission Description	Category
Career Site - Manage	Grants ability to access and manage Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration
Career Site - View	Grants ability to access and view Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration


Widget Settings
Search Jobs
Available Search Fields
Division
Employment Type
Grade
Keyword or ReqID
Location (Select Location)
Selected Search Fields
(Max=8 Fields)
Display Field
Allow Multi-Selection
Include in Results
Location (GeoLocation) *
Country
Street, City, State/Province
Postal Code
Radius (mi/km)
Allow Advanced Search:
Results To Display:
10
Allow Job Alerts:
Results View:
List
Table
Map & Table
Table Columns
(Max=4 columns)
Column Name
Job Title
Distance
Select Field
Add
*Each requisition must have a valid Requisition Facility Location Address to be searchable with geolocation.
Geolocation is powered by MapQuest.
Save
Cancel

Location (GeoLocation)

This search field allows applicants to search for jobs by geographical location, which is powered by MapQuest. A Country drop-down, Location (Street, City, State/Province) textbox, and Postal Code textbox displays for applicants on the Search Jobs page of the career site. Applicants can select a country and enter street, city, state/province and/or postal code information. A radius drop-down also displays to allow applicants to filter jobs within a certain mileage or kilometer radius of the geographical location.

When configuring the Location (GeoLocation) field in the Selected Search Fields section of the Widget Settings pop-up, it is important to note that all requisitions must have a valid requisition facility location in order to be searchable by geographical location. Requisitions without valid locations will not be returned in the search results. **Note:** *The requisition facility location is defined on the General step of the job requisition.*

Both the Location (GeoLocation) and the Location (Select Location) filters can be added to the widget.

The Display Field checkbox can be selected to enable applicants to define a location in the field on the career site. If the box is not checked, then the default location defined by the administrator cannot be changed by the applicant.

The Allow Multi-Selection and Include in Results options are hidden for the Location (GeoLocation) field.

Results View

This option determines how the job search results display for applicants on the career site. The following options are available:

- List - This option is selected by default and displays the job search results as a list. This is the existing format in which the job search results display.
- Table - This option displays the job search results in a sortable table. When selected, a Table Columns section displays at the bottom of the pop-up to allow administrators configure the columns that will appear in the table on the career site.
- Map & Table - This option only displays if the Location (GeoLocation) search field is selected as a search field. This option displays the job search results on both a map and in a table for applicants on the career site. When selected, a Table Columns section displays at the bottom of the pop-up to allow administrators configure the columns that will appear in the table on the career site.

Table Columns Section

This section only displays if the Table or Map & Table option is selected in the Results View field. This section allows administrators to select up to four columns to display in the table view of the job search results on the career site.

The Job Title column displays in the table by default. This column cannot be removed. Administrators can add up to four columns from the Column Name drop-down:

- Date Posted
- Distance - This column is only available if the Location (GeoLocation) search field is selected as a search field.
- Location City - This column is only available if the Location (GeoLocation) search field is selected as a search field.
- Search Field Values - The search fields added from the Available Search Fields section are available to select from the drop-down.

Once a field is selected, click the **Add** button. This adds the field to the table. To delete a field from the table, click the Delete icon.

Create Job Requisition/Request/Template

With this enhancement, when configuring job requisitions, requisition requests, and requisition templates, the Facility Location pop-up is redesigned. In addition, instructional text is added to the General tab to indicate that accurate address information must be provided in the Address field in order for job searches by geographical location to function properly on the career site. Requisitions that do not have valid facility location addresses will not be returned in the geolocation search on the career site. The geolocation search is powered by MapQuest.

To manage job requisitions, go to **Recruit > Manage Requisition**.

To create requisition requests, go to **Recruit > Requisition Requests**.

To access the Requisition Templates, go to **Admin > Configuration Tools > Recruit**. Then, click the *Requisition Templates* link in the Applicant Tracking section.

Permissions

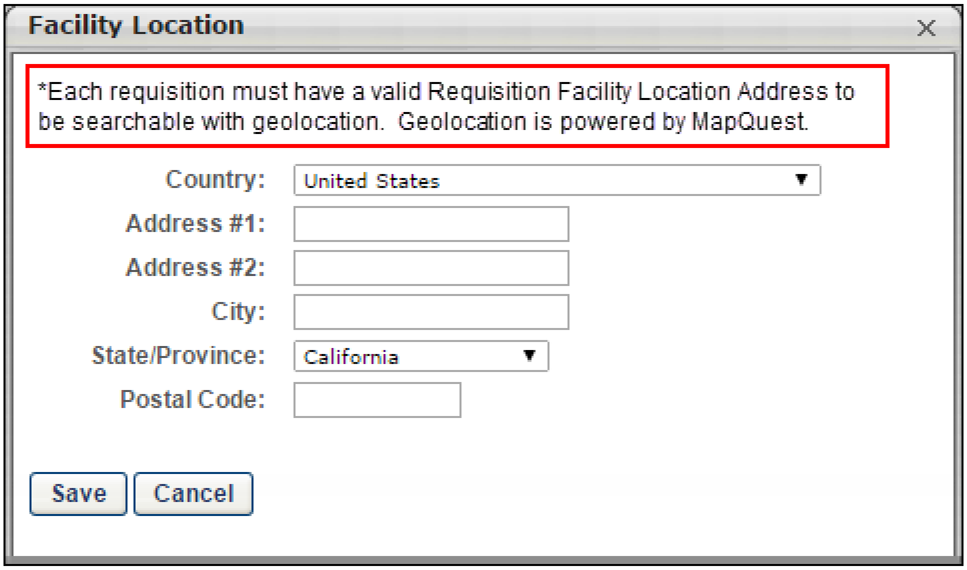
Permission Name	Permission Description	Category
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note****: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the* **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*	Recruiting
Requisition: Reviewer	Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained. **Note:** *This is a dynamically assigned permission that is not available*	Recruiting

	in Security Role Administration. Once a requisition is in a Closed or Cancelled status or if the user is removed as a reviewer, the permission is revoked for the associated requisition. This permission cannot be manually assigned. **Note:** *If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the* **Requisition: Reviewer** *permission is revoked for the associated requisition. However, if the reviewer was also added as a reviewer via the General tab when creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the* **Requisition: Reviewer** *permission. See Applicant Profile Page Overview for more information about duplicate reviewer instances.*	
Requisition Request: Submit Request	Grants ability to create requisition requests. This permission can be constrained by OU and User's OU.	Recruiting
Requisition Template - Manage	Grants ability to access and view Requisition Templates. This permission cannot be constrained. This is an administrator permission.	Recruiting Administration
Requisition Template - View	Grants ability to access and view Requisition Templates. This is an administrator permission.	Recruiting Administration

Facility Location Pop-Up

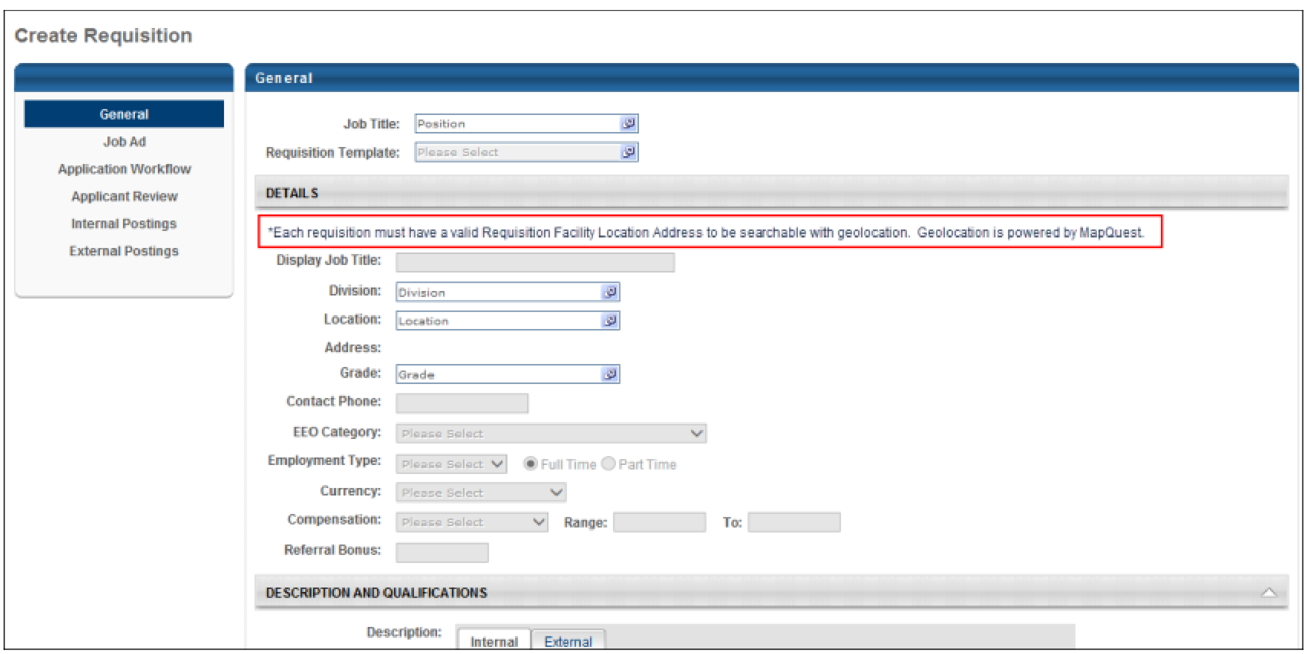
The following update is made to the Facility Location pop-up:

- Instructional text is added to the top of the pop-up to indicate that accurate address information must be provided in the Address field in order for job searches by geographical location to function properly on the career site. Requisitions that do not have valid facility location addresses will not be returned in the geolocation search on the career site. The geolocation search is powered by MapQuest.



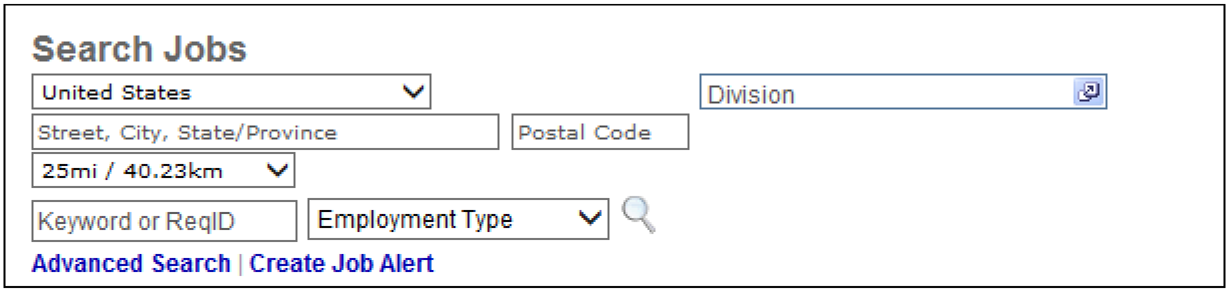
Facility Location Instructions

Instructional text is added to the top of the Details section to indicate that accurate address information must be provided in the Address field in order for job searches by geographical location to function properly on the career site. This text displays for all job requisitions, regardless of whether or not a career site for the portal has been configured to use the geographical location search option.



Career Site - Search Jobs Page

With this enhancement, applicants can search for jobs by geographical location, if the option is enabled by the administrator for the career site. Applicants can also define a radius for the location.



Location

This field allows applicants to select a country and enter a street, city, state/province, and/or postal code for their job search. The job search results display jobs that match the location of the requisition facility location and the radius selection.

If the administrator has not enabled applicants to enter a location in the field, then the default location defined by the administrator when configuring the career site displays and cannot be modified. A radius can still be defined.

Radius

Select a radius from the drop-down. The following options are available:

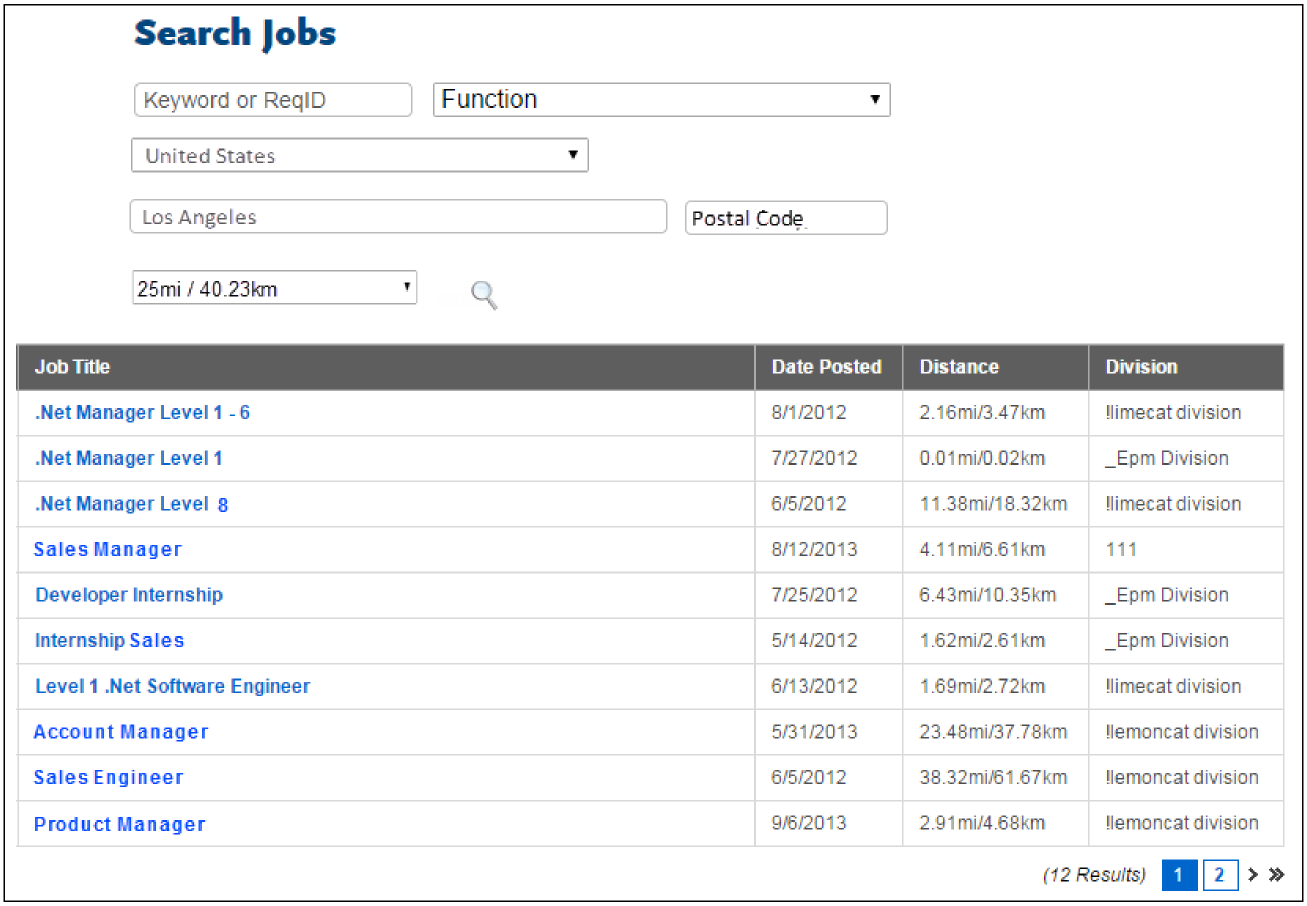
- 10 mi / 16.09-km
- 25 mi / 40.23-km
- 50 mi / 80.47-km
- 100 mi / 160.93-km

Search Results

Table Display

If the career site is configured by the administrator to display the job search results as a table, then the search results display in a sortable table format. Applicants can sort the results by each column.

The columns that display are the columns defined by the administrator when configuring the career site. If the Distance column displays, the distance is defined as the number of miles/kilometers that the job is located from the address, city, state/province and postal code search fields.



Job Title	Date Posted	Distance	Division
.Net Manager Level 1 - 6	8/1/2012	2.16mi/3.47km	!limecat division
.Net Manager Level 1	7/27/2012	0.01mi/0.02km	_Epm Division
.Net Manager Level 8	6/5/2012	11.38mi/18.32km	!limecat division
Sales Manager	8/12/2013	4.11mi/6.61km	111
Developer Internship	7/25/2012	6.43mi/10.35km	_Epm Division
Internship Sales	5/14/2012	1.62mi/2.61km	_Epm Division
Level 1 .Net Software Engineer	6/13/2012	1.69mi/2.72km	!limecat division
Account Manager	5/31/2013	23.48mi/37.78km	!lemoncat division
Sales Engineer	6/5/2012	38.32mi/61.67km	!lemoncat division
Product Manager	9/6/2013	2.91mi/4.68km	!lemoncat division

Map & Table Display

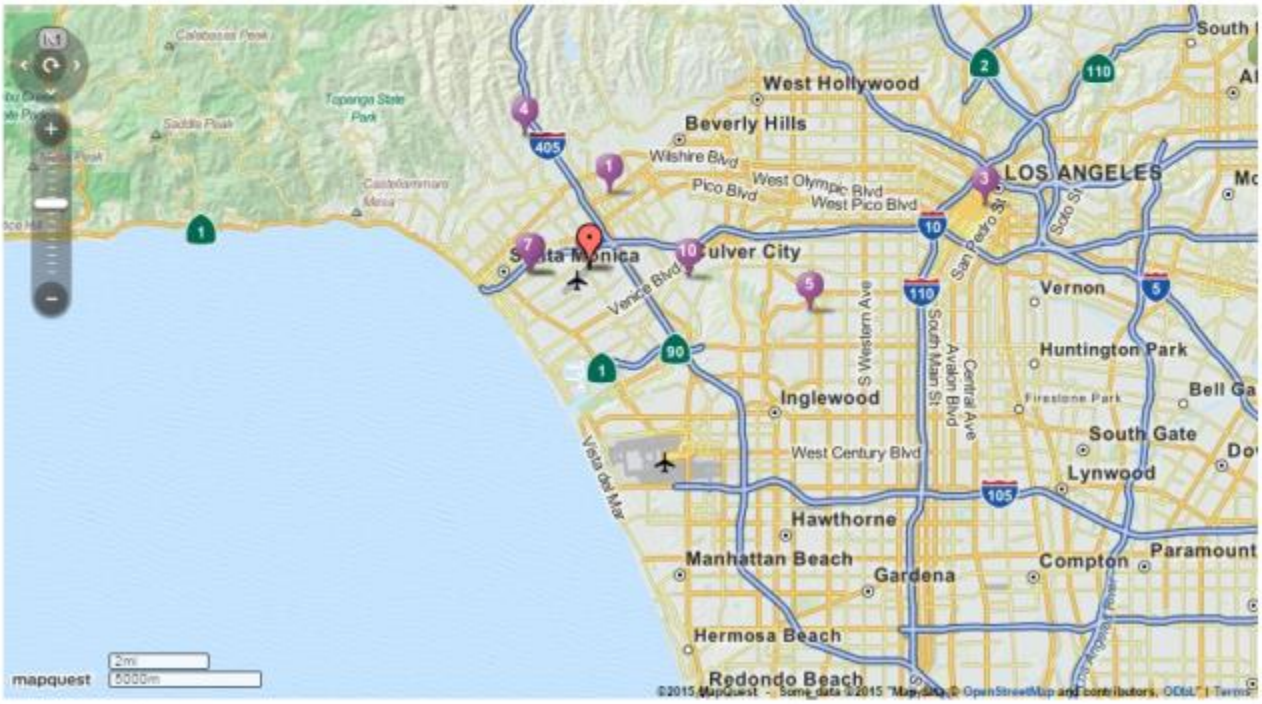
If the career site is configured by the administrator to display the job search results as a table, then the search results display in a sortable table format, as well as a map view. The table includes a Map Pinpoint column in addition to the columns that display in the table-only view. The column displays the linked number of the job corresponding to the pinpoint on the map.

Each job requisition within the search radius is numbered on the map. Clicking a number in the map or in the table displays a hover message over that map pinpoint. The job requisition title and address location displays in the hover message. If more than one requisition is located at a single address, then the hover displays the number of requisitions at that location along with the location address.

The map is interactive. Applicants can zoom in or out or re-center the map.

Search Jobs

Division | Country ▾ | 2445 S Barrington Ave | 50mi / 80.47km ▾



Map Pinpoint	Job Title	Date Posted	Distance	Division
1	.Net Manager Level 1 - 6	8/1/2012	2.16mi/3.47km	!limecat division
2	.Net Manager Level 1	7/27/2012	0.01mi/0.02km	_Epm Division
3	.Net Manager Level 8	6/5/2012	11.38mi/18.32km	!limecat division
4	Sales Manager	8/12/2013	4.11mi/6.61km	111
5	Developer Internship	7/25/2012	6.43mi/10.35km	_Epm Division
6	Internship Sales	5/14/2012	1.62mi/2.61km	_Epm Division
7	Level 1 .Net Software Engineer	6/13/2012	1.69mi/2.72km	!limecat division
8	Account Manager	5/31/2013	23.48mi/37.78km	!lemoncat division
9	Sales Engineer	6/5/2012	38.32mi/61.67km	!lemoncat division
10	Product Manager	9/6/2013	2.91mi/4.68km	!lemoncat division

(12 Results) 1 2 › »

Onboarding

Attachments on Forms

Attachments on Forms Overview

Often during the onboarding process, new hires are required to read and confirm that they have read items such as an employee handbook, computer security policies, benefits packages, etc. Although Human Resources departments have gradually moved paper packages to email packages, there is still the problem of having to attach and email large policy files.

With this enhancement, administrators can add attachments to forms that are assigned via either an onboarding workflow or form task so that new hires can reference the attachments as they complete the forms. Up to three attachments can be added to a form.

Note: *Additional storage may need to be purchased in order to upload a large amount of files.*

Use Case

Laura, an Onboarding Manager, is creating a Health Benefits Enrollment Form for new hires to complete prior to their start date so that new hires will be enrolled in the company's health plan once they become an employee.

1. Laura accesses Manage Forms in Form Management to create the form.
2. Laura adds questions to the form from the Question Bank.
3. Laura wants to make sure that new hires completing the form refer to the proper benefits documentation. She clicks on the Attachment Category and adds the Select File option under the Files sub-category to the form.
4. On the form, she simply drags files into the file uploader to upload them.
5. Once the form has been published and assigned to new hires, they can see the attachments on the form when they launch the form.
6. New hires can click on the attachments to download and open them.

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
Action Items - Forms	Grants ability to access Employee Onboarding Form Tasks on Universal Profile Action Items and in the Your Action Items widget. This permission cannot be constrained.	Universal Profile
Action Items - View	Grants ability to view action items on the Action Items page and in the Your Action Items widget. Users without this permission cannot access the Action Items page. This permission can be constrained by OU, User's OU, User's Self and Subordinates, and User's Self. This is an end user permission.	Universal Profile

Forms - Manage	Grants access to the Form Management Administration functionality. This permission can be constrained by OU and User's OU. This is an administrator permission. **Note:** *This permission enables access to the Form Management functionality that is part of the Onboarding module. This permission does not grant access to the Old Forms Management functionality.*	Forms Management Administration

Create Form

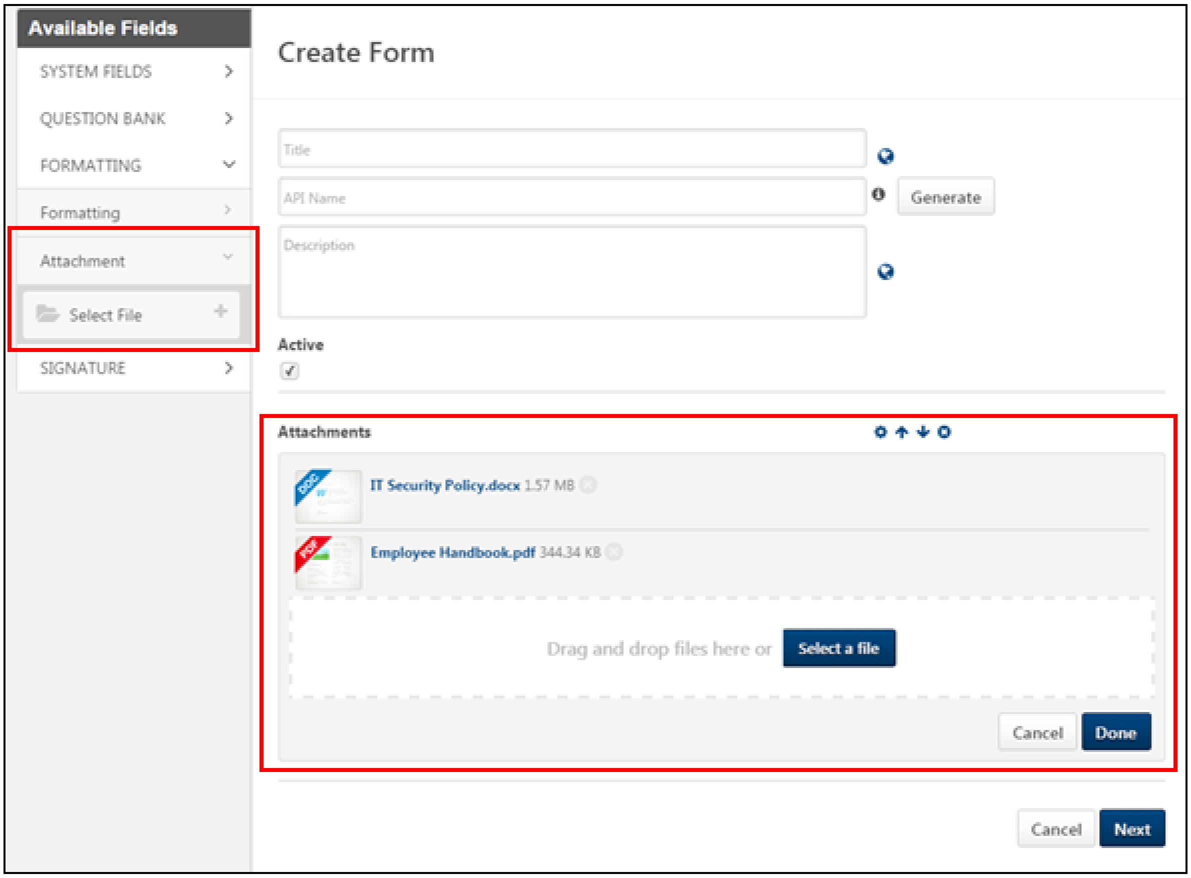
An Attachment section is added to the Available Fields panel on the Create Form page. This section enables administrators to add up to three attachments to forms.

Note: *The form creation process has been modified as part of a separate enhancement for the February '15 release. See* **Form Creation Workflow Enhancements Overview** *on* page 412 *for additional information.*

To create a form, go to **Admin > Configuration Tools > Core Functions**. Then select the *Form Management* link. From the Form Management page, select the *Manage Forms* link. Then, from the Manage Forms page, select the **Create Form** button.

Permissions

Permission Name	Permission Description	Category
Forms - Manage	Grants access to the Form Management Administration functionality. This permission can be constrained by OU and User's OU. This is an administrator permission. **Note:** *This permission enables access to the Form Management functionality that is part of the Onboarding module. This permission does not grant access to the Old Forms Management functionality.*	Forms Management Administration



Attachment Section

This section enables administrators to add file attachments to the form. The Attachment section includes a Select File field. When the Select File field is added to the form, administrators can drag and drop files to the form or upload files using the **Select a file** button. The Select File field can be added to the form multiple times.

Add Attachments - Select a File

To add attachments using the **Select a file** button:

1. Add the Select File field from the Attachment section. This adds an Attachments section to the form.
2. Click the **Select a file** button. This opens a file upload pop-up from your computer.
3. Search for and select a file, up to 30 MB. The file name cannot exceed 50 characters and cannot include invalid characters. Accepted file types are arf, avi, bmp, doc, dot, dotx, flv, gif, htm, html, jpeg, jpg, m4a, docx, m4v, mid, mpeg, mpg, mpp, mp3, mp4, pdf, png, pps, ppsx, ppt, pptx, rm, swf, txt, vsd, wav, wma, wmv, xls, xlsx, zip.
4. Once selected, the file is added to the Attachments section.
5. Click **Done** to add the section to the form.

6. Click **Cancel** to cancel adding the section to the form.

To add more attachments, repeat the steps above.

Add Attachments - Drag and Drop Files

Files can be dragged from anywhere on the administrator's computer and dropped into the Attachments section.

Collapse Attachments Section

To collapse the Attachments section, click the Options icon.

Move Attachments Section

To move the Attachments section, click the Up or Down arrow to place the section in a different location on the form.

Delete Attachments Section

To delete the Attachments section, click the Remove icon.

Next Button

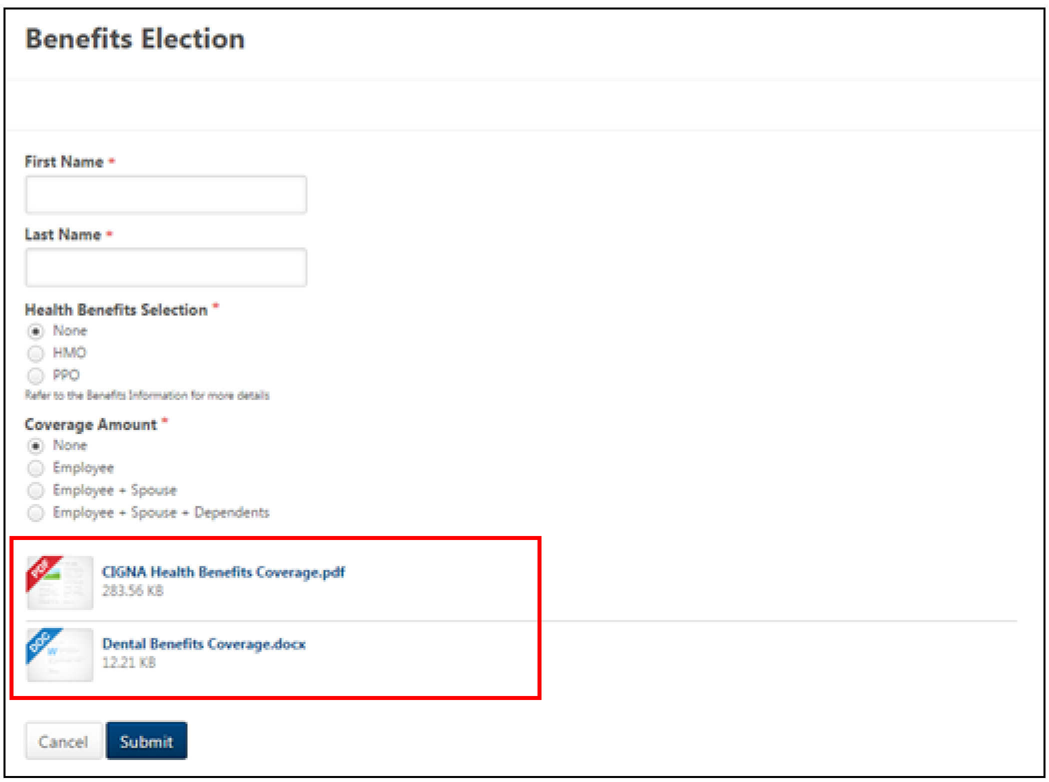
Prior to clicking **Next** at the bottom of the page, at least one file must be uploaded when the Select File field is added to the form. **Note:** *This is a new button added as part of a separate enhancement for the February '15 release that modifies the process of creating a form. See* **Form Creation Workflow Enhancements Overview** *on* page 412 *for additional information.*

Complete Form

When users launch a form that includes attachments, the attachments display at the bottom of the form. To open the form, users click the form title. This opens the form in the file type in which the form was uploaded.

Permissions

Permission Name	Permission Description	Category
Action Items - Forms	Grants ability to access Employee Onboarding Form Tasks on Universal Profile Action Items and in the Your Action Items widget. This permission cannot be constrained.	Universal Profile
Action Items - View	Grants ability to view action items on the Action Items page and in the Your Action Items widget. Users without this permission cannot access the Action Items page. This permission can be constrained by OU, User's OU, User's Self and Subordinates, and User's Self. This is an end user permission.	Universal Profile



Universal Profile - Snapshot - Documents

When users download attachments from forms that have attachments, the documents can be viewed outside of the form in the Documents section of the Universal Profile Snapshot page. The attachments open in the file type in which the form was uploaded.

Permissions

Permission Name	Permission Description	Category
Snapshot Documents - View	Grants ability to view the Documents widget and subpage within the Universal Profile - Snapshot page. The availability of this permission is controlled by a backend setting. This permission can be constrained by OU, User's OU, User's Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, and User's Direct Reports. This is an end user permission.	Universal Profile

Form Creation Workflow Enhancements

Form Creation Workflow Enhancements Overview

With this enhancement, the following enhancements are made to the Create Form pages:

- The **Edit** and **Settings** buttons are removed.
- The Settings options are now accessible by clicking a **Next** button at the bottom of the Create Form page.
- The **Publish** button is moved to the second page of the form creation process.
- The **Save as Draft** button is moved to the second page of the form creation process.
- The Title field can now be translated on the first step of the form creation process. Previously, the title could only be translated from the Edit page.
- The Title field can no longer be edited or translated on the second page of the form creation process.
- The Name field is renamed API Name.
- The Description field is moved to the first page of the form creation process.
- The Active checkbox is moved to the first page of the form creation process.

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
Action Items - Forms	Grants ability to access Employee Onboarding Form Tasks on Universal Profile Action Items and in the Your Action Items widget. This permission cannot be constrained.	Universal Profile
Action Items - View	Grants ability to view action items on the Action Items page and in the Your Action Items widget. Users without this permission cannot access the Action Items page. This permission can be constrained by OU, User's OU, User's Self and Subordinates, and User's Self. This is an end user permission.	Universal Profile
Forms - Manage	Grants access to the Form Management Administration functionality. This permission can be constrained by OU and User's OU. This is an administrator permission. **Note:** *This permission enables access to the Form Management functionality that is part of the Onboarding module. This permission does not grant access to the Old Forms Management functionality.*	Forms Management Administration

Create Form - Step 1

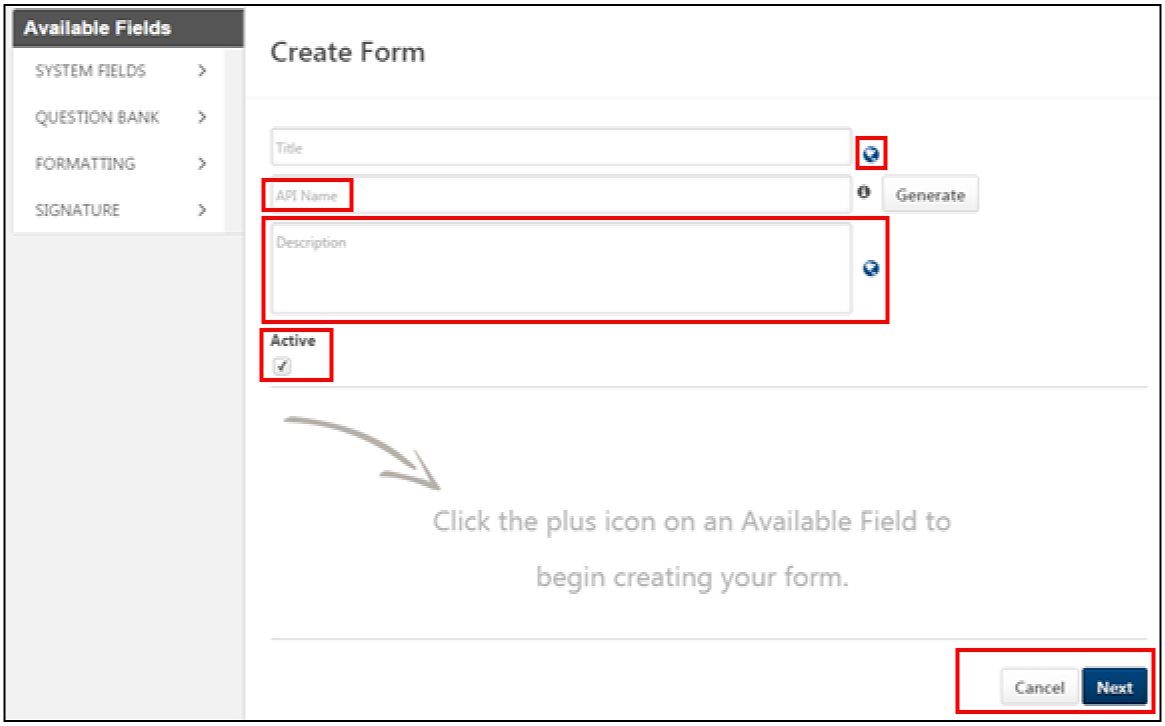
With this enhancement, the following changes are made to the first page of the form creation process:

- The **Edit** and **Settings** buttons are removed.
- The Settings options are now accessible by clicking a **Next** button at the bottom of the first page in the create form process.
- The **Publish** button is removed and now displays on the second page of the form creation process.
- The **Save as Draft** button is removed and now displays on the second page of the form creation process.
- The Title field can now be translated on the first step of the form creation process. Previously, the title could only be translated from the Edit page.
- The Name field is renamed API Name.
- The Description field now displays on the first page of the form creation process.
- The Active checkbox now displays on the first page of the form creation process.

To create a form, go to **Admin > Configuration Tools > Core Functions**. Then select the *Form Management* link. From the Form Management page, select the *Manage Forms* link. Then, from the Manage Forms page, select the **Create Form** button.

Permissions

Permission Name	Permission Description	Category
Forms - Manage	Grants access to the Form Management Administration functionality. This permission can be constrained by OU and User's OU. This is an administrator permission. **Note:** *This permission enables access to the Form Management functionality that is part of the Onboarding module. This permission does not grant access to the Old Forms Management functionality.*	Forms Management Administration


Available Fields
SYSTEM FIELDS
QUESTION BANK
FORMATTING
SIGNATURE
Create Form
Title
API Name
Generate
Description
Active
Click the plus icon on an Available Field to
begin creating your form.
Cancel
Next

Create Form - Step 2

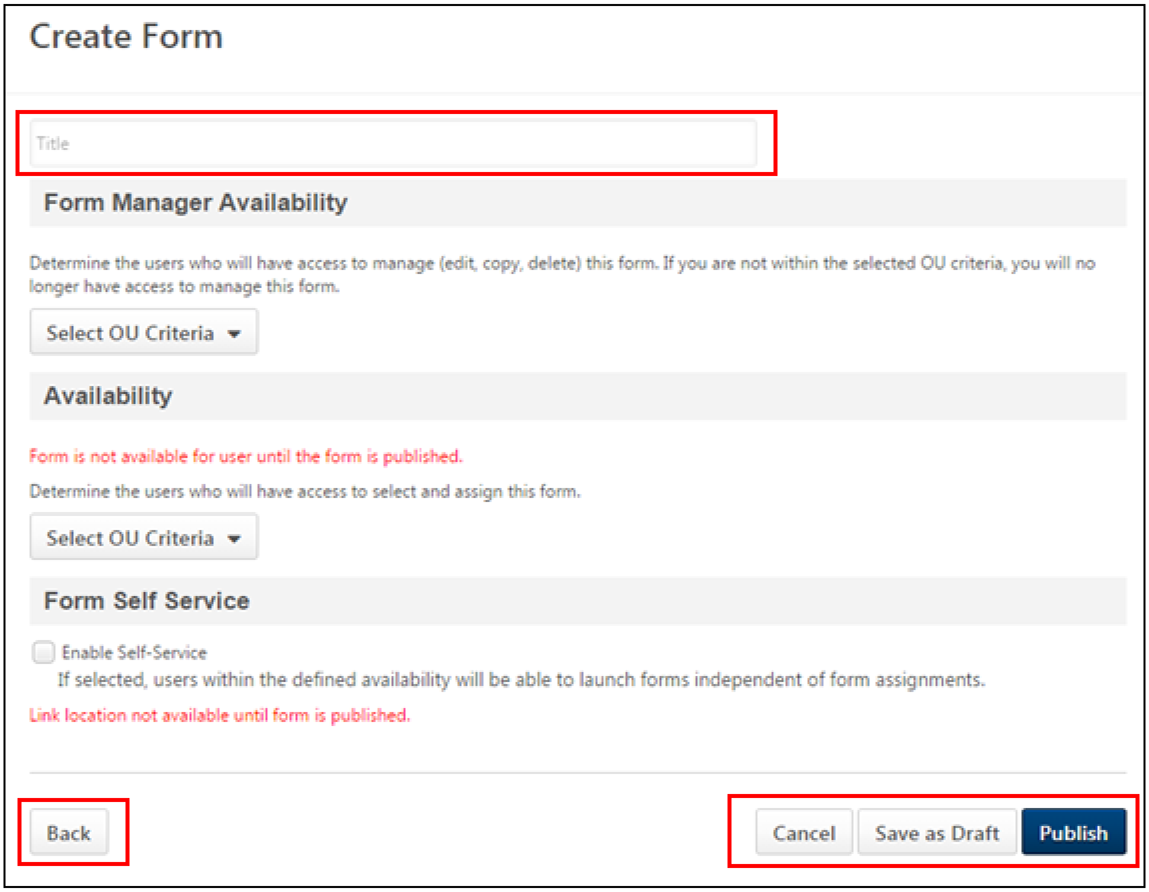
With this enhancement, the following changes are made to the second page of the form creation process:

- The settings options are now accessed by clicking a **Next** button at the bottom of the first page in the form creation process. Previously, the options were accessed by clicking the **Settings** button at the top of the first page of creating a form. The **Settings** button no longer displays.
- The **Publish** button is moved from the first page of the form creation process to the second page.
- The **Save as Draft** button is moved from the first page of the form creation process to the second page.
- The **Save** button is moved from the first page of the form creation process to the second page. **Note:** *As with existing functionality, the* **Save** *button only displays for forms that have been saved as a draft.*
- A **Back** button is added. Click the **Back** button to return to the first page of the form creation process. The settings defined on the second page are saved when returning to the first page.
- The Active checkbox is moved from the second page of the form creation process to the first page.
- The Title field can no longer be edited or translated on the second page of the form creation process.

To create a form, go to **Admin > Configuration Tools > Core Functions**. Then select the *Form Management* link. From the Form Management page, select the *Manage Forms* link. Then, from the Manage Forms page, select the **Create Form** button.

Permissions

Permission Name	Permission Description	Category
Forms - Manage	Grants access to the Form Management Administration functionality. This permission can be constrained by OU and User's OU. This is an administrator permission. **Note:** *This permission enables access to the Form Management functionality that is part of the Onboarding module. This permission does not grant access to the Old Forms Management functionality.*	Forms Management Administration

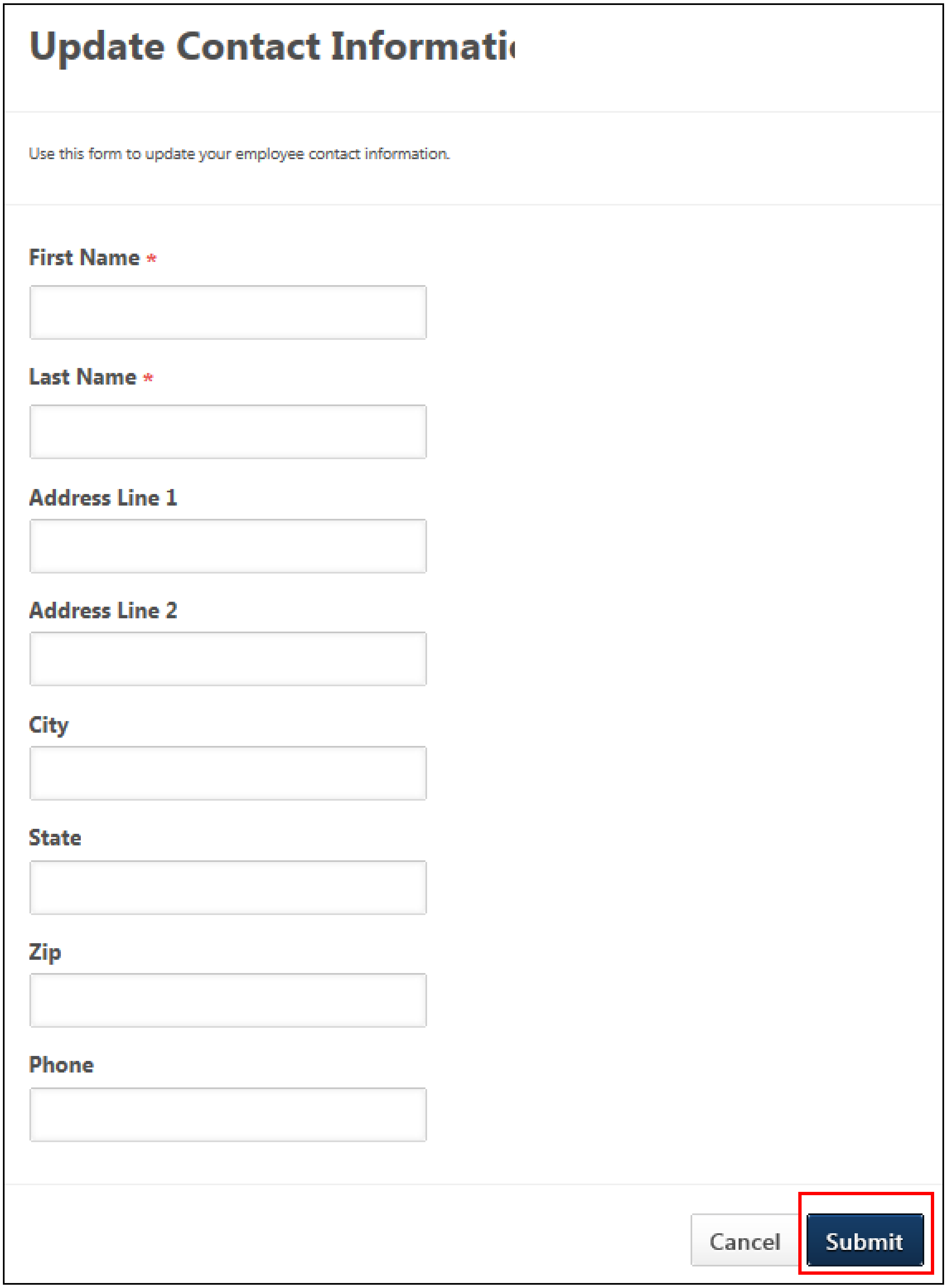

Create Form
Title
Form Manager Availability
Determine the users who will have access to manage (edit, copy, delete) this form. If you are not within the selected OU criteria, you will no longer have access to manage this form.
Select OU Criteria
Availability
Form is not available for user until the form is published.
Determine the users who will have access to select and assign this form.
Select OU Criteria
Form Self Service
Enable Self-Service
If selected, users within the defined availability will be able to launch forms independent of form assignments.
Link location not available until form is published.
Back
Cancel
Save as Draft
Publish

Complete Form

For users filling out a form, the **Save** button is renamed **Submit**.

Permissions

Permission Name	Permission Description	Category
Action Items - View	Grants ability to view action items on the Action Items page and in the Your Action Items widget. Users without this permission cannot access the Action Items page. This permission can be constrained by OU, User's OU, User's Self and Subordinates, and User's Self. This is an end user permission.	Universal Profile


Update Contact Informati
Use this form to update your employee contact information.
First Name *
Last Name *
Address Line 1
Address Line 2
City
State
Zip
Phone
Cancel
Submit

Multi Select Question Types

Multi-Select Question Types Overview

With this enhancement, checkbox and drop-down question types can now be configured in the Question Bank in Form Management to allow users to select multiple options for a question. Prior to this enhancement, checkbox and drop-down question types only allowed users to select a single option for a question.

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
Action Items - View	Grants ability to view action items on the Action Items page and in the Your Action Items widget. Users without this permission cannot access the Action Items page. This permission can be constrained by OU, User's OU, User's Self and Subordinates, and User's Self. This is an end user permission.	Universal Profile
Action Items - Forms	Grants ability to access Employee Onboarding Form Tasks on Universal Profile Action Items and in the Your Action Items widget. This permission cannot be constrained.	Universal Profile
Forms - Manage	Grants access to the Form Management Administration functionality. This permission can be constrained by OU and User's OU. This is an administrator permission. **Note:** *This permission enables access to the Form Management functionality that is part of the Onboarding module. This permission does not grant access to the Old Forms Management functionality.*	Forms Management Administration
Question Bank - Manage	Grants access to the Question Bank Management functionality on the Form Management page. This permission can be constrained by OU and User's OU. This is an administrator permission.	Forms Management Administration

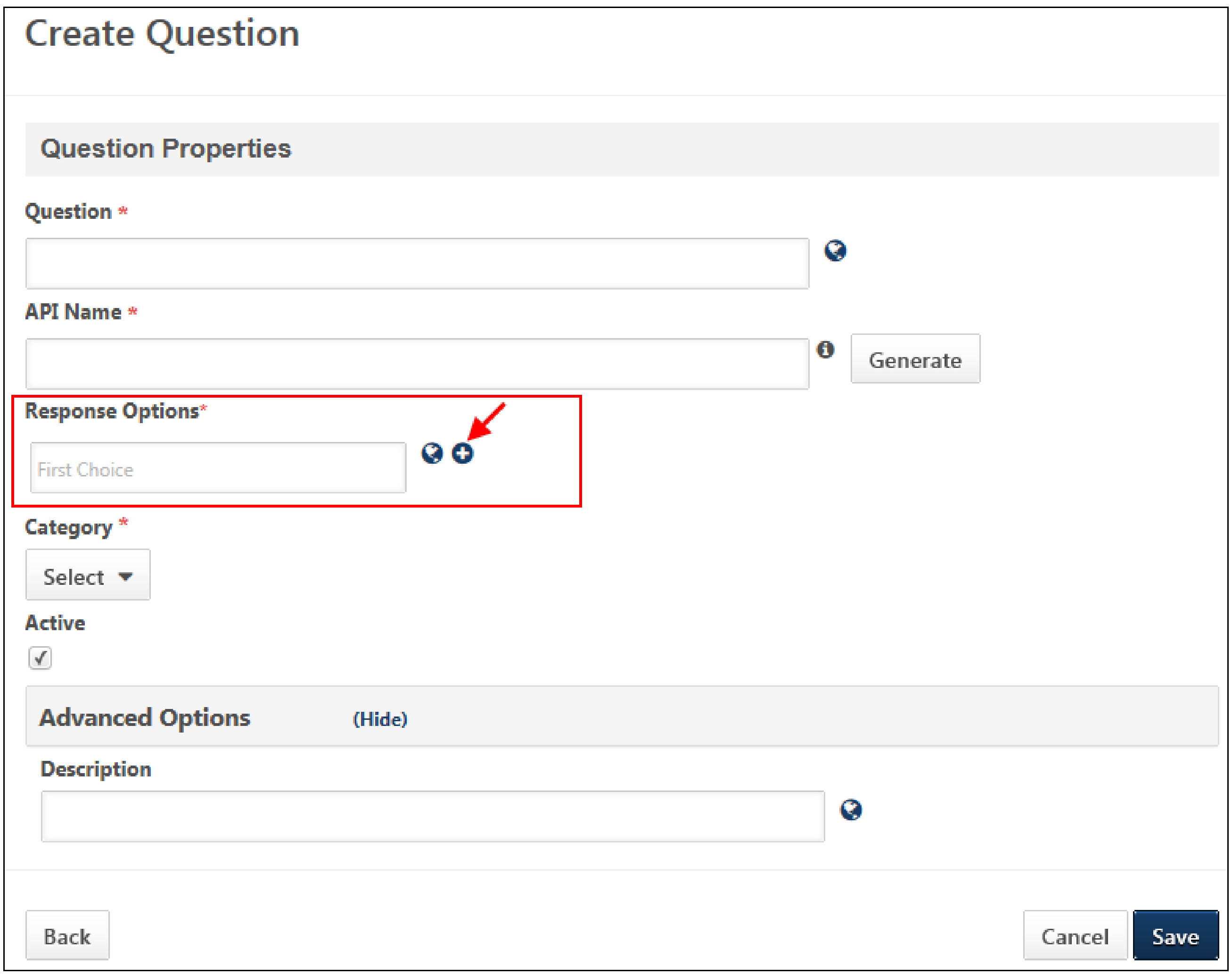
Create Question - Checkbox

With this enhancement, multi-select checkbox questions can now be created. For this question type, administrators configure the response options, and users can select one or more of the options when completing the form.

To create questions, go to **Admin > Configuration Tools > Core Functions**. Then, select the *Form Management* link. Then, select the *Question Bank* link. Then, select the **Create Question** button in the upper-right corner of the Question Bank page.

Permissions

Permission Name	Permission Description	Category
Question Bank - Manage	Grants access to the Question Bank Management functionality on the Form Management page. This permission can be constrained by OU and User's OU. This is an administrator permission.	Forms Management Administration



Response Options

When configuring the Response Options section for checkbox questions, multiple response options can be added by clicking the Add icon to the right of the question text box. Users can select one or more of the options.

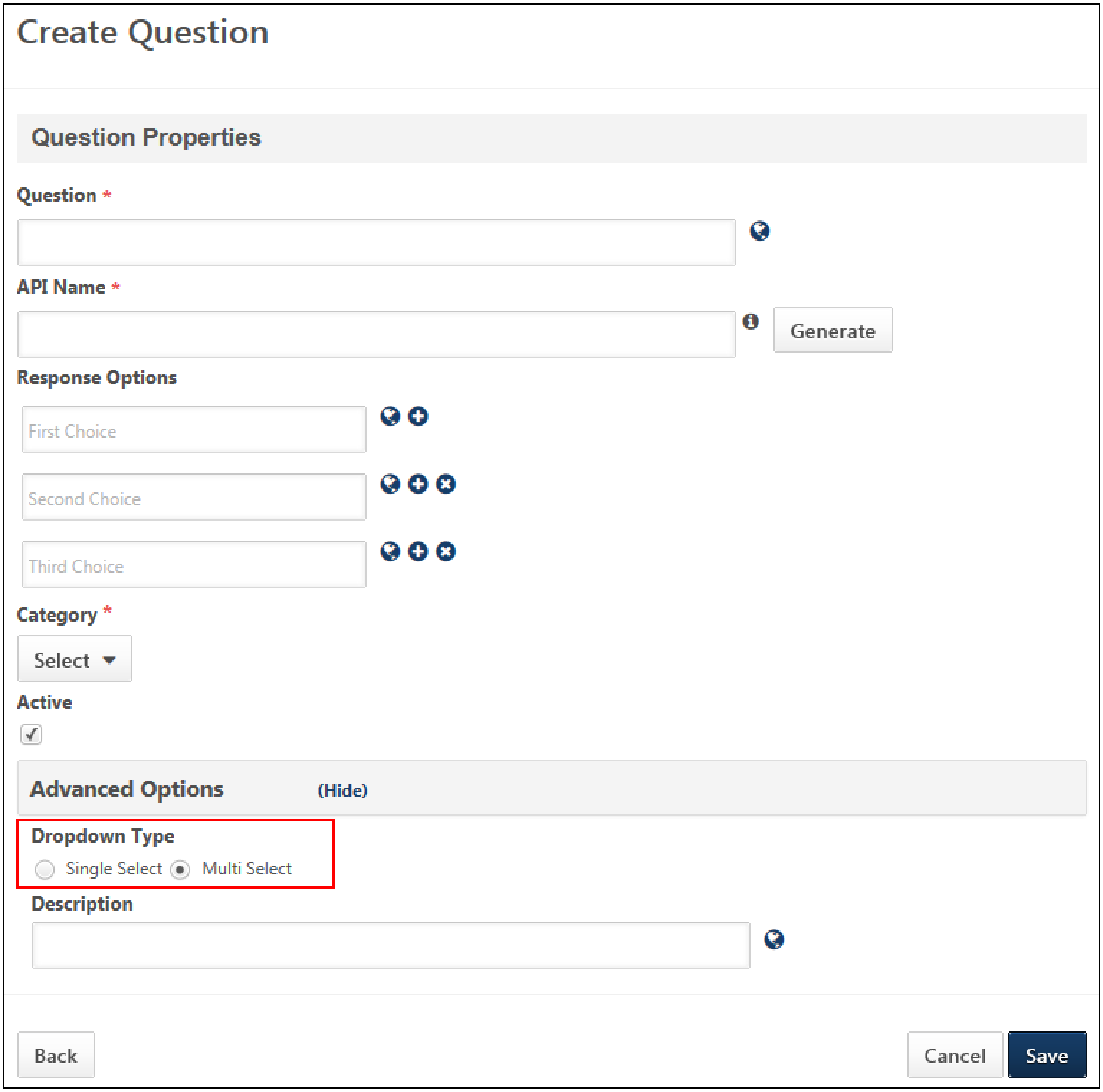
Create Question - Drop-down

With this enhancement, multi-select drop-down questions can now be created. For this question type, administrators configure the response options, and users can select one or more of the options when completing the form.

To create questions, go to **Admin > Configuration Tools > Core Functions**. Then, select the *Form Management* link. Then, select the *Question Bank* link. Then, select the **Create Question** button in the upper-right corner of the Question Bank page.

Permissions

Permission Name	Permission Description	Category
Question Bank - Manage	Grants access to the Question Bank Management functionality on the Form Management page. This permission can be constrained by OU and User's OU. This is an administrator permission.	Forms Management Administration



Advanced Options

When configuring the Advanced Options section for drop-down questions, a new Dropdown Type option is added. This option allows administrators to select whether or not users can select one option or multiple options when responding to the question.

- Single Select - This option is selected by default. When selected, users can only apply to one of the response options for the question.
- Multi Select - Select this option to allow users to select multiple options when responding to the question.

Editing Note: *Once the question is used on a form, the Dropdown Type option can no longer be changed for the question.*

Response Options

The Response Options section must have at least two options configured in order to use the Multi Select option in Advanced Options.

View Form

Permissions

Permission Name	Permission Description	Category
Action Items - Forms	Grants ability to access Employee Onboarding Form Tasks on Universal Profile Action Items and in the Your Action Items widget. This permission cannot be constrained.	Universal Profile
Employee Onboarding Action Items - View	Allows user to access Employee Onboarding on Universal Profile Action Items. This permission cannot be constrained. This is an end user permission.	Universal Profile

Launched Form

When users launch a form that includes multi-select checkbox and drop-down question types, the form displays the response options available to the user, as configured for the question by the administrator.

For checkbox question types, the user can select one or more response options. For drop-down question types, the user selects one or more response options from the drop-down.

As with existing functionality, in order to launch and complete a form, users must have permission to view Forms action items in Universal Profile and permission to view action items in Universal Profile.

Completed Form

When viewing a completed form that includes multi-select checkbox and drop-down question types, the form lists the user's responses below the question.

Onboarding Task Due Dates

Onboarding Task Due Dates Overview

With the onboarding workflows functionality, administrators can configure a series of tasks that need to be completed during a new hire's onboarding process. Prior to this enhancement, all onboarding tasks were assigned when the onboarding process was launched. Administrators were not able to assign time-sensitive tasks as part of the onboarding workflow.

With this enhancement, administrators can configure the onboarding assignment date and due dates for tasks assigned via an onboarding workflow. This provides administrators with the flexibility to determine their own assignment and due dates for onboarding tasks.

Use Case

1. Dhara, the Onboarding Manager for QA Corp, is setting up onboarding workflows for new employees. She wants Stev, a new hire, to complete an Office Supply Request Form three days before his first day so that QA Corp can supply Stev with what he needs by his first day on the job.
2. Dhara adds a Form Task to Stev's onboarding workflow and configures the Date Criteria section so that his Office Supply Request Form Task is assigned on his onboarding launch date and is due three days before his start date.
3. Stev receives an email saying that he has a form task assigned to him and that the task is due on March 2, 2015. When he first logs in to his onboarding portal, he sees an action item to complete an Office Supply Request Form. He sees that he has to complete the form by March 2, 2015, which is three days before his start date of March 5, 2015.
4. Stev completes the Office Supply Request Form task. The action item no longer shows on his list of actions. On Stev's start date, his office supplies are ready at his workstation.

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
Action Items - Forms	Grants ability to access Employee Onboarding Form Tasks on Universal Profile Action Items and in the Your Action Items widget. This permission cannot be constrained.	Universal Profile
Employee Onboarding Workflows - Manage	Allows user to view and manage Employee Onboarding Workflows. This permission cannot be constrained. This is an administrator permission.	Employee Onboarding - Administration
Form Management: Task Administration	Grants access to the Form Task Administration functionality. This permission can be constrained by OU and User's OU. This is an administrator permission.	Forms Administration

Global Email Administration - Manage	Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration
Global Email Administration - View	Grants view only access to email templates/triggers and email logs at the global level for the portal. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration

Create Onboarding Workflow

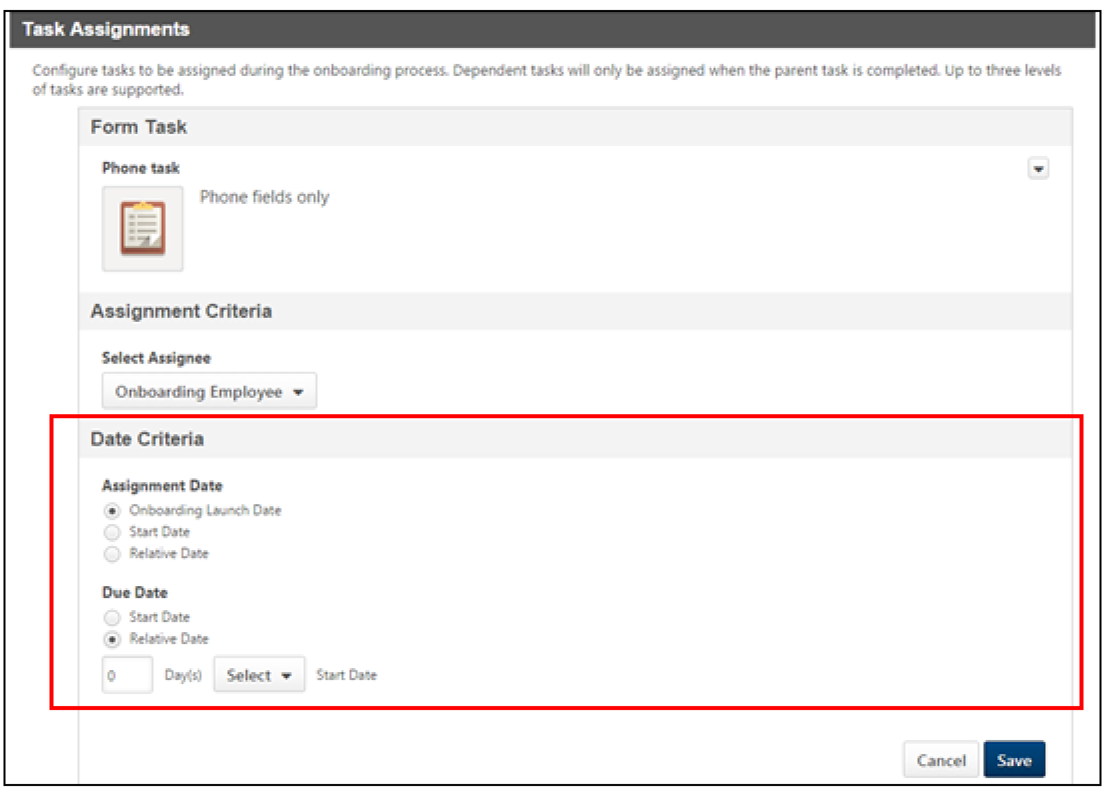
With this enhancement, a Date Criteria section is added to Task Assignments. This section enables administrators to configure the onboarding assignment date and due dates for tasks that are assigned via an onboarding workflow.

As with existing functionality for onboarding workflows, the workflow cannot be modified once the workflow has been used in an onboarding process. **Note:** *Onboarding workflows are used by recruiters when launching the onboarding process for a user from the user's Applicant Profile page.*

To access the Create Onboarding Workflow page, click the **Create Onboarding** button on the Onboarding Workflows page.

Permissions

Permission Name	Permission Description	Category
Employee Onboarding Workflows - Manage	Allows user to view and manage Employee Onboarding Workflows. This permission cannot be constrained. This is an administrator permission.	Employee Onboarding - Administration
Form Management: Task Administration	Grants access to the Form Task Administration functionality. This permission can be constrained by OU and User's OU. This is an administrator permission.	Forms Administration



Assignment Date

In this section, administrators determine when the onboarding task begins for the employee. The following options are available:

- Onboarding Launch Date - Select this option to assign the task on the date the employee launches the onboarding workflow. This option is selected by default.
- Start Date - Select this option to assign the task on the employee's start date of employment.
- Relative Date - Select this option to assign the task on a certain number of days before or after the employee's start date of employment. When selected, options display that require the administrator to define the number of days before or after the employee's start date that the task will be assigned. Enter the number of days in the Day(s) numeric text box, from 1 to 200. Then select the Before or the After option from the drop-down to define the task assignment date relative to the start date.

The Onboarding Form Assigned email is triggered on the task assignment date. The start date selected populates the TASK.START.DATE tag in the email, provided that the tag is used in the email. **Note:** *This is a new email that is added with this enhancement. See* **Email Administration** *on* page 433 *for additional information.*

The Assignment Date section does not display when configuring dependent tasks.

Due Date

In this section, administrators determine when the onboarding task is due. The due date for parent tasks must be after the assignment date. The due date for dependent tasks must be after the parent task due date.

The following options are available:

- Start Date - Select this option for the task to be due on the employee's start date of employment. This option is selected by default.
- Relative Date - Select this option for the task to be due on a certain number of days before or after the employee's start date of employment. When selected, options display that require the administrator to define the number of days before or after the employee's start date that the task will be due. Enter the number of days in the Day(s) numeric text box, from 1 to 200. Then select the Before or the After option from the drop-down to define the task due date relative to the start date.

The Onboarding Form Assigned email is triggered on the task due date. The due date selected populates the TASK.DUE.DATE tag in the email, provided that the tag is used in the email. **Note:** *This is a new email that is added with this enhancement. See* **Email Administration** *on* page 433 *for additional information.*

Email Administration

With this enhancement, the following emails are added to the Employee Onboarding email action type:

- Onboarding Form Assigned
- Onboarding Form Completed

Permissions

Permission Name	Permission Description	Category
Global Email Administration - Manage	Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration
Global Email Administration - View	Grants view only access to email templates/triggers and email logs at the global level for the portal. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration

Onboarding Form Assigned

Action	Description/Trigger
Onboarding Form Assigned	This email is triggered when an onboarding form is assigned to a user through an onboarding workflow. The email can be sent to Form Assignee or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Employee Onboarding action type section of Email Management. Use Case: Use this email to notify a user that they have been assigned an onboarding form as part of an onboarding workflow.

The following tags are available for the Onboarding Form Assigned email:

Tag Name	Description
ACTION.DATE	Date that the action took place that triggers the email.
FORM.DESCRIPTION	Description entered when configuring the form.
FORM.TASK.INSTRUCTIONS	Instructions entered for the form task.

Tag Name	Description
FORM.TASK.TITLE	Title entered for the form task.
FORM.TITLE	Title entered when configuring the form.
RECIPIENT.DIVISION	Recipient's division.
RECIPIENT.FIRST.NAME	Recipient's first name.
RECIPIENT.LAST.NAME	Recipient's last name.
RECIPIENT.PHONE	Recipient's phone.
RECIPIENT.POSITION	Recipient's position.
RECIPIENT.USERNAME	Recipient's user name.
TASK.DUE.DATE	The date on which the form task is due.
TASK.START.DATE	The date on which the form task starts.

Onboarding Form Completed

Action	Description/Trigger
Onboarding Form Completed	This email is triggered when an onboarding form is completed by a user. The email can be sent to Form Assignee, Form Assignee Manager, or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Employee Onboarding action type section of Email Management. Use Case: Use this email to notify a user that they have been assigned an onboarding form as part of an onboarding workflow.

The following tags are available for the Onboarding Form Completed email (new tags appear in red):

Tag Name	Description
ACTION.DATE	Date that the action took place that triggers the email.
FORM.DESCRIPTION	Description entered when configuring the form.
FORM.ESIGNED.DATETIME	Displays the date and time that the form was electronically signed.
FORM.RESPONDER.DIVISION	Division of the user who filled out the form.
FORM.RESPONDER.FIRST.NAME	First name of the user who filled out the form.
FORM.RESPONDER.LAST.NAME	Last name of the user who filled out the form.
FORM.RESPONDER.PHONE	Phone of the user who filled out the form.
FORM.RESPONDER.POSITION	Position of the user who filled out the form.
FORM.TASK.INSTRUCTIONS	Instructions entered for the form task.

Tag Name	Description
FORM.TASK.TITLE	Title entered for the form task.
FORM.TITLE	Title entered when configuring the form.
RECIPIENT.DIVISION	Recipient's division.
RECIPIENT.FIRST.NAME	Recipient's first name.
RECIPIENT.LAST.NAME	Recipient's last name.
RECIPIENT.PHONE	Recipient's phone.
RECIPIENT.POSITION	Recipient's position.
RECIPIENT.USERNAME	Recipient's user name.
TASK.DUE.DATE	The date on which the form task is due.
TASK.START.DATE	The date on which the form task starts.

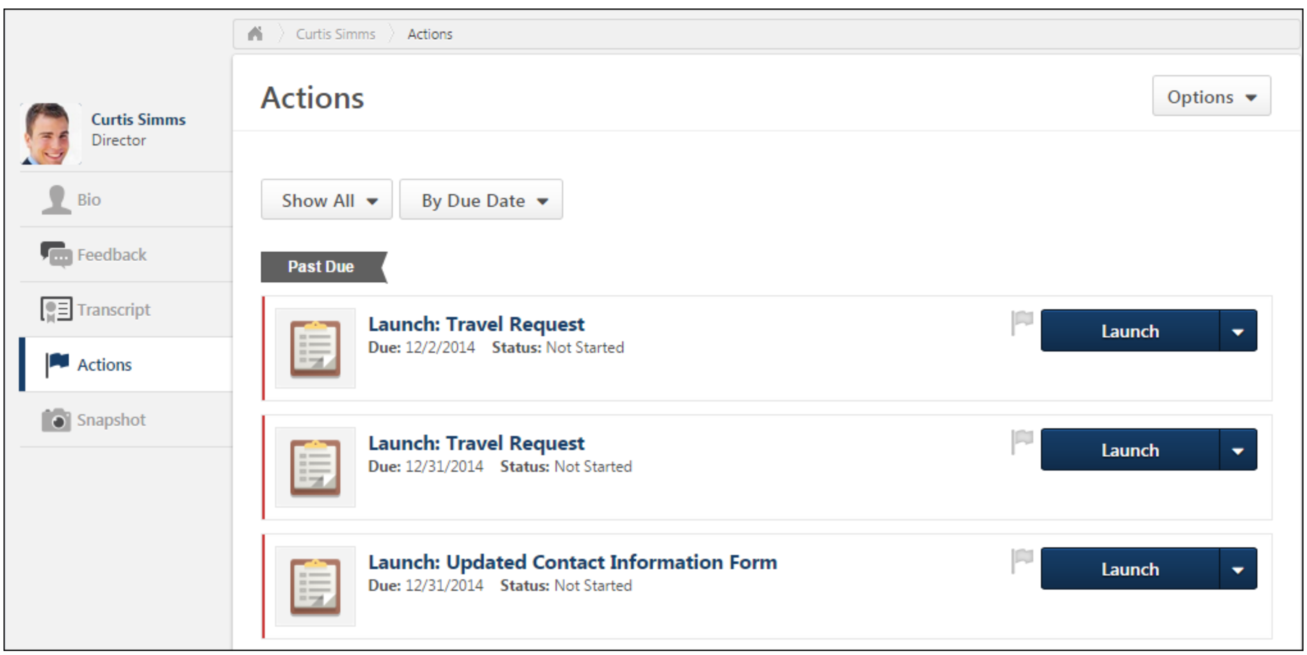
Universal Profile - Actions - Task Due Dates

With this enhancement, administrators can configure the due date for tasks assigned via an onboarding workflow. When users view their onboarding tasks, the due date that displays is the due date configured by the administrator.

Upon implementation, the due date for existing onboarding tasks defaults to the employee's start date of employment. The assignment date will be unchanged upon implementation.

Permissions

Permission Name	Permission Description	Category
Action Items - Forms	Grants ability to access Employee Onboarding Form Tasks on Universal Profile Action Items and in the Your Action Items widget. This permission cannot be constrained.	Universal Profile
Employee Onboarding Action Items - View	Allows user to access Employee Onboarding on Universal Profile Action Items. This permission cannot be constrained. This is an end user permission.	Universal Profile



Related Requisitions Phase 2

Related Requisitions Phase 2 Overview

With this enhancement, applicants can now apply to up to 10 requisitions at the same time that are related to the parent requisition. A new related requisition type Related Requisitions (Apply to Multiple Jobs) can be selected when configuring related requisitions for the parent. Applicants select the requisitions to which they would like to apply on the Job Details page on the career site, and then complete a single application that applies to all of the requisitions to which they selected. Once submitted, the completed application is available on the Applicant Profile page for all of the requisitions to which the applicant applied.

Use Case

A recruiter for a retail chain creates a requisition for the Sales Floor Associate position. The recruiter wants to create multiple requisitions based on the same position but at different store locations so that applicants can apply to multiple store locations at the same time. Stores that have openings for that position are in the same geographical area; therefore, most of the requisition attributes are the same, such as Position, Hiring Team, Approval Workflow, Applicant Statuses, and Application workflow including EEO and compliance.

The recruiter creates a parent requisition for the regional store location. The recruiter submits the parent requisition and adds Related Requisition (Apply to Multiple Jobs) for other store locations. The recruiter submits and posts the related requisitions to the same career site so that all related requisitions are included on the parent requisition Job Details page, which allows applicants to select individual or multiple requisitions to which to apply.

The application workflow for all of the related requisitions is the same for both internal and external applicants so that applicants can apply to all of the related requisition by going through the same applicant experience.

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
Requisition: Edit Job Ad	Grants ability to edit the Job Ad tab of the Edit Requisition page. This permission cannot be constrained.	Recruiting
Requisition: Edit Owners	Grants ability to edit the owners section for requisitions. This permission can be constrained by OU and User's OU.	Recruiting
Requisition: Edit Postings	Grants ability to edit the Internal Postings and External Postings tabs when creating, copying, or editing a job requisition. In addition, this permission enables users to store user-level credentialing information for job board aggregation partners on the My Gateways tab of the My Account page. This permission cannot be constrained.	Recruiting

Requisition: Edit Reviewers	Grants ability to edit the requisition reviewers section for requisitions. This permission can be constrained by OU.	Recruiting

Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting

Requisition Preferences - Manage	Grants ability to access and manage Requisition Preferences. This permission cannot be constrained.	Recruiting Administration

Requisition: Reviewer	Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained. **Note:** *This is a dynamically assigned permission that is not available in Security Role Administration. Once a requisition is in a Closed or Cancelled status or if the user is removed as a reviewer, the permission is revoked for the associated requisition. This permission cannot be manually assigned.* **Note:** *If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the* **Requisition: Reviewer** *permission is revoked for the associated requisition. However, if the reviewer was also added as a reviewer via the General tab when creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the* **Requisition: Reviewer** *permission. See Applicant Profile Page Overview for more information about duplicate reviewer instances.*	Recruiting

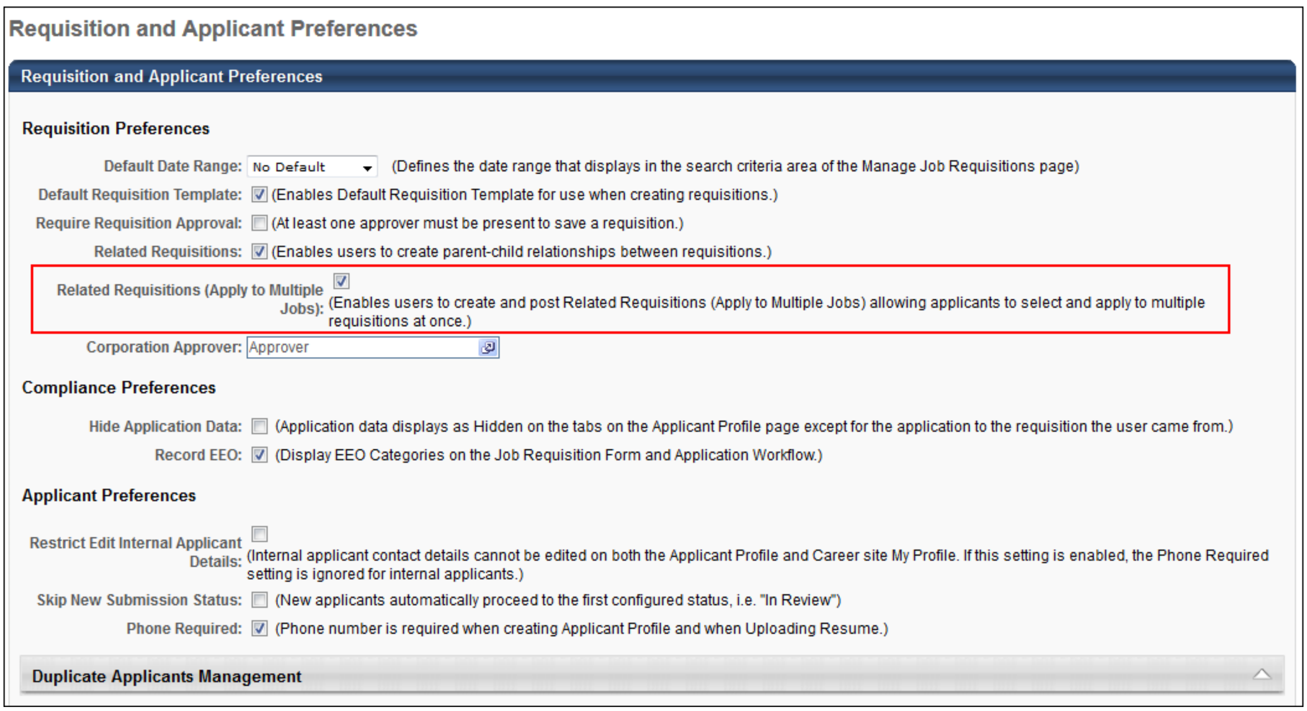
Requisition and Applicant Preferences

With this enhancement, a Related Requisitions (Apply to Multiple Jobs) option is added to the Requisition Preferences section of the Requisition and Applicant Preferences page.

To access Requisition and Applicant Preferences, go to **Admin > Tools > Recruit**. Then, select *Requisition and Applicant Preferences* from the General Recruitment section.

Permissions

Permission Name	Permission Description	Category
Requisition Preferences - Manage	Grants ability to access and manage Requisition Preferences. This permission cannot be constrained.	Recruiting Administration



Related Requisitions (Apply to Multiple Jobs)

The Related Requisitions (Apply to Multiple Jobs) option allows recruiters to create related requisitions and have applicants apply to multiple requisitions within a single applicant experience. This option is unchecked by default. This option is only available to select if the Related Requisitions option is checked.

When this option is checked, recruiters can select the type of related requisition they want to add, either a related requisition or a related requisition to which applicants can apply to multiple jobs within the requisition.

If the option is unchecked after the selection is saved in Requisition and Applicant Preferences, then any related requisitions to which the applicant can apply are preserved. However, the option to **Submit and Add Related** button no longer displays on the External Postings tab when configuring job requisitions.

Parent Requisition - Related Requisition Type Pop-Up

With this enhancement, recruiters can now select the type of related requisition to add when adding related requisitions. The related requisition type is selected from the Related Requisition Type pop-up when clicking the **Submit and Add Related Requisition** button from the External Postings page or when clicking the *Add Related Requisition* link from the top of any page in the requisition once at least one related requisition is submitted.

The Related Requisition Type pop-up allows recruiters to add either a related requisition or a related requisition that allows applicants to apply to multiple locations.

Note: *The pop-up is only available if the* Related Requisitions (Apply to Multiple Jobs) *option is checked by the administrator in Requisition and Applicant Preferences. The pop-up does not display if the parent requisition already has at least one standard related requisition.*

Permissions

Permission Name	Permission Description	Category
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note****: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the* **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*	Recruiting

Related Requisition Type Pop-Up

The Related Requisition Type pop-up allows recruiters to add either a related requisition or a related requisition that allows applicants to apply to multiple locations. Select one of the following options in the pop-up:

- Related Requisition - This option is selected by default. When selected, recruiters can add a standard related requisition. With this related requisition type, applicants can only apply to one requisition at a time. In addition, the requisition template can be modified, which allows for multiple application workflows, depending on the configuration of the selected template.
- Related Requisition (Apply to Multiple Jobs) - This option is unselected by default. When selected, recruiters can add related requisitions that allow applicants to apply at one time to each of the related requisitions associated to the parent requisition. In addition, the job title and requisition template cannot be modified, which means that each related requisition will have the same application workflow as the parent requisition.

Once the selection is made, click **Done**. This closes the pop-up and navigates the recruiter to the General tab of the related requisition.

Parent Requisition - Closed Status

With this enhancement, the **Submit** button and the **Submit and Add Related Requisition** button do not display on the External Postings step for parent requisitions that are in a Closed status. The requisition cannot be submitted again, and related requisitions cannot be added.

Add Related Requisition (Apply to Multiple Jobs)

With this enhancement, recruiters can add a new type of related requisition that allows applicants to apply for multiple requisitions related to the parent during a single application experience. Applicants select the related requisitions to which they would like to apply, and then complete the application process one time for all of the selected jobs. Once completed, the application is tied to all related requisitions to which the applicant applied.

Note: *A Related Requisition (Apply to Multiple Jobs) cannot be added to a parent requisition for which standard related requisitions have already been added.*

Note: *If an approval process has been configured for the parent requisition, then Related Requisition (Apply to Multiple Jobs) cannot be added until the parent requisition is approved.*

Add Requisition

Recruiters can add a Related Requisition (Apply to Multiple Jobs) by doing one of the following:

- Click the **Submit and Add Related Requisition** Button - This option displays on the External Postings tab. This option is available for the parent requisition and on the External Postings tab for related requisitions.
- Click the *Add Related Requisition (Apply to Multiple Jobs)* Link - After at least one Related Requisition (Apply to Multiple Jobs) has been added, this option displays as a link on all pages of the requisition, including the parent requisition. The link is only enabled when at least one Related Requisitions (Apply to Multiple Jobs) has been saved. This option does not display for recruiters who do not have permission to view the parent requisition and for recruiters who do not have permission to manage job requisitions.

Clicking one of the above options opens the Related Requisition Type pop-up. Recruiters select the type of related requisition to add, and then click **Done**. This closes the pop-up and navigates the recruiter to the General tab of the related requisition. All fields of the parent requisition are copied.

If the parent requisition has not yet been submitted, then clicking **Done** submits the parent requisition.

Parent Requisition Fields Copied

When adding a Related Requisition (Apply to Multiple Jobs), all fields of the parent requisition are copied. Recruiters can modify most fields except for the <u>Job Title</u> and <u>Requisition Template</u> fields. The application workflow is inherited from the parent requisition and cannot be changed, since a different requisition template cannot be selected.

Career Sites

In order for related requisitions to be available on the career site for the parent requisition, the related requisitions must be configured to be posted to the same career site as the parent.

Requisition Status

The status for newly submitted Related Requisition (Apply to Multiple Jobs) is automatically defined as Open.

Pending Changes to Parent Requisition

If there are pending changes to the parent requisition, the changes are not saved to the parent when adding a Related Requisition (Apply to Multiple Jobs) by clicking the *Add Related Requisition (Apply to Multiple Jobs)* link.

Submit Requisition

Clicking the **Submit** button submits the Related Requisition (Apply to Multiple Jobs) for posting. The posting dates are dependent upon the dates defined on the Internal Posting and External Posting tabs.

Submit and Add Related Requisition

Clicking the **Submit and Add Related Requisition** button submits the Related Requisition (Apply to Multiple Jobs) for posting and allows the recruiters to add another Related Requisition (Apply to Multiple Jobs). When **Submit and Add Related Requisition** is clicked, the recruiter is directed to the General page of the new requisition.

Note: *The Related Requisition Type pop-up does not display, since standard related requisitions cannot be added to a parent requisition that already has at least one Related Requisition (Apply to Multiple Jobs).*

Save Requisition

Clicking the **Save** button saves the settings on the Related Requisition (Apply to Multiple Jobs) but does not submit the requisition. When **Save** is clicked, the user is directed to the Manage Job Requisitions page.

View Related Requisitions (Apply to Multiple Jobs)

With this enhancement, recruiters can add a new type of related requisition that allows applicants to apply for multiple requisitions related to the parent. These related requisitions can be viewed from the parent requisition or related requisition by clicking the *View Related Requisition (Apply to Multiple Jobs)* link, which displays at the top of all pages of the requisition.

Clicking the *View Related Requisition (Apply to Multiple Jobs)* link opens the Related Requisitions (Apply to Multiple Jobs) pop-up. This pop-up displays the parent requisition and related requisitions. Recruiters can navigate to any of the related requisitions in the pop-up by clicking the name of the requisition.

Manage Job Requisitions

With this enhancement, recruiters can filter the Manage Job Requisitions page by the parent requisition that has at least one Related Requisitions (Apply to Multiple Jobs). A new icon displays to the right of the job title in the Job column to indicate that the parent requisition includes one or more Related Requisitions (Apply to Multiple Jobs). Clicking the icon refreshes the page to display only the parent requisition and any Related Requisitions (Apply to Multiple Jobs).

In order for the icon to display, recruiters must have permission to view the requisition and must be part of the hiring team for the requisition.

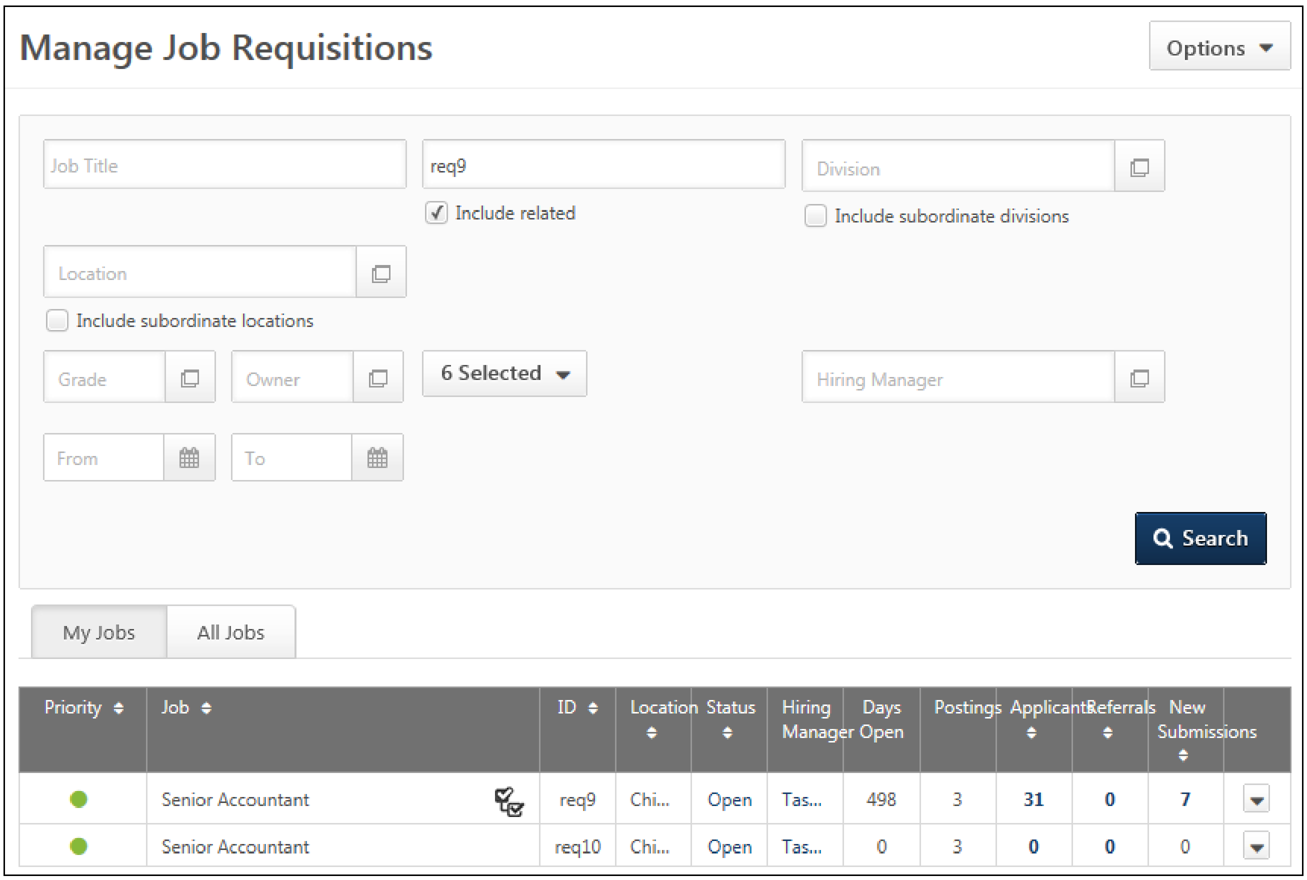
To manage job requisitions, go to **Recruit > Manage Requisition**.

Permissions

Permission Name	Permission Description	Category
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note**: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the* **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*	Recruiting
Requisition: Reviewer	Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained. **Note:** *This is a dynamically assigned permission that is not available in Security Role Administration. Once a requisition is in a Closed or Cancelled status or if the user is removed as a reviewer, the*	Recruiting

permission is revoked for the associated requisition. This permission cannot be manually assigned.

Note: *If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the* **Requisition: Reviewer** *permission is revoked for the associated requisition. However, if the reviewer was also added as a reviewer via the General tab when creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the* **Requisition: Reviewer** *permission. See Applicant Profile Page Overview for more information about duplicate reviewer instances.*



Manage Applicants Page

With this enhancement, the *View All* link is hidden in the SHL Assessment column on the Manage Applicants page for parent requisitions that have at least one Related Requisitions (Apply to Multiple Jobs). The link also does not display for the associated Related Requisitions (Apply to Multiple Jobs).

Note: *The* View All *link opens the group summary report of assessment results for all applicants who have completed the assessment for the requisition.*

New Submissions Page

With this enhancement, the *View All* link is hidden in the SHL Assessment column on the New Submissions page for parent requisitions that have at least one Related Requisitions (Apply to Multiple Jobs). The link also does not display for the associated Related Requisitions (Apply to Multiple Jobs).

Note: *The* View All *link opens the group summary report of assessment results for all applicants who have completed the assessment for the requisition.*

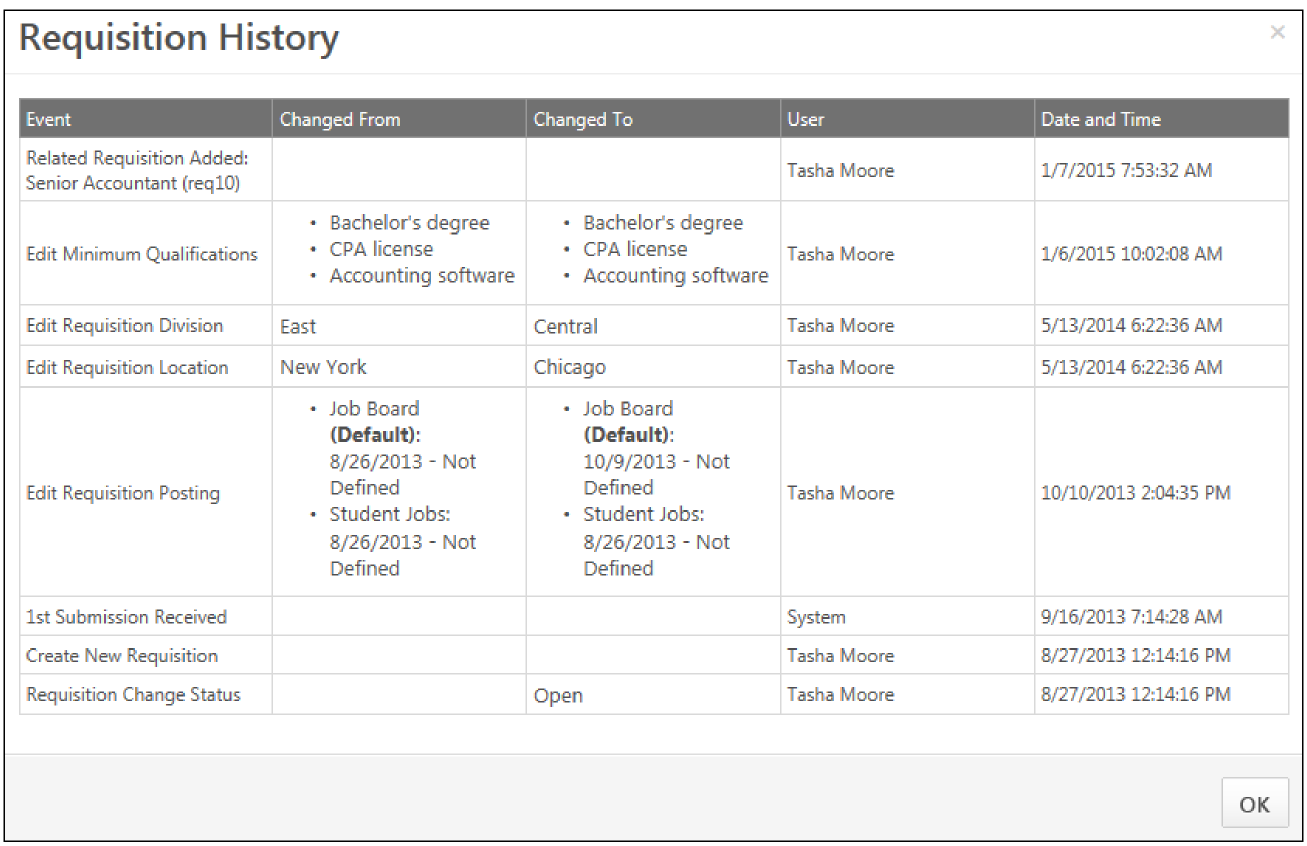
Requisition History

When a Related Requisition (Apply to Multiple Jobs) is saved or submitted for a parent requisition, the event is logged in the Requisition History pop-up. Logging new related requisitions allows recruiters to keep track of changes to the requisition family and view them in the parent's history or the related requisition history.

The following information displays in the requisition history table for the event:

Column Name	Description
Event	Added to Parent Requisition: [Job Title of the related requisition (reqID of the related requisition)]
Changed From	This column is blank.
Changed To	This column is blank.
User	This column displays the name of the user associated with the event.
Date and Time	This column displays the date and time that the event occurred.

Parent Requisition History Pop-Up


Requisition History

Event	Changed From	Changed To	User	Date and Time
Related Requisition Added: Senior Accountant (req10)			Tasha Moore	1/7/2015 7:53:32 AM
Edit Minimum Qualifications	• Bachelor's degree • CPA license • Accounting software	• Bachelor's degree • CPA license • Accounting software	Tasha Moore	1/6/2015 10:02:08 AM
Edit Requisition Division	East	Central	Tasha Moore	5/13/2014 6:22:36 AM
Edit Requisition Location	New York	Chicago	Tasha Moore	5/13/2014 6:22:36 AM
Edit Requisition Posting	• Job Board **(Default)**: 8/26/2013 - Not Defined • Student Jobs: 8/26/2013 - Not Defined	• Job Board **(Default)**: 10/9/2013 - Not Defined • Student Jobs: 8/26/2013 - Not Defined	Tasha Moore	10/10/2013 2:04:35 PM
1st Submission Received			System	9/16/2013 7:14:28 AM
Create New Requisition			Tasha Moore	8/27/2013 12:14:16 PM
Requisition Change Status		Open	Tasha Moore	8/27/2013 12:14:16 PM

OK

Related Requisition History Pop-Up

Requisition History

×

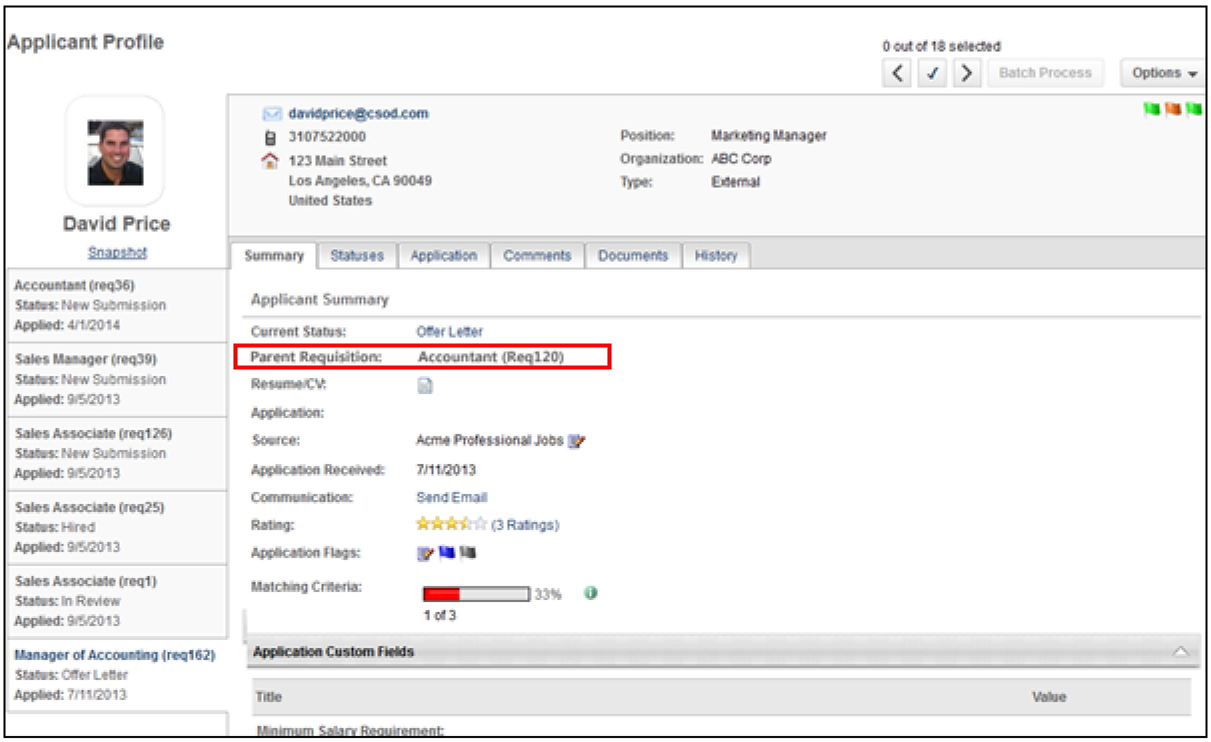
Event	Changed From	Changed To	User	Date and Time
Create New Requisition			Tasha Moore	1/7/2015 7:53:32 AM
Requisition Change Status		Open	Tasha Moore	1/7/2015 7:53:32 AM
Added to Parent Requisition: Senior Accountant (req9)			Tasha Moore	1/7/2015 7:53:32 AM

OK

Applicant Profile - Summary Tab

With this enhancement, a Parent Requisition field is added to the Summary tab. This field displays the name of the parent requisition and the requisition ID for the parent. The field helps recruiters know that the applicant has applied to a Related Requisitions (Apply to Multiple Jobs) that is associated to the parent.

This Parent Requisition field only displays for Related Requisitions (Apply to Multiple Jobs). In addition, the field is only visible for users with permission to access the parent requisition, based on the user's organizational unit or permission to manage job requisitions. The field does not display on the applicant's profile for the parent requisition.



Applicant Profile - Resume/CV Tab

For applicants who have applied to a Related Requisitions (Apply to Multiple Jobs), the Resume/CV tab of the applicant's profile displays the same resume/CV across each of the related requisitions to which the applicant applied. If the applicant applied with a LinkedIn resume, then the same LinkedIn resume displays for each related requisition to which the applicant applied.

Applicant Profile - Application Tab

For applicants who have applied to a Related Requisitions (Apply to Multiple Jobs), the Application tab of the applicant's profile only displays the compliance questions that are associated to the applicable organizational unit configured for the job requisition.

Example:[1]

[1] Compliance questions are configured for Division West and Division East and included in the application workflow. The applicant applies to two jobs on the career site that are associated to a parent requisition. One job is configured for Division West and the other is configured for Division East. The applicant answers all of the compliance questions on the application, which includes all questions from Division West and all questions from Division East. When a recruiter views the Application tab on the Applicant Profile page for the Division West job, the only questions that are visible to the recruiter are the questions that are configured for Division West. The questions for Division East are not visible.

Applicant Profile - Documents Tab

For applicants who have applied to a Related Requisitions (Apply to Multiple Jobs), the Documents tab of the applicant's profile displays the same documents across each of the related requisitions to which the applicant applied.

Application Workflow

With this enhancement, the instructions are modified on the External Applicant and Internal Applicant tabs of the Application Workflow page when configuring Related Requisitions (Apply to Multiple Jobs). Text is added to the end of instructions to indicate that the workflow is shared with the parent requisition and any other Related Requisitions (Apply to Multiple Jobs) that are associated to the parent.

Career Site - Job Search

When searching for jobs on the career site, the parent requisition and Related Requisitions (Apply to Multiple Jobs) are searchable. If the user opens the parent requisition, then the list of related requisitions displays on the parent requisition's Job Details page. If the user opens a related requisition, then the related requisitions and parent requisition are listed on the Job Details page for the related requisition.

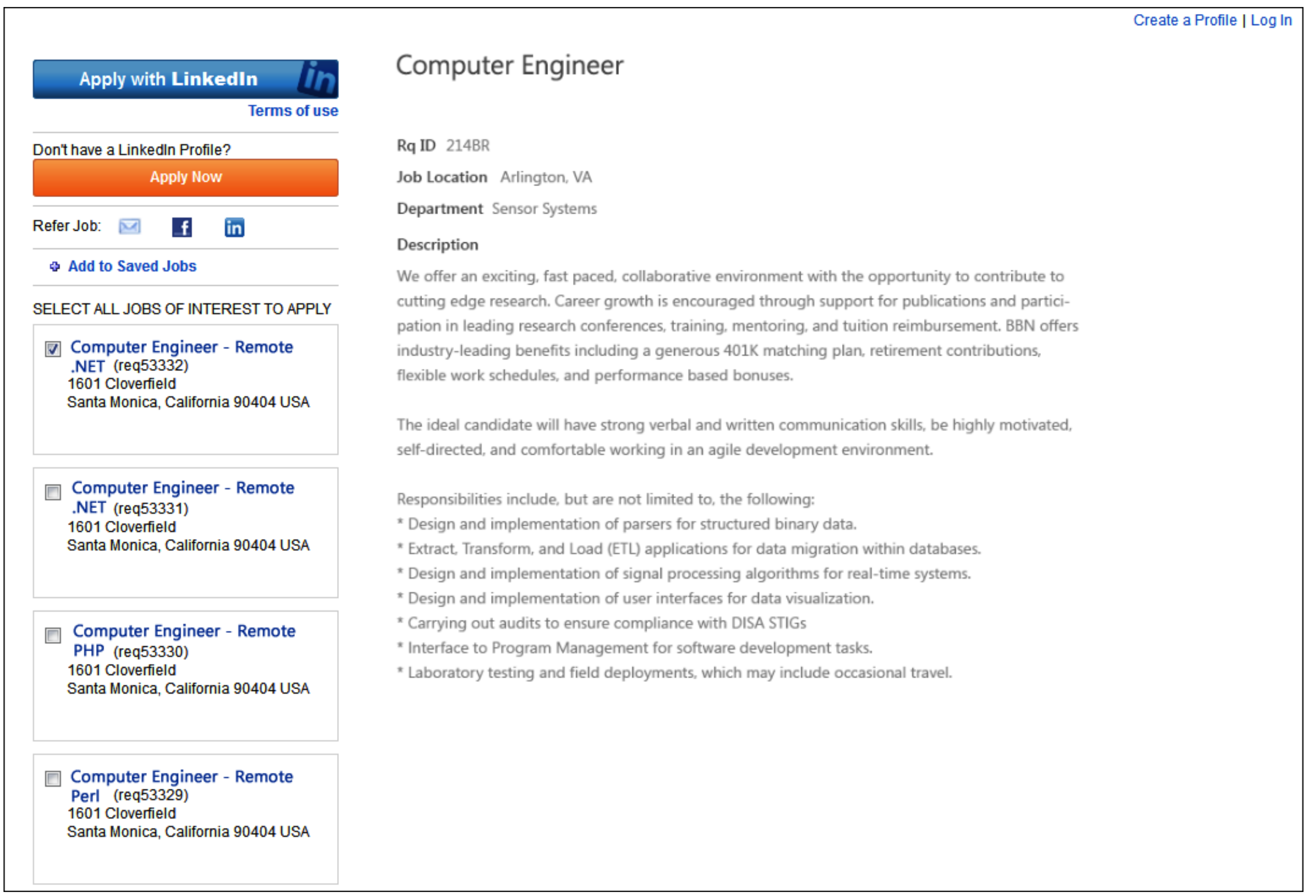
Career Site - Apply to Multiple Jobs

With this enhancement, parent requisitions can be configured to have one or more Related Requisitions (Apply to Multiple Jobs). For this type of requisition, applicants can apply to up to 10 related requisitions at the same time. Applicants can also apply to the parent requisition if configured to allow applicants to apply, but can then only apply to up to nine related requisitions.

To apply to multiple related requisitions, applicants access the Job Details page on the career site for the parent or a related requisition. The related requisitions are listed in the left panel on the Job Details page under the heading "Select All Jobs of Interest to Apply." Clicking the job title opens the Job Details page for the related requisition.

Note: *When viewing the Job Details page for a related requisition, if applicants are allowed to apply to the parent requisition, then the parent always displays first in the list of related requisitions. If applicants are not allowed to apply to the parent, then the parent does not display in the list of related requisitions and the related requisitions display in order of highest to lowest priority.*

Note: *Related requisitions only display if the requisitions are in an Open status and their posting dates have not expired.*



The following information displays for each related requisition:

- Job Title
- Requisition ID
- Street Address
- City/State/Region
- Postal Code
- Country/Country Code

If the applicant has already applied to any of the related requisitions, the status of the application displays for the requisition.

A checkbox also displays for each related requisition. Applicants check the box next to each related requisition to which they would like to apply. **Note:** *When viewing the Job Details page of a related requisition, if the parent requisition is configured not to allow applicants to apply, then the parent requisition does not display in the list of related requisitions.*

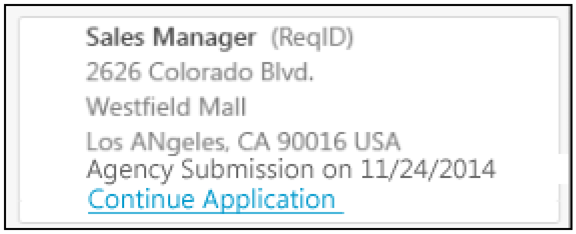
Once the applicant has checked the requisitions to which they would like to apply, the applicant clicks the **Apply Now** button. This opens the application, and allows the applicant to apply to all of the selected jobs by completing a single application. The date on which the applicant applied displays in the related requisitions list on the Job Details page for each related requisition to which the applicant applied.

Re-Applying to Related Requisitions

If the administrator has configured General Preferences so that applicants cannot re-apply to jobs, then once the applicant applies to the selected jobs, the option to re-apply is not available. The date on which the applicant applied to the related requisition displays in the related requisitions list on the Job Details page.

Recruiting Agency Submissions

For applicants submitted by a recruiting agency to apply to a Related Requisitions (Apply to Multiple Jobs), the applicant can only apply to the current requisition. A *Continue Application* link displays in the left panel for the related requisition, allowing the applicant to access and complete the application. The date on which the applicant was submitted by the agency also displays.



Applicants submitted by a recruiting agency can re-apply to the requisition if the administrator has configured General Preferences so that applicants can re-apply to jobs.

Incomplete Application

For applicants applying to a single Related Requisitions (Apply to Multiple Jobs) who have not yet submitted an application that they started, a *Continue Application* link displays in the left panel for the requisition, allowing the applicant to access and complete the application.

Refer Job

When using the refer job options on the Job Details page, the job that is being referred is the current job on the page. The related requisitions are not included in the referral.

Save Job

When using the *Save Job* option on the Job Details page, the job that is saved is the current job on the page. The related requisitions are not also saved.

Career Site - Application

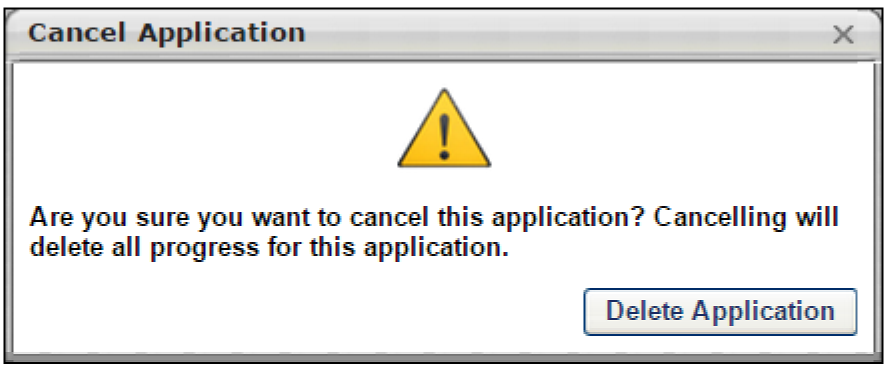
For applicants who are applying to one or more Related Requisitions (Apply to Multiple Jobs), the application workflow is the same for all of the related requisitions. The applicant fills out one application, and the completed application applies to all of the Related Requisitions (Apply to Multiple Jobs) to which the applicant applies in association to the parent.

Save/Return Later Button

The **Save/Return Later** button does not display on the application for applicants who are applying to two or more Related Requisitions (Apply to Multiple Jobs). The button does display for applicants who are only applying to one Related Requisitions (Apply to Multiple Jobs).

Cancel Button

For applicants who are applying to two or more Related Requisitions (Apply to Multiple Jobs), when clicking the **Cancel** button to cancel completing the application, a Cancel Application pop-up displays. The pop-up indicates that canceling the application deletes all progress for the application. The application is cancelled for all of the related requisitions to which the applicant selected to apply.



Leaving the Application

For applicants who are applying to two or more Related Requisitions (Apply to Multiple Jobs), the application progress is not saved if the applicant leaves the application without submitting it. A warning message appears on the page, indicating that the application will not be saved unless it is submitted.

Career Site - My Profile Page

For applicants who are only applying to one Related Requisitions (Apply to Multiple Jobs) associated to the parent requisition and have started but not yet submitted the application, the incomplete application can be accessed from the Application section on their My Profile page on the career site.

The following information displays for the application in the Application section:

- Position Title - This column displays the job title displays as a link. Clicking the link opens the Job Details page. The page displays the details for the current job, as well as lists any other Related Requisitions (Apply to Multiple Jobs) associated to the parent.
- Application Status - This column displays the application progress.
- Last Modified - This column displays the most recent date on which the application was modified.
- Review Status - This column displays the step the applicant is in based on the applicant status workflow. If the requisition is moved into a Closed status before the applicant completes the application, then Closed displays in the Options column.
- Options - This column displays a **Continue Application** button. Clicking the button opens the application for the applicant to complete.
- Withdraw/Delete - The applicant can delete their application prior to completing it, and they can withdraw the application after submitting it.

For applicants who are applying to two or more Related Requisitions (Apply to Multiple Jobs), the application does not appear on the My Profile page until the application is submitted.

Succession

Display Inactive Successors

Display Inactive Successors in Succession Plans

Prior to this enhancement, it was not possible to display inactive successors in a Succession Management Planning (SMP) task. Inactive users were automatically removed from the task.

With this enhancement, administrators can configure SMP tasks to display inactive successors. When inactive successors are displayed in a succession task, they are clearly identified as inactive.

- Inactive successor cards appear gray and "Inactive User" is displayed on the successor card in red text.
- Inactive successors are displayed after all active successors for each incumbent.

Considerations

- When inactive successors are displayed in a succession task, the succession planner can remove the inactive successors, but the inactive successor's succession custom field values cannot be changed.
- Inactive successors remain in the succession task unless they are removed.
- Inactive users who are purged or deleted from the system do not appear in succession tasks.

Use Cases

An organization conducts their succession planning over a nine month period. With succession tasks open for nine months, there are occasions when a successor becomes inactive in the system. These changes can be disruptive for a succession plan. To provide greater visibility into inactive successors in the planning process, the organization configures their succession tasks to include inactive successors. Inactive successors appear gray, clearly identifying them as inactive. The succession planner has the option to keep the inactive successor or to remove them from the succession plan.

Implementation

Upon release, this functionality is automatically available in Stage and Live portals to all organizations using the Succession module.

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
SMP Task Administration	Grants access to create Succession Management Plan (SMP) tasks for assessing talent incumbents and	Talent/Succession - Administration

	successors, and manage activity within those tasks. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	

SMP Task - Create/Edit/Copy - General

When creating, editing, or copying a manager, assessor, or job pool Succession Management Planning (SMP) task, a new option is now available on the General step that allows administrators to include inactive successors within the succession task.

To create a SMP task, go to **Admin > Tools > Succession Management > Tasks**. Then, click the *Add SMP Task* link.

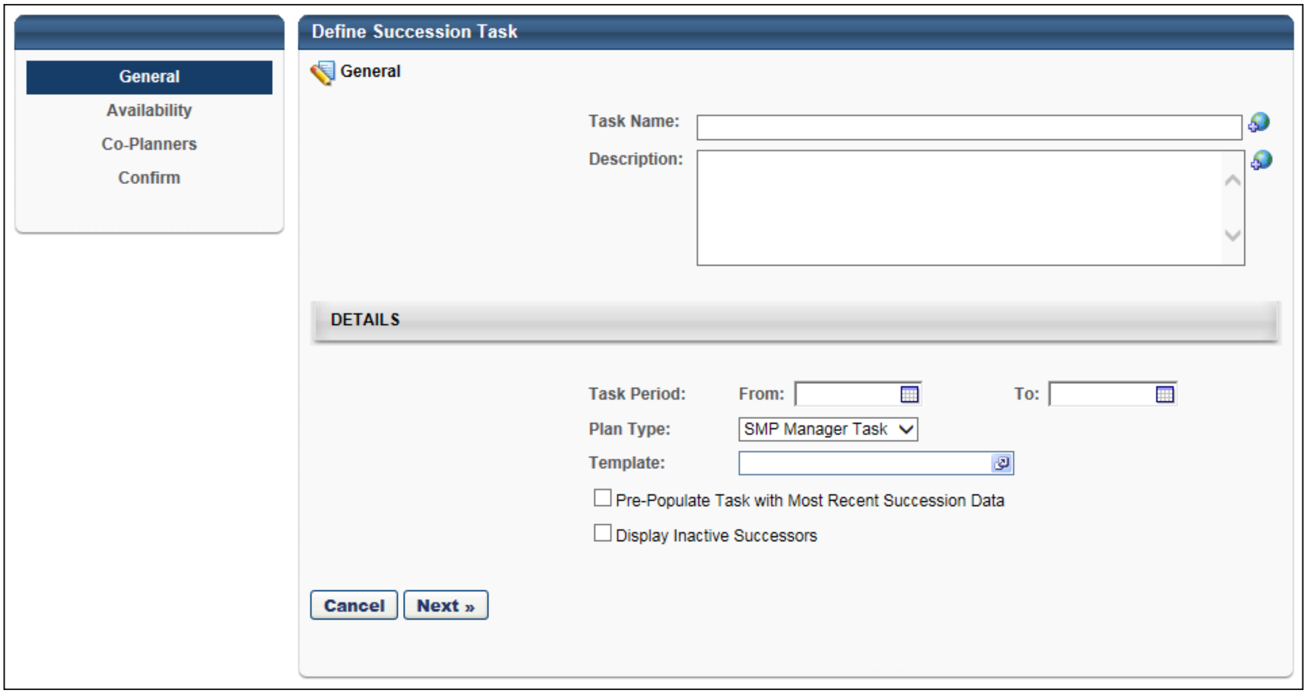
Permissions

Permission Name	Permission Description	Category
SMP Task Administration	Grants access to create Succession Management Plan (SMP) tasks for assessing talent incumbents and successors, and manage activity within those tasks. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Talent/Succession - Administration

Display Inactive Successors - When this option is selected, users who have been identified as successors for another user but have been made inactive within the system will still appear in the succession task. This option is unselected by default.

- Inactive successor cards appear gray and "Inactive User" is displayed on the successor card in red text.
- Inactive successors are displayed after all active successors for each incumbent.
- Inactive successors can be removed within the succession task, but the inactive successor's succession custom field values cannot be changed.
- Inactive successors do not count towards the minimum and maximum number of successors within the Succession Chart step.
- Inactive successors may appear on the Succession Chart step, Add Successors page, and Position Details page.

When editing a task, this option cannot be modified if the task is in In Progress, Complete, or Expired status.


General
Availability
Co-Planners
Confirm
Define Succession Task
General
Task Name:
Description:
DETAILS
Task Period:
From:
To:
Plan Type:
SMP Manager Task
Template:
Pre-Populate Task with Most Recent Succession Data
Display Inactive Successors
Cancel
Next »

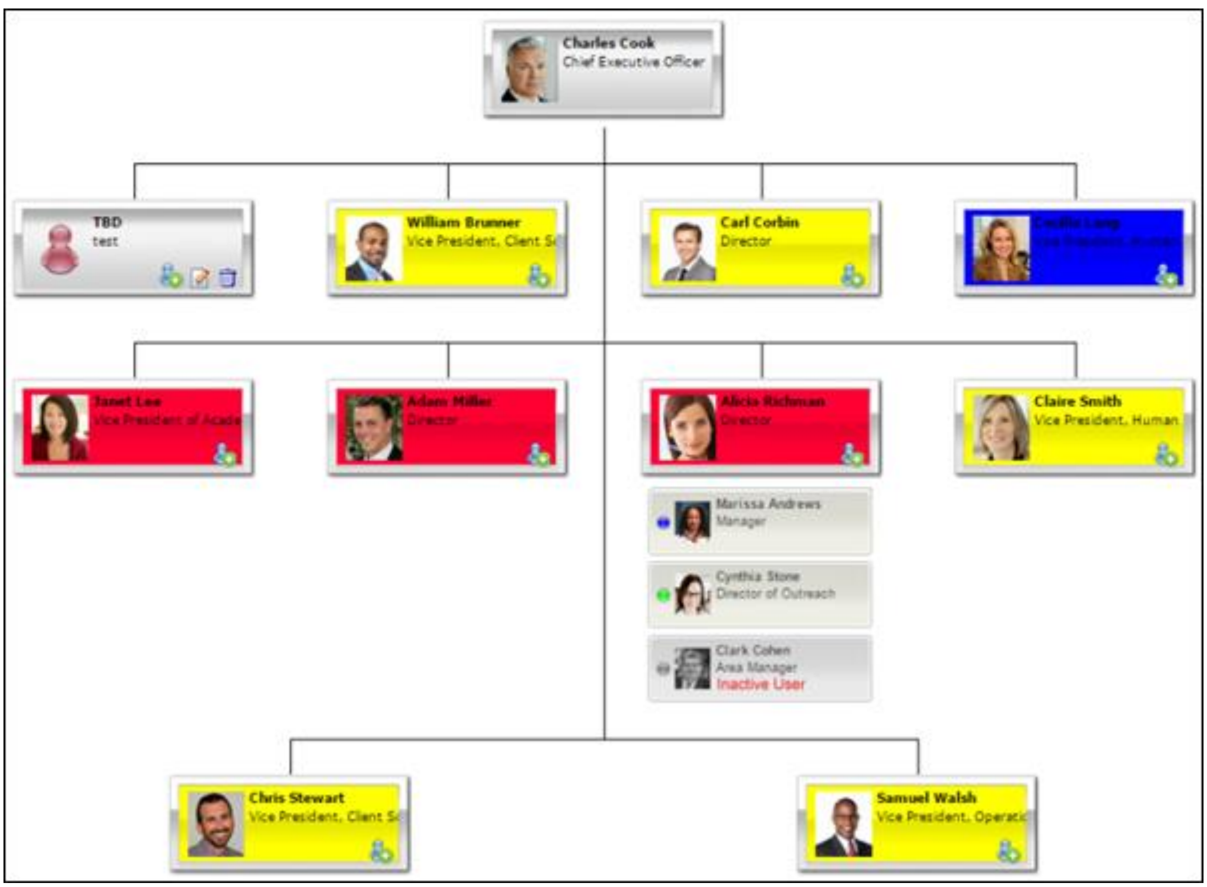
SMP Task - Display Inactive Users

When completing a Succession Management Planning (SMP) task, inactive successors may be displayed on the following pages:

- Manager/Assessor/Job Pool Task
    - Succession Chart step
    - Add Successors page
- Job Pool Task
    - Position Details page

When inactive successors are displayed, the following is true:

- Inactive successor cards appear gray and "Inactive User" is displayed on the successor card in red text.
- Inactive successors are displayed after all active successors for each incumbent.
- Inactive successors can be removed within the succession task, but the inactive successor's succession custom field values cannot be changed.
- Inactive successors do not count towards the minimum and maximum number of successors within the Succession Chart step.

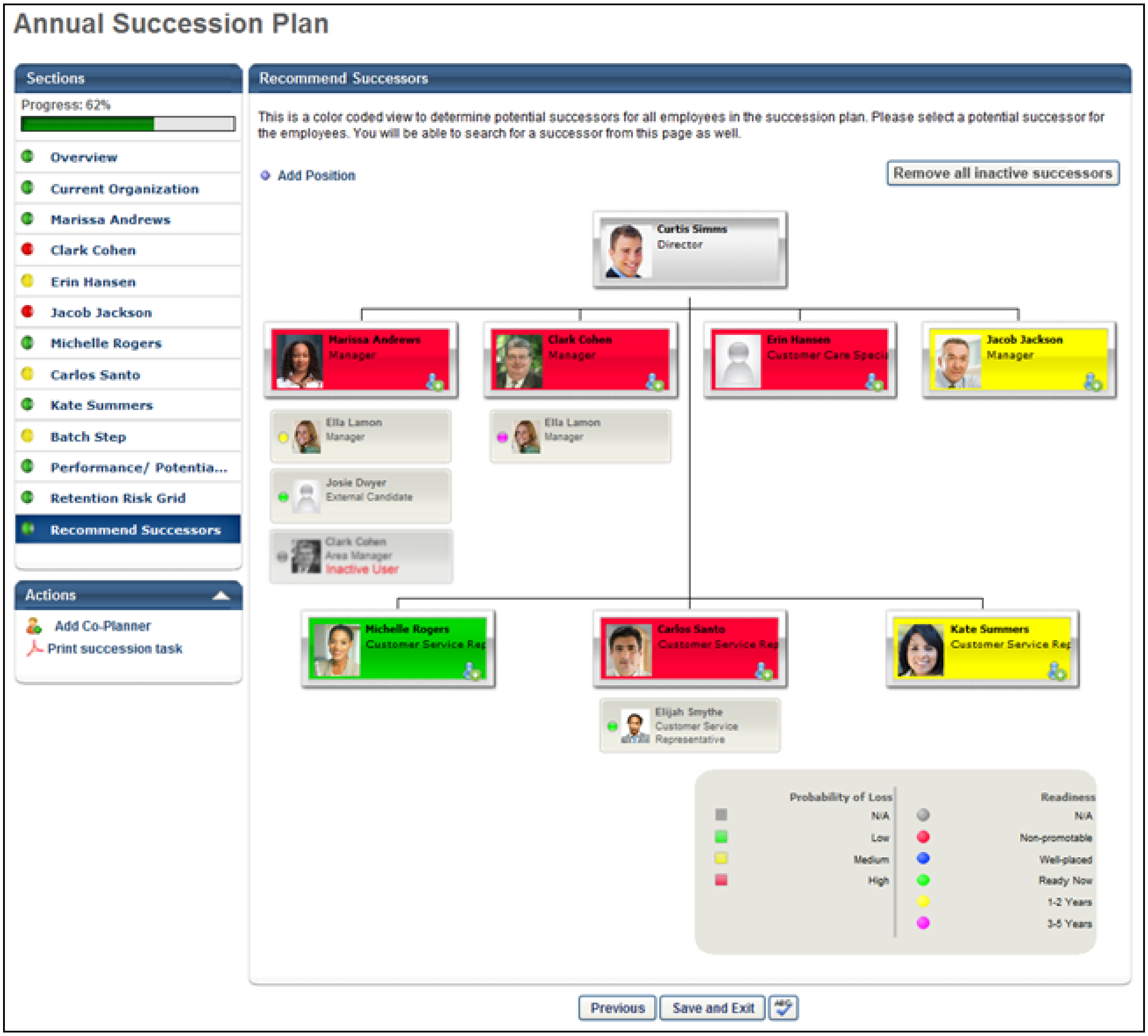


SMP Task - Remove all Inactive Successors

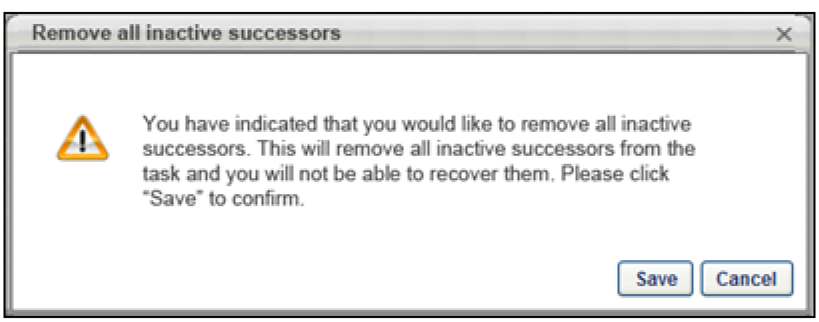
When completing a Succession Management Planning (SMP) task, inactive successors may be displayed on the following pages:

- Manager/Assessor/Job Pool Task
    - Succession Chart step
    - Add Successors page
- Job Pool Task
    - Position Details page

When inactive successors are displayed in the SMP task, a **Remove all inactive successors** button is available. This button enables succession planners to permanently remove all successors from the task who have been made inactive within the system. This button is only available when there is at least one inactive successor in the task.



When a succession planner clicks the **Remove all inactive successors** button, a confirmation pop-up appears. Click **Save** to remove all inactive successors from the entire SMP task. Or, click **Cancel** to close the pop-up without removing inactive successors.



Pre-populate Succession Task

Pre-populate Succession Task with Most Recent Data

With this enhancement, administrators can configure Succession Management Planning (SMP) tasks to be pre-populated with the most recent succession data, including succession custom field values, ratings, and successors. This enables succession planners to leverage existing succession data more easily.

The following data sets cannot be pre-populated into new tasks:

- Career Preference comments
- Placeholder positions (and successors)
- Competency ratings from non-SMP Competency Assessments

Use Cases

An organization conducts their succession planning annually, and the succession planning process includes a combination of manager, assessor, and job pool task types. The organization views the succession planning process as an ongoing process. To best serve this methodology, the organization wants their annual succession plans to be pre-populated with the most recent succession data. When configuring their succession tasks, the administrator elects to pre-populate the task with the most recent succession custom field values, successors, comments, and competency ratings. This enables succession planners to take a more editorial approach, only changing information that is out of date or inaccurate.

Considerations

- Data from an assessor task that hides results from managers is not pre-populated in a manager task.
- Even though a succession task may be pre-populated with the most recent succession data, the succession task remains in Not Started status until it is launched. When the task is launched, the task status changes from Not Started to In Progress.
- When there is no data with which to pre-populate a field in a succession task, the field is not pre-populated.
- When a succession task is completed with empty fields such as rating or comment fields, the empty fields are stored. When pre-populating a task with the most recent succession data, the previously stored blank fields are pre-populated.

Implementation

Upon release, this functionality is automatically available in Stage and Live portals to all organizations using the Succession module.

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
SMP Task Administration	Grants access to create Succession Management Plan (SMP) tasks for assessing talent incumbents and successors, and manage activity within those tasks. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Talent/Succession - Administration

SMP Task - Create/Edit/Copy - General

When creating, editing, or copying a manager, assessor, or job pool Succession Management Planning (SMP) task, a new option is now available on the General step that allows administrators to pre-populate the task with the most recent succession data.

To create a SMP task, go to **Admin > Tools > Succession Management > Tasks**. Then, click the *Add SMP Task* link.

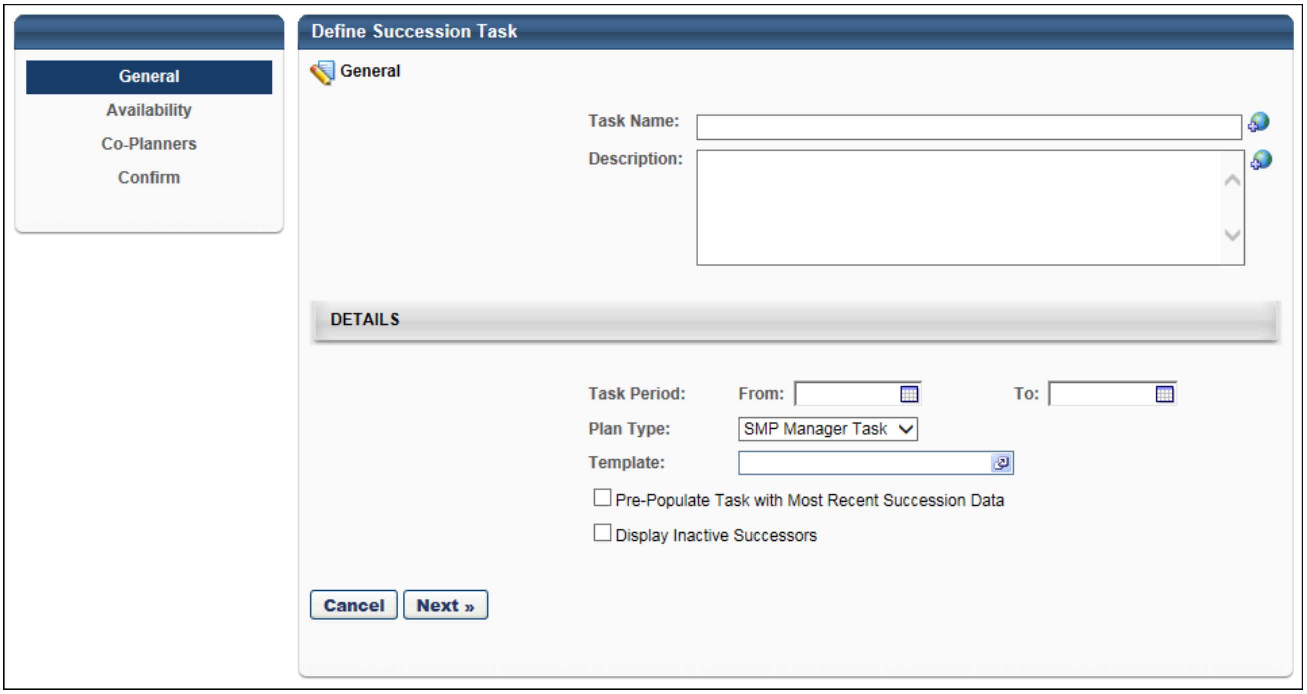
Permissions

Permission Name	Permission Description	Category
SMP Task Administration	Grants access to create Succession Management Plan (SMP) tasks for assessing talent incumbents and successors, and manage activity within those tasks. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Talent/Succession - Administration

Pre-Populate Task with Most Recent Succession Data - When this option is selected, the task will automatically be populated with the most recent succession data for users. This option is unselected by default. The following fields will be pre-populated:

- Succession Custom Fields - Succession custom field values attributed to a position, incumbent user, or successor will be pre-populated in the task.
- Successors - Successors who are attributed to a position or incumbent user will be pre-populated in the task. If the task is configured to include inactive successors, the task will be pre-populated with inactive and active successors.
- Comments - Any comment text attributed to an incumbent user from the most recent task will be pre-populated in the task.
- Competency and Competency Item Ratings - Any competency ratings or competency item ratings attributed to a user from the most recent SMP task will be pre-populated in the task. Only ratings from SMP tasks are pre-populated.
- **Note:** *Development actions are not pre-populated.*

When editing a task, this option cannot be modified if the task is in In Progress, Complete, or Expired status.


Define Succession Task
General
Availability
Co-Planners
Confirm
General
Task Name:
Description:
DETAILS
Task Period:
From:
To:
Plan Type:
SMP Manager Task
Template:
Pre-Populate Task with Most Recent Succession Data
Display Inactive Successors
Cancel
Next »

SMP Task - Profile Step

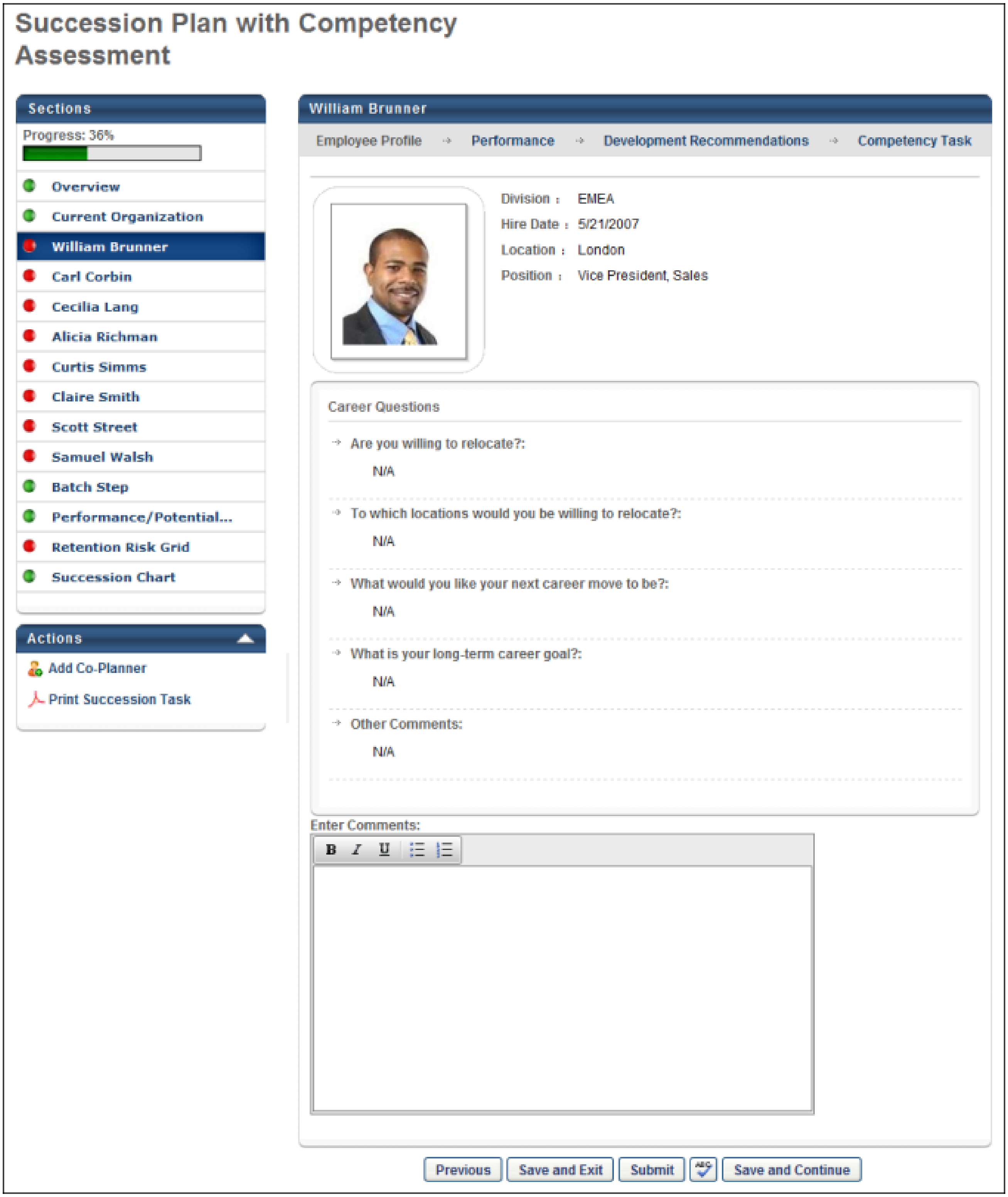
The Profile step may be added to a manager or assessor task.

With this enhancement, if the Succession Management Planning (SMP) task is configured to pre-populate the most recent succession data, then the following data elements are automatically populated with the most recent data:

- Comments - Comments from the most recent task are automatically populated when the step is opened. The succession planner can edit and update the comments as needed. If no comments were added in the Comments field from the most recent task, then no comments are pre-populated.

Use Case - Comments

1. In the annual SMP task in 2012, Kate's manager entered "This is great" in the Comments field.
2. In the annual SMP task in 2013, the Comments field is automatically populated with "This is great." Kate's manager deletes the comments and saves the task.
3. In the annual SMP task in 2014, the Comments field is automatically populated with no text because the previous value for the field is empty.


Succession Plan with Competency Assessment
Sections
Progress: 36%
Overview
Current Organization
William Brunner
Carl Corbin
Cecilia Lang
Alicia Richman
Curtis Simms
Claire Smith
Scott Street
Samuel Walsh
Batch Step
Performance/Potential...
Retention Risk Grid
Succession Chart
Actions
Add Co-Planner
Print Succession Task
William Brunner
Employee Profile
Performance
Development Recommendations
Competency Task
Division : EMEA
Hire Date : 5/21/2007
Location : London
Position : Vice President, Sales
Career Questions
Are you willing to relocate?:
N/A
To which locations would you be willing to relocate?:
N/A
What would you like your next career move to be?:
N/A
What is your long-term career goal?:
N/A
Other Comments:
N/A
Enter Comments:
Previous
Save and Exit
Submit
Save and Continue

SMP Task - Profile Sub-step

The Profile sub-step may be added to a manager or assessor task.

With this enhancement, if the Succession Management Planning (SMP) task is configured to pre-populate the most recent succession data, then the following data elements are automatically populated with the most recent data:

- Succession Custom Fields - The user's most recent succession custom field values are automatically populated when the step is opened. The most recent ratings can either be from Universal Profile or from a SMP task. The succession planner can update the field values as needed.
- Comments - Comments from the most recent task are automatically populated when the step is opened. The succession planner can edit and update the comments as needed. If no comments were added in the Comments field from the most recent task, then no comments are pre-populated.

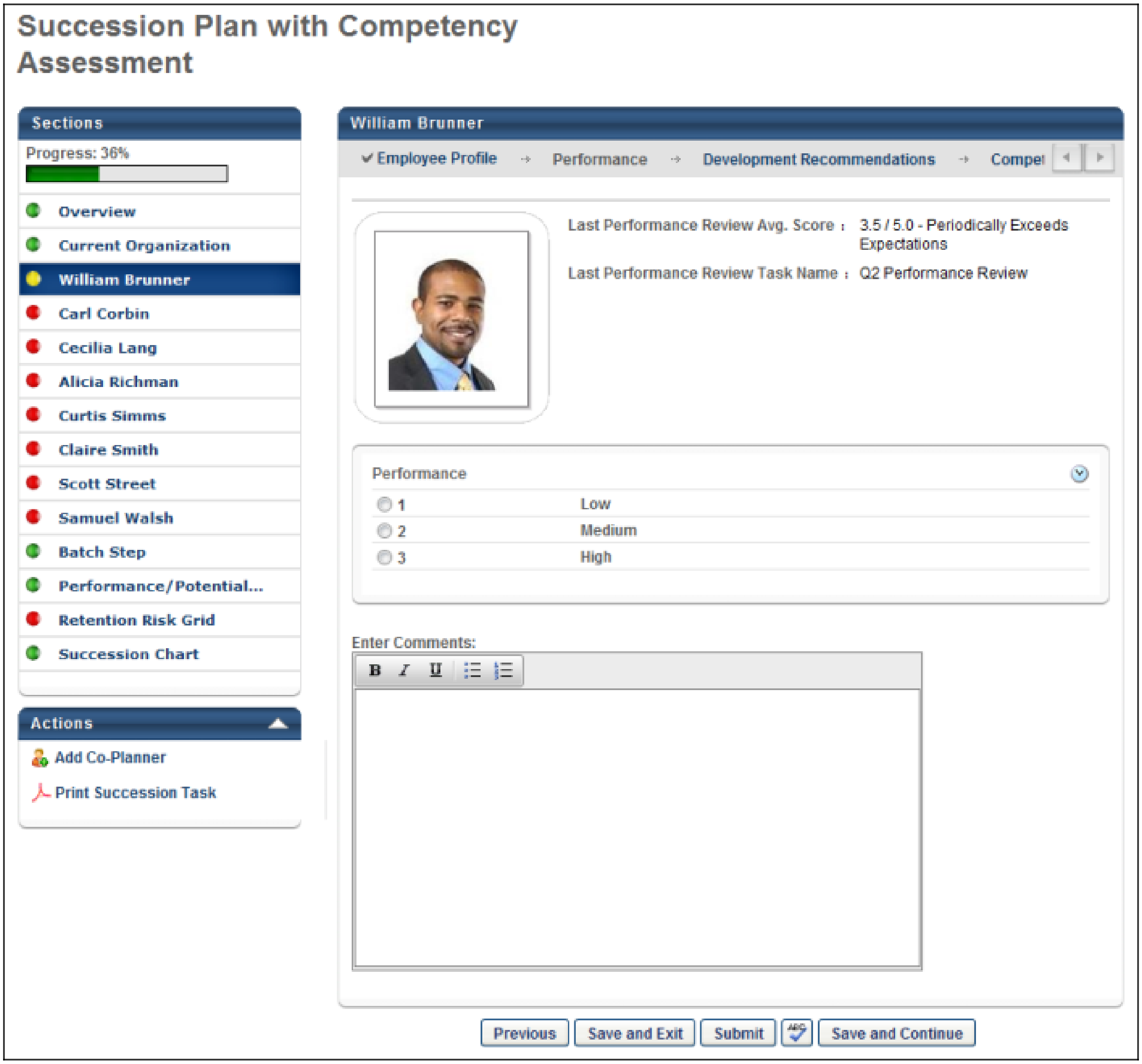
In Metric sub-steps, succession planners may have the option to view historical SMP data by clicking the History icon. If the succession planner chooses to view historical SMP data, the pre-populated data is overwritten and cannot be retrieved.

In Resume sub-steps, only the most recent comments that apply to the corresponding user and resume section are displayed.

In Competency Assessment sub-steps, the most recent competency ratings from SMP tasks are pre-populated. Competency ratings from any other source (e.g., observation checklist, competency task) are not pre-populated.

Use Case - Comments

1. In the annual SMP task in 2012, Kate's manager entered "This is great" in the Comments field.
2. In the annual SMP task in 2013, the Comments field is automatically populated with "This is great." Kate's manager deletes the comments and saves the task.
3. In the annual SMP task in 2014, the Comments field is automatically populated with no text because the previous value for the field is empty.


Succession Plan with Competency Assessment
Sections
Progress: 36%
Overview
Current Organization
William Brunner
Carl Corbin
Cecilia Lang
Alicia Richman
Curtis Simms
Claire Smith
Scott Street
Samuel Walsh
Batch Step
Performance/Potential...
Retention Risk Grid
Succession Chart
Actions
Add Co-Planner
Print Succession Task
William Brunner
Employee Profile
Performance
Development Recommendations
Compet
Last Performance Review Avg. Score : 3.5 / 5.0 - Periodically Exceeds Expectations
Last Performance Review Task Name : Q2 Performance Review
Performance
1 Low
2 Medium
3 High
Enter Comments:
Previous
Save and Exit
Submit
Save and Continue

SMP Task - Profile - Development Sub-step

There are no changes to the Profile - Development sub-step. Previous task data is not pre-populated.

SMP Task - Batch Step

The Batch step may be added to a manager or assessor task.

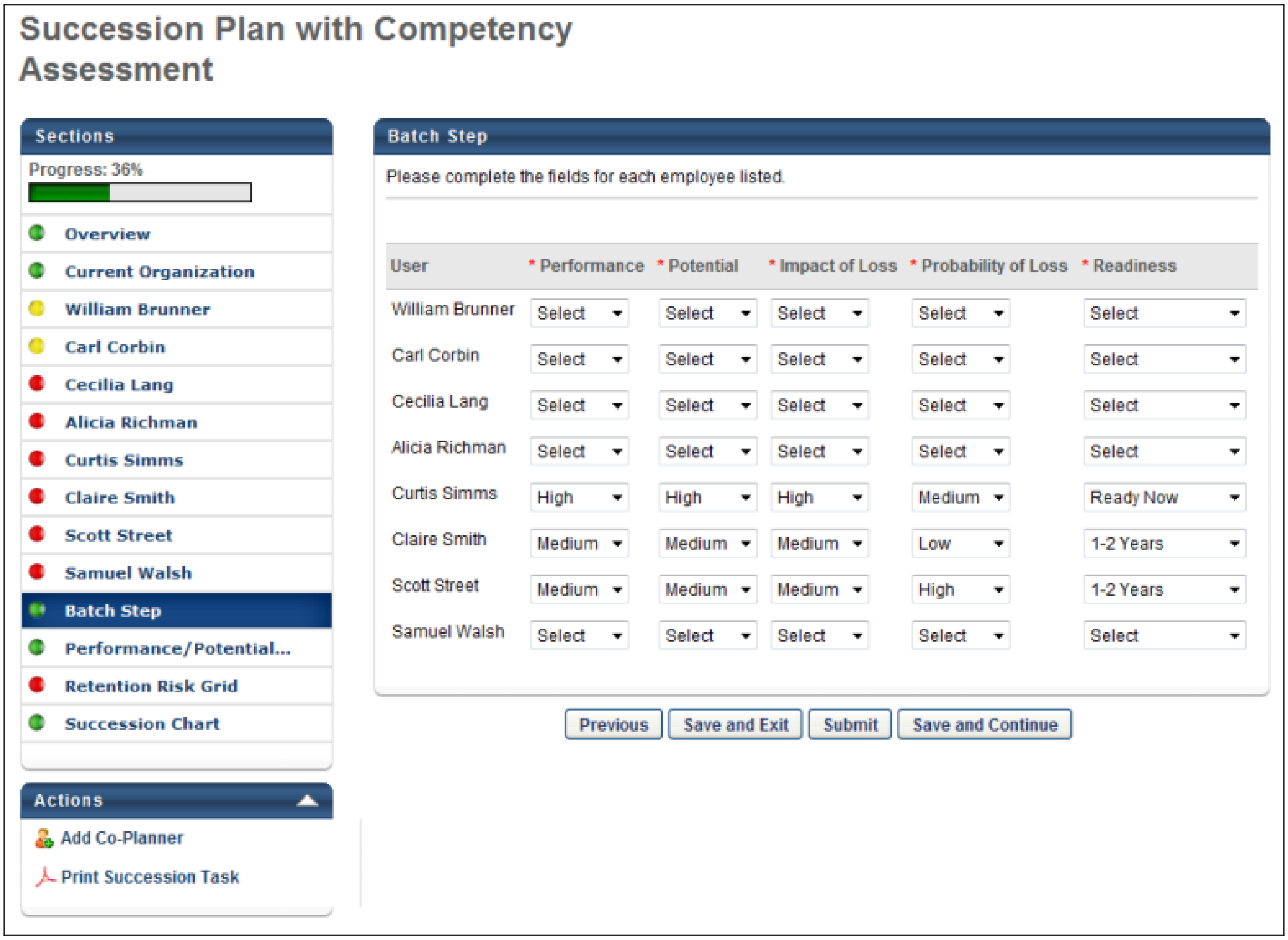
With this enhancement, if the Succession Management Planning (SMP) task is configured to pre-populate the most recent succession data, then the following data elements are automatically populated with the most recent data:

- Ratings - The most recent succession ratings for each user are automatically populated when the step is opened. The most recent ratings can either be from Universal Profile or from a SMP task. The succession planner can update the field values as needed.

Use Case - Ratings

1. On January 1, 2013, Will receives the following ratings in a manager SMP task:
    - Performance: Medium
    - Potential: Medium
    - Impact of Loss: Medium
    - Probability of Loss: Medium
    - Readiness: 1-2 years
2. On February 1, 2013, Will is added to a job pool task by another reviewer. The reviewer sees the following pre-populated information:
    - Performance: Medium
    - Potential: Medium
    - SMP Metric: (Blank)
    - Impact of Loss: Medium
    - Probability of Loss: Medium
    - Readiness: 1-2 years
3. The reviewer updates the following values for Will:
    - SMP Metric: High
    - Probability of Loss: (Blank)
4. On June 1, 2013, Will's manager opens the Helicopter View page for Will and sees the following ratings:
    - Performance: Medium
    - Potential: Medium
    - SMP Metric: High
    - Impact of Loss: Medium
    - Probability of Loss: (Blank)

- Readiness: 1-2 years

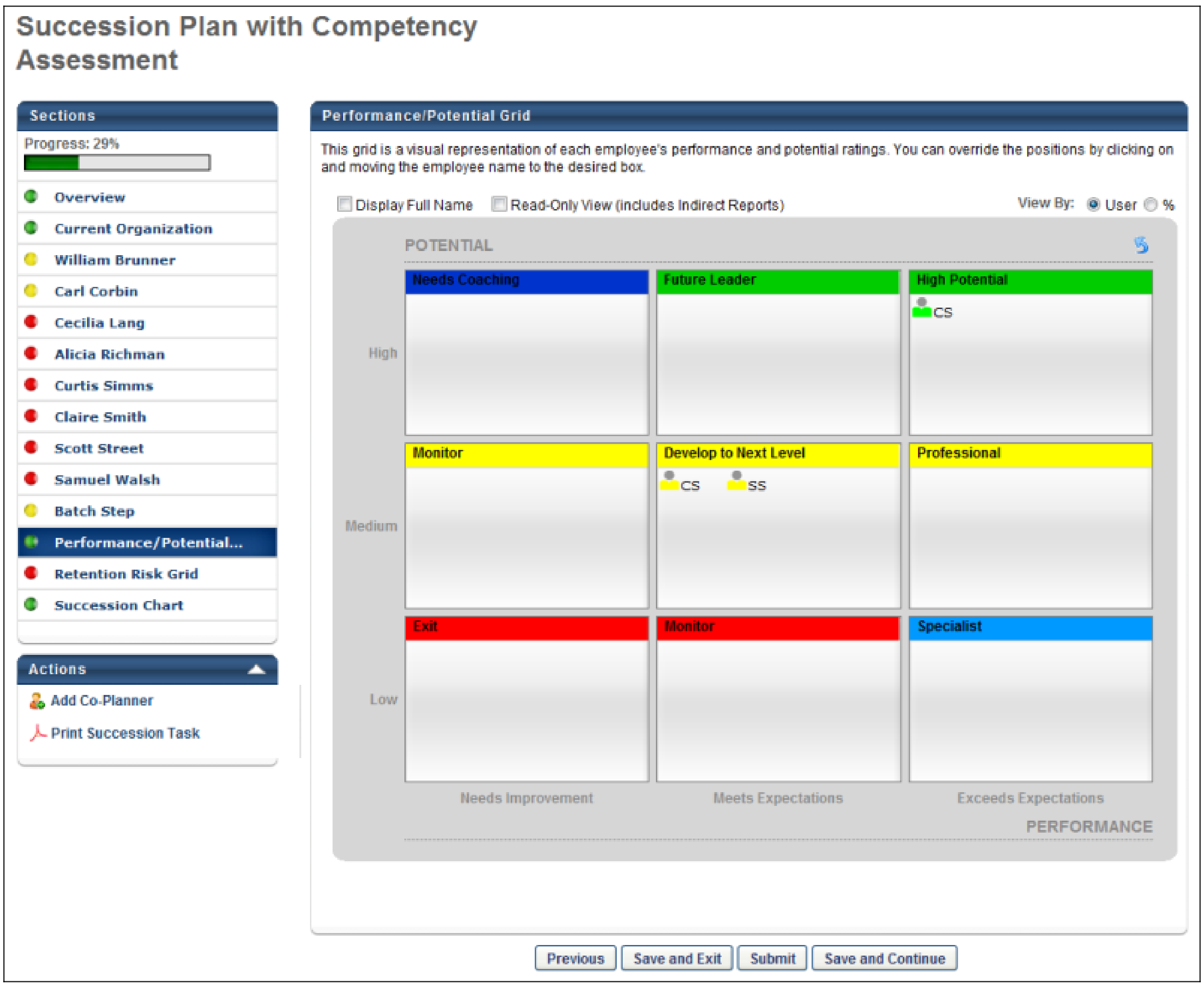


SMP Task - Metric Grid Step

The Batch step may be added to a manager or assessor task.

With this enhancement, if the Succession Management Planning (SMP) task is configured to pre-populate the most recent succession data, then the following data elements are automatically populated with the most recent data:

- Grid Placements - The most recent metric grid placements for each user are automatically populated when the step is opened. The most recent placements can either be from Helicopter View or from a SMP task. The succession planner can update the grid placements as needed.



SMP Task - Survey Step

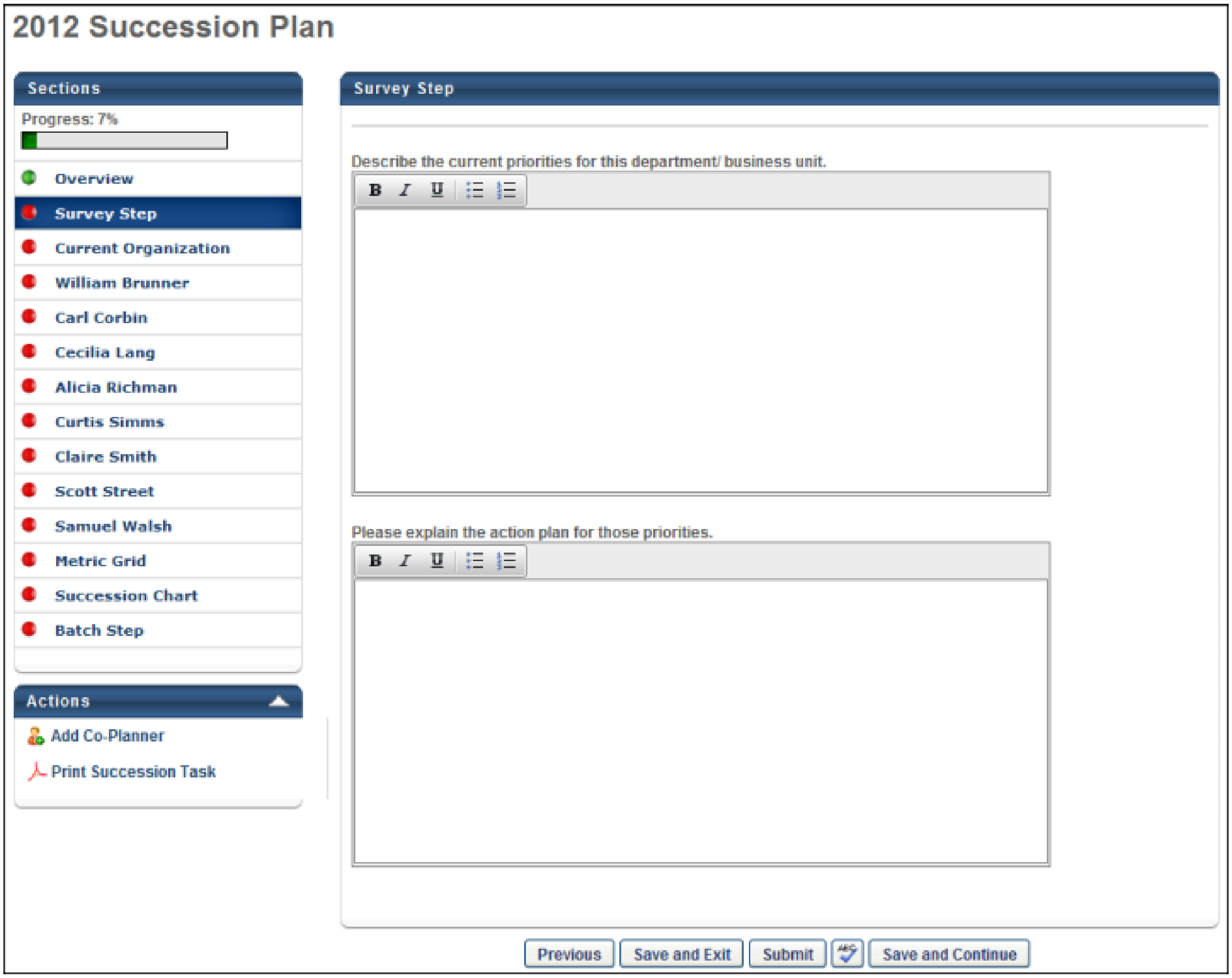
The Profile step may be added to a manager, assessor, or job pool task.

With this enhancement, if the Succession Management Planning (SMP) task is configured to pre-populate the most recent succession data, then the following data elements are automatically populated with the most recent data:

- Responses - Responses from the most recent task are automatically populated when the step is opened. The succession planner can edit and update the responses as needed. If no responses were added in the most recent task, then no responses are pre-populated.

Use Case - Responses

1. In the annual SMP task in 2012, Kate's manager entered "This is great" in the response field.
2. In the annual SMP task in 2013, the response field is automatically populated with "This is great." Kate's manager deletes the response and saves the task.
3. In the annual SMP task in 2014, the response field is automatically populated with no text because the previous value for the field is empty.


2012 Succession Plan
Sections
Progress: 7%
Overview
Survey Step
Current Organization
William Brunner
Carl Corbin
Cecilia Lang
Alicia Richman
Curtis Simms
Claire Smith
Scott Street
Samuel Walsh
Metric Grid
Succession Chart
Batch Step
Actions
Add Co-Planner
Print Succession Task
Survey Step
Describe the current priorities for this department/ business unit.
Please explain the action plan for those priorities.
Previous
Save and Exit
Submit
Save and Continue

SMP Task - Succession Chart Step (Manager or Assessor Task)

The Succession Chart step may be added to a manager or assessor task.

With this enhancement, if the Succession Management Planning (SMP) task is configured to pre-populate the most recent succession data, then the following data elements are automatically populated with the most recent data:

- Successors - Any successors who are specific to the user (i.e., successors who are not position-based) are automatically populated when the step is opened. The successors can either be from Universal Profile or from a SMP task. All existing internal, external, and unknown successors are pre-populated. The successor's most recent SMP metrics, Opportunity for Development, and Recommended Mentor information is also pre-populated. If the incumbent has more successors than the task allows, then only the most recently added successors are populated. The succession planner can update the successors as needed.

It is important to note that when a successor is identified for a specific incumbent, the successor's Readiness rating is specific to the incumbent, not the successor's individual SMP metric rating. A user can be named as a successor for multiple incumbents in the same position at the same time and have a different Readiness rating for each incumbent. If a successor's Readiness is modified via an incumbent's Universal Profile, this updates the user's Readiness with regards to being a successor for the specific incumbent.


Succession Plan with Competency Assessment
Sections
Progress: 36%
Overview
Current Organization
William Brunner
Carl Corbin
Cecilia Lang
Alicia Richman
Curtis Simms
Claire Smith
Scott Street
Samuel Walsh
Batch Step
Performance/Potential...
Retention Risk Grid
Succession Chart
Actions
Add Co-Planner
Print Succession Task
Succession Chart
This is a chart to determine potential successors for all employees in the succession plan. Please select a potential successor for the employees.
Add Position
Charles Cook
Chief Executive Offic
William Brunner
Vice President, Sales
Carl Corbin
Director
Cecilia Lang
Vice President, Hum
Alicia Richman
Director
Curtis Simms
Vice President, Oper
Claire Smith
Vice President, Hum
Scott Street
Vice President, Sale
Samuel Walsh
Vice President, Oper
Marissa Andrews
Marketing Manager
Probability of Loss
N/A
Low
Medium
High
Readiness
N/A
Non-promotable
Well-placed
Ready Now
1-2 Years
3-5 Years
Previous
Save and Exit
Submit

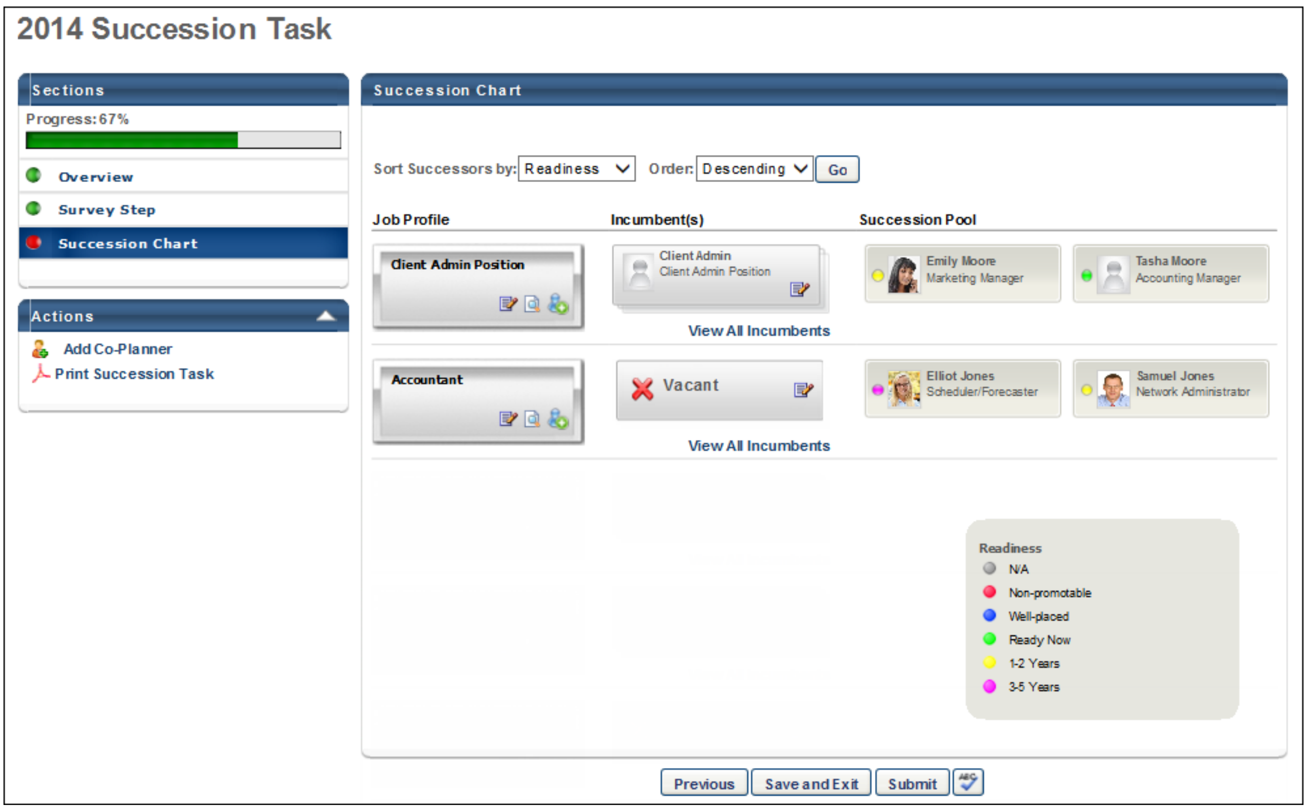
SMP Task - Succession Chart Step (Job Pool Task)

The Succession Chart step may be added to a job pool task.

With this enhancement, if the Succession Management Planning (SMP) task is configured to pre-populate the most recent succession data, then the following data elements are automatically populated with the most recent data:

- Successors - Any successors who are specific to the position (i.e., successors who are not incumbent-based) are automatically populated when the step is opened. The successors can either be from Universal Profile or from a SMP task. All existing internal, external, and unknown successors are pre-populated. The successor's most recent SMP metrics, Opportunity for Development, and Recommended Mentor information is also pre-populated. If the position has more successors than the task allows, then only the most recently added successors are populated. The succession planner can update the successors as needed.

It is important to note that when a successor is identified for a specific position, the successor's Readiness rating is specific to the position, not the successor's individual SMP metric rating.



Universal Profile - Snapshot - Succession

With this enhancement, the potential successors and potential successor ratings that are displayed in the Succession page of Universal Profile - Snapshot are automatically updated with the results of each Succession Management Planning (SMP) task. For example, if a potential successor is removed from an incumbent during a SMP task, then the potential successor is also removed from the incumbent's Snapshot - Succession page.

Use Case - Potential Successors

1. An organization allows managers to plan successors for individuals via SMP tasks and Universal Profile.
2. During the 2012 Succession Planning Task, John's manager selects User X as a successor for John.
3. Later, John's manager identifies User Y as a successor for John and adds the potential successor via the Succession page of John's Universal Profile - Snapshot.
4. During the 2013 Succession Planning Task, John's manager removes User X as a successor for John because the successor is no longer a valid successor.
5. Later, John's manager views the Succession page of John's Universal Profile - Snapshot and sees that User X is removed as a potential successor for John.

Use Case - Successor Ratings

1. An organization allows managers to plan and rate successors for individuals via SMP tasks and Universal Profile.
2. During the 2013 Succession Planning Task, John's manager updates the successor ratings for User X.
3. Later, John's manager views the Succession page of John's Universal Profile - Snapshot and sees that the successor ratings for User X have been updated.