

Cornerstone July 15 Release Notes

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What's New for September 25 Patch Release

The following is released along with the September 25 patch release:

Feature	Description
Full Edit of Not Started Review Task	With this enhancement, the first step cannot be deleted from a performance review task that is in a Processing or Not Started status because the first step has been assigned to users. Administrators are able to fully edit the step (e.g., add or remove sections, change assignee, change due dates), but the first step cannot be removed. This is to prevent any issues with the data and processing workflow.
Video Administration: Support for .mov Files	With this enhancement, .mov files can now be uploaded in Video Administration.

Full Edit of Not Started Review Task

With this enhancement, the first step cannot be deleted from a performance review task that is in a Processing or Not Started status because the first step has been assigned to users. Administrators are able to fully edit the step (e.g., add or remove sections, change assignee, change due dates), but the first step cannot be removed. This is to prevent any issues with the data and processing workflow.

This change does not impact performance review tasks that are queued.

Implementation

Upon release, this functionality is automatically enabled in Stage, Pilot, and Live portals for organizations using the Performance module.

Security

The following existing permission applies to this functionality:

Permission Name	Permission Description	Category
	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

Video Administration: Support for .mov Files

With this enhancement, .mov files can now be uploaded in Video Administration.

Implementation

Upon release, this functionality is automatically enabled in Stage, Pilot, and Live portals for organizations using the Learning module.

Security

The following existing permissions apply to this functionality:

Permission Name		Permission Description	Category
Video Administration - Manage	Grants ability to create and manage video learning objects (LOs). The availability of this permission is controlled by a backend setting. This permission can be constrained by OU, User's OU, Self and Subordinates, and User. This is an administrator permission.		Learning - Administration
Video Administration - View	Video Administr permission is co permission can	view video learning objects (LOs) on the ation page. The availability of this introlled by a backend setting. This be constrained by OU, User's OU, Self and nd User. This is an administrator permission.	Learning - Administration

What's New for July 2015

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

Compensation Features

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
3 OU Salary Structure within Standard Reports	3 OU Salary Structure within Standard Reports		Prior to this enhancement, portals that defined a salary structure with primary, secondary, and tertiary organizational units (OU) could not report on the tertiary OU in the Employee Salary Range Report. With this enhancement, when running the Employee Salary Range Report, for portals that have configured their salary ranges with a tertiary OU, then the Tertiary OU column and the tertiary OU display in the report output.
Compensation Redesign and Auto-upgrade	Compensation Redesign & Auto- upgrade		With this release, all portals are automatically upgraded with the new Compensation Task redesign. Because of this, the layout and appearance of compensation tasks will be improved. Also, organizations will receive new enhancements that have been released since November 2014 that only impacted the redesigned Compensation Task functionality.
Custom Employee Relationships for Compensation Snapshot	Custom Employee Relationships for Compensation Snapshot		With this enhancement, administrators can constrain users' permissions for Compensation functionality using the custom employee relationships defined in their portal. These constraints can be applied to either individual permissions or as general constraints within a security role.
Decrease Budgets	Decrease Budgets		With this enhancement, administrators are able to decrease a compensation manager's budget while the compensation manager's plan is in progress.

Connect Features

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
Connect Redesign	Connect Redesign	Yes	With the March 2014 Release, the user experience of Connect was completely redesigned. This includes a customizable main page, intuitive community set-up and activity, and Q&A, Suggestion, Discussion, and File posting types. Once enabled, new pages must be set up through Nav Tabs and Links. Note: <i>New Connect and New Knowledge Bank is a</i> <i>replacement for Old Connect. Currently, there</i> <i>are no plans to retire Old Knowledge Bank.</i>
Connect Redesign - Data Migration	Connect Redesign - Data Migration	Yes	As of the February 2015 Release, a data migration script is 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.
Community Activity Updates in Live Feed	Community Activity Updates in Live Feed		With this enhancement, the Live Feed may now display community activity updates. This enables the user to view activity updates from all communities in which they are a member in a single location.
Flexible Availability for Cohort Communities	Flexible Availability for Cohort Communities		With this enhancement, when editing the availability of a cohort topic or community, the entire cohort roster appears as a single line item. This functionality gives the administrator greater control over the availability configuration for cohort communities and topics, and allows for the creation of larger and more stable cohort rosters. In addition, if a new user is added to the cohort roster, any customized availability settings are maintained.
Like, Reply, and View Counts	N/A		With this enhancement, the Likes, Replies, and Views totals are now updated in real time on the Topic Details page.
Share Topics across Communities	Share Topics across Communities		With this enhancement, a topic can be shared across communities. A shared topic can be updated in one location, and the update is applied to the topic in all shared locations. This

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
			includes if a topic's subtopics and postings are updated. This enables administrators and moderators to update a posting in one location instead of multiple locations.
Sort Drop- downs in Topics	Sort Dropdowns in Topics		With this enhancement, users can sort postings on the Topic Details page using six different options.
Threaded Replies in Postings	Threaded Replies in Postings		With this enhancement, users are now able to reply directly to posting replies.

Learning Features

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
Adobe Connect Seminar Rooms Integration		Yes	With this enhancement, the Adobe Connect vILT integration now supports Seminar Rooms, in addition to Meetings and Shared Meetings. The Seminar Rooms functionality allows for a higher number of participants in sessions.
Cisco WebEx Meetings SSO	WebEx VILT SSO	Yes	WebEx integration is enhanced to enable organizations to utilize the WebEx Single Sign On (SSO) functionality. When WebEx SSO is enabled, WebEx instructors are no longer required to enter their passwords when creating and launching meetings.
Collaborative Learning - Custom Fields	Collaborative Learning Usability Improvements		With this enhancement, program and cohort learning objects (LOs) now support custom fields.
Collaborative Learning - Email Triggers	Collaborative Learning Usability Improvements		With this enhancement, the following new email triggers are now available for Collaborative Learning via Global Email Administration: • Video Comment - New • Video Comment - Reply
Collaborative Learning - Launch	Collaborative Learning Usability Improvements		With this enhancement, when a cohort is launched from the Transcript, the Main tab of the cohort is opened.

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
Cohort			
Collaborative Learning - Cohorts in Standard Reports	Collaborative Learning - Cohorts in Standard Reports		With this enhancement, standard reports now include cohorts.
Configurable Session Completion Date	Configurable Session Completion Date		With this enhancement, organizations can configure how session completion dates are determined. Organizations can set the configuration for all new sessions in the portal. In addition, administrators may be granted permission to manually adjust the session completion date for individual users on the session roster.
Create Event LOs Web Service	Create Event LOs Web Service	Yes	With this enhancement, a new Create Event web service is now available. This web service enables administrators to create event learning objects (LOs) via REST Web Services. This facilitates the creation of bulk event LOs.
Curricula Administration Localization	Curricula Administration Localization		With this enhancement, the text field values can now be localized when creating or editing a curriculum.
Curriculum Player Redesign and Auto- upgrade	Curriculum Player Redesign and Auto-upgrade		With this release, all portals are automatically upgraded with the new Curriculum Player redesign. Because of this, the layout and appearance of the Curriculum Player will be improved. Also, organizations will receive new enhancements that have been released since November 2014 that only impacted the redesigned Curriculum Player functionality.
Curriculum Versioning - Push to Completed Users	Curriculum Versioning - Push to Completed Users		With this enhancement, the curriculum reversioning functionality is redesigned, providing additional options to administrators. Administrators have enhanced filtering options when defining which users are impacted by the new version of the curriculum, including the option to assign the new version of the curriculum to users in a Completed status. Administrators can also now define whether users are able to maintain their curriculum progress with the new version.
Custom Transaction	Custom		With this enhancement, administrators can

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
Fields	Transaction Fields		now create custom Transaction fields in Custom Field Administration. A Transaction tab is added to Custom Field Administration to enable administrators to create custom fields for transactions and add the fields to the transactions that are created when training is purchased. The fields can be added to the Shopping Cart, My Account, and Manage Transactions functionality.
Enhanced ILT Reservation Summary Standard Report	Enhanced ILT Reservation Summary Standard Report		With this enhancement, fields are added to the Advanced Criteria section of the ILT Reservation Summary Report.
Filter Transcript by Type	Filter Transcript by Type		With this enhancement, a learning object (LO) type filter is added to the Universal Profile: Transcript page. This enables users to filter the items within their transcript by a specific LO type, such as Online Class, Cohort, or Certification. Only a single LO type can be selected at a time.
Google Analytics on Self-Registration Page	Google Analytics on Self- Registration Page		With this release, when Google Analytics is enabled to be used within the portal and organizations use their Google Analytics tracking code, Web traffic will be tracked and reported back to Google Analytics for any page that includes a standard Cornerstone footer as well as any self- registration pages.
Hide Certified Certifications	Hide Certified Certifications		With this enhancement, certified certifications can now be hidden from the Certifications widget and the Universal Profile: Transcript page. In addition, administrators can configure whether or not certified certifications are hidden on the Universal Profile: Transcript page by default. This enhancement enables users to more efficiently manage their certifications.
Offline Network Player Enhancements	Offline Network Player Enhancements		With this enhancement, administrators can configure automatic training synchronizations using the Windows Task Scheduler. The Sync Management page now maintains a log of historical

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
			synchronizations. On the Download Courses page, administrators can search for and filter courses. On the Offline Transcript page, Completed courses can now be displayed and users can filter courses.
Quick Add Users to Session Roster	Quick Add Users to Session Roster		With this enhancement, when an instructor or administrator clicks the <i>Add Users</i> link on the Session Roster page, the instructor or administrator is directed to a Select Users pop-up that allows them to select the users to be added to the session roster. They can then add the selected users to the roster. This avoids having to complete the Proxy Enrollment process.
Same LO in Multiple Recurring Curricula	Same LO in Multiple Recurring Curricula		With this enhancement, a new preference is now available to control whether a LO may be added to multiple recurring curricula. Organizations may choose whether they enable the ability to include the same LO in multiple recurring curricula. This preference only impacts curricula that are created or modified after the preference is modified.
Support Up to 10 VAT Numbers	Support Up to 10 VAT Numbers		Portals using the Extended Enterprise functionality to sell training internationally must include VAT (Value Added Tax) numbers in order to calculate tax. Often, the training is sold in more than one country, so it is imperative to have support for multiple VAT numbers. With this enhancement, the <u>VAT Number</u> field on the Modify Payment Account page will support up to 150 characters alphanumeric characters in a comma delimited string. This will allow administrators to enter up to 10 VAT numbers into the field. Prior to this enhancement, the field only accepted up to 25 characters.
Transcript Enhancements			With this enhancement, one of the Sort By filters on the Transcript is renamed from "By Date Added to Transcript" to "By Date Added." This applies when any training category is selected. Within Transcript Preferences, one of the Sort By options is renamed from "Date added to transcript"

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
			to "By Date Added." This applies to all training categories.
Transcript Redesign - Universal Profile	Transcript Redesign - UP	Yes	With the June 2014 Release, the Transcript page is redesigned with an improved user experience and is accessible from the Universal Profile. Once enabled, active relevant widgets and links direct users to the new Transcript page. The configuration of the Transcript title and description is migrated to Transcript Preferences instead of within Navigation Tabs.
Update to TranscriptAndTask Web Service		Yes	With this enhancement, the TranscriptAndTask web service is enhanced so that the launchURL that is generated in the web service response is encrypted. Because of this, organizations need the new encrypted URL to deep link to the Transcript Summary page for a user.
Withdrawal Penalty for Sessions in Curricula	Withdrawal Penalty for Sessions in Curricula		With this enhancement, if a withdrawal penalty is configured for a session that is part of an event within a curriculum, and a user withdraws from the session, then the user is charged the withdrawal penalty.
Reports - Added Fields in Learning Custom Reports	Added Fields in Learning Custom Reports		With this enhancement, fields are added and modified in the Training section for the following custom reports: • Training Report
			Training Plan ReportTranscript Report

Mobile Features

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
Mobile Responsive Content	Mobile Responsive Content		With this enhancement, if an online course is designed to be responsive and is enabled for mobile devices, then administrators can now

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
	Preference		configure whether or not the online course content is responsive to the size of the screen on which it is being viewed.
Mobile User Generated Content - Video	Mobile User Generated Content - Video		With this enhancement, users with the appropriate permissions can now upload a video from their mobile devices and submit the video for approval to the system administrator. After a user has submitted a video, they can view the details of their submission within the mobile application.

Performance Features

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
Admin Preview for Performance Reviews	Admin Preview for Performance Reviews		With this enhancement, when using the redesigned Performance Reviews functionality, administrators are now able to preview a performance review task before it is assigned to reviewers. This enables administrators to ensure the performance review task appears properly and make any necessary adjustments before it is finalized.
Ability to Inactivate Competencies	Ability to Inactivate Competencies		With this enhancement, administrators can now make a competency inactive, which prevents it from being added to new skills matrix roles and competency models.
All Versions Count within Skills Matrix Standard Reports	All Versions Count within Skills Matrix Standard Reports		With this enhancement, if a user has completed any version of a LO, the LO will show as Completed and count toward role completion in the Skills Matrix Report. If a user has completed any version of a training equivalency, the LO will show as Completed and count towards role completion in the Skills Matrix Report.
Custom Employee Relationship for Goals Snapshot	Custom Employee Relationship for Goals Snapshot		With this enhancement, administrators can constrain users' permissions for Goals functionality using the custom employee relationships defined in their portal. These constraints can be applied to either individual permissions or as general constraints within a security role. In addition, the goal approval

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
			workflow is now enforced on all goals, and the option to view a user's goals is now available throughout Universal Profile.
Data Load Wizard - Competency Load Updates			With this enhancement, competencies loaded via the Competency Bank data load will have the Admin Visibility set to All Employees.
New Competency Management Permissions	New Competency Management Permissions		With this enhancement, new Competency Assessment Bank Admin and Competency Assessment Model permissions control whether an administrator can view, edit, and manage competencies and competency models. Admin Visibility can be set for competencies and competency models, which restricts the administrators who can view the competencies and competency models.
Performance Review Email Digests	Performance Review Email Digests		With this enhancement, administrators can create email digests for performance review step assignments. An email digest is a scheduled email that is sent on a recurring basis. They are intended to group a user's notifications and reminders into a single email. Email digests are only sent to a user if there is active content for the user. In future releases, the Email Digest functionality will be expanded to include additional email digest sections for other modules.
Reports - Added Fields in Custom Goal Reports	Added Fields in Custom Goal Reports		With this enhancement, a <u>Target Actual</u> <u>Amount</u> field is added to the Targets section for custom Goal reports.

Platform Features

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
Custom Charting	Custom Charting		With this enhancement, charts can now be created for all custom report types. A new Chart tab is added to the Custom Report Builder page to allow users to display data visually.
Custom Employee Relationship	Custom Employee Relationship		With this enhancement, administrators can constrain users' permissions using the custom employee relationships defined in

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
Security Roles	Security Roles		their portal. These constraints can be applied to either individual permissions or as general constraints within a security role. In addition, administrators can enable dynamic security roles for any custom employee relationship, which are dynamically assigned to any user designated in the custom employee relationship.
Data Load Wizard - Blank Overwrite		Automatically enabled when using the Data Load Wizard	With this enhancement, the Blank Overwrite feature is updated to prevent it from overwriting existing values in the database when the fields containing these values are not mapped to the data file.
Data Load Wizard - Group Load	DLW - Group Load	Automatically enabled when using the Data Load Wizard	With this enhancement, administrators can now load group data into the system via the Data Load Wizard. Using the Data Load Wizard, administrators are able to create new groups, update existing groups, add users to groups, and remove users from groups.
Data Load Wizard - User Load Primary Key		Yes	With this enhancement, the User Data Load can now support the GUID as the primary key for a user record. This enables organizations to convert an external candidate within the Recruiting module to an internal user in the system. Organizations can also now use the Username as the primary key for a user record. When the Username is used as the primary key, the organization is able to modify the User ID via the data load.
Introducing Link	Introducing Cornerstone Link	Yes	Link is the newest product in Cornerstone OnDemand's unified suite of talent management applications. Link adds functionality to general Cornerstone system functionality so that organizations can use Cornerstone to manage their employee records. Organizations can continue to feed data from 3rd party systems, but Link's added functionality enables organizations to additionally manage their people data within the Cornerstone system. In addition,

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
			employee data can be maintained within the Cornerstone system and updated, when necessary in 3rd party business applications.
			Link enables organizations to manage their talent data and their employee data in the same system.
Jump to Predictive Search	Jump to Predictive Search		With this enhancement, clicking a predictive search result in the Global Search widget or page directly navigates the user to the appropriate page for the selected search result.
Link: Scheduled Changes in Auditing Log	Introducing Cornerstone Link		With this enhancement, administrators now have the option to view future effective changes within the Modification History section. Administrators can also modify past or future effective dated records via the Effective Dated Records section. Lastly, when a future effective dated change is cancelled, the Modification History section now displays all cancelled modifications.
Link: Reason for Change	Introducing Cornerstone Link		With this enhancement, administrators can select a reason for change when modifying employee data. These are intended to provide an explanation as to why a change was made. Administrators can define the reasons that can be selected. On the User Record, the reason for change is displayed in the <i>Modification</i> <i>History</i> section and the <i>Effective Dated</i> <i>Record</i> section.
Lockout Preferences	Lockout Preferences		With this enhancement, administrators can configure the number of incorrect login attempts a user is allowed to make before they are locked out of their account. Administrators can configure the amount of time a user is locked out of their account before they can attempt to log in again. Administrators also have the ability to unlock a user's account when it has been locked.

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
Universal Profile - View Enlarged Photo	View Enlarged Photo in Universal Profile Bio		This enhancement allows the user to view enlarged profile photos on all Universal Profile Bio pages.
User Record Contact Fields on My Account	User Record Contact Fields on My Account		With this enhancement, administrators are able to enable users to modify their own contact information within My Account. Administrators configure which contact fields display on the page and which contact fields can be edited.
User Transcript Audit Report - New Action Time Stamp and HTML Output		Yes	With this enhancement, a new action time stamp and HTML output capabilities are added to the User Transcript Audit Report.
Reports - Added Fields in Core	Added Fields in Core		With this enhancement, a <u>Date Effective</u> field is added to the User section for all custom reports that include a User section.

Recruiting Features

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
Added Recruiting Requisition and Vendor Fields in Custom Reports	Added Recruiting Requisition and Vendor Fields in Custom Reports		With this enhancement, new fields are added to the Requisition and External Vendor sections for custom Recruiting reports. In addition, existing fields are enhanced in the External Vendor section.
Candidate My Profile Redesign and Auto Upgrade	Candidate My Profile Redesign and Auto Upgrade		With this enhancement, the My Profile page in career sites is updated to improve the user experience by introducing common page elements, updating graphic to match current user interface (UI) styles, and enabling applicants to view applications and resumes per job application. In addition, applicants can now view their application and resume from the Application Status section on the My Profile page.
Candidate Search Redesign	Candidate Search Redesign		The Candidate Search Query functionality is enhanced to improve the user experience when searching for talent or looking up

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
			specific candidates across internal and external users. The search is improved by enhancing the capabilities of the keyword search feature to allow Boolean operators to be used in the search. In addition, the information that is used to find matching candidates is expanded by including attached resumes. The user interface (UI) for the Candidate Search and search results pages is also updated to match current styles.
Encrypted User Custom Fields on Forms	Encrypted User Custom Fields on Forms		This enhancement allows encrypted short text box fields to be used as User Custom Fields on forms. When included on a form, the fields automatically encrypt the data that is entered in the field once the form is saved or submitted.
First Advantage Integration		Yes	Integration with First Advantage (FADV) provides a new integration provider for screenings, including background checks and drug screening.
Form Approvals	Form Approvals		With this enhancement, an approval workflow process is added to the Form Management functionality. The approval process allows for submitted forms to go through a predefined approval workflow before they are considered completed.
Future Manager in Onboarding Emails	Future Manager in Onboarding Emails		Prior to this enhancement, when User's Manager was selected as the email recipient, the email was only sent to the user's current manager. This presented an issue in the onboarding process, because the user's current manager for internal new hires was not the manager that the new hire would have once they reached their onboarding start date. External new hires do not have a current manager while they are in their temporary organizational units, so the email is not sent to any recipient. This enhancement rectifies the issue by adding an option to designate the User's Future Manager as a recipient for Onboarding emails. The user's future manager is the manager

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
			for their new position.

Succession Features

Feature Name from Release Notes	Feature Name from Release Summary	By Request?	Description
Custom Employee Relationships for Succession Snapshot	Custom Employee Relationships for Succession Snapshot		With this enhancement, administrators can constrain users' permissions for Succession functionality using the custom employee relationships defined in their portal. These constraints can be applied to either individual permissions or as general constraints within a security role.
Display Successor Roles in Succession Snapshot	Display Roles the User is a Successor for in Succession Snapshot		With this enhancement, administrators can now quickly view for how many positions and users a user is planned as a successor from the Succession Snapshot page within Universal Profile. This enables them to make effective decisions based on the information.
Search Attributes in Universal Profile Resume	Search Attributes in Universal Profile Resume		With this enhancement, users are able to search for a resume attribute when selecting a resume attribute on their Bio: Resume page. In addition, the Select Attribute pop-up now displays the parent attributes if the attribute has a parent value.
Succession Snapshot History Enhancements	Succession Snapshot History Enhancements		With this enhancement, updates to the Succession Snapshot page are tracked in a Modification History section at the bottom of the page.
View-Only Permission for Succession Snapshot	View-Only Permission for Succession Snapshot		With this enhancement, a new permission is now available, which only grants users the ability to view Succession Snapshot information. Because of the new permission, the Snapshot - Succession permission is renamed and is now titled Snapshot Succession - Manage. This permission continues to allow the ability to view and manage Succession Snapshot information.

New and Enhanced Permissions for July '15 Release

The following permissions are new for the July '15 release:

Product	Permission Name	Permission Description	Permission Category
Extended Enterprise	Transaction Custom Fields - Manage	Grants ability to create and edit custom fields to be used with transactions. This permission cannot be constrained. This is an administrator permission.	eCommerce - Administration
Learning	Curricula Version - Manage	The constraints on this permission determine for which users the administrator can assign a new version of a curriculum when reversioning the curriculum. This permission works in conjunction with the Curricula Admin - Manage permission. This permission can be constrained by OU, User's OU, and User. This is an administrator permission.	Learning - Administration
Learning	Curricula Preferences	Grants ability to configure Curricula Preferences, which grants the ability to allow or disallow the same learning object (LO) from being added to multiple recurring curricula. This permission cannot be constrained. This is an administrator permission.	Learning - Administration
Learning	Roster - Add Pending Users	Grant ability to add pending users to the ILT session roster. The administrator must also have the Roster - Manage or Roster - View permission. This permission cannot be constrained. This is an administrator permission. This permission is available as of the August 14 patch release.	Learning - Administration
Learning	Roster - Increase Seats	Grant user the ability to increase the session's available seats when adding users to the session roster if the added users exceed the number of available or reserved seats. User must also have Manage Roster or View Roster permission. This permission cannot be constrained. This is an administrator permission.	Learning - Administration
Mobile	User Generated Content Video LO	Grants ability to upload and submit video content from an iOS mobile device to the Pending Videos tab within Video	Learning - Administration

Product	Permission Name	Permission Description	Permission Category
		Administration. The Add Training tab within the mobile app is only available with this permission. This permission cannot be constrained.	
Onboarding	Form Approvals - Manage	Grants access to manage Form Approvals functionality. This permission cannot be constrained. This is an administrator permission. Note: This permission enables access to the new Form Management functionality that is part of the Onboarding module. This	Forms Management Administration
		<i>permission does not grant access to the Old Forms Management functionality.</i>	
Onboarding	Request Items - Forms	Allows user to access form requests on Universal Profile Request items. This permission cannot be constrained.	Universal Profile
Onboarding	Request Items - View	Allows user to access the Requests tab on the Universal Profile > Actions tab. This permission cannot be constrained.	Universal Profile
Performance	Competency Assessment Bank Admin - Edit	Grants ability to edit competencies in the Competency Bank. Administrators can only edit a competency if they have this permission and are also included in the Admin Visibility settings for the competency. This permission cannot be constrained. This is an administrator permission.	Performance - Administration
Performance	Competency Assessment Bank Admin - Manage	Grants ability to create, edit, view, and delete competencies in the Competency Bank. This permission cannot be constrained. This is an administrator permission.	Performance - Administration
Performance	Competency Assessment Bank Admin - View	Grants ability to view competencies in the Competency Bank. Administrators can only view a competency if they have this permission and are also included in the Admin Visibility settings for the competency. This permission cannot be constrained. This is an administrator permission.	Performance - Administration
Performance	Competency Assessment Model Admin - Edit	Grants ability to edit competency models. This permission cannot be constrained. This is an administrator permission.	Performance - Administration
Performance	Competency	Grants ability to create, edit, delete, and	Performance -

Product	Permission Name	Permission Description	Permission Category
	Assessment Model Admin - Manage	view competency models. This permission cannot be constrained. This is an administrator permission.	Administration
Performance	Competency Assessment Model Admin - View	Grants ability to view competency models. This permission cannot be constrained. This is an administrator permission.	Performance - Administration
Performance	Email Digest Administration - Manage	Grants ability to create, edit, view, and delete email digests. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. The permission constraints determine which email digests the administrator can edit and delete. This is an administrator permission.	Performance - Administration
Performance	Email Digest Administration - View	Grants ability to view email digests. This permission cannot be constrained. This is an administrator permission.	Performance - Administration
Platform	Corporate Preferences: Lockout Preferences - Manage	Grants ability to configure the Lockout Preferences on the Corporate Preferences page. This permission cannot be constrained. This is an administrator permission.	Core Administration
Platform	Data Load Wizard - Group Data Load	Enables administrator to load group data via the Data Load Wizard. This permission also enables administrators to track data loads and manage data load templates. This permission cannot be constrained. This is an administrator permission.	Data Load Wizard
Platform	Data Load Wizard - Users Enable GUID	Enables the GUID in the Data Load Wizard User Load and mapping template. This enables organizations to include the GUID as the primary key for user data loads. This permission cannot be constrained.	Data Load Wizard
Platform	Users - Effective Dating: Manage	Enables administrator to make effective dated changes to the user record. This permission only works when used in conjunction with the Users - Edit permission. This permission cannot be constrained. This is an administrator permission.	Core Administration
Platform	User Preferences - Core Information: View	Grants ability to view the User Preferences administrator page. This permission does not allow administrators to modify the preferences. This permission cannot be constrained. This is an administrator permission.	Core Administration

Product	Permission Name	Permission Description	Permission Category
Platform	User Preferences - Reasons for Change: Manage	Grants ability to define and configure Reasons for Change on the User Preferences administrator page, which may be used when modifying the user record. The administrator must also have the User Preferences - Core Information: View permission to access the User Preferences page. This permission cannot be constrained. This is an administrator permission.	Core Administration
Platform	Users - Unlock Accounts	Grants ability to unlock user accounts that are currently locked. This permission can be constrained by OU, User's OU, User's Subordinates, and User. This is an administrator permission.	Core Administration
Platform	Users - View Modification Details	Grants ability to view the Modification Details section on the User Record and view User Audits fields when creating a User custom report. This permission only works when used in conjunction with the Users - View and Users - Edit permissions. This is an administrator permission.	Core Administration
Recruiting	Recruiter: Share Saved Searches	Allows users to view and manage the Availability column on the Saved Searches Page. This permission can be constrained by OU and User's OU.	Recruiting
Succession	Snapshot Succession - View	Enables user to view the Succession widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. On this page, users can view successors and successor ratings. Users cannot view their own `Succession widget and subpage, regardless of permissions. This permission can be constrained by User's Subordinates, User's Direct Reports, and Employee Relationship. Best Practice: For most users, this permission should be constrained by User Self and Subordinates.	Universal Profile

The following existing permissions are enhanced for the July '15 release:

Product	Permission Name	Permission Category
Compensation	Compensation Statement	Reports - Compensation

Product	Permission Name	Permission Description	Permission Category
	Report	Report which enables printing the compensation statement for one user at a time. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User's Subordinates.	
		This permission can now be constrained by Employee Relationship.	
Compensation	Snapshot - Compensation	Enables user to view the Compensation widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. 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, and User's Direct Reports. Best Practice: For most users, this permission should be constrained by User Self and Subordinates.	Universal Profile
		This permission can now be constrained by Employee Relationship.	
Performance	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
		This permission is updated so that it only grants access to define competency categories, competency model categories, and the default rating scale for competency models.	
Performance	Goals - Create	Grants ability for user to create goals for self (and direct and indirect reports if a manager). The permission constraints determine for whom the user can create goals. This permission can be constrained by OU, User's OU, and User Self and Subordinates. This is an end user permission.	Performance

Product	Permission Name	Permission Description	Permission Category
		This permission can now be constrained by Employee Relationship.	
Performance	Snapshot - Goals	Enables user to view the Goals widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. 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, and User's Direct Reports. Best Practice: For most users, this permission should be constrained by User Self and Subordinates. This permission can now be constrained by Employee Relationship.	Universal Profile
Performance	View Goals	Grants ability to view own goals and (depending on role and settings) goals of others (manager's visible goals, direct subordinate's goals, company goals, division goals). This permission can be constrained by OU, User's OU, and User Self and Subordinates. This is an end user permission.	Performance
		This permission can now be constrained by Employee Relationship.	
Platform	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. This permission can now be constrained by Employee Relationship.	Universal Profile
Platform	Bio About - View	Enables user to view the Bio page for users within their permission constraints. If a user	Universal Profile

Product	Permission Name	Permission Description	Permission Category
		does not have this permission and they click a person's name or user photo within the Universal Profile, then the Bio page will not open. This permission can be constrained by OU, User's OU, User's Direct Reports, User Self and Subordinates, and User. This permission can now be constrained by Employee Relationship.	
Platform	Documents - Delete	Enables user to delete a file that has been uploaded to the Snapshot - Documents page. 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, Self and Direct Reports, User's Self, User's Manager, User's Superiors, User's Subordinates, and User's Direct Reports. This permission can now be constrained by Employee Relationship.	Universal Profile
Platform	Documents Preferences - Manage	Enables administrator to access and edit the Documents Preferences page. The availability of this permission is controlled by a backend setting. This permission can be constrained by OU and User's OU. This is an administrator permission.	Universal Profile
Platform	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. This permission can now be constrained by Employee Relationship.	Core Administration
Platform	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	Universal Profile

Product	Permission Name	Permission Description	Permission Category
		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.	
		This permission can now be constrained by Employee Relationship.	
Platform	Snapshot Main - View	Enables user to view the Snapshot page for users within their permission constraints. 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, and User's Direct Reports. Best Practice: For most users, this permission should be constrained by User Self and Subordinates. This permission can now be constrained by Employee Relationship.	Universal Profile
Platform	Snapshot Preferences - Manage	Enables administrator to access and edit the Snapshot Preferences page. This permission can be constrained by OU and User's OU. This is an administrator permission. This permission can now be constrained by Employee Relationship.	Universal Profile
Recruiting	Applicants: Manage Background Checks	Grants ability to manage background checks from the Applicant Profile page. This permission cannot be constrained.	Recruiting
Succession	Bio Career Preferences - View	Grants ability to view the Bio - Career Preferences page for users within the permission constraints. This permission can be constrained by OU, User's OU, User Self and Subordinates, User's Direct Reports, User's Self, and User. This permission can now be constrained by Employee Relationship.	Universal Profile

Product	Permission Name	Permission Description	Permission Category
Succession	Bio Resume - View	Enables user to view the Bio - Resume page for users within their permission constraints. If a user does not have permission to view the Bio - Resume page, then the Resume tab is not available. This permission can be constrained by OU, User's OU, User Self and Subordinates, User's Direct Reports, User's Self, and User. This permission can now be constrained by Employee Relationship.	Universal Profile
Succession	Snapshot - Succession	Enables user to view the Succession widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. On this page, users can view and manage successors and successor ratings. Users cannot view their own Succession widget and subpage, regardless of permissions. This permission can be constrained by User's Subordinates and User's Direct Reports. Best Practice: <i>For most users, this permission should be</i> <i>constrained by User Self and Subordinates.</i> This permission is renamed and is now titled Snapshot Succession - Manage.	Universal Profile

Release Notes Updates

Changes have been made on August 14, 2015, to the following areas of the release notes for the July '15 release:

Recruiting

Enhancement Name	Name of Updated Topic	Purpose of Change	Change Made to Topic
Candidate Search Redesign	Candidate Search Redesign Overview	Clarify how Candidate Search Query sublink appears in Recruit navigation tab.	Added text to the overview page to indicate that the Candidate Search Query navigation sublink must be added manually by the administrator in Navigation Tabs and Links.
Candidate Search Redesign	Advanced Search Tab	Replace image that reflected incorrect functionality.	Updated the Group Search Criteria image on the Advanced Search Tab page to reflect the correct fields that display on the Advanced Search tab.

Changes have been made on July 31, 2015, to the following areas of the release notes for the July '15 release:

Connect

Enhancement Name	Name of Updated Topic	Purpose of Change	Change Made to Topic
Data Load Wizard - Group Load	Load Group Data - Template and Validations	Update text to reflect that when loading multiple rows of data for the same group, then the Group Name, Parent Group ID, Group Description, Active, and Group Owner columns must all contain the same value.	Updated the Comments/Rules column for the Group Name, Parent Group ID, Group Description, Active, and Group Owner fields. This now reflects that when loading multiple rows of data for the same group, then these columns must contain the same value.

Learning

Enhancement Name		Purpose of Change	Change Made to Topic
User Transcript Audit	User Transcript	Indicate that the	Added text to indicate that the

Enhancement Name	Name of Updated Topic	Purpose of Change	Change Made to Topic
Report - New Action Time Stamp and HTML Output	Audit Report - New Action Time Stamp and HTML Output	enhancement is not enabled by default.	enhancement is disabled by default and that it can only be enabled by request by contacting Global Product Support.

Changes have been made on July 24, 2015, to the following areas of the release notes for the July '15 release:

Connect

Enhancement Name	Name of Updated Topic	Purpose of Change	Change Made to Topic
Community Activity Updates in Live Feed	Connect Preferences	Remove the preference to include all featured community postings in the Live Feed.	Removed the <u>Featured posting</u> (visible to all community <u>members</u>) preference and updated the image.

Learning

Enhancement Name	Name of Updated Topic	Purpose of Change	Change Made to Topic
Quick Add Users to Session Roster	Quick Add Users to Session Roster	Reflect that existing Sessions - Create and Sessions - Edit permissions can increase the session's available seats.	Added the Sessions - Create and Sessions - Edit permissions as existing permissions to reflect that these permissions also allow users to increase the session's available seats.
Quick Add Users to Session Roster	Session Roster - Add Users	Reflect that existing Sessions - Create and Sessions - Edit permissions can increase the session's available seats.	Added the Sessions - Create and Sessions - Edit permissions as existing permissions to reflect that these permissions also allow users to increase the session's available seats.

Changes have been made on July 17, 2015, to the following areas of the release notes for the July '15 release:

Enhancement Name	Name of Updated Topic	Purpose of Change	Change Made to Topic
Threaded Replies in Postings	Posting Details Page	Update the Comment icon.	The Comment icon is updated in the text and in the main image.
Share Topics across Communities	Topic - Create/Edit	Update the Remove Shared Community Logic	The Remove Shared Community section is updated to reflect that a topic can be unshared from its original community. If the topic is no longer shared with any communities, then the topic is deleted when the changes are saved. The Done or Cancel section is updated to reflect that if the topic is no longer shared with any communities, then the topic is deleted when the changes are saved.
Share Topics across Communities	Topic Sharing Rules	Update the Remove Shared Community Logic	A rule is added to indicate that unsharing a topic from all communities deletes the topic.

Connect

Learning

Enhancement Name	Name of Updated Topic	Purpose of Change	Change Made to Topic
Enhanced ILT Reservation Summary Standard Report	Enhanced ILT Reservation Summary Standard Report	Release notes are added for the enhancement to the ILT Reservation Summary Standard Report enhancement.	An Enhanced ILT Reservation Summary Standard Report topic has been added to the Learning folder in What's New for July 2015 in Online Help and to the Learning section in the release notes.
Quick Add Users to Session Roster	New and Enhanced Permissions for July '15 Release	Update the name of the Roster - Increase Seats permission.	The name of the new Roster - Increase Max Seats permission is updated and is now named Roster - Increase Seats.
Quick Add Users to Session Roster	Quick Add Users to Session Roster	Update the name of the Roster - Increase Seats permission.	The name of the new Roster - Increase Max Seats permission is updated and is now named Roster - Increase Seats.
Quick Add Users to Session Roster	Session Roster - Add Users	Update the name of the Roster - Increase Seats	The name of the new Roster - Increase Max Seats permission

Enhancement Name	Name of Updated Topic	Purpose of Change	Change Made to Topic
		permission.	is updated and is now named Roster - Increase Seats.
Reports - Added Fields in Learning Custom Reports	Reports - Added Fields in Learning Custom Reports	To indicate that the Test Version Comments and Test Version Effective Dates fields are only available for Test custom reports.	An additional section is added to identify the fields that are added for Test custom reports.
Reports - Added Fields in Learning Custom Reports	Reports - Added Fields in Learning Custom Reports	To update the new name for the Event ID field.	The new name for the Event ID field is changed from Event Name to Event Number.

Platform

Enhancement Name	Name of Updated Topic	Purpose of Change	Change Made to Topic
User Transcript Audit Report - New Action Time Stamp and HTML Output	Audit Report -	added to the July '15 release for the User	A User Transcript Audit Report - New Action Time Stamp and HTML Output topic is added to the Platform folder in What's New for July 2015 in Online Help and to the Platform section in the release notes.

Defect Fixes July '15 Release

The following is the defect that has been fixed as part of the July '15 release:

Report	Defect	Fix
Level 1 Evaluation	The printed version of the report incorrectly labeled the date criteria as session start date. We need to fix this label in the printed version.	The label for the date criteria in the printed version is fixed to indicate that this is the evaluation completion date range. Previous Label Name = Session Date Range Corrected Label Name = Evaluation Completion Date Range

August 14 Patch Release Functionality

What's New for August 14 Patch Release

The following is released along with the August 14 patch release:

Feature	Description
Add Pending Users to Roster Permission	With this enhancement, a new Roster - Add Pending Users permission is now available. This permission grants the ability to add pending users to the ILT session roster. The administrator must also have the Roster - Manage or Roster - View permission. This permission cannot be constrained. This is an administrator permission.

Add Pending Users to Roster Permission

With this enhancement, a new Roster - Add Pending Users permission is now available. This permission grants the ability to add pending users to the ILT session roster. The administrator must also have the Roster - Manage or Roster - View permission. This permission cannot be constrained. This is an administrator permission.

Users without this permission can view the users who have not yet been added to the session. However, they are not able to add these users to the session roster.

Implementation

Upon release, this functionality is automatically enabled in Stage, Pilot, and Live portals for organizations using ILT Sessions.

Compensation

Compensation Redesign and Auto-upgrade

With the November 2014 release, Compensation Tasks were redesigned to provide an engaging user experience and allow users to navigate intuitively through a compensation task.

With this release, all portals are automatically upgraded with the new Compensation Task redesign. Because of this, the layout and appearance of compensation tasks will be improved. Also, organizations will receive new enhancements that have been released since November 2014 that only impacted the redesigned Compensation Task functionality.

- Three OU Salary Structure It is possible to use a primary, secondary, and tertiary OU to build the salary structure. Any OU type can be used to build all tiers of the salary structure.
- Define Salary Midpoint There is an option to use the system generated midpoint or an administrator defined midpoint.
- Administrator Task Visibility The Compensation Task Administration Manage permission enables administrators to view and manage existing compensation tasks. Administrators with the Compensation Task Administration - Manage permission can only view and manage compensation tasks for which they are within the Visibility settings. When an administrator has access to a compensation task, the administrator can view the task details, extend the task, adjust budgets, reset compensation plans, track compensation plans, etc.
- Proration by Last Salary Change Date Compensation proration can 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.
- Retroactive Proration Compensation can 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.
- Decimals of Precision The system uses, calculates, displays, and reports up to three decimal places of precision for all percentages used in the Compensation module. For example, an administrator can set a user's individual bonus target to 7.75% of the user's base salary. The decimal precision is set via a backend setting.

Prior to upgrading, it is advised that all organizations review the Compensation Task Auto-Upgrade Readiness Guide within the July '15 Release community on the Success Center.

Considerations

The new compensation task UI is not supported in Internet Explorer 7 or below.

Implementation

With this release, all portals are automatically upgraded with the new Compensation Task redesign for all new and in progress compensation tasks.

Custom Employee Relationships for Compensation Snapshot

Custom Employee Relationships for Compensation

Within the system, administrators can define custom employee relationships such as Dotted Line Manager or Secondary Manager. These custom relationships can be used in performance reviews, compensation, and custom approval workflows for Learning.

Prior to this enhancement, organizations could use custom employee relationships to define the compensation manager and approvals.

With this enhancement, administrators can constrain users' permissions for Compensation functionality using the custom employee relationships defined in their portal. These constraints can be applied to either individual permissions or as general constraints within a security role.

The following permissions can now be constrained by custom employee relationships:

- Compensation Statement Report
- Snapshot Compensation

Considerations

Custom relationships are not displayed in the Team section of the Universal Profile - Bio - About page.

This constraint type is only available for the indicated permissions. It is not available for all permissions that currently allow manager constraints (User's Self and Subordinates, User's Direct Reports).

Implementation

Upon release, this functionality is automatically enabled for organizations using Compensation, Universal Profile: Snapshot, and custom employee relationships. The availability of the Employee Relationships functionality is controlled by a backend setting. To enable this functionality, contact Global Product Support or your Client Success Manager.

Security

The following existing permissions apply to this functionality and can now be constrained by Employee Relationship. The permission descriptions will be updated when this functionality is released to Live portals.

Compensation Grants access to Statement enables printing Report at a time. This p Relationship, OL		Permission Description	Category		
Statement	enables printin at a time. This	to Compensation Statement Report which g the compensation statement for one user permission can be constrained by Employee DU, User's OU, User Self and Subordinates, pordinates.	Reports - Compensation		

Snapshot - Compensation	Enables user to view the Compensation widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. This permission can be constrained by Employee Relationship, OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, and User's Direct Reports. Best Practice: For most users, this permission should be constrained by User Self and Subordinates.	Universal Profile
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Snapshot - Compensation

Users with the Snapshot - Compensation permission can view the Compensation widget on the Snapshot page and the compensation statement for users within their permission constraints.

To access the Snapshot page, go to **Home > Universal Profile**. Then, click the Snapshot tab. **Note:** *The location of this link is configurable by your system administrator.*

To access another user's Universal Profile - Bio page, click the user's photograph from any page within Universal Profile or from Global Search. From there, you can access the user's Snapshot page by clicking the Snapshot tab. Users can view the Snapshot page of other users who are within their permission to view the Snapshot page.

Permissions

Snapshot - Enables user to vie		Permission Description	Categ	ory
	the Universal Pro permission const Employee Relation User, User's Self Subordinates, an	view the Compensation widget and subpage ofile - Snapshot page for users within their traints. This permission can be constrained b onship, OU, User's OU, User Self and Subordi f, User's Manager, User's Superiors, User's nd User's Direct Reports. Best Practice: For ission should be constrained by User Self and	y inates, <i>most</i>	Universal Profile

Compensation Statement Report

Users with the Compensation Statement Report permission can view the compensation statement for users within their permission constraints.

To access the Compensation Statement report, go to **Reports > Standard Reports**. Under the Compensation tab, click the *Compensation Statement Report* link.

Permissions					
Permission Name		Permission Description	Category		
Compensation Statement Report	enables printin at a time. This	to Compensation Statement Report which g the compensation statement for one user permission can be constrained by Employee DU, User's OU, User Self and Subordinates, pordinates.	Reports - Compensation		

Decrease Budgets

Decrease Budgets

Prior to this enhancement, it was not possible to decrease a compensation manager's budget after the compensation task was launched.

With this enhancement, administrators are able to decrease a compensation manager's budget while the compensation manager's plan is in progress.

Use Case

An administrator needs to stay within the organization's compensation budget. Compensation Manager A's team has performed much better and had better performance review scores than Compensation Manager B's team. After the compensation task is launched, the administrator decides to take 10% of Compensation Manager B's budget and allocate it to Compensation Manager A's budget.

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 Nam	e	Permission Description	Category		
Taskpage, and gra compensationAdministration - ManageCompensation Compensation can only view permission and for the compensation and manage a this permission This is an administrationCompensationGrants ability		s to the Compensation Task Administration ants ability to view and manage a planning and modeling tasks from the a Task Administration page. Administrators a compensation task if they have this and are also included in the Visibility settings ensation task. Note: Administrators with the an Task Administration permission can view all compensation tasks and do not require on. This permission cannot be constrained. ministrator permission.	Compensation - Administration		
Compensation Task Grants ability		to configure and assign compensation modeling tasks to managers in the This permission cannot be constrained.	Compensation - Administration		

This is an administrator permission.	
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Compensation Task Details

. .

With this enhancement, administrators are able to decrease a compensation manager's budget while the compensation manager's plan is in progress. In addition, the Modification History section within the Adjust Budgets pop-up now indicates the dollar amount for each budget adjustment.

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

To view the Compensation Task Details page for a compensation task, go to **Admin > Tools > Compensation Management > Tasks**. Then, click the View Details icon **Solution** in the Options column next to the appropriate task. This option is only available once the task is In Progress.

Permissions Permission Name		Permission Description	Category		
Compensation Task Administration	planning and organization.	to configure and assign compensation modeling tasks to managers in the This permission cannot be constrained. ministrator permission.	Compensation - Administration		

When viewing the Compensation Task Details page, administrators can adjust the budget for a compensation manager by clicking the Adjust Budgets icon ⁵ in the Options column for the appropriate compensation manager. This opens the Adjust Budgets for Compensation Manager pop-up. **Note:** *The Adjust Budgets option is not available if the compensation manager's compensation plan status is Not Started. This option may be available for tasks that are Pending Approval, depending on the Adjust Budgets configuration.*

With this enhancement, administrators are now able to decrease a compensation manager's budget via the Adjust Budgets for Compensation Manager pop-up.

The following information is displayed in the pop-up:

- Component Displays the name of each component in the compensation manager's compensation plan.
- Original Budget Displays the original budget for the component from the compensation template. This value is read-only and is never updated.
- Difference Displays the difference between the Current Budget value and the Original Budget value. This value is read-only, but it is dynamically updated when a new value is entered in the Current Budget column. A budget increase is displayed in green, and a budget decrease is displayed in red.
- Current Budget In this field, enter the new budget for the component. This must be a positive value, but it can be more than or less than the Original Budget value.

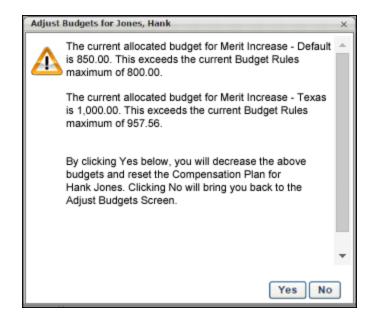
When the Adjust Budgets pop-up is saved, the Modification History section is updated to include the new adjustment. Entries in the Modification History section are grouped by budget type. The following information is included for each adjustment:

- Component that was adjusted
- Amount by which the component budget was adjusted
- User who made the adjustment
- Date on which the adjustment was made

Adjust Budgets for Pat	Kelly		Х				
Budgets adjustment will apply to compensation tasks that are in "Not Started" or "In Progress" status by default. If the budget is cascaded, the adjusted budget will apply to the top level manager. Currency: GBP Component Original Budget Difference Current Budget Merit Increase - Default 7,806.12 193.88 8000							
Currency: GBP							
Component	Original Budget	Difference	Current Budget 📩				
Merit Increase - Default	7,806.12	193.88	8000				
Cost of Living Adjustment - Default	1,000.00	0.00	1000.00				
Market Adjustment - Default	Cascaded		3,250.00				
Promotion - Default	None		*				
			Save Cancel				

When budget adjustments are saved, the system compares the new budgets with the current allocations from the compensation manager's compensation plan.

- If the compensation manager's current allocations do not exceed the new budget allowances, then the lowered component budgets are automatically implemented throughout the compensation manager's compensation task.
- If the compensation manager's current allocations exceed the new budget allowances, then a warning pop-up is displayed, which describes each of the allocations that exceed the new budgets. For example, if a compensation manager previously had a component budget of \$900 and had made allocations that totaled \$850, and then the component budget is decreased to \$800, then this pop-up would appear. The following options are available:
 - **Yes** Click this button to reset the compensation manager's compensation plan allocations and implement the lowered component budget throughout the compensation task. A message is displayed on the compensation manager's compensation task which indicates that the draft has been reset by the administrator.
 - **No** Click this button to return to the Adjust Budgets for Compensation Manager popup to make additional adjustments to the component budgets.



When an employee is added to or removed from a compensation plan, then the budget is automatically increased or decreased by the employee's default budget allocation. For example, if budget is determined by percentage of base salary and the percentage is set at 10%, then an employee with a salary of \$50,000 results in a budget of \$5,000 (10% of \$50,000). If that employee is removed from the compensation plan, then the budget is automatically decreased by \$5,000. Similarly, if that employee is added to the compensation plan, then the budget is automatically increased by \$5,000.

Decrease Budgets Use Cases

The following use cases describe the workflow for decreasing compensation budgets:

Use Case 1

A compensation task is configured with the following compensation plan budgets:

- Percentage of Base Budget = 10%
- Overage Allowance = 10%
- Employee 1 Salary (Default) = \$60,000
- Employee 2 Salary (Texas) = \$50,000
- Employee 3 Salary (Texas) = \$50,000
- Employee 4 Salary (Default) = \$40,000
 - Merit Increase Default Budget = \$10,000
 - Merit Increase Texas Budget = \$10,000

The following allocation totals are made within the compensation task:

- Merit Increase Default = \$11,000
- Merit Increase Texas = \$10,000

The administrator adjusts budgets for the compensation task and sees the following information:

- Merit Increase Default:
 - Original Budget = \$10,000.00
 - Difference = \$0.00
 - Current Budget = \$10,000.00
- Merit Increase Texas:
 - Original Budget = \$10,000.00
 - Difference = \$0.00
 - Current Budget = \$10,000.00

The administrator adjusts the budget to the following:

- Merit Increase Default:
 - Original Budget = \$10,000.00
 - Difference = -\$2,000.00 (red)
 - Current Budget = \$8,000.00

- Merit Increase Texas:
 - Original Budget = \$10,000.00
 - Difference = -\$500.00 (red)
 - Current Budget = \$9,500.00

The administrator saves the adjustments, and a warning pop-up is displayed to indicate that the compensation manager's Merit Increase - Default component allocations exceed the updated budget allowances (new budget plus 10% overage allowance). The administrator clicks the **Yes** button within the pop-up. The compensation manager's compensation plan allocations are reset and the new budgets are reflected in the compensation plan.

- Merit Increase Default = \$8,000
- Merit Increase Texas = \$9,500

The Modification History section within the Adjust Budgets pop-up displays the details of the two budget modifications.

Use Case 2

A compensation task is configured with the following compensation plan budgets:

- Percentage of Base Budget = 10%
- Overage Allowance = 10%
- Employee 1 Salary (Default) = \$60,000
- Employee 2 Salary (Texas) = \$50,000
- Employee 3 Salary (Texas) = \$50,000
- Employee 4 Salary (Default) = \$40,000
 - Merit Increase Default Budget = \$10,000
 - Merit Increase Texas Budget = \$10,000

The following allocation totals are made within the compensation task:

- Merit Increase Default = \$11,000
- Merit Increase Texas = \$10,000

The administrator adjusts budgets for the compensation task and sees the following information:

- Merit Increase Default:
 - Original Budget = \$10,000.00
 - Difference = \$0.00
 - Current Budget = \$10,000.00

- Merit Increase Texas:
 - Original Budget = \$10,000.00
 - Difference = \$0.00
 - Current Budget = \$10,000.00

The administrator adjusts the budget to the following:

- Merit Increase Default:
 - Original Budget = \$10,000.00
 - Difference = -\$5,000.00 (red)
 - Current Budget = \$5,000.00
- Merit Increase Texas:
 - Original Budget = \$10,000.00
 - Difference = -\$500.00 (red)
 - Current Budget = \$9,500.00

The administrator saves the adjustments, and a warning pop-up is displayed to indicate that the compensation manager's Merit Increase - Default component allocations exceed the updated budget allowances (new budget plus 10% overage allowance). The administrator clicks the **Yes** button within the pop-up. The compensation manager's compensation plan allocations are reset and the new budgets are reflected in the compensation plan.

- Merit Increase Default = \$5,000
- Merit Increase Texas = \$9,500

Employee 1 is moved to a new team and is no longer included in the compensation plan. Because the budgets are determined by percentage of base salary, the original Default budget is decreased by the employee's default budget allocation (10% of \$60,000), which makes the original Default budget \$4,000 (\$10,000 - \$6,000). The previous budget reduction of \$5,000 still applies to the Default budget. The following new budgets are automatically implemented for the compensation plan:

- Merit Increase Default:
 - Original Budget = \$4,000.00
 - Difference = -\$5,000.00 (red)
 - Current Budget = \$0.00
- Merit Increase Texas:
 - Original Budget = \$10,000.00
 - Difference = -\$500.00 (red)
 - Current Budget = \$9,500.00

A new employee, Employee 5, is moved to the team and is included in the Default budget for the compensation plan. Employee 5's salary is \$80,000. Because the budgets are determined by percentage of base salary, the Default budget is increased by the employee's default budget allocation (10% of \$80,000), which makes the original Default budget \$12,000 (\$4,000 + \$8,000). The following new budgets are automatically implemented for the compensation plan:

- Merit Increase Default:
 - Original Budget = \$12,000.00
 - Difference = -\$5,000.00 (red)
 - Current Budget = \$7,000.00
- Merit Increase Texas:
 - Original Budget = \$10,000.00
 - Difference = -\$500.00 (red)
 - Current Budget = \$9,500.00

The Modification History section within the Adjust Budgets pop-up displays the details of the two budget modifications.

Use Case 3

A compensation task is configured with the following compensation plan budgets:

- Percentage of Base Budget = 10%
- Overage Allowance = 10%
- Employee 1 Salary (Default) = \$60,000
- Employee 2 Salary (Texas) = \$50,000
- Employee 3 Salary (Texas) = \$50,000
- Employee 4 Salary (Default) = \$40,000
 - Merit Increase Default Budget = \$10,000
 - Merit Increase Texas Budget = \$10,000

The following allocation totals are made within the compensation task:

- Merit Increase Default = \$11,000
- Merit Increase Texas = \$10,000

The administrator adjusts budgets for the compensation task and sees the following information:

- Merit Increase Default:
 - Original Budget = \$10,000.00
 - Difference = \$0.00

- Current Budget = \$10,000.00
- Merit Increase Texas:
 - Original Budget = \$10,000.00
 - Difference = \$0.00
 - Current Budget = \$10,000.00

The administrator adjusts the budget to the following:

- Merit Increase Default:
 - Original Budget = \$10,000.00
 - Difference = -\$5,000.00 (red)
 - Current Budget = \$5,000.00
- Merit Increase Texas:
 - Original Budget = \$10,000.00
 - Difference = -\$500.00 (red)
 - Current Budget = \$9,500.00

The administrator saves the adjustments, and a warning pop-up is displayed to indicate that the compensation manager's Merit Increase - Default component allocations exceed the updated budget allowances (new budget plus 10% overage allowance). The administrator clicks the **Yes** button within the pop-up. The compensation manager's compensation plan allocations are reset and the new budgets are reflected in the compensation plan.

- Merit Increase Default = \$5,000
- Merit Increase Texas = \$9,500

Employee 1 is moved to a new team and is no longer included in the compensation plan. Because the budgets are determined by percentage of base salary, the original Default budget is decreased by the employee's default budget allocation (10% of \$60,000), which makes the original Default budget \$4,000 (\$10,000 - \$6,000). The previous budget reduction of \$5,000 still applies to the Default budget. The following new budgets are automatically implemented for the compensation plan:

- Merit Increase Default:
 - Original Budget = \$4,000.00
 - Difference = -\$5,000.00 (red)
 - Current Budget = \$0.00
- Merit Increase Texas:
 - Original Budget = \$10,000.00
 - Difference = -\$500.00 (red)
 - Current Budget = \$9,500.00

The administrator adjusts the Merit Increase - Default budget.

- Merit Increase Default:
 - Original Budget = \$4,000.00
 - Difference = -\$2,000.00 (red)
 - Current Budget = \$2,000.00
- Merit Increase Texas:
 - Original Budget = \$10,000.00
 - Difference = -\$500.00 (red)
 - Current Budget = \$9,500.00

A new employee, Employee 5, is moved to the team and is included in the Default budget for the compensation plan. Employee 5's salary is \$80,000. Because the budgets are determined by percentage of base salary, the Default budget is increased by the employee's default budget allocation (10% of \$80,000), which makes the original Default budget \$12,000 (\$4,000 + \$8,000). The following new budgets are automatically implemented for the compensation plan:

- Merit Increase Default:
 - Original Budget = \$12,000.00
 - Difference = -\$2,000.00 (red)
 - Current Budget = \$10,000.00
- Merit Increase Texas:
 - Original Budget = \$10,000.00
 - Difference = -\$500.00 (red)
 - Current Budget = \$9,500.00

The Modification History section within the Adjust Budgets pop-up displays the details of the three budget modifications.

Reports - 3 OU Salary Structure within Standard Reports

3 OU Salary Structure within Standard Reports

Prior to this enhancement, portals that defined a salary structure with primary, secondary, and tertiary organizational units (OU) could not report on the tertiary OU in the Employee Salary Range Report. With this enhancement, when running the Employee Salary Range Report, for portals that have configured their salary ranges with a tertiary OU, then the Tertiary OU column and the tertiary OU display in the report output.

Note: This enhancement is only supported in the new Compensation user interface (UI).

Report Output - Tertiary OU Column

The Tertiary OU column on the report output displays the tertiary OU for users who are part of a primary, secondary, and tertiary OU. The column name is the name of the tertiary OU that is configured on the Salary Structures page.

1	A	В	с	D	E	F	G	н	1	J	K	L
1												
2												
2	Employee Colony Dr											
4	Employee Salary Ra	ange										
5	User	User ID	<primary ou=""></primary>	<secondary ou=""></secondary>	<tertiary ou=""></tertiary>	Wage Type	Current Salary	Panga Minimum	Pange Midnoint	Range Maximum	Compa-Patio	
	Admin, Cornerstone	cesadmin	Cornerstone Administrator Position	Cornerstone Admin Location	steriary 00>	Annual	current salary	N/A	N/A	N/A	compa-katio	
	Admin, Learning	ladmin	cornerstone Administrator Position	Corrierscone Admin Location		Annual		N/A	N/A	N/A		
	Admin, Performance	padmin				Annual		N/A	N/A	N/A		
	Admin, ServiceTech	ServiceTechAdmin				Annual		N/A	N/A	N/A		
	Admin, Soap					Annual		N/A	N/A	N/A		
	Admin2, Cornerstone	cesadmin2	Cornerstone Administrator Position			Annual		N/A	N/A	N/A		
	Administrator, Cornerstone	ca		California		Annual		N/A	N/A	N/A		
14	Alto, Scott	salto	Corporate Services Manager			Annual		N/A	N/A	N/A		
15	Barker, Bob	bbarker	Business Development Advisor	Santa Monica	Grade 1	Annual	50000	N/A	N/A	N/A		
16	Beavers, Jonathan					Annual		N/A	N/A	N/A		
17	Bernst, Monica	mbernst	Accounting Manager	New York	Grade 2	Annual	49393.24	80000	85000	90000	0.58	
18	Bersudsky, Anna	1234567895	Cornerstone Administrator Position	Cornerstone Admin Location		Annual		N/A	N/A	N/A		
19	Biggs, John	jbiggs				Annual		N/A	N/A	N/A		
	Billing Account, CyberU					Annual		N/A	N/A	N/A		
	Block, Gene	23				Annual		N/A	N/A	N/A		
	Bob, Jamie	test165		Illinois		Annual		N/A	N/A	N/A		
	Bruin, Joe	0	***Extra	California	Grade 2	Annual	77000	N/A	N/A	N/A		
	Bruin, Josie	7878787	***Extra			Annual	90000	N/A	N/A	N/A		
	Burgess, Ron	rburgess	Business Development Manager	Chicago		Annual	75000.12	N/A	N/A	N/A		
	Burns, Sandra	sburns	Marketer	Dallas	Grade 2	Annual	68520.4	N/A	N/A	N/A		
	Campion, Ryan		Chief Executive Officer			Annual		N/A	N/A	N/A		
	Chan, John	jchan	-			Annual		N/A	N/A	N/A		
	Chang, Jim	jchang	Chairman	Los Angeles	Grade 2	Hourly	34320	N/A	N/A	N/A		
	choe, dan	have a strength of the strengt		ab to a second		Annual		N/A	N/A	N/A		
	Cornelson, Brittany	bcornelson	Project Manager	Chicago		Annual	136999.98	N/A	N/A N/A	N/A		
	CSOD, soapadmin	ada bu				Annual		N/A N/A	N/A N/A	N/A N/A		
	Daly, Tim Dane, Jimmy	tdaly Jdane@none.com	Chairman	Los Angeles		Annual Annual		150000	200000	250000		
	Dog, Kai	Joane@none.com kdog	Director	LOS Angeles		Annual		150000 N/A	200000 N/A	250000 N/A		
	Dog, Rich	rdog	Director			Annual		N/A	N/A	N/A		
	Dog, Tammy	tdog	Director			Annual		N/A	N/A	N/A		
	Drogo, Khal	kdrogo@csod.com	Chairman	Santa Monica		Annual		150000	200000	250000		
	dummy, dummy	an open coorcom				Annual		N/A	N/A	N/A		
	Farsani, Ghazal	gfarsani@csod.com			Grade 2	Annual	105000	N/A	N/A	N/A		
	Fisk, Jill	ifisk	Network Administrator			Annual	103000	N/A	N/A	N/A		

Considerations

- If a user has a tertiary OU on their user record, and the tertiary OU is not listed on the Salary Structure page, then the Tertiary OU column displays the user's tertiary OU from the user record.
- The report will show the salary range minimum, range midpoint, and salary range maximum for the tertiary OU for users who are part of a primary, secondary, and tertiary OU when the Salary Structures page has a defined tertiary OU salary range minimum, range midpoint, and salary range maximum.
- If the Salary Structures page has a primary, secondary, and tertiary OU defined:
 - and the user only has a primary OU, then the system shows the primary salary range minimum, range midpoint, and salary range maximum in the report output.

- and the user only has a primary and secondary OU, then the system shows the primary and secondary salary range minimum, range midpoint, and salary range maximum in the report output.
- and a tertiary OU is not present for the user on the user record, tertiary OU will remain blank in the Tertiary OU column.
- If "None" is selected in the <u>Select Tertiary OU</u> field on the Salary Structures page, then the Tertiary OU column does not display on the Employee Salary Range Report.
- The Employee Salary Range Report will display the edited midpoint when the <u>Edit Midpoint</u> option is selected on the Salary Structures page, regardless of the level of the OUs defined for the position.

Use Cases

- An organization's salary structure is made up of a primary, secondary, and tertiary OU. They would like to load their salary structure into the system.
- An organization would like to report on its salary structure data on a per user basis.

Security

The following existing permission applies to this functionality:

Permission Name		Permission Description	Category
Employee Salary Range Report	Grants access to Employee Salary Range Report, which displays the salary range of each employee in the report criteria.		Reports - Compensation

Examples

The following are examples of the report output based on criteria defined for the portal's salary structure.

Example 1

Criteria	Result	
User: John Jones	John Jones will show on the report with Grade 1, Position 1, and Location 1 with Min: \$10,000.00; Midpoint: \$14,000.00; Max:	
Primary OU: Grade 1	\$20,000.00	
Secondary OU: Position 1		
Tertiary OU: Location 1		
Salary Range for Grade 1; Position 1; (No Tertiary OU for this range) - Min: \$10,000.00; Range Midpoint: \$14,000.00; Max: \$20,000.00		

Example 2

Criteria	Result
User: John Jones	John Jones will show on the report with Grade 1, Position 1, and Location 1 in the report with Min: \$10,000.00; Midpoint: \$14,000.00; Max:
Primary OU: Grade 1	\$20,000.00
Secondary OU: Position 1	
Tertiary OU: Location 1	
Salary Range for Grade 1; Position 1; Location 1 - Min: \$10,000.00; Edited Midpoint: \$14,000.00; Max: \$20,000.00	

Connect

Connect Redesign

With the March 2014 Release, the user experience of Connect was completely redesigned. This includes a customizable main page, intuitive community set-up and activity, and Q&A, Suggestion, Discussion, and File posting types. Once enabled, new pages must be set up through Nav Tabs and Links. **Note:** *New Connect and New Knowledge Bank is a replacement for Old Connect. Currently, there are no plans to retire Old Knowledge Bank.*

Implementation

For organizations using Old Connect, this functionality is available by request until 2016.

For organizations not using Old Connect, this functionality is available at an additional cost.

The availability of this functionality is controlled by a backend setting. To enable this functionality, contact Global Product Support or your Client Success Manager.

Use Cases

A customer service manager creates a discussion in the Knowledge Bank titled Customer Service Best Practices to collect all of the organization's best practices. Years later, new hires in customer service can learn from the posted best practices.

Connect Redesign - Data Migration

As of the February 2015 Release, a data migration script is 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.

This migration is currently optional and, if chosen, will be a one-time migration and irreversible. Migration is recommended for all organizations except those who heavily share topics across communities. For organizations sharing topics, it is advised to wait until that feature becomes available.

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.

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 data migration is available by request until 2016.

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.

Community Activity Updates in Live Feed

Community Activity Updates in Live Feed

Prior to this enhancement, the user would have to navigate to each community individually to view updates from each community.

With this enhancement, the Live Feed may now display community activity updates. This enables the user to view activity updates from all communities in which they are a member in a single location.

Use Cases

Curtis is a manager in an organization. The organization has different communities for different teams, and Curtis is a part of all of them. In order to stay updated on each team's activity, the manager must navigate to each community to view new information. By visiting the Live Feed, the manager can view activity updates from the different teams consolidated into one location.

Implementation

This functionality is activated by default for all New Connect clients in Stage and Production.

Security

The following existing permissions apply to this functionality:

Permission Name			Permission Description	Catego	ory
Bank/Communities pages. Th		pages. Th OU. This	pility to view the Knowledge Bank and Communities his permission can be constrained by OU and User's permission is assigned to the default Administrator efault.		New Connect
		Preferences.	y to view and manage the New Con This permission can be constrained		New Connect
Connect Teams, Team Overvie		eam Overvi	the new Connect pages, including l ew, Team Feed, Team Tasks, Task D rmission cannot be constrained.		New Connect

Connect Preferences

With this enhancement, administrators can enable community updates to appear in the Live Feed through the Communities Activity Update Display Options panel in the Connect Preferences page.

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

Permissions

Permission Name		Permission Description		Category	
View New Connect Preferences		ry to view and manage the New Connect . This permission can be constrained by OU ar	nd	New Connect	

Communities Activity Update Display Options

This section controls which community activity updates are included in the Live Feed.

The following option is available:

• <u>New posting created (visible to all community members)</u> - When this option is selected, all new community postings are displayed in the Live Feed for all users within the community. This option is selected by default.

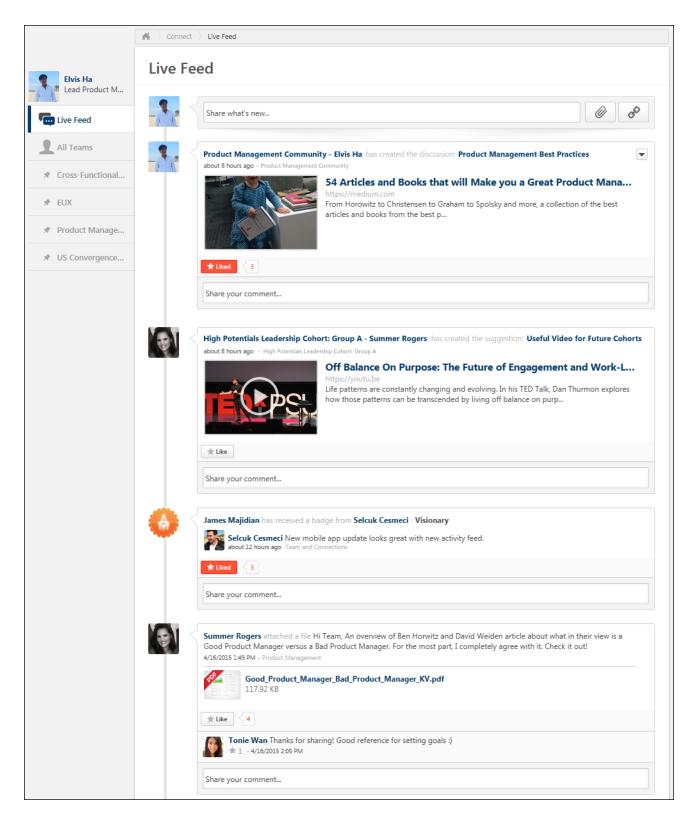
Communities	Activity Update Display Options	Δ
Include	Preference	Description
\checkmark	New posting created (visible to all community members)	Enable a preference to display an activity update whenever a new posting is created in a community.

Connect - Live Feed

With this enhancement, a user may be able to view and interact with community updates within the Live Feed. Users can only view community updates from communities of which the user is a member.

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

If enabled by the administrator, community updates display in the Live Feed. The user must be a member of the community in order to view updates. As with any other Live Feed activity, the user is able to 'Like' or comment on community updates.



Flexible Availability for Cohort Communities

Flexible Availability for Cohort Communities

Prior to this enhancement, when editing the availability of a cohort topic or community, each member of the cohort roster appeared as an individual line item. If the availability for the roster needed to be adjusted, administrators needed to adjust the availability for each individual on the cohort roster. In addition, if a new user was added to the cohort roster, then the availability was reset to the default settings.

With this enhancement, when editing the availability of a cohort topic or community, the entire cohort roster appears as a single line item. This functionality gives the administrator greater control over the availability configuration for cohort communities and topics, and allows for the creation of larger and more stable cohort rosters. In addition, if a new user is added to the cohort roster, any customized availability settings are maintained.

Implementation

This functionality is only available when using the New Connect functionality.

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

For organizations using Old Connect, New Connect is available by request until 2016.

Security

The following existing permission applies to this functionality:

Permission Name	Permission Description Catego	ry
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
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

Cohort Community - Edit

Prior to this enhancement, each member of the cohort roster was displayed as an individual entry in the Availability Selection Criteria section, and group availability could not be edited.

With this enhancement, all members of the roster are consolidated into a single line item. Through this format, administrators can configure availability for the entire roster.

To edit a cohort community, on the Community page, select *Edit Community* from the <u>Options</u> drop-down menu.

Permissions					
Permission Name	Permission Description C	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 dele topics and subtopics. Administrators with this permission can view all communities, topics, sub-topics and postin regardless of permission constraints. In addition, administrators can add a posting to the Course Catalog permission can be constrained by OU and User's OU. T permission is assigned to the default Administrator role default.	ete on ngs, g. This This			
View Knowledge Bank/Communities	Grants ability to view the Knowledge Bank and Commur pages. This permission can be constrained by OU and U OU. This permission is assigned to the default Administr role by default.	Iser's Connect			

The *Availability Selection Criteria* section at the bottom of Edit Community page now displays the members of the cohort roster in a single entry. The line item is titled: "All users on cohort roster: Cohort Name". The <u>Include Subordinates</u> option is not available for this line item.

Availability Selection Criteria				
Criteria	Include Subordinates	Action Group		
Admin, Cornerstone (cesadmin)		Community Moderator 🔻		
Admin, Cornerstone (cesadmin)		Expert 💌		
All users on cohort roster: High Potentials Leadership Group A		Member 💌		
Cancel Done				

Cohort Topic - Create/Edit

Prior to this enhancement, each member of the cohort roster was displayed as an individual entry in the Availability Selection Criteria section, and group availability could not be edited.

With this enhancement, all members of the roster are consolidated into a single line item. Through this format, administrators can configure availability for the entire roster. In addition, administrators can now reset the availability settings for a cohort topic to the default settings.

To create a topic from within a community, click the **Create Topic** button on the Topics tab of the community.

To create a subtopic within a topic, on the Topic Details page, select *Create Subtopic* from the <u>Manage Topic</u> drop-down menu.

To edit a topic, on the Topic Details page, select *Edit Topic* from the <u>Manage Topic</u> drop-down menu.

Permissions				
Permission Name	Permission Description	Categor	ory	
Manage Knowledge Bank/Communities Administration	Grants ability to view the New Knowledge Bank Administration page. Based on permission constrain administrators with this permission can create and topics and subtopics. Administrators with this perm can view all communities, topics, sub-topics and po regardless of permission constraints. In addition, administrators can add a posting to the Course Cata permission can be constrained by OU and User's OL permission is assigned to the default Administrator default.	ts, delete ssion stings, alog. This J. This	New Connect	

The *Availability Selection Criteria* section at the bottom of Edit Community page now displays the members of the cohort roster in a single entry. The line item is titled: "All users on cohort roster: Cohort Name". The <u>Include Subordinates</u> option is not available for this line item.

Administrators can restore the availability settings to the default setting by clicking the **Reset Availability** button on the right side of the section. By default, the Instructor is in the Expert action group and the entire cohort roster is in the Member action group.

Administrators must click the **Done** button to save any changes to the *Availability Selection Criteria* section.

Availability Selection Criteria		
Select OU Criteria 🔻		Reset Availability
Criteria	Include Subordinates	Action Group
Admin, Cornerstone (cesadmin)		Expert 🔻
All users on cohort roster: High Potentials Leadership Group A		Member 🔻
Overwrite availability changes for all of this topic's child topics.		

Like, Reply, and View Counts

With this enhancement, the Likes, Replies, and Views totals are now updated in real time on the Topic Details page.

This enhancement affects the following displays:

- Likes Displays the total number of users who liked a posting.
- Replies Displays the total number of replies to a posting.
- Views Displays the total number of users who viewed a posting.

Knowledge Bank > Topics > Wellness at Work				
Wellness at Work		Manage Topic 🔻	Create	Posting 🔻
POSTINGS	Author	Replies	Views	Likes
Fitness Day	Jon Lolley 9/9/2014 7:21 AM	1	1	1
Exercise Ball as Chair	Jon Lolley 9/9/2014 7:20 AM	0	1	0
Office Exercises	Jon Lolley 9/9/2014 7:17 AM	0	1	0
Office Exercises	Jon Lolley 9/9/2014 7:03 AM	0	4	0

Implementation

This functionality is only available when using the New Connect functionality.

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

For organizations using Old Connect, New Connect is available by request until 2016.

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 Communages. This permission can be constrained by OU and OU. This permission is assigned to the default Administrole by default.	User's Connect

Share Topics across Communities

Shared Topics across Communities

Prior to this enhancement, a topic could not be shared across communities. If identical topics were created in different communities, then the topic had to be edited in each community.

With this enhancement, a topic can be shared across communities. A shared topic can be updated in one location, and the update is applied to the topic in all shared locations. This includes if a topic's subtopics and postings are updated. This enables administrators and moderators to update a posting in one location instead of multiple locations.

Use Cases

A technology organization using New Connect has a "Rolling Roadmap" topic. This rolling roadmap was originally created in the "Product Management" community, but other stakeholders in the organization rely on this information. The "Rolling Roadmap" topic is shared with the "Client Success" and "Sales" communities so that the members of all communities can be updated with any changes without a moderator manually updating the "Client Success" and "Sales" communities.

Implementation

This functionality is only available when using the New Connect functionality.

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

For organizations using Old Connect, New Connect is available by request until 2016.

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description Categ	ory	
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 s	

View Knowledge	Grants ability to view the Knowledge Bank and Communities	New
Bank/Communities	pages. This permission can be constrained by OU and User's	Connect

	OU. This permission is assigned to the default Administrator role by default.	
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Topic - Create/Edit

When editing a topic for a community, learning community, or cohort community, a *Shared to Communities* section is now available. This section enables administrators to share a topic across multiple communities.

When creating a topic, the *Shared to Communities* section is not available.

When creating a subtopic, the *Shared to Communities* section is only available if the parent topic is shared.

To create a subtopic within a topic, on the Topic Details page, select *Create Subtopic* from the <u>Manage Topic</u> drop-down menu.

To edit a topic, on the Topic Details page, select *Edit Topic* from the <u>Manage Topic</u> drop-down menu.

Permissions		
Permission Name	Permission Description Catego	ory
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
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

Shared to Communities

This section is only visible to users with permission to manage the Knowledge Bank and communities.

Note: This section is always available when editing a topic. This section is not available when creating a topic. When creating a subtopic, this section is only available if the parent topic is shared.

This section enables administrators to share a topic across multiple communities. When a topic is shared, all subtopics are also shared. A shared topic can be updated in one location, and the

update is applied to the topic in all shared locations. This includes if a topic's subtopics and postings are updated. This enables administrators and moderators to update a posting in one location instead of multiple locations.

This section displays all communities with which the topic is currently being shared.

Share with Community

To share the topic with another community, click the Select icon \Box to the right of the <u>Add</u> <u>Community</u> field. This opens the Select Community pop-up, in which you can search for and select a community. Select a community by clicking the community name within the pop-up.

When a topic is shared with a community, the topic is always shared in the main level of topics within the shared community.

Remove Shared Community

If a topic is currently shared with other communities, then the communities with which the topic is currently shared are listed in the *Shared to Communities* section. To stop sharing a topic with a community, click the Remove icon it to the right of the community name. **Note:** *Removing a shared community never impacts the shared topic's availability settings, even if the shared community's availability had previously been added to the shared topic. The added availability remains with the shared topic.*

A topic can only be removed from sharing if none of the topic's parent topics are shared.

If the topic is no longer shared with any communities, then the topic is deleted when the changes are saved.

View or Add Availability

If a topic is currently shared with other communities, then the communities with which the topic is currently shared are listed in the *Shared to Communities* section. Each community may have unique availability settings. To view the availability settings of a community with which the topic is shared, click the **View Availability** button to the right of the community. This opens a read-only view of the community's availability in a pop-up in which you may choose to add to community's availability to the topic.

See Shared Topic - Availability Pop-up on page 93 for additional information.

Overwrite availability changes for child topics

If this option is selected when editing a topic that has a shared child topic, then a warning popup is displayed when the topic is saved to indicate that the availability of a shared topic will be overwritten. Click **OK** to overwrite the availability for all child topics. Or, click **Cancel** to not overwrite the availability for all child topics.

- This option is not available when creating a topic because the new topic does not have any subtopics.
- This option is not available when editing a topic within a cohort community.

Done or Cancel

Click **Done** to save any unsaved changes.

- If a new community was added to the *Share to Communities* section, the topic is now shared with the added community with the configured availability settings.
- If a community was removed from the *Share to Communities* section, the topic and all of its subtopics are no longer shared with the removed community. However, the availability settings for the shared topic are unaffected. If the topic is no longer shared with any communities, then the topic is deleted. A confirmation pop-up opens to confirm the deletion.
- If the <u>Overwrite availability changes for child topics</u> option is selected when editing a topic that has a shared child topic, then a warning pop-up is displayed when the topic is saved to indicate that the availability of a shared topic will be overwritten.

Click **Cancel** to discard any unsaved changes.

Communities Executive Leadership Topics C-level Edit Topic Edit Topic dit Topic		
Details		
escription		
Add Community	View Availability	
Executive Leadership Community New Hire Orientation Community	 View Availability View Availability 	
Add Community Executive Leadership Community New Hire Orientation Community Fech Services Community	View Availability	
Add Community Executive Leadership Community New Hire Orientation Community Fech Services Community Availability Selection Criteria	 View Availability View Availability 	
Add Community xecutive Leadership Community lew Hire Orientation Community ech Services Community Availability Selection Criteria	 View Availability View Availability 	
Add Community xecutive Leadership Community Hew Hire Orientation Community ech Services Community Availability Selection Criteria Select OU Criteria	 View Availability View Availability View Availability View Availability 	Action Group
Add Community Executive Leadership Community New Hire Orientation Community Each Services Community Each Services Community Availability Selection Criteria Select OU Criteria riteria All employees in Position: Chief Operating Officer	 View Availability View Availability View Availability Include Subordinates 	Action Group Member
Add Community Executive Leadership Community New Hire Orientation Community Each Services Community Each Services Community Each Select Community Each Select OU Criteria Each Community E	 View Availability View Availability View Availability View Availability Include Subordinates Include Subordinates 	
Add Community Executive Leadership Community New Hire Orientation Community Fech Services Community	 View Availability View Availability View Availability View Availability Include Subordinates Include Subordinates Include Subordinates 	Member 👻
Add Community Executive Leadership Community New Hire Orientation Community Tech Services Community Availability Selection Criteria Select OU Criteria Interia All employees in Position: Chief Operating Officer All employees in Position: Chief Nursing Officer	 View Availability View Availability View Availability View Availability Include Subordinates Include Subordinates 	Member 💌

Topic Sharing Rules

The following rules apply when sharing a topic to another community:

- 1. The topic is always shared in the main level of topics within the shared community.
- 2. The topic's original availability is always retained, regardless of the availability of the shared community. However, the availability of the shared community can be added to the shared topic.
- 3. A topic must be associated with at least two communities to be considered shared. If a topic is only associated with a single community, then the topic is not considered shared.
- 4. Unsharing a topic from all communities deletes the topic.
- 5. When editing a community or topic, the editor can choose to apply the availability settings to all topics within the community or topic. However, a warning message is displayed to confirm the action.
- 6. A shared topic cannot be deleted. Also, if a parent topic has shared subtopics, then the parent topic cannot be deleted.
- 7. A user must match the availability of a shared topic to view the shared topic. However, a user does not need to match the availability of the topic's community to view the shared topic.
- 8. A shared child topic cannot be unshared if the parent topic is shared.
- 9. Creating a child topic within a shared topic automatically shares the child topic.
- 10. Unsharing a parent topic automatically unshares any child topics.

Shared Topic - Availability Pop-up

If a topic is currently shared with other communities, then the communities with which the topic is currently shared are listed in the *Shared to Communities* section. Each community may have unique availability settings. To view the availability settings of a community with which the topic is shared, click the **View Availability** button to the right of the community. This opens a read-only view of the community's availability in a pop-up in which you may choose to add to community's availability to the topic.

By viewing the availability of a community with which a topic is being shared, this enables administrators and moderators to ensure that the availability of the shared topic aligns with the availability of the community.

Add Availability

To add the availability of the community to the availability of the shared topic, click the **Add** button within the Availability pop-up. This updates the availability of the shared topic to include the availability of the corresponding community.

Availability		×		
These are the current availability settings for Leadership Training. Please ensure that the availability for a shared topic aligns with the availability for Leadership Training. Clicking "Add" will populate the shared topic's availability criteria with Leadership Training's current availability criteria				
Criteria	Include Subordinates	Action Group		
Waits-Smith, Kalia (kwaitssmith)		Community Moderator 🔻		
Simms, Curtis (csimms)		Expert 💌		
All employees in Cohort Roster: Leadership Training		Member 🔻		
		Cancel Add		

Community Topic - Topic Details Page

When a topic is shared with other communities, a user is not required to be a member of a community in order to view the topic. As long as the user is within the availability for the topic, then the user can view the topic. This is important if a user has a direct link to the topic.

When viewing the Topic Details page for a shared topic or a topic that has a shared child topic, if the *Delete Topic* option is selected from the <u>Manage Topic</u> drop-down menu, then a pop-up appears and notifies the user that the shared topic cannot be deleted. In order to delete a shared topic, the topic must be unshared from all communities before being deleted.

To view the Topic Details page for a community topic, click the topic title from anywhere in the community.

Permissions

Permission Name	Permission Description Catego	egory	
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	
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	

Communities New Hires 2014 Topics Employee Training				
Employee Training		Manage Topic	 Create 	Posting
POSTINGS	Author	Replies	Views	Likes
Fitness Day	Jon Lolley 9/9/2014 7:21 AM	1	1	1
Exercise Ball as Chair	Jon Lolley 9/9/2014 7:20 AM	0	1	0
Office Exercises	Jon Lolley 9/9/2014 7:17 AM	0	1	0
Office Exercises	Jon Lolley 9/9/2014 7:03 AM	0	4	0

Community - Topics Tab

When a topic is shared with other communities, then the topic appears on the Topics tab for all corresponding communities. The topic appearance on the Topics tab is unchanged.

To access the Topics tab for a community, go to **Connect > All Communities**. Click the community title, and then click the Topics tab.

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

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.	
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Communities New Hires 2014 Topics	
Main Topics Members	Create Topic
Employee Benefits This topic is dedicated to information regarding employee benefits.	Employee Training This topic is dedicated to the training that is available to employees.

Community - Edit

When editing a community or learning community, the community editor can choose to apply the community's availability settings to all topics associated with the community. With this enhancement, a notification is now available that alerts the community editor if the availability of a shared topic is about to be overwritten.

To edit a community, on the Community page, select *Edit Community* from the <u>Options</u> dropdown menu.

Permissions		
Permission Name	Permission Description Catego	ory
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
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

Overwrite availability changes for child topics

If this option is selected when editing a community that contains a shared topic, then a warning pop-up is displayed when the community is saved to indicate that the availability of a shared topic will be overwritten. Click **OK** to overwrite the availability for all topics. Or, click **Cancel** to not overwrite the availability for all topics.

• This option is not available when editing a cohort community.

Community - Delete

When viewing the Main tab of a community or learning community that contains a shared topic, if the *Delete Community* option is selected from the <u>Options</u> drop-down menu, then a pop-up appears and notifies the user that a shared topic cannot be deleted. In order to delete a shared topic, the topic must be unshared from all communities before being deleted.

To delete a community, on the Community page, select *Delete Community* from the <u>Options</u> drop-down menu.

Permissions			
Permission Name	Permission Description Catego	egory	
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	
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	

Email Notifications Workflow

For Community related email triggers, a user must match the following criteria in order to receive the email:

- User is selected in the <u>Send To</u> or <u>CC</u> field for the email trigger.
- User is within the availability criteria for the corresponding posting's parent topic.
- User is within the constraints of the posting's parent topic's creator constraints.
- User is a member of one of the communities with which the topic is shared.

This applies to all community action groups (i.e., Community Moderator, Topic Moderator, Expert, and Member).

Sort Drop-downs in Topics

Sort Drop-downs in Topics

Prior to this enhancement, topic postings on the Topic Details page were sorted by latest reply date, and this could not be changed.

With this enhancement, users can sort postings on the Topic Details page using six different options.

Implementation

This functionality is only available when using the New Connect functionality.

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

For organizations using Old Connect, New Connect is available by request until 2016.

Security

The following existing permission applies to this functionality:

Permission Name		Permission Description	Catego	ry
Manage Knowledge Bank/Communities Administration	Adminis adminis topics a can view regardle adminis permiss	ability to view the New Knowledge Ba tration page. Based on permission co trators with this permission can creat nd subtopics. Administrators with this v all communities, topics, sub-topics a ess of permission constraints. In addit trators can add a posting to the Cours ion can be constrained by OU and Use ion is assigned to the default Adminis	nstraints, e and delete s permission and postings, tion, se Catalog. This er's OU. This	New Connect
View Knowledge Bank/Communities	pages. Tl	bility to view the Knowledge Bank and nis permission can be constrained by permission is assigned to the default efault.	OU and User's	New Connect

Topic Details Page - Sort Options

With this enhancement, users can sort postings on the Topic Details page using six different options.

To view the Topic Details page for a community topic, click the topic title from anywhere in the community.

Permissions			
Permission Name	Permission Description Catego	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	
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	New Connect	

The following sorting options are available from the <u>Sort</u> drop-down menu:

role by default.

- Sort Alphabetically* This option sorts and displays all postings in alphabetical order.
- Sort by Create Date* This option sorts and displays all postings by create date, from newest to oldest.
- Sort by Latest Reply This option sorts and displays all postings by reply date, from newest to oldest. If there are no replies, then the creation time and date of the posting is used as the latest reply date.
- Sort by Most Likes* This option sorts and displays all postings by the amount of likes, from most to least.
- Sort by Most Views* This option sorts and displays all postings by view count, from most to least.
- Sort by Type* This option sorts and displays all postings by type: Discussion, File, Q&A, Suggestion.

*The secondary sort option is Sort by Latest Reply, from newest to oldest.

Core Functionality Q&A - Services				Create Posting •		
Sort Alphabetically 💌						
POSTINGS	Author	Replies	Views	Likes		
Client Logo within Custom Reporting	Angeline Dawson 4/27/2015 9:00 PM	1	6	0		
Culture ID vs Default Language (Preferences)	Lexie Gumba 4/21/2015 11:15 PM	2	21	0		
Email Attachment Security	Brieann Custodio 5/5/2015 5:23 PM	1	9	0		

Threaded Replies in Postings

Threaded Replies in Postings

Prior to this enhancement, users could only reply directly to postings, and users could not reply to other posting replies.

With this enhancement, users are now able to reply directly to posting replies.

Use Cases

A manager is viewing a discussion. Another user replies with a valuable idea. The manager directly replies to the user, which triggers an email notification to the user. The manager and user continue the discussion about the idea.

Implementation

This enhancement is enabled by default for all New Connect clients in Stage and Production.

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 Commu pages. This permission can be constrained by OU and OU. This permission is assigned to the default Adminis role by default.	User's Connect

Posting Details Page

With this enhancement, users now have the option to reply to posting replies through the Posting Details Page.

To view a posting, click the posting title from anywhere in the Knowledge Bank or communities.

The user can reply to a direct posting reply by clicking the Comment icon in the lower-left corner of the reply. Doing so opens a text box. The location of the text box depends on the number of existing replies:

- Replying to a reply thread with 3 or more existing replies opens a text box directly beneath the last threaded reply.
- Replying to a reply thread with 2 or fewer existing replies opens a text box at the bottom of the page.

Secondary replies are indented to denote hierarchy. Secondary replies can be edited, liked, and deleted, but users cannot reply to a secondary reply.

If there are three or more existing replies, only two replies are displayed and a *View previous replies* link displays. Users can click the link to view all previous replies.

Communities Services Expert Q&A Community Topics Extended Enterprise Q&A - Services Credit Card Billing
Credit Card Billing
Jeff Miller posted 5/10/2013 10:29 PM Helio, I can't seem to find detailed documentation on the process to setup credit card billing for an Extended Enterprise client. The online course on the topic seems to indicate that I can just open a case to request It. My main question though is; If I simply open a case it is assumed that the client will use CSOD's Cybersource account and they will receive their payments on a monthy basis. Is It also assumed that the client only sets up their own Cybersource account if they want to be paid directly from Cybersource instead of CSOD? If there is any workflow documentation on the setup of these options please feel free to share the link. Thank you!
Kelie Padage replied 5/17/2013 3:31 PM. Final, unless told otherwise, yes the assumption would be that the client would be using the CSOD merchant account. If the client wants to set up their own merchant account, yes they'd be pada directly by Opersource. Here is some information you may think helpful: Questions to ask to determine whether the client should have their own cybersource account or use CSOD default account. I wetry using to be orded ord payment? I wetry using multiple correctal 2001 I wetry using the orded order payment? I wetry using the orded or the order order order or the order ord
8 @
Reply
Victoria Fitzgerald replied less than a minute ago Hi Jeff, here's some detailed documentation!
ccbilling.doc 83.5 KB
B I S U)= := 非 非 學
8
Cancel Reply

Knowledge Bank/Communities Reply Email Trigger

With this enhancement, the Knowledge Bank/Communities Reply email trigger is enhanced. If configured, this email trigger is now triggered when replies are added to posting replies.

This email can no longer be sent to Posting Creator. This email can be sent to Author, Community Moderator, Community Members, or a specific user.

If the reply is added directly to the posting, then Author refers to the posting creator. If the reply is added to another reply, then Author refers to the posting creator and the author of the original reply.

Learning

Adobe Connect Seminar Rooms Integration

Adobe Connect Seminar Rooms Integration

Prior to this enhancement, the Adobe Connect vILT integration only supported Adobe Connect Meetings and Shared Meetings.

With this enhancement, the Adobe Connect vILT integration now supports Seminar Rooms, in addition to Meetings and Shared Meetings. The Seminar Rooms functionality allows for a higher number of participants in sessions.

Use Case

- 1. An administrator working inside the Learning Management System (LMS) is setting up webinar training that will be attended by the entire company. She creates the session inside the LMS and assigns an instructor. Because there will be over 1,000 attendees, she decides to use one of her company's licensed Seminar Rooms with Adobe Connect.
- 2. One of the facilities inside of the LMS is mapped to the appropriate Seminar Room in Adobe Connect. The administrator makes sure that the location of the session is using a location with that facility so that the meeting will be held inside the Seminar Room.
- 3. The webinar is assigned to the entire company and when it comes time for the session to start, the attendees launch the webinar directly from their transcripts and are taken directly into the Seminar Room inside of Adobe Connect.

Considerations

The Adobe Connect API does not support the passing back of attendance data from Adobe Connect to the LMS.

The system enables administrators to move an ILT session into a seminar room. However, seminar rooms must be created and managed within Adobe Connect.

Implementation

For organizations with an existing Adobe Connect vILT integration, this functionality is available upon request.

Move Session to Seminar Room

The system enables administrators to move an ILT session into a seminar room. However, seminar rooms must be created and managed within Adobe Connect.

To move an ILT session into a seminar room, first, create an ILT Facility that matches the name or ID of the shared seminar room in Adobe Connect. Second, create an ILT session. On the Parts Schedule page for the session, set the session location as the facility that corresponds to the Adobe Connect seminar room. This ensures the session is associated with the correct seminar room in Adobe Connect.

Create Seminar Room Facility

To create a seminar room facility, go to **ILT > Facilities and Resources**. Then, click the *Add Facility* link.

The following information must be entered for the seminar room facility in order to map it to the seminar room in Adobe Connect:

- <u>Name</u> Enter the Adobe Connect Seminar Room name. This is required.
- ID Enter the Adobe Connect Seminar Room ID. This is required.
- <u>Description</u> Enter an optional description for the seminar room facility.
- <u>Active</u> Select this option to make facility active.
- <u>Facility Type</u> Select the appropriate facility type from the drop-down list.
- In the address fields, enter the address of the seminar room, if applicable.

Create Session with Seminar Room Facility

To create an ILT Event 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 \square . To create a new session, you can do so via one of the following options:

- Click Create New Session to create a new session.
- Click Copy icon to create a copy of an existing session which can be changed or edited and saved as a new session.
- Click Edit icon to modify an existing session.

The following information must be entered for the session on the Parts Schedule page in order to utilize the Adobe Connect seminar room facility:

- <u>Name</u> Enter the session name.
- Description Enter the session description.
- Location Select the Seminar Room Facility.

Cisco WebEx Meetings SSO

Cisco WebEx Meetings SSO

WebEx integration is enhanced to enable organizations to utilize the WebEx Single Sign On (SSO) functionality. When WebEx SSO is enabled, WebEx instructors are no longer required to enter their passwords when creating and launching meetings.

Considerations

Migration is not supported for this functionality. That is, organizations with WebEx vILT sessions must remove or copy them after WebEx SSO is enabled in order for them to function properly. Existing sessions cannot be launched or edited after WebEx SSO is enabled.

WebEx only allows one SAML certificate to authenticate users. This means that if SSO is set up between Cornerstone and WebEx, the organization can only access WebEx via the Cornerstone system. In this scenario, the organization cannot use SSO from multiple platforms into the same WebEx account.

Implementation

Enabling WebEx for a portal requires an integration project. This functionality is controlled by backend settings.

The WebEx SSO functionality is disabled by default in Stage and Live portals and must be enabled via a work order. This functionality is controlled by a backend setting. Prior to enabling WebEx SSO within the Cornerstone portal, organizations must also request SSO from WebEx and have the SAML metadata imported to their WebEx support site.

WebEx Support Site

Prior to enabling WebEx SSO within the Cornerstone portal, organizations must request SSO from WebEx.

After SSO is enabled by WebEx, organizations must have the SAML metadata imported to their WebEx support site. This can be done via the SSO Configuration page within the WebEx support site.



vebex		Site Administration	0
Home Manage Site	SSO Configuration		
Site Settings Tracking Codes	Site Certificate Manager		
Company Addresses	Federated Web SSO Configuration		
SSO Configuration Manage Users			
Add User Edit User List Import/Export Users Edit Privileges Sand Email to All Session Types	Federation Protocol: SSO Profile: SP Initiated AuthnRequest Signed	SAML 2.0	
Add Custom Type Session Type List	Target page URL Parameter.	TARGET	1
ssistance		Import SAML Metadata	1
Help	WebEx SAML Issuer (SP ID):	http://www.webex.com	*
og out	Issuer for SAML (IdP ID):]•
	Customer SSO Service Login URL:]•
	You can export a SAML metadata WebEx SP configuration file:	Export	
	NameID Format:	Unspecified •	-
	AuthnContextClassRef.	um oasis names to SAML 2.0 ac classes PasswordProtectedTransport	•
	Default WebEx Target page URL:		
	Customer SSO Error URL:		
	Single Logout Auto Account Creation Auto Account Update Remove uid Domain Suffix for Active Directory UPN		

Instructor Passwords

When WebEx SSO is enabled, WebEx instructor passwords are no longer necessary. Because of this, they are no longer stored within the Cornerstone portal.

When viewing the Instructor Details pop-up for a WebEx instructor, the pop-up does not display password information if WebEx SSO is enabled.



Collaborative Learning Usability Improvements

Collaborative Learning - Custom Fields

Collaborative Learning - Custom Fields

With this enhancement, program and cohort learning objects (LOs) now support custom fields.

Implementation

Upon release, this functionality is automatically enabled in Stage and Live portals for organizations using Learning and New Connect.

Security

Manage

The following existing permissions apply to this functionality:

permission.

Permission Name			Permission Description	Category
Course Catalog - Update	e Learning - Administration			
		nore learni	eate and edit custom fields to be used for ng object types. This is an administrator	Learning - Administration
Training Re Custom Fie	Learning - Administration			

Training Custom Field - Add/Edit

When adding or editing a training custom field, administrators now have the option to enable and configure the custom field for program and cohort learning objects (LOs). All types of custom fields can be enabled for programs and cohorts.

To define a training custom field, go to **Admin > Tools > Core Functions > Custom Field Administration**. Click the Training tab on the left. Then, click the Add Field icon in the Fields section.

Permissions

Permission Name		Permission Description	Category		
-	-		Learning - Administration		

Training Request Form	Grants access to create and edit custom fields used	Learning -
Custom Fields -	for Training Request Forms. This is an administrator	Administration
Manage	permission.	

ustom Field Administration											
Define Field	_	_			_	_	_	_	_	_	
Application Define the field name, field type, field an not visible to anyone.	ailability	and add	litional	field prop	erties be	elow. If a	availabili	ity is not	defined	the cus	tom field is
Compensation											
Development Plans	Na	ame:								4	9
Offer Letter	Er	mail Tag	g:								
Organizational Units	ту	/pe:		Select C	ustom F	ield Typ	e 🗸				
Performance Reviews		vailable		English ((15)				•		
Request Forms		anguage	es:		0.57			-			
SF-182	A	ctive:		✓							
Succession FIELD DETAILS FOR EACH TRAINI	NG TYPE	Chec									\triangle
Training	-	-		-		11.	-	4	6		
User Record		\odot				ų,			V	1	
Vendor Active Training Type											
Response Required											
Editable On Transcript By Admin											
Visible to End User on Transcript											
Editable on Transcript By End Use	r 🗌										
AVAILABILITY Select OU Criteria Cancel Save			✓ ^Φ c	reate Ne	w Grou	p					

Training Custom Field Administration

The Training Custom Field Administration page displays all training custom fields that are available to the administrator.

To manage custom fields, go to **Admin > Tools > Core Functions > Custom Field Administration**. Then click the appropriate tab on the left.

Permissions Permission N	ame	Permission Description	Category	
Training Custom Fields			Learning - Administration	

Training Request Form	Grants access to create and edit custom fields used	Learning -
Custom Fields -	for Training Request Forms. This is an administrator	Administration
Manage	permission.	

Custom Field Administrat	tion					?
Application Compensation Development Plans Offer Letter Organizational Units	of custom fields and indicate for white	r all training types. Select Define LO T ch learning object type the custom fiel All Types [o on the session details page Define	ds will display. nclude inactive	Search		rder
Performance Reviews Request Forms					(4 Res	ults)
SF-182	Title	Туре	Created By	Active	Options	
Succession	CEU Credits	Numeric Field	Config, LMS	✓	2 🗉	Ì
Training	Dress Code	Dropdown	Config, LMS	✓	2	Ì
User Record Vendor	Special Instructions	Scrolling Text Box	Config, LMS	✓	2	Ì
	Target Audience	Scrolling Text Box	Config, LMS	\checkmark	2	Ì

Training Custom Fields - Define Custom Field Order

When defining the display order of existing custom fields and indicating for which type of learning objects (LOs) the custom fields will display, the Program and Cohort LO types are now displayed in the table.

To define custom field order, go to **Admin > Tools > Core Functions > Custom Field Administration**. Click the Training tab on the left. Then, click the *Define LO Type and Order* link.

Permissions

Permission Name		Permission Description	Category		
		eate and edit custom fields to be used for ng object types. This is an administrator	Learning - Administration		

	Define Custom Field	Order and Vi	ew LO Type	s								
Application	Drag and drop rows to d checkmark, return to the							y trai	ning typ	be that	has a	1
Compensation Development Plans	Name	Туре	Language	📩 🥝	1	s 💻	6			ا 🖌	`	2
Offer Letter	CEU Credits	Numeric Field	English (US)									
Organizational Units		T IOIG										
Performance Reviews	Dress Code	Dropdown	English (US)	×	•	,						
Request Forms	Special Instructions	Scrolling	English	~		,						
SF-182		Text Box	(US)									
Succession	Target Audience	Scrolling Text Box	English (US)	×		 Image: Image: Ima	1					
Training												
User Record	Cancel Submit	•										
Vendor		,										

Training Custom Fields - View

Training custom fields for program and cohort learning objects (LOs) may appear on the following pages:

- Course Catalog General tab (Program LOs only)
- Program LO Details
- Cohort LO Details
- Cohort Training Details
- Global Search Advanced Search
- Course Catalog Advanced Search

For a training custom field to display on Program pages, the following must be true:

- Custom field is Active.
- Custom field is enabled for Program LOs.
- Custom field is available to the user.

For a training custom field to display on Cohort pages, the following must be true:

- Custom field is Active.
- Custom field is enabled for Cohort LOs.
- Custom field is available to the user.

Collaborative Learning - Email Triggers

Collaborative Learning - Email Triggers

With this enhancement, the following new email triggers are now available for Collaborative Learning via Global Email Administration:

- Video Comment New
- Video Comment Reply

Implementation

Upon release, this functionality is automatically enabled in Stage and Live portals for organizations using Learning and New Connect.

Security

The following existing permission applies to this functionality:

Permission Name		Permission Description	Category		
Global Email Administration - Manage	active modules deleting email actions and wo by OU, User's	to manage email trigger templates across all s in the portal. Enables creating, editing and message templates for various system orkflows. This permission can be constrained OU, User Self and Subordinates, and User. inistrator permission.	Core Administration		

Email Trigger - Video Comment - New

With this enhancement, a new Video Comment - New email trigger is available in the Collaborative Learning email action type.

This email is triggered when a new comment is added to a collaborative learning video. This email can be sent as a notification to Cohort Instructor, Video Comment Author, Video Comment Author's Manager, or a specific user. If the notification is sent to Cohort Instructor, this includes all of the cohort's instructors if there is more than one.

The following new tags are available for this email trigger:

- VIDEOCOMMENT.REPLY This displays the text of the instructor's reply to a comment that was added to the collaborative learning video.
- VIDEOCOMMENT.TEXT This displays the text of the comment that was added to the collaborative learning video.
- VIDEOCOMMENT.AUTHOR This displays the full name of the user who added the comment to the collaborative learning video.
- VIDEOCOMMENT.TIME This displays the date and time at which the comment was added to the collaborative learning video.
- VIDEO.TIME This displays the point of time in the video at which the comment was posted.
- VIDEO.TITLE This displays the title of the video learning object in which the comment was added.

Email Trigger - Video Comment - Reply

With this enhancement, a new Video Comment - Reply email trigger is available in the Collaborative Learning email action type.

This email is triggered when an instructor replies to a comment that was added to a collaborative learning video. This email can be sent as a notification to the Video Comment Author, Video Comment Author's Manager, or a specific user.

The following new tags are available for this email trigger:

- VIDEOCOMMENT.REPLY This displays the text of the instructor's reply to a comment that was added to the collaborative learning video.
- VIDEOCOMMENT.TEXT This displays the text of the comment that was added to the collaborative learning video.
- VIDEOCOMMENT.AUTHOR This displays the full name of the user who added the comment to the collaborative learning video.
- VIDEOCOMMENT.TIME This displays the date and time at which the comment was added to the collaborative learning video.
- VIDEO.TIME This displays the point of time in the video at which the comment was posted.
- VIDEO.TITLE This displays the title of the video learning object in which the comment was added.

Collaborative Learning - Launch Cohort

Prior to this enhancement, when a cohort was launched from the Transcript, the Learning tab of the cohort was opened.

With this enhancement, when a cohort is launched from the Transcript, the Main tab of the cohort is opened.

Implementation

Upon release, this functionality is automatically enabled in Stage and Live portals for organizations using Learning and New Connect.

Configurable Session Completion Date

Configurable Session Completion Date

Prior to this enhancement, the completion date for a session was always determined by the date on which the session roster was submitted. Because of this, the session completion date that was recorded in the system was not necessarily the actual date on which the session was completed.

With this enhancement, organizations can configure how session completion dates are determined. Organizations can set the configuration for all new sessions in the portal. In addition, administrators may be granted permission to manually adjust the session completion date for individual users on the session roster.

The following areas of the system are dependent on the Session Completion Date:

- User session completion
- Prerequisite completion
- Pre-work completion

Note: Certifications use the session completion date in determining prerequisite completion. No change is being made to this logic with this enhancement. Regardless of the configuration of the Session Completion Date preference, certifications will continue to always use the session end date.

Use Cases

- Sam Jones registers for and attends a session, but the instructor does not feel as though he has grasped the content to a sufficient level. The instructor arranges a follow up session to ensure he fully understands. In this case, the administrator manually adjusts Sam Jones' session completion date to be the date of the follow up session.
- Alice Adams registers for a session that is comprised of four parts that each last a day. Due to illness, Alice misses part of day 2 but attends days 1, 3, and 4. Alice joins a different session the following week for day 2 to ensure that she has completed the full session. In this case, the administrator manually adjusts Alice Adams' session completion date to be the date that she attended day 2 of the session.

Implementation

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

The default setting for the Session Completion Date preference is to calculate session completion dates based on the session end date. This is a change from previous behavior in which session completion date was based on the roster submission date. Organizations that prefer the previous default behavior must update this preference.

Security

The following existing permissions apply to this functionality:

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

ILT Preferences - Default Session Completion Date

With this enhancement, the General tab of the ILT Preferences page is enhanced to enable administrators to set the default logic for determining session completion dates.

To configure ILT Preferences, go to Admin > Tools > Learning > Learning Preferences > ILT Preferences.

Permissions				
Permission Name		Permission Description	Category	
ILT Preferences - Manage	apply to new inst	e constrained by OU and User's OU. This is	Learning - Administration	

The *Corporate Settings* section of the General tab is only available when configuring ILT Preferences for the topmost organizational unit (OU).

The following option is now available in the *Corporate Settings* section of the General tab:

- <u>Default Session Completion Date to</u> This option enables administrators to select the method for calculating the session completion date. The selected method will be implemented for all sessions that are created after the setting is saved. **Note:** *This setting only impacts sessions that are created after this preference is changed. Existing sessions are not impacted.* The following methods are available:
 - Session End Date This option is selected by default. When this option is selected, all new sessions that are created will have the session completion date automatically set to the session end date. The session end date is the latest date of the last session part.
 - Roster Submission Date When this option is selected, all new sessions that are created will have the session completion date automatically set to the date on which the session roster is submitted.

The default setting for the Session Completion Date preference is to calculate session completion date based on the session end date. This is a change from previous behavior in which session completion date was based on the roster submission date. Organizations that prefer the previous default behavior must update this preference.

Corporate Settings (These settings are only visible at the top Division level)
 Display Training Contact for Events and Sessions. Default Training Contact field to the Admin creating the Event (if deselected, the field is left blank). Only display to End Users: Session ID Locator Number Only display to End Users:
 Allow Penalty for Withdrawal. When withdrawn from the session, a charged will be issued to users' "Request bill" cost center Allow costs to be associated with each session. Add Cost Type training unit
 Allow reservation of seats for a specific organizational unit. Allow enrollment restrictions to be placed on a specific organizational unit. Allow enrollment restrictions to be placed on organizational unit types. Add users on the waitlist to the interest tracking list for that event and location. Allow option to grant waitlist opening to all waitlisted users at once (If selected, this preference can be overridden at the organizational unit level.)
Default Event Settings: Image: Construction of the start opening to one user at a time based on priority Image: Construction of the start opening to all waitlisted users at once for first come first served registration Image: Construction of the start opening to all waitlight opening top
Default Start Time for new parts: B:30 AM ▼ 5:30 PM ▼
Default Session Completion Date to: 🔘 Session End Date 🔘 Roster Submission Date

Session Roster - Session Completion Date

With this enhancement, the Attendance and Scoring tab of the session roster is enhanced to display the session completion date for each user on the roster. In addition, instructors or administrators with the appropriate permissions are able to edit the session completion date for each user.

To view the ILT session roster, go to **ILT > Manage Events & Sessions**. Next to the appropriate event, click the View Sessions icon \square . Then, next to the appropriate session, in the Options column, click the View Roster icon \square .

Permissions

Permission Name	Permission Description	Category
Manage including updating atte complete to update stu are available depending permission works in co View, and Roster - View constrained by Instruct	ge instructor led training session rosters, ndance, and marking the ILT session dent transcripts. A variety of other features g upon additional roster permissions. This njunction with Events - View, Sessions - v permissions. This permission can be for, User as Instructor, ILT Provider, and is is an administrator permission.	Learning - Administration

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

Session Completion

The Session Completion column displays the date on which the user completed the session. In ILT Preferences, administrators are able to configure the logic that determines the completion date for sessions. This column is visible to all users who have permission to view or manage the session roster.

- When the administrator has configured the session completion date to be the date on which the session roster is submitted, then the Session Completion column displays "Pending" until the roster is submitted.

Session Completion - Edit

To edit the session completion date for a user, click the Edit icon P to the right of the user's session completion date. The session completion date can be set to any date, even if the date is before the session start date or after the session end date.

After selecting the appropriate date, click the Save icon 🗟 to the right of the Session Completion date. Then, click the **Save** button at the bottom of the page to save the entire roster. **Important:** The updated session completion date is not saved until the entire roster is saved. In addition, the user's transcript is not updated until the roster is submitted.

Once the session roster is submitted, the user's transcript is updated with the new session completion date. However, administrators may edit the user's session completion date and submit the roster multiple times, if necessary.

Albert, Maria 123 malbert 1 0 Image: state s	
Track attendance and scoring below. Use the "Submit Roster for Completed Users" button to subas status for users who have completed enough parts required for Session Completion. Atternatus will not be editable when the roster is submitted and a user has a status of "Completed". Jubmit the roster again and update the user's attendance, score and pass status where the user 123 PARTS USERS USERS Check/Uncheck All Name Locator User ID Attendance Score Pass Alvares, Tomas 123 and update 1 0 ✓ Andrews, Janette 123 jandrews 1 0 ✓ Barden, Doug 123 dbarden 1 0 ✓	
Pass status for users who have completed enough parts required for Session Completion. Atter tatus will not be editable when the roster is submitted and a user has a status of "Completed". Individual the roster again and update the user's attendance, score and pass status where the user 123 123 ▼ PARTS VISERS Check/Uncheck All Name Locator User ID Attendance Score Pass Albert, Maria 123 malbert 1 0 ✓ Alvares, Tomas 123 jandrews 1 0 ✓ Image: Score status of a status	
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Check/Uncheck All Locator User ID Attendance Score Pass Albert, Maria 123 malbert 1 0 ✓ ✓ Alvares, Tomas 123 talvares 1 0 ✓ ✓ Andrews, Janette 123 jandrews 1 0 ✓ ✓ Arthur, Lloyd 123 larthur 1 0 ✓ ✓ Barden, Doug 123 dbarden 1 0 ✓ ✓	
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Barden, Doug 123 dbarden 1 0 V	8/24/2012 🖻
	8/24/2012 🖻
Bates, Timothy 123 tbates 1 0	8/24/2012 🖻
	8/24/2012 🖻
Williams, Emily 123 ewilliams 1 0	8/24/2012 🖻
Save Submit Roster & Back	
Save Submit Roster & Back	

Create Event LOs Web Service

This Create Event LOs web service enables administrators to create event learning objects (LOs) via REST Web Services. This facilitates the creation of bulk event LOs.

An administrator must have permission to create events in order to use this web service.

Input Parameters

This web service has the following input parameters:

Data Field	Туре	Description
ActorID	String	This is optional. The character limit is 200.
EventName	String	This is required. The character limit is 1000.
EventNumber	String	This is optional. The character limit is 200.
PrimaryProviderName	String	This is required. The character limit is 200.
SecondaryProviderName	String	This is optional. The character limit is 200.
TrainingHours	Integer	This is optional. Only alphanumeric characters. The character limit is 4.
TrainingMins	Integer	This is optional. Only alphanumeric characters. The character limit is 4.
Description	String	This is optional. The character limit is 2000.
Objectives	String	This is optional. The character limit is 200.
AvailableLanguageItem > Language	String	This is optional. The character limit is 200.
AvailableLanguageItem > LanguageID	String	This is optional. The character limit is 200.
SubjectTitles > String	String	This is required. The character limit is 200.
ObtionsActive	Boolean	This is optional. True or False.
OptionsAllowUsers	Boolean	This is optional. True or False.
OptionsAllowInterestTracking	Boolean	This is optional. True or False.
AbilityToSelectSessions	Enum	EndUsers, AdminsAndManagers, All
Keywords	String	This is optional. The character limit is 2000.
CopyAvailabilityToNewSessions	Boolean	This is optional. True or False.
Availability > Type	Enum	AllUsers, OUAvailability, UserAvailability
Availability > IncludeSubs	Boolean	This is optional. True or False.
Availability > PreApproved	Boolean	This is optional. True or False.
Availability > RegisterUponApproval	Boolean	This is optional. True or False.
Availability > ID	Enum	User ID/OU ID. This is required if Availability > Type is set to OU Availability

Data Field	Туре	Description
		or User Availability.
Availability > SubType	String	OU Type Name. This is required if Availability > Type is set to OU Availability.
DefaultPrice	Decimal	This is optional.
DefaultPriceCurrency	String	This is optional. The character limit is 20.
PriceType	Enum	ACTIVE, FUTURE
LoPricingItem > LoOuPricingItemObject > OuId	String	This is optional. The character limit is 200.
LoPricingItem > LoOuPricingItemObject > OuTypeId	String	This is optional. The character limit is 800.
LoPricingItem > LoOuPricingItemObject > IncludeSubordinateOus	Boolean	This is optional. True or False.
LoPricingItem > EffectiveFromDate	Datetime	YYYY-MM-DD
LoPricingItem > EffectiveToDate	Datetime	YYYY-MM-DD
LoPricingItem > PriceCurrency	String	This is optional. The character limit is 20.
LoPricingItem > UnitPrice	Decimal	This is optional.
LoPricingItem > Discount	Decimal	This is optional.
LoPricingItem > Registration	Decimal	This is optional.
LoPricingItem > Delivery	Decimal	This is optional.
LoTrainPriceType	Enum	AutomaticConversion, DisassociateConversion, TrainingUnitPaymentsDisallowed
TrainingUnitDefaultPrice	Decimal	This is optional.
TrainingUnitPriceType	Enum	ACTIVE, FUTURE
LoTrainingUnitPriceItem > LoOuPricingItemObject > OuId	String	This is optional. The character limit is 200.
LoTrainingUnitPriceItem > LoOuPricingItemObject > OuTypeId	String	This is optional. The character limit is 800.
LoTrainingUnitPriceItem > LoOuPricingItemObject > IncludeSubordinateOus	Boolean	This is optional. True or False.
LoTrainingUnitPriceItem > EffectiveFromDate	Datetime	YYYY-MM-DD
LoTrainingUnitPriceItem > EffectiveToDate	Datetime	YYYY-MM-DD
LoTrainingUnitPriceItem > PriceCurrency	String	This is optional. The character limit is 20.
LoTrainingUnitPriceItem > UnitPrice	Decimal	This is optional.
LoTrainingUnitPriceItem > Discount	Decimal	This is optional.

Data Field	Туре	Description
RegistrationDeadlineNumber	Integer	This is optional. Only alphanumeric characters. The character limit is 4.
RegistrationDeadlineType	Enum	Minutes, Hours, Days, Week
RegistrationDeadlinePeriod	Enum	Before, After
MinimumRegistration	Integer	This is optional. Only alphanumeric characters. The character limit is 4.
MaximumRegistration	Integer	This is optional. Only alphanumeric characters. The character limit is 4.
AllowWaitlist	Boolean	This is optional. True or False.
StudentGrantedDays	Integer	This is optional. Only alphanumeric characters. The character limit is 4.
StudentGrantedHours	Integer	This is optional. Only alphanumeric characters. The character limit is 4.
WaitlistExpiresDays	Integer	This is optional. Only alphanumeric characters. The character limit is 4.
WaitlistExpiresHours	Integer	This is optional. Only alphanumeric characters. The character limit is 4.
AllowAdvancedRegistration	Boolean	This is optional. True or False.
AdvancedRegistrationPeriod	Integer	This is optional. Only alphanumeric characters. The character limit is 4.
AdvanceRegistrationPreApproved	Boolean	This is optional. True or False.
AdvanceRegistrationRegister	Boolean	This is optional. True or False.
CustomFieldServiceItem > Tag	String	This is optional. The character limit is 100.
CustomFieldServiceItem > Value	String	This is optional. The character limit is 4000.

Security

The following existing permission applies to this functionality:

Permi	ssion Name	Permission Description	Category
Events Create	permission works in compermission can be cons	new instructor led training events. This njunction with Events - View permission. This trained by OU, User's OU, ILT Provider, and s is an administrator permission.	Learning - Administration

Curricula Administration Localization

Curricula Administration Localization

With this enhancement, the text field values can now be localized when creating or editing a curriculum.

The following fields can now be localized on the General page:

- Title
- Keywords
- Description

The following fields can now be localized on the Structure page:

- Section Title
- Section Instructions
- Note Title
- Note Text
- Note Instructions

Use Cases

- Jennifer is a Learning Content Manager at Acme Inc. She is creating an Instructional Design Curriculum that is available in Spanish and French. Her display language is English (US). She translates the curriculum title, keywords, and description into Spanish and French.
- Thiago is a Spanish local administrator at Acme Inc. He is searching for the Instructional Design Curriculum. Thiago searches for the curriculum using Spanish keywords and finds the curriculum because the keywords are translated into Spanish.
- Jennifer is creating a French Compliance Curriculum that is available in Spanish and French. Jennifer is enrolling Alice into this training. Alice is a French local administrator. When she launches the curriculum, the section title, description, and notes appear in French.

Implementation

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

Security

The following existing permissions apply to this functionality:

Permission Name		Permission Description	Category
Curricula	Grants ability to cr	eate new and edit/update existing curricula.	Learning -

Admin - Manage	This permission can be constrained by OU, User's OU, Provider, and User's LO Availability. This is an administrator permission.	Administration
Curriculum Admin - View	Grants view only access to curriculum details via Curriculum Administration screen. Does not include ability to view details of users enrolled in curricula. This permission can be constrained by Provider, OU, User's OU, and User's LO Availability.	Learning - Administration
Launch Curriculum Player	Grants users the ability to launch a curriculum in the curriculum player view if the curriculum player option is enabled for the particular curriculum. This is an end user permission.	Learning - Administration

Curriculum - Create/Edit - General

When creating or editing a curriculum, the following fields can now be translated on the General page:

- Title
- Keywords
- Description

To create a curriculum, go to **Admin > Tools > Learning > Catalog Management > Curricula**. Then, click the *Create a New Curriculum* link.

Permissions

Permission N	lame	Permission Description	Category
Admin -	This permission car	eate new and edit/update existing curricula. n be constrained by OU, User's OU, 's LO Availability. This is an administrator	Learning - Administration

Onboarding Curriculum	for New Hires 2.0 - Edit
	General
General	Version 2.0 (Current)
Availability	Effective Date: 7/7/2011
Emails	Title : Onboarding Curriculum for New Hires
Pricing	Keywords : Onboarding, new hires
Training Units	Description : B I U ;= ;= ;=
Structure	This curriculum will enable New Hires to be proficient in the policies and procedures of the company. After completing this curriculum, the new hires will be more readily prepared to do their job.
	completing this curriculum, the new nines will be more readily prepared to do their job.
	Cesign 🔇 HTML
	Languages: Lenglish (US)
	Vendor : Internal
	Owners : • Add Owner
	🛅 Mullen, Lori
	Subjects: Add Subject
	Target Audience: New Hires
	Curriculum Player:
	Player:
	Section Progress :
	Required Place a value in this box greater than 0 to require this number of training completion approvals to all users who complete this training. Upon completion user's status will proceed to Pending Completion
	Approvals : Approval before moving to Completed. If this box is blank, the LO will not require completion approval
	PREREQUISITES
	Users must complete one of the prerequisite options before registering for this training.
	Add New Option
	NAME TYPE OPTIONS
	Save Cancel Next »
	Modification History

Curriculum - Create/Edit - Structure

When creating or editing a curriculum, the following fields can now be translated on the Structure page:

- Add Section:
 - Title
 - Instructions
- Add Note:
 - Title
 - Note
 - Instructions

To create a curriculum, go to **Admin > Tools > Learning > Catalog Management > Curricula**. Then, click the *Create a New Curriculum* link.

Permissions

Permission Name		Permission Description	Category
Curricula Admin - Manage	This permission ca	eate new and edit/update existing curricula. n be constrained by OU, User's OU, 's LO Availability. This is an administrator	Learning - Administration

Add Section		×
Title:	<i>S</i>	
Instructions:		<i>"</i>
	Cesign ITML	
	Save	cel

Add Note	×
Title:	
Note: B I U $\vdots \equiv b \equiv$	<i>"</i>
🥕 Design 🔇 HTML	
Instructions: B <i>I</i> <u>U</u> \vdots \equiv \vdots	<i>(</i>)
🥕 Design 🔇 HTML	
Due Date: No Due Date	
O Due Days After Assigned Date of Training Item V	
O Due on	
Do not allow next step until due date.	
Save	Cancel

Curriculum Player Redesign and Autoupgrade

With the November 2014 release, the Curriculum Player was redesigned to include additional functionality and provide an engaging user experience.

With this release, all portals are automatically upgraded with the new Curriculum Player redesign. Because of this, the layout and appearance of the Curriculum Player will be improved. Also, organizations will receive new enhancements that have been released since November 2014 that only impacted the redesigned Curriculum Player functionality.

All previously existing functionality is still available in the redesigned Curriculum Player, including the following:

- Track progress
- View curriculum structure, including required and optional learning objects (LOs)
- View LO status
- Perform actions on LOs (e.g., Launch, Mark Complete, Purchase)
- View instructions

In addition to previously existing functionality, the following new functionality is available in the redesigned Curriculum Player:

- View curriculum structure in a more focused manner
- View LO details
- View curriculum training details
- View section requirements
- Navigate curriculum based on section
- Launch videos and notes in-line.
- More accurate calculation of completion progress.

Prior to upgrading, it is advised that all organizations review the Curriculum Player Redesign Auto-Upgrade Readiness Guide within the July '15 Release community on the Success Center.

Considerations

- Security roles, permissions, and navigation pages all remain the same with the autoupgrade.
- New Transcript redesign is not required at this time.
- To use the Curriculum Player, the Curriculum Player checkbox must still be selected when creating a curriculum.
- The standard Transcript Details Curriculum view is not affected by this upgrade.

Implementation

With this release, all portals using the Curriculum Player are automatically upgraded with the new Curriculum Player redesign for all new and existing curricula.

Curriculum Versioning - Push to Completed Users

Curriculum Versioning - Push to Completed Users

Prior to this enhancement, when a curriculum was reversioned, administrators had the option to assign the curriculum to Not Started and In Progress users.

With this enhancement, the curriculum reversioning functionality is redesigned, providing additional options to administrators. Administrators have enhanced filtering options when defining which users are impacted by the new version of the curriculum, including the option to assign the new version of the curriculum to users in a Completed status. Administrators can also now define whether users are able to maintain their curriculum progress with the new version.

When viewing the enrolled users for a reversioned curriculum, the process for modifying the version for enrolled users now follows the same workflow as reversioning a curriculum.

When viewing the Transcript Details page for a curriculum, a new *Assignment and Version History* section is now available, which displays the different versions of the curriculum the user has been assigned or has requested. Users have the option to view a read-only version of the Transcript Details page for previous versions of the curriculum.

Use Cases

Reversion Curriculum Use Case 1

- 1. A training administrator needs to update the Company Compliance Curriculum to include the new Company Compliance Online Course.
- 2. The administrator edits the curriculum and adds the course.
- 3. Because this is the Company Compliance Curriculum, all employees should be assigned this new online course, regardless their curriculum completion status. The administrator assigns the new version to all Not Started, In Progress, and Completed users.

Reversion Curriculum Use Case 2

- 1. A training administrator is responsible for the training for managers. A curriculum has been completed by all managers, and a new material has been created that only the Finance division needs to complete immediately.
- 2. The administrator modifies the curriculum and adds the new material.
- 3. While reversioning the curriculum, the administrator assigns the new version to the Finance division.

Reversion Curriculum Use Case 3

1. A training administrator has created dynamic proxy enrollments to assign a Management curriculum to specific managers at the organization. This curriculum is available to all managers.

- 2. The administrator needs to modify the structure of the curriculum to include a new online course and material.
- 3. The administrator only wants to reassign the curriculum to those users who have been assigned the curriculum via the dynamic proxy enrollment.

View Enrolled Users Use Case

- 1. A training administrator realizes that he did not reassign the new curriculum version to some enrolled users.
- 2. The administrator views the enrolled users and modifies their version to the new version, including users in a Completed status.

Transcript Details Page Use Case 1

- 1. An external auditor wants to access the information for all completed versions of the Compliance curriculum for Mike Campbell.
- 2. Mike opens his Transcript and views the Transcript Details page for the Compliance curriculum.
- 3. Mike views the Transcript Details for all completed versions of the Compliance curriculum and exports them to PDF.

Transcript Details Page Use Case 2

- 1. Mike Campbell's manager wants to view the different assignments and statuses for Mike's Compliance curriculum.
- 2. Mike's manager accesses Mike's Compliance curriculum Transcript Details page and can view the version history for each of Mike's assignments.

Considerations

When a new version of a curriculum is reassigned to a user, the approval workflow from the user's original assignment or request is implemented.

Implementation

Upon release, this functionality is automatically enabled in Stage and Live portals for organizations using Curricula.

Security

The following new permission applies to this functionality:

Permission Name Permission Description Category

Curricula Version - Manage	The constraints on this permission determine for which users the administrator can assign a new version of a curriculum when reversioning the curriculum. This permission works in conjunction with the Curricula Admin - Manage permission. This permission can be constrained by OU, User's OU, and User. This is an administrator permission.	Administration
----------------------------------	---	----------------

The following existing permissions apply to this functionality:

Permission N	lame	Permission Description	Category
Curricula Admin - Manage	Grants ability to cr This permission ca Provider, and User permission.	Learning - Administration	
Curriculum Admin - View	Administration screet of users enrolled in	ccess to curriculum details via Curriculum een. Does not include ability to view details n curricula. This permission can be vider, OU, User's OU, and User's LO	Learning - Administration
Curriculum Owner		nose designated as owner of one or more o make edits/updates to those curricula. rator permission.	Learning - Administration
MyTeam Transcript - Manage	(or others dependir (training records). User's OU, User's D Self and Subordina which users the Tra in My Team. Note: <i>is included in the M</i> <i>manager's direct ar</i> <i>constraints, even if</i> <i>constraints for the</i>	To view details of direct and indirect reports ing on constraints) to view transcripts This permission can be constrained by OU, pirect Reports, User, User's Self, and User tes. The permission constraints determine for anscript tab is available when viewing a user By design, for any My Team permission that lanager default security role, all of the ind indirect reports are included in the they are not selected in the permission role. Note: If the user's permission is also r Self and Subordinates, then this overrides eports constraint.	Administration

Standard, Dynamic	Grants ability To create Standard and Dynamic proxy enrollment requests, to assign training to users. This is an administrator permission.	Learning - Administration

View	Grants ability to view details of learning objects that appear on	Learning -
Transcript	the transcript (training record), by clicking on the name of the	Administration
Item	learning object. This permission can be constrained by OU,	

User's OU, User Self and Subordinates, User, or User's Self. This is an end user permission.

Curriculum - Edit - Reversion - Reversion Options

Prior to this enhancement, when creating a new version of a curriculum, a Version page would open when the curriculum was saved. The Version page enabled administrators to set an effective date for the new version and assign the new version of the curriculum to users in a Not Started or In Progress status. Administrators could also provide comments to describe the curriculum changes.

With this enhancement, the reversioning functionality is redesigned, providing additional options to administrators, including the option to assign the new version of the curriculum to users in a Completed status. The Version page is now two pages, the Reversion Options page and the Confirm page.

The Reversion Options page enables administrators to define which users are impacted by the new version of the curriculum. Administrators can select which users are assigned the new version by the version that is currently on their transcript and by the status of their curriculum. Administrators can also assign the new version to all users with a previous version on their transcript, users who were assigned the curriculum by proxy enrollment, or users in a specific organizational unit (OU).

To edit a curriculum, go to **Admin > Tools > Learning > Catalog Management > Curricula**. Next to the curriculum, click the Edit icon. If the modifications warrant a new version, then the Reversion Options page opens when the curriculum is saved.

Permissions					
Permission Name			Permission Description	Category	
Curricula Admin - Manage	Grants ability to create new and edit/update existing curricula. Learning - This permission can be constrained by OU, User's OU, Provider, and User's LO Availability. This is an administrator permission.				
Curricula Version - Manage	rsion - administrator can assign a new version of a curriculum when Administration				
Curriculum Grants ability for those designated as owner of one or more Learning - Owner existing curricula to make edits/updates to those curricula. Administrat This is an administrator permission.				Learning - Administration	
Standard, Dynamic enrollment re			y To create Standard and Dynamic proxy equests, to assign training to users. This is rator permission.	Learning - Administration	

Permissions

Reversion Options

This section enables the administrator to set the criteria that define which users may be assigned the new version of the curriculum. Once the criteria are defined, administrators can view and adjust which users are assigned the new version in the *Results* section.

- <u>Version</u> This drop-down enables administrators to filter users by which version of the curriculum they currently have on their transcript. Administrators can select one of the existing versions of the curriculum or all versions. For example, if All Versions is selected, then active users who have any version of the curriculum on their transcript are displayed in the *Results* section.
- <u>Status</u> Select which transcript statuses should be assigned the new version of the curriculum. For example, if the In Progress option is selected, then users who have an In Progress status for another version of the curriculum will be assigned the new version of the curriculum. If none of the status options are selected, then only users who register after the changes have been made get the new version of the curriculum. The following status options are available:
 - Not Started
 - In Progress
 - Completed This status includes users in a Completed, Completed Equivalent, or Exempt status.
 - If a user is in Exempt status and users are allowed to maintain progress, then the Exempt user is moved to a Registered status.
 - If a completed curriculum with completion approvals is reversioned and users are allowed to maintain progress, then the status is changed to Pending Completion Approval.
- <u>Assign To</u> Select which users who have a previous version of the curriculum on their transcript are assigned the new version of the curriculum. The following options are available:
 - Users with Previous Version(s) on Transcript This option is selected by default. When this option is selected, users who have a previous version of the curriculum on their transcript are assigned the new version of the curriculum.
 - Users Assigned by Proxy When this option is selected, administrators can select a specific dynamic proxy enrollment, and users who were assigned the curriculum within the selected dynamic proxy enrollment are assigned the new version of the curriculum. Dynamic proxy enrollments for all previous versions of the curriculum are available. All available dynamic proxy enrollments are displayed in the *Proxy Details* section. However, the constraints on the administrator's Proxy Enrollment Standard, Dynamic permission determine the list of proxies appearing in the Proxy Details section.
 - Define by OU When this option is selected, administrators can select a specific OU, and users within the selected OU who have a previous version of the curriculum on their transcript are assigned the new version of the curriculum. The constraints on the administrator's Curricula Version Manage permission determine which OUs can be selected and which users are available to the administrator in the *Results* section.

Proxy Details

When the <u>Users Assigned by Proxy</u> option is selected in the *Assign To* section, the Proxy Details section appears and displays historical dynamic proxy enrollments for all previous versions of the curriculum. All available dynamic proxy enrollments are displayed in the *Proxy Details* section. However, the constraints on the administrator's Proxy Enrollment - Standard, Dynamic permission determine the list of proxies appearing in the Proxy Details section. **Note:** *Only active, non-recurring, dynamic proxy enrollments are displayed.*

Using the filters, administrators can display curricula from a specific time period. After selecting the appropriate filters, click the **Filter Proxies** button to update the list of proxies that are displayed.

Select the <u>Select</u> checkbox to the left of the training name to include the users from the corresponding proxy enrollment in the *Results* section.

Click the View Options icon ^(*) in the Options column to view the proxy enrollment options for the corresponding proxy enrollment. The options are opened in a new browser window.

From: 6/1/2015 To: 6/30/2015	Filter Proxies					
		This Month From: 6/1/2015 Filter Proxies Uncheck/Check All (4 Results) (4 Results)				
ing	Create Date	Created By	Options			
Compliance Curriculum	6/19/2015 2:35:00 PM	sna1, sna1	\$(]			
Compliance Curriculum	6/19/2015 2:26:00 PM	sna2, sna2	8			
Compliance Curriculum	6/19/2015 12:53:00 PM	n, sree	<u>\$</u>			
Compliance Curriculum	6/3/2015 10:44:00 AM	n, sree	\$ (]			
l	Compliance Curriculum Compliance Curriculum Compliance Curriculum	Compliance Curriculum 6/19/2015 2:35:00 PM Compliance Curriculum 6/19/2015 2:26:00 PM Compliance Curriculum 6/19/2015 12:53:00 PM	Compliance Curriculum 6/19/2015 2:35:00 PM sna1, sna1 Compliance Curriculum 6/19/2015 2:26:00 PM sna2, sna2 Compliance Curriculum 6/19/2015 12:53:00 PM n, sree			

Results

When the Reversion Options page is opened, the *Results* section displays all users who meet the default options that are set in the *Reversion Options* section and who have been assigned or have requested the curriculum. If the reversion options are modified, the *Results* section is not automatically updated. After modifying the reversion options, click the **Update User List** button to update the *Results* section to reflect the selected options. **Note:** *Only active users are displayed.*

The constraints on the administrator's Curricula Version - Manage permission determine which users are available in the *Results* section. If an administrator does not have the Curricula Version - Manage permission, then they can create a new version of the curriculum, but they cannot assign it to users.

Select the <u>Select</u> checkbox to the left of a user to assign the new version of the curriculum to the user. The selected users are immediately added to the proxy queue when the reversion is confirmed on the Confirm page.

Next or Cancel

Click **Next** to proceed to the Confirm step. *See* **Curriculum - Edit - Reversion - Confirm** *on* page 159 *for additional information.*

Click **Cancel** to cancel the edits to the curriculum and return to the Curricula Administration page. **Note:** *No modifications to the curriculum structure are saved.*

New Hire Onboarding 4.0 - Edit					
	Reversion Op	otions			
Reversion Options	To complete the	curriculum revers	ion, define which user	s will be impacted by this change, if any.	
Confirm	Version: A	ll Versions 🗸			
	Status: 🗸	Not Started			
	~	In Progress			
		Completed			
	Assign To: 🦲	Users with Previo	ous Version(s) on Tra	ascript	
		Users Assigned			
	-	Define by OU	.,,		
	Update User	Lint			
l l	Opdate User	LIST			
	Results				
	Uncheck/Chec	k All			(4 Results)
	Select	Version	Name	Organizational Unit(s)	Status
		4.0	Alvares, Tomas	Admin1 (Division) General Office Clerk (Position)	In Progress
		4.0	Andrews, Marissa	Customer Service4 (Division) Director (Position)	In Progress
		4.0	Bates, Timothy	Operations3 (Division) Project Manager (Position)	In Progress
		4.0	Cohen, Clark	Customer Service3 (Division) Manager (Position)	In Progress
					in Program
(Cancel	ext »			

Registration Number Behavior

The registration number behavior for the curriculum and the LOs within the curriculum depends on whether progress is maintained and whether the user is in a Completed status for the curriculum.

	Not Started/In Progress	Completed
Maintain Progress	The curriculum maintains the same registration number. The LOs within the curriculum maintain the same status and registration number.	The curriculum gets a new registration number. The LOs within the curriculum retain the same status and registration number.
Do Not Maintain	The curriculum gets a new registration number.	The curriculum gets a new registration number.

	Not Started/In Progress	Completed
Progress	2	The LOs within the curriculum get a new registration number.

Curriculum - Edit - Reversion - Confirm

Prior to this enhancement, when creating a new version of a curriculum, a Version page would open when the curriculum was saved. The Version page enabled administrators to set an effective date for the new version and assign the new version of the curriculum to users in a Not Started or In Progress status. Administrators could also provide comments to describe the curriculum changes.

With this enhancement, the reversioning functionality is redesigned, providing additional options to administrators, including the option to assign the new version of the curriculum to users in a Completed status. The Version page is now two pages, the Reversion Options page and the Confirm page.

The Confirm page enables administrators to define when the new curriculum version is effective and whether users are able to maintain their curriculum progress with the new version. Administrators can also provide comments to describe the curriculum changes.

To edit a curriculum, go to **Admin > Tools > Learning > Catalog Management > Curricula**. Next to the curriculum, click the Edit icon. If the modifications warrant a new version, then the Reversion Options page opens when the curriculum is saved.

Permissions

Permission	Name	Permission Description	Category
Curricula Admin - Manage	This permission car	eate new and edit/update existing curricula. n be constrained by OU, User's OU, 's LO Availability. This is an administrator	Learning - Administration
Curriculum Owner		make edits/updates to those curricula.	Learning - Administration

Confirm

This section enables the administrator to set the effective date for the new curriculum version, configure whether users maintain progress with the new curriculum version, and provide comments to explain the changes to the curriculum.

- <u>Effective Date</u> Select when the new version of the curriculum is available within the system and is assigned to the selected users.
 - Immediately If this option is selected, the new version is implemented immediately after the curriculum is saved. However, the time required for the system to process the changes varies.
 - Assign On If this option is selected, the new version is implemented shortly after 12:00 AM UTC on the selected date. The effective date cannot be in the past. The Effective Date may be modified as long as the date has not yet passed.

- <u>Allow users to maintain progress?</u> Select whether users are able to maintain any progress that was made in their previous version of the curriculum for the new version of the curriculum.
 - Yes If this option is selected, users are able to maintain their progress from the old curriculum version. Users are only assigned any newly added learning objects (LOs). All existing LOs on the user's transcript maintain their statuses.
 - No If this option is selected, users are assigned all LOs within the curriculum and their status is changed to Not Started. Any LOs that were previously completed must be completed again. Any approvals that were already received are applied to the new curriculum version.
- <u>Comment</u> Enter any comments to explain the changes being implemented in the new version. This helps others to distinguish the differences between versions. The comments may also explain why the changes were made. The character limit for this field is 250. These comments appear in the *Approval History* section on the Curriculum Transcript Details page for assigned users and in the Curriculum Modification History within the Course Catalog and Curricula Administration.

Results

This section displays a read-only view of all of the users who will be assigned the new version of the curriculum. This list of users was determined on the Reversion Options page.

Back, Save, or Cancel

Click **Back** to return to the Reversion Options page. *See* **Curriculum - Edit - Reversion -Reversion Options** *on* page 154 *for additional information.*

Click **Save** to create a new version of the curriculum. The selected users are immediately added to the proxy queue. Once the new version of the curriculum is effective, users are assigned the new version of the curriculum and the new version of the curriculum can be requested via Browse for Training or Global Search. This triggers the Updated Training email, if configured in Email Management.

• If a completed LO is removed from the curriculum, then the LO remains on the user's transcript as an individual LO.

Click **Cancel** to cancel the edits to the curriculum and return to the Curricula Administration page.

Emails				
Email Name		Email Description	Action Type	
Updated Training	This is triggered	n updated to a new version. by the user getting automatically updated curriculum or library, either because the		System Administration

date has occurred or an administrator manually updated the version of users.

The **UPDATED.COMMENTS** email tag can be used to display any comments the administrator entered in the Comments field when they edited the curriculum.

New Hire Onboarding 4.	0 - Edit			
	Confirm			
Reversion Options Confirm	Effective Date:			
	Results			
				(4 Results)
	Version	Name	Organizational Unit(s)	Status
	4.0	Alvares, Tomas	Admin1 (Division) General Office Clerk (Position)	In Progress
	4.0	Andrews, Marissa	Customer Service4 (Division) Director (Position)	In Progress
	4.0	Bates, Timothy	Operations3 (Division) Project Manager (Position)	In Progress
	4.0	Cohen, Clark	Customer Service3 (Division) Manager (Position)	In Progress
	- 6.0	Davis, Tony	(19 (Chelater) Computer and beforealism Systems Manager (Prodition)	In Progress
	« Back Sav	Cancel		

Registration Number Behavior

The registration number behavior for the curriculum and the LOs within the curriculum depends on whether progress is maintained and whether the user is in a Completed status for the curriculum.

	Not Started/In Progress	Completed
Maintain Progress	The curriculum maintains the same registration number.	The curriculum gets a new registration number.

	Not Started/In Progress	Completed
	The LOs within the curriculum maintain the same status and registration number.	The LOs within the curriculum retain the same status and registration number.
Do Not Maintain Progress	The curriculum gets a new registration number. The LOs within the curriculum get a new registration number.	The curriculum gets a new registration number. The LOs within the curriculum get a new registration number.

Curriculum - Edit - General - Effective Date

With this enhancement, a new version of a curriculum can be assigned to users with a Not Started, In Progress, or Completed status. As previously implemented, the curriculum version number, the effective date, and the statuses to which the new version was assigned are displayed on the General page when editing a reversioned curriculum.

To edit a curriculum, go to **Admin > Tools > Learning > Catalog Management > Curricula**. Next to the curriculum, click the Edit icon.

Permissions

Permission	Name	Permission Description	Category
Curricula Admin - Manage	This permission ca	reate new and edit/update existing curricula. n be constrained by OU, User's OU, 's LO Availability. This is an administrator	Learning - Administration
Curriculum	Grants ability for th	nose designated as owner of one or more	Learning -

Curriculum Owner	, 5	Learning - Administration
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Curricula Administration - View Enrolled Users

On the View Enrolled Users page for a curriculum, the *Modify Version of Selected Users* link enables administrators to reassign the latest version of the curriculum to users who are currently enrolled in a previous version of the curriculum.

Prior to this enhancement, when an administrator clicked the *Modify Version of Selected Users* link, the administrator could select which Not Started or In Progress users would be assigned the curriculum and select a specific version to assign to the users.

With this enhancement, when an administrator clicked the *Modify Version of Selected Users* link, the administrator is taken to the Reversion Options page. Administrators can choose to assign the new version of the curriculum to users in a Not Started, In Progress, or Completed status. Administrators have access to all options on the Reversion Options and Confirm pages with the following changes:

- The <u>Effective Date</u> option is not available on the Confirm page because the new version is immediately effective for the selected users.
- The comments that are entered only appear in the *Approval History* section on the Curriculum Transcript Details page.

To manage users enrolled in a curriculum, go to Admin > Tools > Learning > Catalog

Management > Curricula. Then, click the View Users icon ^{SS} in the Options column for the appropriate curriculum.

Permission Name		Permission Description	Category
Curricula Admin - Manage	This permission car	eate new and edit/update existing curricula. n be constrained by OU, User's OU, 's LO Availability. This is an administrator	Learning - Administration
Curriculum Admin - View	Administration scree of users enrolled in	ccess to curriculum details via Curriculum een. Does not include ability to view details n curricula. This permission can be vider, OU, User's OU, and User's LO	Learning - Administration

Permissions

Enrolled Employees for New Hire Onboarding								
	View the worksheets of users enrolled in this curriculum. If the structure of the curriculum has been modified, then users with different versions of the curriculum will have different requirements.							
Employees								
Search Users:	Last Name:	All Versions V Q Search						
Modify Version	on of Selected users			(1 Result)				
Version	Name	Organizational Unit	Status					
4.0	Simms, Curtis	Central (Division) Vice President, Operations (Position)	In Progress	\$.				
« Back								

Curriculum Transcript Details Page

Prior to this enhancement, curricula versions were displayed and tracked in the *Approval History* section of the Transcript Details page for curricula learning objects (LOs). The following information was displayed for each version of the curriculum:

- Version Number
- Version Creator
- Reversion Date
- Reversion Time
- Reversion Comments

With this enhancement, users can be assigned a new version of a curriculum even after they have completed a previous version of the curriculum. Because of this, users can now complete different versions of the same curriculum.

The Approval History section is unchanged.

A new *Assignment and Version History* section is now available on the Transcript Details page for curriculum LOs, which displays the different versions of the curriculum the user has been assigned or has requested. The *Assignment and Version History* section displays the following information:

- Delivery Displays how the curriculum was delivered to the user, such as when it was requested or assigned.
- Version Displays the curriculum version.
- Effective Date Displays the date on which the curriculum was effective for the user.
- Due Date Displays when the curriculum was due.
- Status Displays the user's curriculum status.

Users can click the View Details icon in the Options column to view a read-only version of the curriculum's Transcript Details page. This page can be exported to PDF.

Permission Name		Permission Description	Category
View Transcript Item	the transcript (traini learning object. This	v details of learning objects that appear on ng record), by clicking on the name of the permission can be constrained by OU, and Subordinates, User, or User's Self. This ssion.	Learning - Administration

Assi	Assignment and Version History						
	Delivery	Version	Effective Date	Due Date	Status	Options	
3	Assigned By Laurence Barral On 6/04/2014 04:35:43 PM	7	05/25/2015	12/31/2015	In Progress	<u>a</u>	
3	Assigned By Vicky Stephen On 7/24/2014 11:12:11 AM	5	7/01/2014	None	In Progress/Past Due	٩	
2	Assigned By Vicky Stephen On 6/24/2014 11:24:51 AM	3	5/06/2014	None	Completed	٩	
2	Assigned By Vicky Stephen On 12/10/2013 09:14:04 AM	2	12/04/2013	None	In Progress	Q	
1	Requested By Sam Smith On 5/10/2013 12:15:00 PM	1	5/10/2013	None	Completed	Q	

Custom Transaction Fields

Custom Transaction Fields Overview

With this enhancement, administrators can now create custom Transaction fields in Custom Field Administration. A Transaction tab is added to Custom Field Administration to enable administrators to create custom fields for transactions and add the fields to the transactions that are created when training is purchased. The fields can be added to the Shopping Cart, My Account, and Manage Transactions functionality.

Upon implementation, this functionality is controlled by backend settings that are disabled by default. To enable this functionality, contact Global Product Support. For more information about this enhancement, contact your Client Success Manager.

Use Cases

Organization Invoicing a Customer

A training coordinator buys training for her company. The system administrator updates the custom date and custom status fields on the transaction in Manage Transactions. The transaction is sent to the Accounts Receivable department. Accounts Receivable processes an invoice and sends it to the training coordinator. Accounts Receivable updates the custom Invoice Number field in manage transactions with the invoice number from the invoice sent to the training coordinator. The Invoice Number field was created as a custom Transaction field in Custom Field Administration to allow Accounts Receivable to enter invoice numbers directly on transactions.

Organization Makes Purchase by Proxy

A training coordinator purchases training over the phone with the assistance of an account manager using purchase by proxy. Quite often, the training coordinator will buy additional training because of a recommendation from the account manager. During the shopping cart checkout process, the account manager needs to be able to identify the sale as belonging to her so that the she can earn commission on the sale. This information then goes back into a source system for further processing via analytics/outbound reporting.

Security

The following new permission applies to this functionality:

Permission Name		Permission Description	Category
Transaction Custom Fields - Manage	used with tra	to create and edit custom fields to be nsactions. This permission cannot be This is an administrator permission.	eCommerce - Administration

The following existing permissions apply to this functionality:

Permission Nam	е	Permission Description	Category
Global Email Administration - Manage	active modules deleting email actions and wo by OU, User's	to manage email trigger templates across all s in the portal. Enables creating, editing and message templates for various system orkflows. This permission can be constrained OU, User Self and Subordinates, and User. inistrator 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	
	permission.		

My Account	Allow users to view and modify their preferences on the My Account screen.	Core	1
- Manage	The user must have this permission to access My Account. This permission		1
	cannot be constrained. This is an end user permission.		

Order History Details - Edit	Grants ability to edit the Order History Details page of My Account, which displays all of the details for orders, including transaction date, transaction ID, payment method, reference number, order status, secondary address, and the details of each item purchased. Users with this permission can edit their own transaction information. This permission can be constrained by User's OU. This is an end user permission.	eCommerce
---------------------------------------	---	-----------

1				
	Order	Grants access to Order History Details page of My Account, which	eCommerce	
	History	displays all of the details for orders, including transaction date,		
	Details -	transaction ID, payment method, reference number, order status, and		
	View	the details of each item purchased. This permission cannot be		
		constrained. This is an end user permission.		

Shopping Cart Preferences - Manage		eCommerce - Administration
--	--	-------------------------------

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
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1		
Transaction	Grants ability to view the Manage Transaction page where	eCommerce -
Manager -	the administrator can review the transactions that meet their	Administration

l	
View	permission constraints. This permission can be constrained
	by User's OU. This is an administrator permission.

Custom Field Administration - Transaction Tab

With this enhancement, administrators can now create custom Transaction fields. A Transactions tab is added to Custom Field Administration to enable administrators to create custom fields for transactions and add the fields to the transactions that are created when training is purchased. The fields can be added to the Shopping Cart, My Account, and Manage Transactions functionality.

To access custom Transaction fields, go to **Admin > Tools > Core Functions > Custom Field Administration**.

Permissions					
Permission Name		Permission Description		Category	
Transaction Custom Fields - Manage	used with tra	to create and edit custom fields to be nsactions. This permission cannot be This is an administrator permission.		eCommerce - Administration	

	Transaction Custon	n Fields			
Compensation	Define the custom field	ls available for transactions. Only active	fields will display for each transaction.		
Development Plans Organizational Units	Name	All Types 🔻	Include inactive Search		
Performance Reviews	Set Field Order				
Request Forms	FIELDS o				
Succession					(3 Res
Training	Title	Туре	Created By	Active	Options
Transaction	Bill To	Short Text Box	Admin, Cornerstone	Ø	2
User Record		Oheart Taurt Dave	Admin, Cornerstone	1	2
User Record Vendor	Ship To	Short Text Box			

Feature	Description
Search Filters	The following search filters are available:
	• Name - Enter search terms in the <u>Name</u> filter. The field displays results for a partial or exact match to the search terms.
	• Field Type - Select a field type from the drop-down.
	• Include Inactive - Check the <u>Include Inactive</u> option to include inactive custom fields in the search.
	Once all filters are defined, click Search . This refreshes the fields table with the

 filtered results. Click the Set Field Order link to open the page, which allows the administrator to rearrange the order in which custom Transaction fields appear to users. Click the Add Field • icon in the Fields panel header to create a new custom field. See Custom Field Administration - Add Custom Transaction Field on page 174 for additional information. This table displays all existing custom fields. The table is sorted in alphabetical order by name. The Title and Created By columns are sortable. The following displays for each field: Title - This column displays the title of the custom field. Type - This column displays the field type, which includes drop-down or short text box.
 rearrange the order in which custom Transaction fields appear to users. Click the Add Field • icon in the Fields panel header to create a new custom field. See Custom Field Administration - Add Custom Transaction Field on page 174 for additional information. This table displays all existing custom fields. The table is sorted in alphabetical order by name. The Title and Created By columns are sortable. The following displays for each field: Title - This column displays the title of the custom field. Type - This column displays the field type, which includes drop-down or short text box.
 See Custom Field Administration - Add Custom Transaction Field on page 174 for additional information. This table displays all existing custom fields. The table is sorted in alphabetical order by name. The Title and Created By columns are sortable. The following displays for each field: Title - This column displays the title of the custom field. Type - This column displays the field type, which includes drop-down or short text box.
 order by name. The Title and Created By columns are sortable. The following displays for each field: Title - This column displays the title of the custom field. Type - This column displays the field type, which includes drop-down or short text box.
• Type - This column displays the field type, which includes drop-down or short text box.
text box.
 Created By - This column displays the name of the administrator who created the field by last name, first name.
• Active - This column defines the active status of the field. To activate the field, check the box in the Active column. To inactivate the field, uncheck the box. Note: If a custom field is inactivated after the field is added to a transaction, then the field still displays on the transaction but is read-only, and the field cannot be used for future transactions until the field is activated.
The following options are available in the Options column:
• Edit - Click the Edit icon to edit the field. The field name, type, email tag, and availability settings can be modified. Also, where the field appears in the system can be modified. See Custom Field Administration - Add Custom Transaction Field on page 174 for additional information.
 Copy - Click the Copy icon to copy the field. All fields and their values are copied.
• Delete - This option only displays for fields that have not yet been used in a transaction. Click the Trash Can icon to delete the field. When a field is deleted, it no longer appears on the Shopping Cart, Manage Transactions, and/or My Account pages. In addition, the email tag for the field is not automatically removed from any emails that contain the tag. The tags must be manually removed by the administrator.

Custom Field Administration - Add Custom Transaction Field

The Define Field page allows administrators to create custom Transaction fields in Custom Field Administration. Administrators define the general values for the field, such as the name, email, tag, and type. They will also define where in the system the field displays. Custom Transaction fields can appear in the following areas of the system:

- Shopping Cart Preferences
- My Account > Order Details
- Manage Transactions > Order History Details

Permissions

Permission Name		Permission Description	Category	
Custom Fields -	used with tra		eCommerce - Administration	

	Define Field						
Compensation	Define the field name, field type, field availability and additional f	eld properties below.					
Development Plans		Name:	s				
Organizational Units		Email Tag: Type: Select Custom Field	d Tuna				
erformance Reviews		Active:	a type				
Request Forms	SHOPPING CART PREFERENCES						
Succession	Select "Make Field Available" to make this field available to an	ariministrator when eatling up the Shonning Cart. On	a s faid is quailable in the Shonning Cart it is among t	ha fields an administrator can use to configure Shonni			
Training	preferences by OU.	authinistrator when setting up the anopping care on	te a liefu is available in the onopping cart, it is among t	ie ielos an automocator can use lo compute anoppr			
Transaction							
User Record		Make Field Available					
Vendor	Shopping Cart Preferences						
	TRANSACTION DETAILS Check All						
	TRANSACTION DETAILS Check All	Visible	Editable	Required			
	TRANSACTION DETAILS Check All Order History (My Account)	Visible	Editable	Required			
	Order History (My Account)	0					
	Order History (My Account) Transaction Details (Manage Transactions)	0					
	Order History (My Account)	0					
	Order History (My Account) Transaction Details (Manage Transactions) AVAILABILITY	0					

Name

This is a required field. Enter the name of the custom field that will be visible to end users. The character limit for this field is 50. If multiple languages are enabled, click the globe icon to translate the name into other available languages.

Email Tag

This is a required field. Enter the tag name for the field, up to 50 characters. The name must be unique and cannot be used by another tag. All tags automatically begin with "CUSTOM." If a space is entered, the system translates the space into a period.

The tag displays in the View Tags pop-up on the Shopping Cart Preferences and Email Administration.

Editing Note: When editing the custom field, the tag in the <u>Tag Name</u> field cannot be modified.

Туре

From the drop-down list, select the type of field you are creating. The following options are available in the drop-down:

- Dropdown
- Short Text Box

Depending on the field type selected, options may be available to configure for the field. *See the Custom Field Admin - Custom Field Type Options topic in Online Help for additional information.*

Active

The <u>Active</u> box is checked by default. To inactivate the custom field, uncheck the <u>Active</u> box. When active, the custom field displays in the areas of the system in which it is configured to display, including the Shopping Cart, My Account, and Manage Transactions pages.

If a custom field is inactivated after the field is added to a transaction, then the field still displays on the transaction but is read-only, and the field cannot be used for future transactions until the field is activated.

Shopping Cart Preferences

This section allows the administrator to add the custom field to the Shopping Cart Preferences page. To add the field, check the <u>Make Field Available</u> option. This makes the custom field available to an administrator when configuring Shopping Cart Preferences. From the Shopping Cart Preferences page, the administrator can then choose to make the field visible to end users on the Payment or Confirmation/Thank You page during the shopping cart checkout process.

Note: This section only displays for portals that have the Shopping Cart functionality enabled.

Transaction Details

This section allows the administrator to add the custom field to the My Account > Order Details page and the Manage Transactions > Transaction Details page. The administrator can also select to make the field editable and required. The following options are available:

- <u>Check All</u> Select the *Check All* option to the right of the Transaction Details header to select all options in the section.
- <u>Visible</u> Select this option to make the custom field visible on the Order Details (My Account) page and/or Order History Details page in Manage Transactions. Users must have permission to view the order history details in order for the field to be visible on the Order History page. Users must have permission to manage transactions for the field to be visible on the Transaction Details page. If the <u>Editable</u> option is not also selected, then the field is visible but read-only.
- <u>Editable</u> Select this option to make the custom field editable on the Order Details (My Account) page and/or Order History Details page in Manage Transactions. When this option is selected, the value in the field is editable on the Order History page by users with permission to view the order history details. The field is editable on the Transaction Details page by users with permission to manage transactions. **Note:** *The* <u>Visible</u> *option is automatically selected when* <u>Editable</u> *is selected*.
- <u>Required</u> Select this option to make the custom field required on the Order Details (My Account) page and/or Order History Details page in Manage Transactions. If a field is required, then the user must enter a value in the field before saving the page. **Note:** *The* <u>Visible</u> and <u>Editable</u> options are automatically selected when <u>Required</u> is selected.

Note: *The Order Details (My Account) option only displays for portals that have the Order Details functionality enabled for My Account.*

Availability

In the Availability section, set the availability for the custom field to determine which users can see the fields on the My Account > Order Details page and the Manage Transactions > Order History Details page. Select the organizational unit (OU) criteria from the drop-down, and then select the OU or users from the pop-up. This section is required.

The users who meet the availability criteria defined in the Availability section will see the field if the field is made visible in the Transaction Details section. If a custom field is not made visible, then the field does not display for users, even if the users meet the availability criteria.

Considerations

- All custom Transaction fields that are made visible in the Shopping Cart Preferences section are visible on the Shopping Cart Preferences page, regardless of the availability settings defined in the Availability section.
- For Billing emails in Email Administration, all active email tags display in the View Tags popup, regardless of the availability settings defined in the Availability section. However, once an email is sent to a recipient, the availability for the field is respected and the system

considers whether that field is available to the email recipient before populating the email tag with a value for the custom field.

Cancel/Save

Click **Cancel** to cancel adding or editing the field.

Click **Save** to save the field.

Custom Field Administration - Set Field Order

The Set Field Order page allows administrators to define the order in which the custom Transaction fields appear on the My Account > Order Details page and the Manage Transactions > Order History Details page.

To access the Custom Field Display Order page, click the *Set Field Order* link on the Transaction tab in Custom Field Administration.

Permission Name		Permission Description	Category	
Transaction Custom Fields - Manage	used with tra	to create and edit custom fields to be insactions. This permission cannot be This is an administrator permission.	eCommerce - Administration	

	Custom Field Display C)rder						
Compensation Development Plans	Set the order custom fields	appear on Manage Transactions and My	Account					
			Transaction Details (Manage Transactions)			Order History (My Account)		
Organizational Units Performance Reviews	Name	Туре	Visible	Editable	Required	Visible	Editable	Required
Request Forms	Bill To	Short Text Box	8	2	8	2	2	8
Succession	Ship To	Short Text Box	2		2	8	8	1
Training	Sold To	Short Text Box	2	100 E	2	1		
Transaction User Record	Field Rep	Short Text Box	2	2	2			
Vendor	PO Number	Short Text Box	2	8	2	2	2	2
	Cancel Submit							

Custom Fields Table

The custom fields table has one column for the Transaction Details (Manage Transactions) options and one column for the Order History (My Account) options. The following information displays in the table for both sections:

- Name This column displays the name of the field.
- Type This column displays the type of field, either Dropdown or Short Text Box.
- Visible This column displays the read-only visibility selection for the field. If the box is checked, then the field was made visible on the Order History Details and/or Order Details pages. If the box is unchecked, then the field was not made visible.
- Editable This column displays the read-only editable selection for the field. If the box is checked, then the field is editable on the Order History Details and/or Order Details pages. If the box is unchecked, then the field is not editable.
- Required This column displays the read-only required selection for the field. If the box is checked, then the field is required on the Order History Details and/or Order Details pages. If the box is unchecked, then the field is not required.

Reorder Fields

To reorder the fields in the table, drag and drop the row into the desired position.

Cancel/Submit

Click **Cancel** to cancel the changes to the field order.

Click **Submit** to submit the changes to the field order. The fields are reordered on the My Account > Order Details page and the Manage Transactions > Order History Details page.

Shopping Cart Preferences - Custom Fields

With this enhancement, administrators can now create custom Transaction fields. From the Shopping Cart Preferences page, up to four custom fields can be added to the Payment page of the shopping cart checkout process. In addition, the email tags for custom Transaction fields can be added to the Thank You Page Message Box.

To set the shopping cart preferences, go to Admin > Tools > Learning > E-Commerce > Shopping Cart.

Permissions			
Permission Name		Permission Description	Category
Shopping Cart Preferences - Manage	allows the admir cart page to be purchases. This	configure shopping cart preferences, which histrator configure aspects of the shopping viewed by users making shopping cart permission can be constrained by OU and s an administrator permission.	eCommerce - Administration

dd Custom Field 🔍 Manage Custom Fields			
Field	Display on Shopping Cart	Response Required	Delete
Account Number	2		Ū
Sales Rep	2		1
Field Office	2		Ť

Add Custom Field

This option allows administrators to select from existing custom Transaction fields to add to the Shopping Cart Preferences page. The fields that are added can then be configured to display on the Payment page of the shopping cart checkout process.

To add a field:

- 1. Click the *Add Custom Field* link. This opens the Select Custom Fields pop-up. The pop-up displays all active custom Transaction fields that have been created, regardless of the availability settings defined for the fields. The field title and type also display.
- 2. Check the box in the Select column next to each field you would like to add. Up to four fields can be added.
- 3. Reorder the fields in the pop-up to define the order in which the fields display on the Payment page of the shopping cart. The fields will also display in this order in the custom fields table on the Shopping Cart Preferences page.

4. Click **Save**. This adds the fields to the custom fields table.

		×
Select C	ustom Fields	
Select	Title	Display Type
	Account Number	Short Text Box
	Field Office	Short Text Box
	Invoice Status	Short Text Box
	Rep ID	Short Text Box
	Sales Rep	Short Text Box
		*
		Cancel Save

Manage Custom Fields

Click *Manage Custom Fields* to open the Transaction tab of the Custom Field Administration page. From there, administrators can add or edit custom Transaction fields.

Custom Fields Table

The custom fields table displays all custom Transaction fields that have been added from the Select Custom Fields pop-up. The following columns display in the table:

- Field This column displays the name of the field.
- Display on Shopping Cart Check the box in the column to display the field on the Payment page.
- Response Required Check the box in the column to require users to complete the field.
- Delete Click the Delete icon $\overline{\square}$ to delete the field from the Shopping Cart Preferences page. When deleted, the field no longer displays on the

Thank You Page Message Box

Email tags for custom Transaction fields can be added to the Thank You Page Message Box. Click the *List of Available Tags* link to view the tags. To add the tags to the message box, click the Edit icon to open the text box and add the tags.

There is no limit to the number of custom Transaction field email tags that can be added to the message box.

Email Administration

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Permissions			
Permission Name	e	Permission Description	Category
Global Email Administration - Manage	active modules deleting email actions and wo by OU, User's	to manage email trigger templates across all s in the portal. Enables creating, editing and message templates for various system orkflows. This permission can be constrained OU, User Self and Subordinates, and User. inistrator permission.	Core Administration
Global Email Administration - View	email logs at t can be constra	nly access to email templates/triggers and the global level for the portal. This permission ained by OU, User's OU, User Self and and User. This is an administrator	Core Administration

With this enhancement, administrators can create custom Transaction fields in Custom Field Administration. The email tags that are configured for active custom Transaction fields can be added to the following emails in Email Administration:

- Order Status Adjusted
- Pending Payment Notification
- Shopping Cart Purchase
- Transaction Price Adjusted
- Transaction Price Refunded

To view tags for an email, click the *Display a list of tags* link when configuring the email.

Note: If there is no value for a tag when the email is triggered, then the tag does not display in the email. If a value cannot be replaced for the tag because the recipient does not meet the availability requirements for the custom Transaction field, then the actual tag displays in the email.

Shopping Cart - Payment Step

An Additional Information section is added to the Payment step of the shopping cart checkout process. The Additional Information section displays any custom Transaction fields that were added by the administrator to the Custom Fields section on the Shopping Cart Preferences page.

First Name	Address Line 1	
Last Name	Address Line 2	
Email	City	
Country	State/Province	Zip Code
Select 🔻		
Additional Information		
PO Number *		
PO Number *		
PO Number *		
Sold To *		

Complete Field

Users can enter a value in fields that are configured as editable by the administrator.

Required Fields

Fields that are required display with a red asterisk. A value must be entered in the field before proceeding to the next step in the purchasing process.

Shopping Cart - Confirmation Page

With this enhancement, the Confirmation/Thank You page of the shopping cart checkout process displays the field and values for any custom Transaction field tags that were added by the administrator to the message box and completed by the user on the Payment step.

Note: If the field was not required on the Payment page when checking out, and the user did not enter a value, then the field does not display on the Confirmation/Thank You page.

Confirmation	Options v						tions 🔻
Payment	Review Confirmation					ation	
Thank you for your purchase. Please print this page for your record Account Number: R736-A539	5.						
Title	Provider	Туре	Status	Cost %	Quantity & Price	Subtotal	Total
Acme Co Product 50 Training	External Training	Self	Registered	1.00 %	1 X \$300.00	\$300.00	\$3.00
					Tota		al: \$3.00 \$3.00

Manage Transactions - Order History Details

With this enhancement, the Order History Details page in Manage Transactions displays any custom Transaction fields that were defined by the administrator to display on the page. Administrators set the visibility and availability settings for custom Transaction fields in the Transaction Details section when configuring the fields.

The custom fields display below the system fields in the Order Information section. If the field was not required on the Payment page when checking out, and the user did not enter a value, then the field is blank.

Permissions

Permission Na	sion Name Permission Description C		
Transaction Manager - Manage	create and edit trapage, the administration prices, issue refur	access the Manage Transaction page and also ansactions. On the Order History Details strator can edit the order status, adjust ads, or enter comments. This permission can buser's OU. This is an administrator	eCommerce - Administration
Transaction	Grants ability to	view the Manage Transaction page where	eCommerce -

Transaction	Grants ability to view the Manage Transaction page where	eCommerce -	
Manager -	the administrator can review the transactions that meet their	Administration	
View	permission constraints. This permission can be constrained		
	by User's OU. This is an administrator permission.		

	1										
User Name :	Suzy Learner									Edit C	rder
User ID :	slearner										
ransaction Date :	6/7/2015										
Transaction ID :	4336928104085000001515										
Identifier :	Cornerstone Admin (Cost C	enter), Grade 3 (custor	m Grade), Acme Co	(Division), Secret	ary (Positio	n)					
ayment Method :	Credit Card	Credit Card									
Order Status :	Completed										
Bill To:	Suzy Learner Co										
Ship To:											
Sold To:	Suzy Learner Co										
Field Rep:											
Field Rep: PO Number:											
PO Number:											
	6457	Provider	Purchase Type	Training Status	Cost %	Quantity	Unit Price	Subtotal	Тах	Total	Optio

Edit Field

If the administrator defined the custom Transaction field as editable, then the field can be modified from the Order History Details page.

Required Fields

If the administrator defined the custom Transaction field as required, and the field was only added to the Order History Details page, then a value must be entered into the field. A value can only be entered by users with permission to manage transactions.

Note: If the field is required and was also added to the Payment page of the shopping cart, then the user completing the transaction would have been required to enter a value prior to completing the purchase.

My Account - Order Details

With this enhancement, the Order Details page in My Account displays any custom Transaction fields that were defined by the administrator to display on the page. Administrators set the visibility and availability settings for custom Transaction fields in the Transaction Details section when configuring the fields.

The custom fields display below the system fields in the Order Information section in the order in which they are configured on the Set Field Order page. If the field was not required and a value was not entered for the field, then the field is blank.

Permissions

Permissio	Permission Name Permission Description Cat			
Order History Details - Edit	which displays all of t transaction ID, payme secondary address, a this permission can ee	the Order History Details page of My Account he details for orders, including transaction da ent method, reference number, order status, nd the details of each item purchased. Users dit their own transaction information. This nstrained by User's OU. This is an end user	ite,	
Order History Details - View	displays all of the det transaction ID, paym the details of each ite	er History Details page of My Account, which ails for orders, including transaction date, ent method, reference number, order status, em purchased. This permission cannot be n end user permission.	eCommerce and	

Order Details								
Order Informatio	n							¥
User Name Suzy Learner User ID								
slearner Transaction Date								
5/29/2015								
Transaction ID PO053015-F6C0EF-000	00718							
Identifier Cornerstone Admin (C	ost Center), Grade 3	(custorn G	irade), Acme Co	o (Division), !	Secretary (Position)			
Payment Method Purchase Order								
Reference Number 234								
Order Status Completed								
Shipping Address Suzy Learner 123 Main St Santa Monica, CA 9040 suzy@learner.com	04							
Bill To 123 Main St								
Ship To 123 Main St								
Sold To 123 Main St								
Order Details								
Title	Provider	Туре	Status	Cost %	Quantity & Price	Тах	Subtotal	Total
Se klavdia may	Pkelly's vendor1	Self	Registered	90.00 %	1X \$25.80	\$2.21	\$23.22	\$25.43
								al: \$23.22 ax: \$2.21
						То		\$25.43

Edit Field

If the administrator defined the custom Transaction field as editable, then the field can be modified from the Order Details page.

Required Fields

If the administrator defined the custom Transaction field as required, and the field was only added to the Order Details page, then a value must be entered into the field. A value can only be entered by users with permission to edit the Order History Details page.

Required fields cannot be left blank. A value must be entered prior to saving changes to the Order Details page.

Enhanced ILT Reservation Summary Standard Report

With this enhancement, the following fields are added to the Advanced Criteria section of the ILT Reservation Summary Report:

- <u>Include Waitlisted</u> When this option is checked, the report output includes a "# of Waitlisted Users" column. The column shows the number of users who are waitlisted for the session. The option is unchecked by default.
- <u>Remove Instructors</u> When this option is checked, the Instructor column does not appear in the report output. This option is beneficial when users would prefer not to have instructor names appear in the report output. The option is unchecked by default.

ILT Reservation Summary
View the reservation summary for one or more sessions.
DATE CRITERIA
Date Criteria: Select V From: 7/1/2015 To: 7/15/2015
ADVANCED CRITERIA
User Criteria: Select Criteria
Event :
 Facility : من ش
Provider : All 2
Sort By: Start Date/Time Event Title Session ID Organizational Unit Seats Available
Filter Session Status: Approved Completed Tentative Cancelled
Include Restrictions: 🗌 Include seat restriction information
Include Waitlisted: 🗌 Include count of waitlisted users
Remove Instructors: Remove instructor information
PROCESS REPORT
Report Title: (If no report title is entered, the title of the report will default to ILT Reservation Summary)
III Process Report

Security

The following existing permission applies to this functionality:

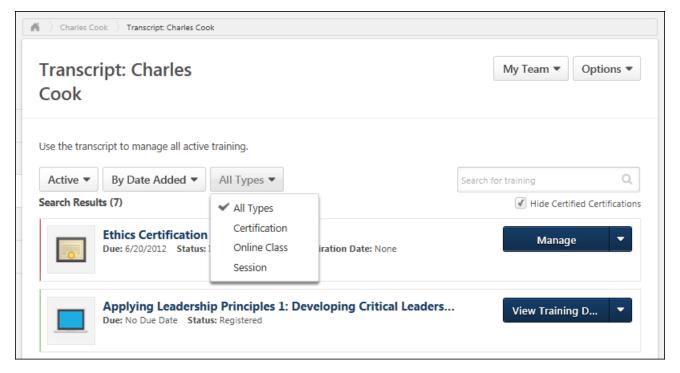
Permission Name		Permission Description	Catego	ry
ILT Reservation Summary Report	seat reservation constrained by O the OUs that can Administrators ca indicated as a re- the administrator	ILT Reservation Summary report, which disp information for sessions. This permission car bU and User's OU. The permission constraints be selected in the User Criteria for the report an only see sessions where the constrained C servation OU. If this permission is not constr r can see all sessions and registration inform istrator permission.	n be s limit rt. OUs are ained,	Reports - ILT

Filter Transcript by Type

With this enhancement, a learning object (LO) type filter is added to the Universal Profile: Transcript page. This enables users to filter the items within their transcript by a specific LO type, such as Online Class, Cohort, or Certification. Only a single LO type can be selected at a time.

The LO type filter only displays the LO types that are currently displayed on the user's Transcript. For example, if the user only has certifications, online classes, and sessions on their Transcript, then the user can only select those LO types from the filter. By default, all LO types are displayed on the Transcript.

The LO type filter is available for all training categories (i.e., Active, Completed, Archived, and Removed).



When Certification is selected from the LO Type filter, the Sort By filter now includes the following new filter options:

- By Family
- By Category
- By Expiration Date



Implementation

Upon release, this functionality is automatically enabled in Stage and Live portals for organizations using Universal Profile: Transcript.

Google Analytics on Self-Registration Page

Organizations that use the Extended Enterprise functionality use their own Google Analytics tracking code to track Web traffic. By analyzing Web traffic, clients can optimize marketing efforts. One of the most important areas of the application to marketers is the self-registration page. This page is important because it is an important step consumers must complete before entering the portal to purchase training. Having access to traffic analytics helps marketers fine-tune elements of the self-registration page (e.g., number of fields, call to action, number of pages, etc.) to optimize the number of registrations.

Prior to the release, the ability to track Web traffic with Google Analytics was not possible on the self-registration page. With this release, when Google Analytics is enabled to be used within the portal and organizations use their Google Analytics tracking code, Web traffic will be tracked and reported back to Google Analytics for any page that includes a standard Cornerstone footer as well as any self-registration pages.

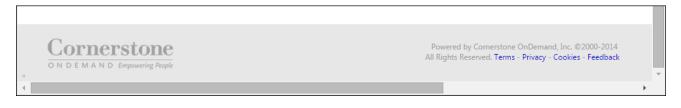
Note: Google Analytics can be used by any organization that has a Google Analytics tracking code.

Implementation

The Google Analytics functionality in the portal is controlled by backend settings that are disabled by default. To enable these settings, you must submit a work order.

For portals that already have Google Analytics enabled, this enhancement is automatically enabled in your Stage and Production portals.

Standard Footer



Workflow: Configuring & Using Google Analytics

- 1. An Extended Enterprise administrator opens a Google Analytics account and gets a unique Google Analytics tracking code for the account.
- 2. The administrator opens a work order to have Cornerstone enable Google Analytics in the portal and to insert the unique Google Analytics tracking code.
- 3. The administrator creates a self-registration group.
- 4. A consumer visits the self-registration page.
- 5. The administrator logs in to Google Analytics to view Web traffic analysis of the consumer's activity on the self-registration page.

Use Case

Marisa, a marketing manager at Acme Co, is testing two different layouts for a self-registration page to determine which layout is most effective at convincing consumers to register for the Acme Co website. Marisa has one set of customers go to one self-registration page (i.e., they are one self-registration group), and the other consumers go to a different self-registration page.

Marisa wants to know which page was more effective. She logs in to Google Analytics and looks at the web traffic on each page. For the first self-registration group, she sees that users went through the first step but did not complete the second step. For the second self-registration group, she sees that users went through both steps at a high frequency.

Based on this data, Marisa chooses to roll out the second self-registration page to all of her consumers.

Security

The following existing permissions apply to this functionality:

Permission N	lame	Permission Description	Category
Self Registration Groups - Manage	groups, which ar available to peop feed. This permis	create and update/edit self-registration e configured to make a self-registration pag ble who are not added to the portal via user ssion can be constrained by OU, User's OU, pration. This is an administrator permission.	Core e Administration
Self		view Self Registration Groups when selectin	ng Core

Self	Grants ability to view Self Registration Groups when selecting	Core
Registration	availability for training, tasks, proxy enrolls, etc. This	Administration
Groups - View	permission can be constrained by OU, User's OU, and User's	
	Corporation. This is an administrator permission.	

Hide Certified Certifications

Hide Certified Certifications

With this enhancement, certified certifications can now be hidden from the Certifications widget and the Universal Profile: Transcript page. In addition, administrators can configure whether or not certified certifications are hidden on the Universal Profile: Transcript page by default. This enhancement enables users to more efficiently manage their certifications.

Implementation

Upon release, this functionality is automatically enabled in Stage and Live portals for organizations using the new Certifications module and Universal Profile: Transcript.

Security

The following existing permissions apply to this functionality:

Permission Na	ame	Permission Description	Category
Custom Pages - Manage		reate and edit custom pages for the portal. nnot be constrained. This is an administrator	Core Administration
Transcript Preferences - Manage	permission ca		_earning - Administration
Welcome Page Preferences - Manage	Page that users	to configure the look and feel of the Welcome s see upon logging in to the portal. This be constrained by OU and User's OU. This is or permission.	Core Administration

Certifications Widget Settings

With this enhancement, the Certifications widget can now be configured to hide certified certifications. The Certifications widget can be added to Welcome pages and custom pages.

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 Grants access to create and edit custom pages for the portal. - Manage This permission cannot be constrained. This is an administrator permission.		Core Administration	
Welcome Page Preferences - Manage	Page that user	to configure the look and feel of the Welcome s see upon logging in to the portal. This n be constrained by OU and User's OU. This is or permission.	Core Administration

When configuring a Certifications widget, a <u>Hide Certified Certifications</u> option is now available. When this option is selected, the widget only displays incomplete certifications for the user. Any certifications in which the user is currently certified are hidden.

Widget Settings	
Certifications	
Hide Certified Certifications	
Items to show: 3 🗸	
Save	

Universal Profile - Transcript

With this enhancement, users have the option to hide any certifications in a Certified status when viewing the Active training category on the Universal Profile: Transcript page.

To access the Transcript page, go to **Home > Universal Profile**. Then, click the Transcript tab. **Note:** *The location of this link is configurable by your system administrator.*

When the <u>Hide Certified Certifications</u> option is selected, the Transcript only displays incomplete certifications for the user. Any certifications in which the user is currently certified are hidden. This option is only available when viewing the Active training category and when certifications exist on the user's transcript. If the Training Type filter is set to a specific training type other than Certifications, then this option is not available.

My Team Options
Search for training Q
✓ Hide Certified Certification:

Transcript Preferences

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With this enhancement, the Universal Profile: Transcript page is enhanced to include the option to hide certified certifications. In order to support this functionality, Transcript Preferences is enhanced to enable administrators to configure the default setting for this option.

To access Transcript Preferences, go to Admin > Tools > Learning > Learning Preferences > Transcript.

Permissions Permission Name		Permission Description	Category
Transcript Preferences - Manage	permission ca	to set Transcript Preferences. This n be constrained by OU and User's OU. ninistrator permission.	Learning - Administration

Certification Display Preferences

This section is only available when the new Certifications module is enabled.

When viewing the Active training category on the Universal Profile: Transcript page, users have the option to hide any certifications in a Certified status.

This option enables administrators to configure the default setting for the Transcript option. When this option is selected, the Transcript page automatically hides any certified certifications. However, the user is able to display or hide certified certifications from the Transcript page.

Certification Display Preferences

When checked, Transcript will default to hide Certifications when status is "Certified"

Offline Network Player Enhancements

Offline Network Player Enhancements

With this enhancement, administrators can configure automatic training synchronizations using the Windows Task Scheduler. The Sync Management page now maintains a log of historical synchronizations. On the Download Courses page, administrators can search for and filter courses. On the Offline Transcript page, Completed courses can now be displayed and users can filter courses.

Use Cases

Automatic Sync

Richard is a learning administrator on a cruise ship. He wants to configure a scheduled time for synchronizing users' progress on the cruise ship's computers.

- Richard accesses one of the training computers and opens the Windows Task Scheduler.
- He creates a new task, specifies the relevant details, and saves the task.
- Once the task is created, Richard imports the task to other training computers.
- Upon the scheduled task's request, the Offline Network Player executes the sync process.

Synchronization Log

Jon is a crew member on a cruise ship. He completed a training two days ago, but it still appears in a status of Awaiting Sync. Richard, the system administrator, investigates the issue.

- Richard logs in to the computer on which Jon is using the Offline Network Player and accesses the Sync Management screen.
- He views the synchronization log and sees that the sync failed due to a network disconnection.
- Richard reconnects the computer to the network and manually syncs the data.

Search for Courses

Sarah is the training manager on a cruise ship. She needs to download the four Cruise Security Policy courses.

- Sarah logs in to the Offline Network Player, and opens the Download Courses page which displays all available courses.
- She searches for Cruise Security, and the four relevant courses are displayed.
- She selects the four courses and downloads them.

View Completed Courses

Amber is an employee on a cruise ship, and she wants to view a list of her completed training.

- Amber logs in to the Offline Network Player, and views her Offline Transcript.
- Using the Training Category filter, she selects the Completed filter option.
- The Offline Transcript page is updated to only display completed courses.

Considerations

- The Offline Network Player must be installed on each device that will be utilized. Installation is done by the system administrator.
- Each user must first log in to the Offline Network Player while connected to the Internet in order to be authenticated prior to completing training offline.
- Users must complete the training on the same device on which they registered.
- If a user completes the same training item online and offline, the sync feature applies the online progress and overwrites the offline progress.
- Courses must meet the technical requirements in order to be eligible for use with the Offline Network Player.
- The following content standards are supported by the Offline Network Player: SCORM 1.2, SCORM 2004.
- The following operating systems are supported by the Offline Network Player: Windows XP, Windows 7, Windows 8, Windows Server 2003, Windows Server 2008.
- Courses that can only be run using an Internet Explorer (IE) browser cannot be completed via the Offline Network Player.

Implementation

Upon release, this functionality is automatically enabled for organizations using the Offline Network Player.

The Offline Network Player is available by request at an additional cost.

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
Network Learning -	Grants administrators the ability to designate online courses as available to be completed offline a network location using the Offline Network Player. This designation is done via the Course Catalog. This	Learning - Administration

from a networkpermission is only available if the Offline Network Playerlocationis enabled. This permission cannot be constrained. Thisis an administrator permission.	
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	Grants end users the ability to access and utilize the Offline Network Player. This permission is only available if the	Learning	
courses from a network	Offline Network Player is enabled. This permission cannot be constrained.		

Offline Player Network Learning - Manage download courses and sync users' data	Grants administrators the ability to download courses in order to be launched from a local network location. This permission also grants administrators the ability to sync users' data. This permission is only available if the Offline Network Player is enabled. This permission can be constrained by OU, User's OU, User, User's Self, User's Direct Reports, and User Self and Subordinates. This is an administrator permission.	Learning - Administration
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Offline Network Player - Sync Management

With this enhancement, administrators can now configure a scheduled synchronization of Offline Network Player data using the Windows Task Scheduler. In addition, a sync log is now available on the Sync Management page. This log enables administrators to quickly view the status of the most recent sync and a full history of previous synchronizations.

To sync user data from the local network to the online system, click Options in the toolbar menu and select *Sync Data* option. This option is only available to administrators who have permission to sync users' data.

Permissions		
Permission Name	Permission Description	Category
Offline Player Network Learning - Manage download courses and sync users' data	Grants administrators the ability to download courses in order to be launched from a local network location. This permission also grants administrators the ability to sync users' data. This permission is only available if the Offline Network Player is enabled. This permission can be constrained by OU, User's OU, User, User's Self, User's Direct Reports, and User Self and Subordinates. This is an administrator permission.	Learning - Administration

Data Synchronization

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Offline Network Player data synchronization can be performed in the following ways:

- Automatically Administrators can schedule synchronization by creating a scheduled task using the Windows Task Scheduler. When an automatic synchronization is triggered, the following occurs:
 - User progress is uploaded to the online server. Only progress from unsynchronized courses is uploaded to the online server. If a course is unlocked on the online transcript, no progress is uploaded to the online server.
 - User transcript data is downloaded from the online server.
 - If no Internet connectivity is available, no synchronization occurs.
- Manually Administrators can sync data by clicking the **Sync Users Data** button on the Sync Management page.

Only one synchronization process can occur at one time. If an automatic or manual synchronization is in progress, then the new synchronization is cancelled.

Last Sync Status

The status of the most recent synchronization is displayed below the **Sync Users Data** button. *See the Synchronization Status Details section for details on what information is displayed.*

Synchronization History

Administrators can view a summary of all previous synchronizations by clicking the *View History* link. The section is expanded to display all previous synchronizations. *See the Synchronization Status Details section for details on what information is displayed.*

Synchronization Status Details

The following information is displayed for each synchronization status:

- Date Displays the date on which the synchronization was performed.
- Time Displays the time at which the synchronization was completed.
- Windows User Displays the name of the user who was logged in to Microsoft Windows when the synchronization was performed.
- Sync Type Displays whether the sync was an automatic or manual. The following types are available:
 - AutomaticSync The synchronization was scheduled.
 - ManualSync The synchronization was manually triggered by clicking the Sync Users Data button.
- Sync Status Displays the status of the synchronization. The following statuses are available:
 - Succeeded The synchronization completed successfully.
 - Failed The synchronization failed because there was no Internet connectivity or the application could not connect with the online server.
 - Completed with comments The synchronization partially succeeded. The log displays additional information regarding the partial completion.
 - Stopped The manual synchronization was stopped by the administrator.
 - Cancelled The synchronization was cancelled because a synchronization process was already in progress.

ornerstone Off	line Play	er 3.0		-				
Sync	M	anage	ement					att
Sync users			hine to the LMS					
Last sync: 4	/1/2015		utomaticSync Data synced	successfuly [117 of 117 items]				
Sync Histor 4/1/2015 3/31/2015 3/30/2015	03:47 00:30	csodadmin	AutomaticSync(Scheduled) AutomaticSync(Scheduled) AutomaticSync(Scheduled)	Data sync succeseded [117 of 117 items] Data sync succeseded [56 of 56 items] Data sync completed [99 of 102 items] with comments;	jsmith; jsmith;	CSOD 101 Culture CSOD 101 Benefits	user out of constraints user out of constraints Unlocked item	4
3/29/2015 3/29/2015		csodadmin mthompson	AutomaticSync(UserExit) ManualSync	Data sync succeseded [13 of 13 items] Daya sync failed;	ymeiri; No conne	CSOD 101 Culture	Unlocked item	
Back								*

Offline Network Player - Download Courses

With this enhancement, administrators can now search for courses and filter the courses that are displayed on the Download Courses page. This enables administrators to more effectively find the appropriate courses to be downloaded.

To download courses to the local network, click Options in the toolbar menu and select *Download Courses* option. This option is only available to administrators who have permission to manage downloaded courses.

Permissions			
Permission Name		Permission Description	Category
Offline Player Network Learning - Manage download courses and sync users' data	order to be l permission a users' data. Network Play constrained Direct Repor	nistrators the ability to download courses in aunched from a local network location. This ilso grants administrators the ability to sync This permission is only available if the Offline yer is enabled. This permission can be by OU, User's OU, User, User's Self, User's ts, and User Self and Subordinates. This is ar or permission.	

Search Courses

. .

Administrators can search for courses to download by title. Enter the search terms in the <u>Search</u> for courses field, and then click the **Search** button. When a search is performed, the page only displays courses that have a title that matches the search query.

Note: *The search engine does not support searching with quotations.*

Filter Courses

Administrators can filter the courses that are displayed by status. By default, all courses are displayed. The following filter options are available:

- All This option displays all available courses.
- Available to download This option only displays courses that have not been downloaded but are available for download.
- Downloaded This option only displays courses that have already been downloaded.

Download Courses

If there are no courses that match the selected search and filter criteria, then the **Download Courses** button is disabled.

Cornerstone Offline Player 3.0			
Download Courses Select and download courses to the local network drive. Only courses that were defined as Available Offline through the Cour	se Catalog are available, accor	ding to your permissions.	all S
Search for courses	ch		
All 🔻			
All	Version	Status	
Available to download Downloaded in Sandbox Training Guide	1.0	Avilable to download	- 1
CSOD 101 Culture	1.0	Avilable to download	
CSOD 101 Benefits	2.0	Downloaded	
Back Download Courses			

Offline Network Player - Offline Transcript

Prior to this enhancement, only Registered and In Progress statuses were available on the Offline Transcript. In addition, only Active courses were displayed.

With this enhancement, users can view Completed courses. Users can view courses with a status of Awaiting Sync and Pending. Also, users can choose to view either active or completed courses.

Once a user is logged in to the Offline Network Player, the user's offline training list is synced with their transcript and is displayed, only showing the online courses that are available for use in the Offline Network Player. **Note:** The list of courses displayed in the Offline Network Player is only synced with the user's transcript when the Offline Network Player is first launched and after the administrator syncs the user's data with the system.

Permissions						
Permission Name			Permission Description Categ		Jory	
Offline Content		ew Offli	oad and complete training items offline via a ne Player. This permission cannot be constraion.		Mobile	
Learning - Launch Network Offline		Networ Offline	end users the ability to access and utilize th k Player. This permission is only available if Network Player is enabled. This permission strained.	the	Learning	

Additional Statuses

The following additional statuses are now available for courses on the Offline Transcript:

- Awaiting Sync The user has completed the course, but the data has not been synced with the online server.
- Pending The user has completed the course, the data has been synced with the online server, but the online status is not yet Completed because the course is pending another action such as a completion signature, acknowledgment, evaluation, etc.
- Completed The user has an online status of Completed.

Status Filter

The Status filter enables users to quickly view only active or completed courses. The following options are available:

- Active This option displays only courses in the following statuses: Registered, In Progress, Awaiting Sync, or Pending.
- Completed This option displays only courses in the following statuses: Completed.

Launch

The **Launch** button is not available for Completed courses.

Cornerstone Offline Player 3.0 ____ **__** X Options Offline Training - jsmith Active ▼ Active Completed ining Guide Registered Launch CSOD 101 Culture In Progress Launch CSOD 101 Benefits In Progress Launch

Quick Add Users to Session Roster

Quick Add Users to Session Roster

Instructors and administrators need to add users to ILT session rosters for a variety of reasons, typically after the session has ended.

Prior to this enhancement, instructors and administrators could click the *Add Users* link on the Session Roster page to add users to the session roster. This directed the instructor or administrator to the Proxy Enrollment > Enrollment Options page with the session preselected.

With this enhancement, when an instructor or administrator clicks the *Add Users* link on the Session Roster page, the instructor or administrator is directed to a Select Users pop-up that allows them to select the users to be added to the session roster. They can then add the selected users to the roster. This avoids having to complete the Proxy Enrollment process.

Use Cases

Administrator Sally receives a call from Edward, an executive who is interested in an Executive Leadership Training program. Edward wants to register for a particular session date. He does not want to register himself through the system.

- 1. Sally clicks the *Add Users* link on the Session Roster page and adds Edward to the session roster.
- 2. The session is full, but waitlists are enabled, so Edward is added to the waitlist.
- 3. Another user withdraws from the session and a seat becomes available.
- 4. Edward is registered for the session and receives the registration emails that are configured for the session.

Administrator Sally receives a call from Jennifer, an executive who is interested in an Executive Leadership Training program. Jennifer wants to register for a particular session date. She does not want to register herself through the system.

- 1. Sally clicks the *Add Users* link on the Session Roster page and adds Jennifer to the session roster.
- 2. The session is full, but waitlists are enabled.
- 3. Sally has permission to increase the number of seats in the session, and she decides to increase the number of seats to allow Jennifer to be registered directly.
- 4. Jennifer is registered for the session and receives the registration emails that are configured for the session.

Instructor Mark learns that three people attended his session that were not able to register for the session beforehand. Mark clicks the *Add Users* link on the Session Roster page and adds the three people to the session roster. He then marks them as complete for the session. Mark suppresses the registration emails that would have been triggered since the people already attended the session.

Implementation

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

Security

The following new permissions apply to this functionality:

Permission Name		Permission Description	Category	
Roster - Add Pending Users	administrator must a View permission. Thi an administrator peri	bending users to the ILT session roster. The Iso have the Roster - Manage or Roster - is permission cannot be constrained. This is mission. Note: <i>This permission is not</i> <i>regust 14 patch release.</i>	Learning - Administration	

Roster -	Grant user the ability to increase the session's available seats	Learning -	
Increase	when adding users to the session roster if the added users exceed	Administration	
Seats	the number of available or reserved seats. User must also have		
	Manage Roster or View Roster permission. This permission cannot		
	be constrained. This is an administrator permission.		

The following existing permissions apply to this functionality:

Permiss	ion Name	Permission Description	Category
Roster - Add Users	Add training sessions. This permission works in conjunction with the		
RosterGrants view-only access to instructor led training session rost- ViewThis permission works in conjunction with Events - View and- ViewPermissions. This permission can be constrained by InILT Provider, User's ILT Provider, and User as Instructor. Thisadministrator permission.		conjunction with Events - View and Sessions permission can be constrained by Instructor, Provider, and User as Instructor. This is an	Learning - Administration
- Create permission works in co View permissions. Adm events for which they users to a session in w permission grants the seats. This permission Instructor, User as Ins		e new instructor led training sessions. This onjunction with Events - View and Sessions - ninistrators can only create sessions for have the availability to view. When adding which the session roster is full, this ability to increase the session's available can be constrained by OU, User's OU, structor, Facility, Facilities Owned by User, T Provider, User, and User Self and	Learning - Administration

	Subordinates. This is an administrator permission.	
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. When adding users to a session in which the session roster is full, this permission grants the ability to increase the session's available seats. 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

Session Roster - Add Users

On the Session Roster, instructors and administrators may be able to add users to the session roster. With this enhancement, when an instructor or administrator clicks the *Add Users* link on the Session Roster page, the instructor or administrator is directed to a Select Users pop-up that allows them to select the users to be added to the session roster. This avoids having to complete the Proxy Enrollment process. In addition, the instructor or administrator is able to know immediately if a user is added to the session roster.

To access the ILT session roster, go to **ILT > Manage Events & Sessions**. Search for the appropriate event and next to the event in the search results, in the Options column, click the View Sessions icon \square . This option is only available to users with permission to view sessions. Next to the appropriate session, in the Options column, click the View Roster icon \square .

Permissions	5		
Permissio	n Name	Permission Description	Category
Roster - Add Pending Users	administrator must a View permission. This an administrator per	pending users to the ILT session roster. The Iso have the Roster - Manage or Roster - is permission cannot be constrained. This is mission. Note: <i>This permission is not</i> agust 14 patch release.	Learning - Administration
Add t Users F	raining sessions. This provide the real real real real real real real rea	med users to class rosters for instructor led permission works in conjunction with the on. This permission can be constrained by is an administrator permission.	Learning - Administration
Roster - Increase Seats	when adding users to the number of availal Manage Roster or Vie	to increase the session's available seats the session roster if the added users exceed ble or reserved seats. User must also have w Roster permission. This permission cannot s an administrator permission.	Learning - Administration
- View Th - \ IL	is permission works in /iew permissions. This	to instructor led training session rosters. conjunction with Events - View and Sessions permission can be constrained by Instructor, Provider, and User as Instructor. This is an	Learning - Administration
- Create	permission works in co View permissions. Adm events for which they users to a session in w permission grants the	e new instructor led training sessions. This onjunction with Events - View and Sessions - ninistrators can only create sessions for have the availability to view. When adding hich the session roster is full, this ability to increase the session's available can be constrained by OU, User's OU,	Learning - Administration

	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.	
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. When adding users to a session in which the session roster is full, this permission grants the ability to increase the session's available seats. 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

When an instructor or administrator clicks the *Add Users* link, this opens the Select User popup, in which the instructor or administrator can search for and select multiple users to be added to the session roster. Users who are already registered for the session or are pending registration cannot be selected from the pop-up. **Note:** *This option is only available to instructors or administrators with permission to add users to a roster. In addition, the constraints on this permission determine which users can be viewed and selected.*

Add Pending Users to Roster

The selected users have not yet been enrolled in the session, and they are displayed in a table above the enrolled users. This enables the administrator or instructor to view all of the users who have not yet been added to the session.

Emails can be configured for a session when the session is created. By default, any configured emails are triggered when the users are added to the session. To disable any emails that may be sent when the users are added to the session, uncheck the <u>Send emails</u> option. This option must be unchecked before the **Add Pending Users to Roster** button is clicked. Disabling emails may be useful when adding users who attended the session but were not on the roster. In this scenario, the user does not need to be alerted that they were added to the roster.

To enroll the pending users in the session, click the **Add Pending Users to Roster** button. When pending users are added to the roster, the system checks the number of available seats for the session. This includes the session's maximum registration and any reservations and restrictions. If the maximum registration or restrictions are exceeded, then the options that are available to the instructor or administrator may vary. This button is only available to users who have permission to add pending users to the roster. See the Insufficient Seats Scenarios section below for additional information.

When a user is added to the roster, the following occurs:

- Session is immediately assigned to the users.
- The session has no due date.
- The user is assigned, approved, and registered. If payment is required, then the user is in Approved status until payment is received. If the session has ended, then users are automatically assigned a status of Completed.
- Session emails are queued unless they are disabled.

If a user is added to the roster, but the enrollment fails, then the user will be removed from the Pending Users table and the Denied status will be reflected in the user's Transcript.

If multiple sessions are selected, the **Add Pending Users to Roster** button is not available, and the instructor must first select a locator number from the drop-down at the top of the Roster page.

Pending Users Table

The Pending Users table displays all users who have been selected to be added to the roster but have not yet been added. If a user is successfully added to the roster, then they are removed from this table. Similarly, if a user's registration is denied, then they are removed from this table.

The following information is displayed for each user who is pending enrollment:

- Name
- User ID
- Locator This displays the session locator number, which is important if there are child sessions.
- Organizational Unit(s)
- Status

To remove a pending user, click the Remove icon $\overline{\square}$ to the right of the appropriate user in the Pending Users table.

Note: If the roster is submitted or if the session is cancelled, then all pending users are removed from the session.

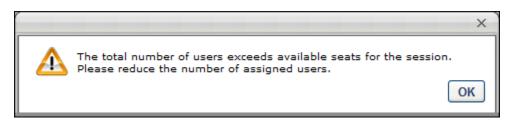
USERS							_			_	_	-
Add Per	nding Us	ers to Ro	ster	Send emails								
Name		U	ser ID	Locator	Organizational Unit(s)				Sta	tus		
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Insufficient Seats Scenarios

When adding users to a roster and there are insufficient seats, which options are available depends on whether the waitlist is enabled for the session and whether the administrator has permission to increase the number of session seats.

Scenario 1 - No Waitlist, Cannot Increase Seats

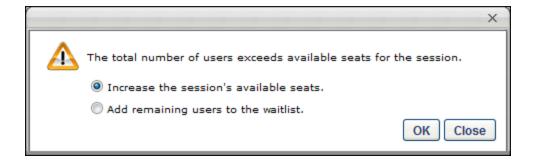
When the administrator attempts to enroll users where the number of users being enrolled exceeds the number of available seats for the session, the administrator cannot proxy enroll the users. The following pop-up appears, informing them that the number of selected users exceeds the number of available seats.



The administrator must then adjust the number of selected users or select a different session.

Scenario 2 - Waitlist Enabled, Can Increase Seats

When the administrator attempts to enroll users where the number of users being enrolled exceeds the number of available seats for the session, the administrator can either increase the session's available seats or add the excess users to the session waitlist. The following pop-up appears, informing the administrator of their options.



Increase Available Seats

Select this option to increase the session's available seats in order to accommodate the excess users. The maximum registration and the number of general seats for the session are increased by the number of matching users that are added to the session. If there are already users on the waitlist, then the pending users are added to the session and the waitlisted users remain on the waitlist.

MS Lync Integration Note: The maximum number of users who can be registered for a MS Lync session is 248. When 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.

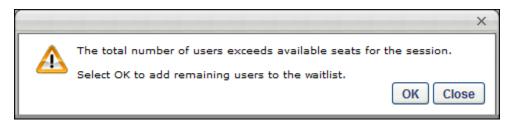
Add Users to Waitlist

Select this option to maintain the session's number of available seats. Once all seats are filled, the remaining users are added to the session's waitlist. The waitlist options that are configured for the session apply. **Note:** *The system begins assigning users at the top of the user list and moves downward.*

The administrator may also click **Close** to reject these options and then adjust the number of selected users or select a different session.

Scenario 3 - Waitlist Enabled, Cannot Increase Seats

When the administrator attempts to enroll users where the number of users being enrolled exceeds the number of available seats for the session, the administrator can add the excess users to the session waitlist. The following pop-up appears, informing the administrator of their options.



The administrator can click **OK** to add as many users to the session as possible. Once all seats are filled, the remaining users are added to the session's waitlist. **Note:** *The system begins assigning users at the top of the user list and moves downward.*

The administrator may also click **Close** to reject this option and then adjust the number of selected users or select a different session.

Scenario 4 - No Waitlist, Can Increase Seats

When the administrator attempts to enroll users where the number of users being enrolled exceeds the number of available seats for the session, the administrator can increase the number of session seats. The following pop-up appears, informing the administrator of their options.

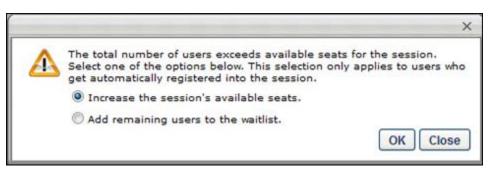


The administrator can click **OK** to increase the session's available seats in order to accommodate the excess users. The maximum registration and the number of general seats for the session are increased by the number of matching users that are added to the session.

The administrator may also click **Close** to reject this option and then adjust the number of selected users or select a different session.

Scenario 5 - Reserved Seats for OU

When enrolling users into a session for which one or more users match the criteria for an organizational unit (OU) that has reserved seats, if there are not enough reserved seats available for the OU, then a pop-up appears that asks the administrator to increase the number of available seats or add the user to the waitlist.



Increase Available Seats

Select this option to increase the session's available seats in order to accommodate the excess users. The maximum registration and the number of general seats for the session are increased by the number of matching users that are added to the session. If there are already users on the waitlist, then the pending users are added to the session and the waitlisted users remain on the waitlist.

MS Lync Integration Note: The maximum number of users who can be registered for a MS Lync session is 248. When 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.

Add Users to Waitlist

Select this option to maintain the session's number of available seats. Once all seats are filled, the remaining users are added to the session's waitlist. The waitlist options that are configured for the session apply. **Note:** *The system begins assigning users at the top of the user list and moves downward.*

The administrator may also click **Close** to reject these options and then adjust the number of selected users or select a different session.

Considerations

- Even if a user on the waitlist matches criteria for an OU that has reserved seats, the user is granted the first available opening. The opening could be a reserved seat for their matching OU or general seating, whichever opens first.
- If a reserved seat is the first available seat for multiple users on the waitlist that match the OU's criteria, then the user that is highest on the waitlist is granted the first available reserved seat for their matching OU if the <u>Allow Auto-Management of Waitlist</u> option is configured for the session.

Same LO in Multiple Recurring Curricula

Same LO in Multiple Recurring Curricula

Prior to this enhancement, a learning object (LO) could not be added to multiple recurring curricula. For example, if a LO is added to a recurring curriculum, then that LO cannot be added to another recurring curriculum.

With this enhancement, a new preference is now available to control whether a LO may be added to multiple recurring curricula. Organizations may choose whether they enable the ability to include the same LO in multiple recurring curricula. This preference only impacts curricula that are created or modified after the preference is modified.

Use Cases

A training administrator creates and manages multiple Security curricula that recur each year. The curricula have some unique LOs and some common LOs.

Considerations

- This preference only impacts curricula that are created or modified after the preference is modified. For example, this option is selected and multiple curricula are created which contain one or more of the same LOs. Later, this option is deselected. The existing recurring curricula continue to contain the same LOs. However, if one of the recurring curricula is modified, then the new preference setting is enforced, and the LO that appears in other recurring curricula must be removed before the curriculum can be saved.
- The availability of this preference is controlled by a backend setting. If the backend setting is disabled, this preference is no longer available to be modified. However, the preference setting is still enforced.

Implementation

The ability to add the same LO to multiple recurring curricula is controlled by a new preference, which is disabled by default. The availability of the Curricula Preferences permission is controlled by a backend setting, which is enabled by default.

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

Security

The following new permission applies to this functionality:

Permission N	lame	Permission Description	Category
	the ability to allow	onfigure Curricula Preferences, which grants or disallow the same learning object (LO) to multiple recurring curricula. This	Learning - Administration

permission cannot be constrained. This is an administrator	
permission.	

The following existing permissions apply to this functionality:

Permission N	lame	Permission Description	Category
Curricula Admin - Manage	This permission car	eate new and edit/update existing curricula. n be constrained by OU, User's OU, s LO Availability. This is an administrator	Learning - Administration
Learning Preferences	be combined with	earning Preferences. This permission must other permissions in order for specific appear. This is an administrator	Learning - Administration

Curricula Preferences

This page enables administrators to configure whether or not a learning object (LO) can be added to multiple recurring curricula.

To manage Curricula Preferences page, go to **Admin > Tools > Learning > Learning Preferences > Curricula Preferences**.

Permission I	Name	Permission Description	Category
Curricula Preferences	the ability to allow from being added t	onfigure Curricula Preferences, which grants or disallow the same learning object (LO) to multiple recurring curricula. This be constrained. This is an administrator	Learning - Administration

The following option is available:

- <u>Allow recurring curriculum to have learning objects in common with other recurring curricula</u> - When this option is selected, a LO can be added to more than one recurring curricula. When this option is not selected, the system prevents administrators from saving a recurring curriculum that contains a LO that exists within another recurring curriculum.
 - This preference only impacts curricula that are created or modified after the preference is modified. For example, this option is selected and multiple curricula are created which contain one or more of the same LOs. Later, this option is deselected. The existing recurring curricula continue to contain the same LOs. However, if one of the recurring curricula is modified, then the new preference setting is enforced, and the LO that appears in other recurring curricula must be removed before the curriculum can be saved.
 - The availability of this preference is controlled by a backend setting. If the backend setting is disabled, this preference is no longer available to be modified. However, the preference setting is still enforced.

\checkmark Configuration Tools	Learning Deferences Curricula Preferences	
Curricula Pre	ferences	
-	lum to have learning objects in common with other recurring curricula. setting affect only curricula modified going forward. Any configuration made previously to recurring curricula will not be affected.	
Save Cancel		

Curriculum - Create/Edit - Structure

With this enhancement, a new preference is now available, which enables administrators to configure whether or not a learning object (LO) can be added to multiple recurring curricula.

When creating or editing a curriculum, the instructions in the Recurrence section of the Structure page are dynamically updated to reflect whether or not a LO can be added to multiple recurring curricula.

To create a curriculum, go to **Admin > Tools > Learning > Catalog Management > Curricula**. Then, click the *Create a New Curriculum* link.

Permissions			
Permission N	lame	Permission Description	Category
Curricula Admin - Manage	This permission car	eate new and edit/update existing curricula. n be constrained by OU, User's OU, 's LO Availability. This is an administrator	Learning - Administration

When the preference is configured so that a LO cannot be added to multiple recurring curricula, the instructions in the Recurrence section reflect this configuration. In addition, the curriculum cannot be saved if recurrence is enabled and a LO within the curriculum structure is also added to another recurring curriculum.

Management Skills 1.0 -	Edit ?
	Structure
General	Recurrence: When a curriculum active for recurrence is re-requested or re-assigned, the internal learning objects will
Availability	be reset. A recurring curriculum may not have a course in common with another recurring curriculum.
Emails	\square Allow this training to be assigned to the same user more than once (Warning: In order to re-assign
Pricing	the latest version of the curriculum to a user with a previous version of the curriculum, the admin must also activate this option for the previous versions of this curriculum.)
Training Units	Allow users to request this training more than once.
Structure	Allow subsequent instances of training to be approved based on original approval. Leave unmarked to apply approval workflow for every request.

When the preference is configured so that a LO can be added to multiple recurring curricula, the instructions in the Recurrence section reflect this configuration. In addition, the curriculum can be saved if recurrence is enabled and a LO within the curriculum structure is also added to another recurring curriculum.

Management Skills 1.0	- Edit
	Structure
General Availability Emails Pricing Training Units	Recurrence: When a curriculum active for recurrence is re-requested or re-assigned, the internal learning objects will be reset. Recurring curricula are allowed to have courses in common with other recurring curricula. Allow this training to be assigned to the same user more than once (Warning: In order to re-assign the latest version of the curriculum to a user with a previous version of the curriculum, the admin must also activate this option for the previous versions of this curriculum.) Allow users to request this training more than once.
Structure	Allow subsequent instances of training to be approved based on original approval. Leave unmarked to apply approval workflow for every request.

Support Up to 10 VAT Numbers

Portals using the Extended Enterprise functionality to sell training internationally must include VAT (Value Added Tax) numbers in order to calculate tax. Often, the training is sold in more than one country, so it is imperative to have support for multiple VAT numbers. With this enhancement, the <u>VAT Number</u> field on the Modify Payment Account page will support up to 150 alphanumeric characters in a comma delimited string. This will allow administrators to enter up to 10 VAT numbers into the field. Prior to this enhancement, the field only accepted up to 25 characters.

To enter multiple VAT numbers into the field, add a comma between each VAT number. The character limit allows for one space to be added between the comma and the VAT number.

fine Payment Acc	ount
Name:	
Description:	
DEFINE CRITERIA	0
Please enter Cyben	source information. Transaction key is generated from the Cybersouce Portal and is a required field. All other fields are optional. Tax Nexus and V
number is only appl	icable if sales tax calculation functionality is turned on.
Transaction Key: 📝 (G	enerated in the Cybersource portal)
3D Secure: C	heck to turn on Payer Authentication. (Payer authentication requires additional configuration from Cybersource.)
Merchant	heck to turn on Payer Authentication. (Payer authentication requires additional configuration from Cybersource.)
Merchant Descriptor:	heck to turn on Payer Authentication. (Payer authentication requires additional configuration from Cybersource.)
Merchant	heck to turn on Payer Authentication. (Payer authentication requires additional configuration from Cybersource.)
Merchant Descriptor:	heck to turn on Payer Authentication. (Payer authentication requires additional configuration from Cybersource.)
Merchant Descriptor: Merchant Descriptor Contact: Merchant	heck to turn on Payer Authentication. (Payer authentication requires additional configuration from Cybersource.)
Merchant Descriptor Descriptor Contact: Merchant Descriptor	heck to turn on Payer Authentication. (Payer authentication requires additional configuration from Cybersource.)
Merchant Descriptor: Merchant Descriptor Contact: Merchant	heck to turn on Payer Authentication. (Payer authentication requires additional configuration from Cybersource.)
Merchant Descriptor Descriptor Contact: Merchant Descriptor	
Merchant Descriptor: Contact: Merchant Contact: Merchant Descriptor (Others): AX CALCULATION	
Merchant Descriptor: Contact: Merchant Contact: Merchant Descriptor (Others): AX CALCULATION	
Merchant Descriptor: Contact: Merchant Descriptor (Others): AX CALCULATION	i calculator. Tax calculation is only applicable if sales tax functionality is turned on.
Merchant Descriptor: Descriptor Contact Merchant Descriptor (Others): AX CALCULATION	i calculator. Tax calculation is only applicable if sales tax functionality is turned on.
Merchant Descriptor: Descriptor Contact: Merchant Descriptor (Others): TAX CALCULATION Please select a tax CyberSource CC	i calculator. Tax calculation is only applicable if sales tax functionality is turned on.

Workflow

- 1. An administrator sets up a merchant account with CyberSource.
- 2. The administrator registers to be a merchant in the United Kingdom (UK) and receives a Value Added Tax (VAT) number. The organization also has existing VAT numbers for two other countries.
- 3. The administrator logs in to Cornerstone and navigates to Modify Payment Account.

- 4. The administrator creates a new payment account and adds criteria for the payment account that specifies that when a user's location is in the United Kingdom, the payment account at hand should be used.
- 5. A user with Location OU (organizational unit) = UK makes a purchase and checks out.
- 6. The UK payment account is used by the system to calculate the tax.

Use Case

An organization sells training to customers in the Netherlands, Brazil, Canada, and the United Kingdom. The organization charges its users in their local currency and charges local tax accordingly. When a customer from the Netherlands places training in her cart and enters her billing information in Dutch, the shopping cart displays the appropriate tax that she needs to be charged. When she completes her purchase and checks out, she is charged the appropriate amount of tax.

Security

The following existing permission applies to this functionality:

Permission Name		Permission Description	Category
Payment Account - Modify	routing of users' p		eCommerce - Administration

Transcript Enhancements

Prior to this enhancement, when printing the Completed transcript, the Due Date was displayed for each item in the report. With this enhancement, the Completion Date is now displayed for each item in the report.

Completed Training: Jon Lolley				Print
Title	Туре	Completion Date	Score	Status
Building Effective and Efficient Personal Networks	Material	6/17/2015		Completed

With this enhancement, one of the Sort By filters on the Transcript is renamed from "By Date Added to Transcript" to "By Date Added." This applies when any training category is selected.

Transcri	ipt: Jon Lolley		My Team
Use the transc	ript to manage all active tra	ining.	
Active 🔻	By Date Added 🔻 🖌	NII Types ▼	Search for training Q
Search Result	By Title		
	By Status	arts 6/1/2015 12:00 AM PST)	View Training D 🔻
	 By Date Added By Training Type 	gistered	
	By Due Date		
	Leadersmp framing (2 Due: No Due Date Status: D	starts 5/1/2015 12:00 AM PST) Denied	Request Again 🔻

With this enhancement, within Transcript Preferences, one of the Sort By options is renamed from "Date added to transcript" to "By Date Added." This applies to all training categories.

Configure preferences for the training transcripts			
Transcript Preferences			
Transcript Page Title:	Transcript: USER.FULLNAME		
Transcript Page Description:	Use the transcript to manage all active training.		
Default Text (when no training is in the Transcript):	You have no training in your transcript.		
	List of Available Tags 🖉		
Sort Training			
Active	Completed		
Sort By: By Date Added	Sort By: Training Completion Date		
Apply All Copy active sort order across all other	categories.		

Implementation

Upon release, this functionality is automatically enabled in Stage and Live portals for organizations using Universal Profile: Transcript.

Transcript Redesign - Universal Profile

With the June 2014 Release, the Transcript page is redesigned with an improved user experience and is accessible from the Universal Profile. Once enabled, active relevant widgets and links direct users to the new Transcript page. The configuration of the Transcript title and description is migrated to Transcript Preferences instead of within Navigation Tabs.

Considerations

The following functionality is still supported with the new transcript UI:

- All previously existing permissions and visibility logic applied to the transcript
- Training Update Tool
- Transcript Data Merge

The following functionality is no longer supported with the new transcript UI:

• Required Training Not In Transcript

The following functionality is not in the scope of this project, but may be included in future enhancements:

- Volunteer Transcript
- Old Certifications/Compliance module functionality

Implementation

For organizations using the Learning module, this functionality is available by request until July 2015.

This functionality is automatically enabled in Stage portals. This functionality is available to all organizations using the Learning module and Universal Profile - Bio. Also, this functionality is controlled by a backend setting. To enable this functionality, contact Global Product Support or your Client Success Manager.

Upon implementation, all transcript data is migrated to the new transcript UI.

Update to TranscriptAndTask Web Service

With this enhancement, the TranscriptAndTask web service is enhanced so that the launchURL that is generated in the web service response is encrypted. Because of this, organizations need the new encrypted URL to deep link to the Transcript Summary page for a user.

Considerations

No change is required by organizations. However, if the old launchURL is stored, a new web service request must be made to generate the new URL.

Implementation

Upon release, this functionality is automatically enabled for organizations using the TranscriptAndTask web service.

Video Administration - Support for Mobile Content

Video Administration - Support for Mobile Content

With this release, users with the appropriate permissions can now upload a video from their mobile iOS devices and submit the video for approval to the system administrator. With this enhancement, Video Administration is enhanced to enable administrators to view and manage all user-generated videos that are pending approval. The Video Administration page is now divided into two tabs, the Manage Videos tab and the Pending Videos tab.

Implementation

Upon release this functionality is automatically enabled for all organizations using Learning.

Security

The following existing permissions apply to this functionality:

Permission Name		Permission Description	Category
Video Administration - Manage	(LOs). The ava backend setting	o create and manage video learning objects ilability of this permission is controlled by a g. This permission can be constrained by OU, and Subordinates, and User. This is an permission.	Learning - Administration
Video Administration - View	Video Administr permission is co permission can	o view video learning objects (LOs) on the ration page. The availability of this ontrolled by a backend setting. This be constrained by OU, User's OU, Self and nd User. This is an administrator permission.	Learning - Administration

Video Administration - Pending Videos

With this enhancement, Video Administration is enhanced to enable administrators to view and manage all user-generated videos that are pending approval. The Video Administration page is now divided into two tabs, the Manage Videos tab and the Pending Videos tab.

The Manage Videos tab contains all of the previously existing Video Administration functionality, enabling administrators to create video learning objects (LOs) and manage existing video LOs.

The Pending Videos tab enables administrators to manage all user-generated mobile videos that are pending approval. Administrators can preview videos and approve or deny user-generated mobile videos. A video is not available in Course Catalog until it is approved.

To access Video Administration, go to **Admin > Tools > Learning > Catalog Management > Videos**.

Permissions Permission Name		Permission Description	Category
Video Administration - Manage	(LOs). The available backend setting	o create and manage video learning objects ilability of this permission is controlled by a g. This permission can be constrained by OU, and Subordinates, and User. This is an permission.	Learning - Administration
Video Administration - View	Video Administr permission is co permission can	view video learning objects (LOs) on the ation page. The availability of this ntrolled by a backend setting. This be constrained by OU, User's OU, Self and nd User. This is an administrator permission.	Learning - Administration

Pending Videos Table

Dormicaiona

A user-generated mobile video does not appear in the Pending Videos table until the video is successfully transcoded. Videos in the table are not officially LOs because they have not yet been approved. Once they are approved, they will be available within Course Catalog. Then, administrators can make then make the video LO available to users by adding availability within Course Catalog.

Administrators can search for pending videos by title and description using the <u>Search</u> field above the Pending Videos Table.

Videos are displayed in the order in which they were uploaded with the most recently uploaded video displayed first.

The following information is displayed for each pending video in the table:

• Video - Click the video preview to preview the video within a pop-up window.

- Title This displays the video title, which was provided by the user who uploaded the video.
- Description This displays the video description, which was provided by the user who uploaded the video.
- Submitted Date This displays the date on which the video was submitted. By default, pending videos are sorted by submission date with the most recently submitted video displayed first.
- Submitted By This displays the name of the user who submitted the video.

Note: A video may take up to 90 minutes to transcode before the video displays on the pending approvals tab in Video Administration.

Preview Pending Video

To preview a pending video, click the video preview image in the Video column of the Pending Videos table. The preview opens within a pop-up and can be expanded to full screen.

Approve Pending Video

This option is only available to administrators who have permission to manage videos.

To approve a pending video, click the Approve icon \checkmark in the Options column. This opens the Add a Video page, on which the video file is displayed. The administrator can preview the video, but they cannot select a different file. See Video Course - Create - Step 1 - Add a Video for additional information.

On the General Information page, the video title and description are automatically populated with the uploaded content. The administrator can modify the general information.

Once the video is successfully approved, the pending video is removed from the Pending Videos tab and now appears on the Manage Videos tab. The video must still be configured in Course Catalog before it is available to users.

Deny Pending Video

This option is only available to administrators who have permission to manage videos.

To deny a pending video, click the Deny icon \times in the Options column. This opens a confirmation pop-up to confirm the action. If the pending video is denied, it is removed from the Pending Videos tab.

Vi	deo Administration					
Μ	anage current videos a	and approve or deny pending v	ideos uploaded by end users.			
	Manage Videos	Pending Videos				
						(10 Results)
	Name	Q Search				
	Video	Title	Description	Submitted Date	Submitted By	Options
		How to do something really cool	This course teaches how to do something really cool	4/8/2015	John Smith	 ✓ ×

Withdrawal Penalty for Sessions in Curricula

Organizations that use the Extended Enterprise functionality charge their customers to buy curricula. Often, an event containing sessions is included in a curriculum. Additionally, as part of the pricing functionality for events and sessions, organizations have the option to charge a penalty if the customer either withdraws from a session too close to the session's start date or if the customer does not attend the session.

Prior to this release, pricing for curricula and session withdrawal penalties both existed and functioned independently. Prior to this enhancement, users were not charged the withdrawal penalty because requesting the session within the curriculum was not considered a transaction. Therefore, if a withdrawal penalty existed, the user was not charged the penalty.

With this enhancement, if a withdrawal penalty is configured for a session that is part of an event within a curriculum, and a user withdraws from the session, then the user is charged the withdrawal penalty.

Use Case

- 1. Alan is an Extended Enterprise administrator at Acme Co. Global Software is an Acme Co customer. Tracy is a training coordinator at Global Software.
- 2. Alan creates a curriculum called "Software Localization" and includes two online courses, "Why Localize?" and "Reaching Your Global Potential." He also includes one event called "Meet Today's Top Translation Companies." The event has one session, and the session features five of the translation industry's top firms. When a student attends the session, the student has the opportunity to meet members of the translation companies and talk about the translation services they offer.
- 3. Alan has gone to a lot of trouble to organize the session for "Meet Today's Top Translation Companies," and he wants to guarantee a high level of attendance. To encourage students who are taking the "Software Localization" curriculum to attend the session, he has included a financial penalty for students who enroll in the session and do not attend. Alan has set a \$300 penalty for students who register for the session but do not attend. He has also has set a \$250 penalty for students who register for the session but withdraw within two days of the session's start date.
- 4. Tracy, the training coordinator at Global Software, has been asked to find training on localization best practices for her product managers. Tracy finds Acme's "Software Localization" curriculum and enrolls Gary and Brenda, who are Product Managers, into the curriculum. The total cost of the curricula for both product managers is \$1200.
- 5. Tracy then enrolls Gary and Brenda in the session for "Meet Today's Top Translation Companies."
- 6. On the day of the session, Gary and Brenda have an emergency at work and are not able to attend the session.
- 7. Gary withdraws from the session on the same day as the session is held. Gary is charged a \$250 penalty for withdrawing within two days of the session's start date.

8. Brenda does not withdraw from the session, but she does not attend it either. Brenda is charged a \$300 penalty for being a "No Show" and not attending the session.

Security

The following existing permissions apply to this functionality:

Permission	Name	Permission Description	Category
Curricula Admin - Manage	This permission car	eate new and edit/update existing curricula. n be constrained by OU, User's OU, 's LO Availability. This is an administrator	Learning - Administration
Create pe	ermission works in con ermission can be const	new instructor led training events. This junction with Events - View permission. This rained by OU, User's OU, ILT Provider, and s is an administrator permission.	Learning - Administration
- Create p	permission works in co view permissions. Adm events for which they users to a session in w permission grants the seats. This permission Instructor, User as Ins ILT Provider, User's IL	e new instructor led training sessions. This onjunction with Events - View and Sessions - ninistrators can only create sessions for have the availability to view. When adding which the session roster is full, this ability to increase the session's available can be constrained by OU, User's OU, structor, Facility, Facilities Owned by User, T Provider, User, and User Self and an administrator permission.	Learning - Administration

Analytics - Added Fields in Learning

With this enhancement, fields are added and modified for the following custom reports:

- Test Report
- Training Report
- Training Plan Report
- Transcript Report

The following fields are added to the Test Report section for the Test Report:

Field Name	Field Description	Field Type
Test Version Comments	This is a new field. This field displays the text entered in the <u>Changes</u> <u>Made to this Test</u> field when configuring tests in the Test Engine. This field appears when a test is reversioned.	Text
Test Version Effective Date	This is a new field. This field displays the effective date of the test version, as defined in the <u>Version (Effective Date)</u> field when configuring tests in the Test Engine. This field appears when a test is reversioned. This field appears when a test is reversioned.	Date

The following fields are modified within the Training section for the Training Report, Training Plan Report, and Transcript Report:

Field Name	Field Description	Field Type
Event ID	This is an existing field that is renamed Event Number with this enhancement.	Text
Training Competencies	This is an existing field that is being updated to display the localized value for the competencies.	Text

Security

The following existing permissions apply to this functionality:

Permission Name	Permission Description	Category
Custom Test Reports Create	Grants ability to create and edit custom Test reports (Test Engine data).	Reports - Analytics
	ants ability to view results of custom Test reports (Test gine data) created by self or shared by others.	Reports - Analytics

_		Grants ability to create and edit training plan (Training Demand Forecast) custom reports.	Reports - Analytics
Plan Report -	Foreca	ability to view results of training plan (Training Dema st) custom reports created by self or shared by others ng Demand Forecast)	
Custom Training Re Create	ports -	,	Reports - Analytics
Custom Training Reports - View		nts ability to view results of Custom Training (Catalog) orts 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		nts ability to view results of Custom Transcript aining Record) reports created by self or shared by ers.	Reports - Analytics

Collaborative Learning - Cohorts in Standard Reports

With this enhancement, the following standard reports now include cohorts:

- Acknowledgment Report
- Divisional Training Report
- Enterprise Past Due Training Report
- Enterprise Training Report
- Incomplete Divisional Training Report
- Incomplete Training Report
- LO Equivalency Report
- Required Classes Completion Report
- Required/Suggested Training Report
- Top Training Items Report
- Training Hours Report
- Training Progress Summary Pie Chart
- Transcript Status Report

Security

For a full list of custom report permissions, see the Analytics Permissions section in the Security Permissions topic in Online Help.

Mobile

Mobile Responsive Content

Online courses can be developed in a way that the course content is responsive, meaning that the content adjusts depending on the size of the screen on which the course is being viewed. For example, when viewing a course on a mobile device, the content is re-sized so that it is more easily viewed on the smaller screen size. Similarly, when viewing the same course on a large computer monitor, the content is re-sized so that it utilizes more of the larger screen size.

Prior to this enhancement, the system did not honor the responsive design of online courses.

With this enhancement, if an online course is designed to be responsive and is enabled for mobile devices, then administrators can now configure whether or not the online course content is responsive to the size of the screen on which it is being viewed.

When editing an online course in the Course Catalog, when the <u>Mobile</u> option is selected, the following option is available:

• If checked, the mobile course will adjust its size according to the screen size of the device <u>used</u> - This option is only available for online courses and when the <u>Mobile</u> option is selected. When this option is selected, the online course display adjusts to the size of the screen on which the course is being viewed. This option is unchecked by default. **Note:** *This option should only be selected if the course is developed with responsive properties. If this option is selected and the course is not developed with responsive properties, then the course will not function properly.*

Active:	When selected, this training is active			
Mobile:	Allow this training to be viewed via the Cornerstone Mobile application/website. Note: For mobile devices, please ensure no plugins (i.e Flash, Java) are required for the course. If checked, the mobile course will adjust its size according to the screen size of the device used. Note: Note: Courses must be developed with responsive properties for this to work properly.			
Signature Message:	Provide a message to override the default electronic signature message.			

Implementation

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

Security

The following existing permission applies to this functionality:

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
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Mobile User Generated Content - Video

Mobile User Generated Content - Video

With this enhancement, users with the appropriate permissions can now upload a video from their mobile devices and submit the video for approval to the system administrator. After a user has submitted a video, they can view the details of their submission within the mobile application.

User generated content appears on the Pending Videos tab within Video Administration.

Considerations

This functionality is currently only available on the native iOS mobile app.

The maximum file size for an uploaded video is 500 MB.

Implementation

Upon release, this functionality is automatically enabled for all organizations using Mobile and Learning.

Security

The following new permission applies to this functionality:

Permission Name		Permission Description	Category
User Generated Content Video LO	mobile device to t Administration. T	upload and submit video content from an iOS the Pending Videos tab within Video he Add Training tab within the mobile app is h this permission. This permission cannot be	Learning - Administration

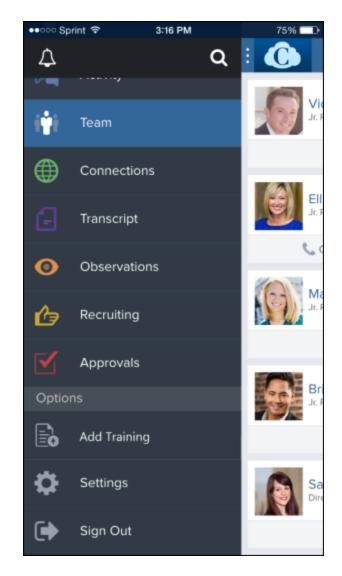
Add Training

Users with the appropriate permissions can upload a video from their mobile devices and submit the video for approval to the system administrator. The maximum file size for an uploaded video is 500 MB.

This functionality is only available for iOS devices.

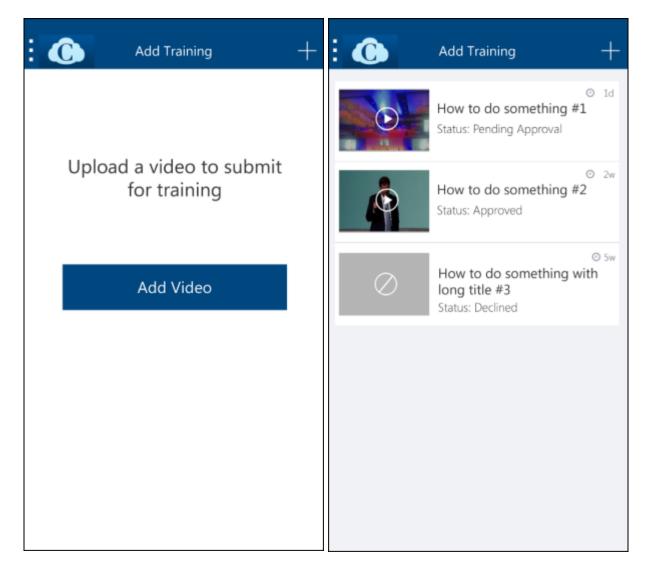
Permissions								
Permission Name		Permission Description	Category					
User Generated Content Video LO	mobile device to t Administration. The second s	pload and submit video content from an iOS the Pending Videos tab within Video he Add Training tab within the mobile app is h this permission. This permission cannot be	Learning - Administration					

To upload a video from your mobile device, tab the Add Training option from the main menu. This opens the Add Training page. This option is only available to users who have the User Generated Content Video LO permission.

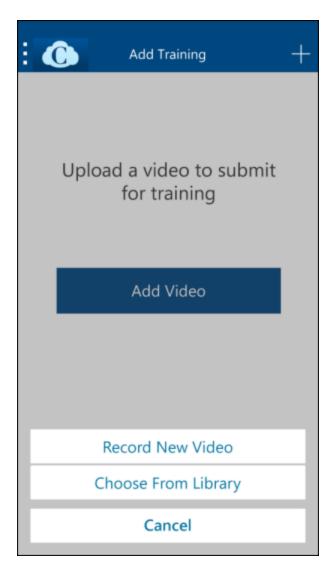


If you have previously added videos, then they are displayed on the Add Training page with the most recently added video displayed first. The video title and status are displayed. The time stamp displays how long ago the video was added. A preview is available for all approved and pending approval videos and can be viewed by tapping the preview image.

To add a video, either tap the plus icon in the upper-right corner of the screen or tap the Add Video button. **Note:** *The Add Video button is only displayed if you have not yet added any videos.*



Tap the appropriate option to either record a new video or choose a video from your video library. The file size limit is 500 MB.

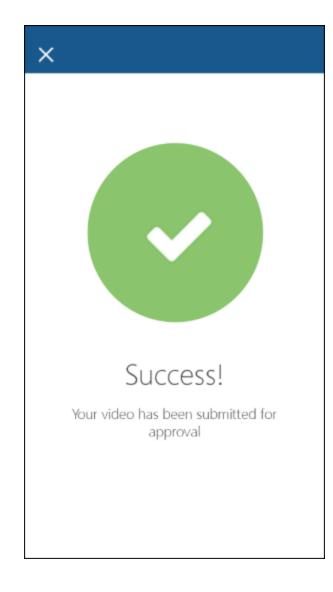


After the video is successfully compressed, a preview of the video is available at the top of the screen.

- 1. Enter a title for the video, up to 50 characters. This is required.
- 2. Enter a description for the video, up to 200 characters. This is optional.
- 3. Tap the check icon in the upper-right corner of the screen. The video begins loading.

×	Add Training	~	Add Training
Title			Uploading Video
		50	
Descrip	tion		
1)		200	

If the video is successfully loaded, a Success page is displayed. The system administrator is now able to review the video for approval. Tap the X icon in the upper-left corner of the screen to return to the Add Training page. **Note:** A video may take up to 90 minutes to transcode before the video displays on the pending approvals tab in Video Administration.



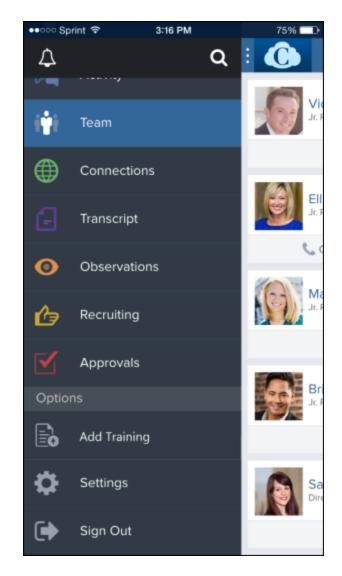
Add Training - View Submitted Details

Users with the appropriate permissions can upload a video from their mobile devices and submit the video for approval to the system administrator. After a video is submitted, the user can view the status of their uploaded video.

This functionality is only available for iOS devices.

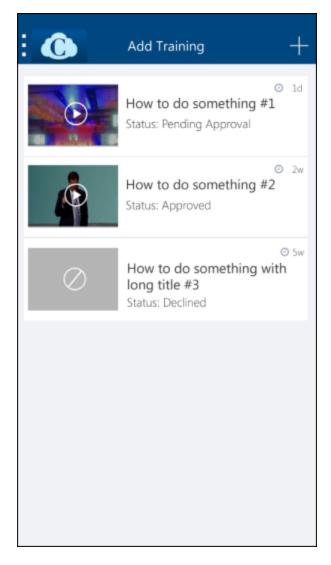
Permissions					
Permission Name		Permission Description	Category		
User Generated Content Video LO	mobile device to t Administration. T	upload and submit video content from an iOS the Pending Videos tab within Video he Add Training tab within the mobile app is h this permission. This permission cannot be	Learning - Administration		

To view the details of a submitted video, tab the Add Training option from the main menu. This opens the Add Training page. This option is only available to users who have the User Generated Content Video LO permission.



If you have previously added videos, then they are displayed on the Add Training page with the most recently added video displayed first. The video title and status are displayed. The time stamp displays how long ago the video was added. A preview is available for all approved and pending approval videos and can be viewed by tapping the preview image.

To view the Submitted Details for an uploaded video, tap anywhere on the item other than the video preview. This opens the Submitted Details page.

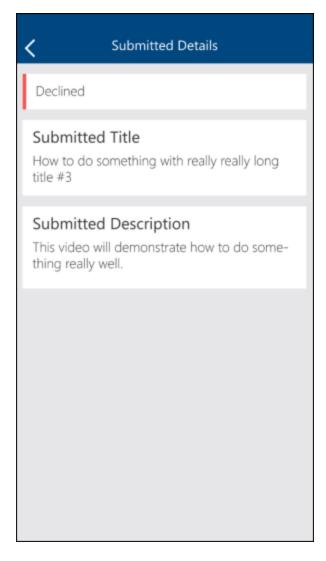


The details that are displayed may vary depending on the status of the training. The following statuses are available:

- Approved The training has been approved by the system administrator.
- Pending Approval The training has been uploaded, but it has not yet been approved or denied by the system administrator.
- Declined The training has been declined and removed by the system administrator.

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Submitted Details	Submitted Details
Approved	Pending Approval
Stats	Submitted Title
★ ★ ★ ★ (26)	How to do something #1
View Details	Submitted Description
Submitted Title How to do something #2	This video will demonstrate how to do some- thing really well.
Submitted Description	
This video will demonstrate how to do some- thing really well.	



The following information may be displayed on the Submitted Details page:

- Preview If the training is in Approved or Pending Approval status, a preview of the video is displayed at the top of the screen. Tap the preview to view the video.
- Status The status of the training is displayed.
- Stats If reviews and ratings are enabled for your portal and the training is approved and available within the Course Catalog, then the training's rating is displayed along with the number of ratings.
- Title This displays the title that you submitted for the training.
- Description This displays the description that you submitted for the training, if applicable.

Performance

Admin Preview for Performance Reviews

Admin Preview for Performance Reviews

With this enhancement, when using the redesigned Performance Reviews functionality, administrators are now able to preview a performance review task before it is assigned to reviewers. This enables administrators to ensure the performance review task appears properly and make any necessary adjustments before it is finalized.

Use Cases

- 1. An administrator creates and configures a performance review task.
- 2. On the Confirm step, the administrator previews the task to see of there are any configuration issues and notices an issue.
- 3. The administrator corrects the issue and then previews the task again to confirm that it is corrected.
- 4. The administrator saves the performance review task, and it is assigned to reviewers.

Considerations

Administrators can only preview performance review tasks. Review sections cannot be previewed.

The Discuss Review page is not included in the performance review task preview.

Implementation

This functionality is only available when using the redesigned Performance Reviews user interface (UI).

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

All portals are automatically using with the redesigned Performance Reviews UI for all new or copied performance review tasks. In Progress tasks will be automatically upgraded with the October 2015 release. However, organizations may choose to upgrade In Progress tasks immediately.

Security

The following existing permission applies to this functionality:

Permission Name	Permission Description	Category
	ty to create/assign performance review anage activity within those tasks. This	Performance - Administration

Self and Subordinates, and User.		permission can be constrained by OU, User's OU, User Self and Subordinates, and User.	
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Review Task - Create - Confirm

With this enhancement, when using the redesigned Performance Reviews functionality, administrators are now able to preview a performance review task before it is assigned to reviewers. This enables administrators to ensure the performance review task appears properly and make any necessary adjustments before it is finalized.

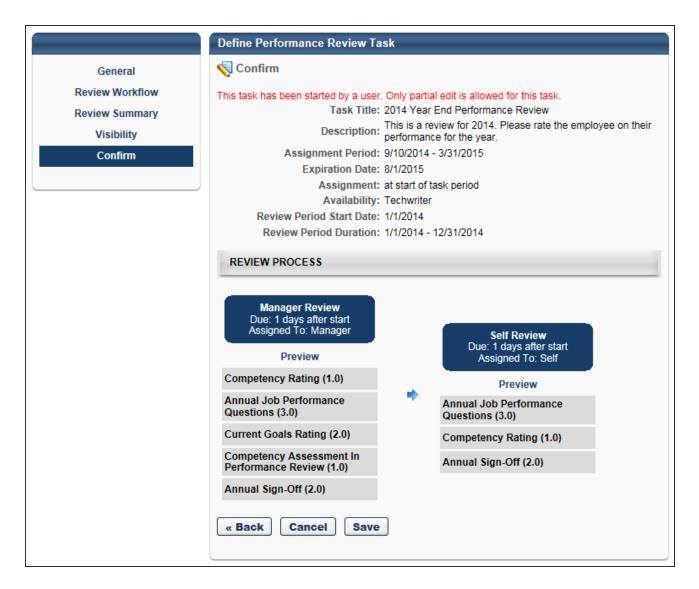
To create a performance review task, go to **Admin > Tools > Performance Management > Tasks**. Then, click the *Create a Performance Review Task* link.

Permissions

Permission Name		Permission Description	Category
	tasks and m permission	ty to create/assign performance review nanage activity within those tasks. This can be constrained by OU, User's OU, User bordinates, and User.	Performance - Administration

A *Preview* link is available for each step within the performance review task. Clicking the *Preview* link opens a preview of the performance review step in a new window. The preview displays the performance review as it will appear to reviewers with the following considerations:

- The version number for each performance review section is displayed to the right of the section title in parentheses.
- Generic employee information is displayed in the review header.
- All options and buttons are included, but cannot be selected.
- The performance review progress is always zero percent.
- Sample data is used for Goal Rating, Goal Planning, Competency, Competency Assessment, and Development Plan sections.



Annual Performance Review	Options v
Employee Name Position 1/1/2014 - 12/31/2014	0%
Overview	
Deliver the best reviews! See below for tips and tricks.	
 Please find below the steps in the process: Complete Self Appraisal – Complete and submit self-assessment to Supervisor. Provide spec performance based on your job duties, business objectives and achievements. Manager Appraisal - Your manager will assess you based on your self-review as well as your p the year. Indirect manager will review and provide the manager with input. Performance Discussion – Meet with your manager to review the completed assessment, disc developmental actions. You and your manager will sign off on the performance management for process. 	performance throughout

Ability to Inactivate Competencies

Ability to Inactivate Competencies

Prior to this enhancement, competencies could not be made inactive to prevent them from being used in the future.

With this enhancement, administrators can now make a competency inactive, which prevents it from being added to new skills matrix roles and competency models.

Implementation

Upon release, this functionality is automatically enabled in Stage and Live portals for organizations using Competencies.

Security

The following new permissions apply to this functionality:

Permission Nam	e Permission Description	Category
Competency Assessment Bank Admin - Edit	Grants ability to edit competencies in the Competency Bank. Administrators can only edit a competency if they have this permission and are also included in the Admin Visibility settings for the competency. This permission cannot be constrained. This is an administrator permission.	Performance - Administration
Competency Assessment Bank Admin - Manage	, , , ,	Performance - Administration
Competency Assessment Bank Admin - View	Grants ability to view competencies in the Competency Bank. Administrators can only view a competency if they have this permission and are also included in the Admin Visibility settings for the competency. This permission cannot be constrained. This is an administrator permission.	Performance - Administration

Competency Bank - Active Checkbox

With this enhancement, competencies can now be designated as inactive via the Competency Bank page. This enables administrators to disable a competency from future use.

To access the Competency Bank page, go to **Admin > Tools > Performance Management > Competency Bank**.

Permissions				
Permission Name		Permission Description	Category	
Competency Assessment Bank Admin - Edit	Bank. Administ have this perm Visibility settin	to edit competencies in the Competency trators can only edit a competency if they ission and are also included in the Admin gs for the competency. This permission strained. This is an administrator permission	Performance - Administration	
Competency Assessment Bank Admin - Manage	competence permission	lity to create, edit, view, and delete ties in the Competency Bank. This a cannot be constrained. This is an tor permission.	Performance - Administration	

Active Checkbox

An Active checkbox is now available in the Competency Bank table for each competency. This option is only available if the administrator has permission to edit or manage competencies. When this option is not selected, the competency is inactive and cannot be added to new skills matrix roles and competency models. However, inactive competencies are still available in any competency model, competency assessment, performance review, skills matrix role, or any other place that it is in use by a user. Also, inactive competencies are available in reporting and when selecting competencies from an existing competency model. For example, a Competency performance review section can be configured to allow users to select competencies from a competency model. If inactive competencies exist in the competency model, then they can still be selected.

If this option is modified for a competency, then the administrator must click the **Save** button to save the competency's Active status. If the updated Active status is not saved, then the updated status is not implemented.

Show Inactive

When this option is selected, inactive and active competencies are displayed in the Competency Bank table. When this option is not selected, only active competencies are displayed in the Competency Bank table.

Save and Back

To save any changes to the Active status of one or more competencies, click the **Save** button. Or, do discard any unsaved changes, click the **Back** button to return to the Admin Tools page.

Competency Bank			?
The competency bank is where competencies are added, edited, deleted, and used in competency assessments. The com Editing a competency from the competency bank will not affect models which already use this competency.	petencies can b	e included in com	petency models.
Search for Competency:			
Show Inactive			
	🔊 🗐 - View	Description 📝 ·	Edit 📋 - Delete
> Create New Competency	~	« Previous 1-	5 of 5 🗸 Next »
Competency Bank			
NAME	ACTIVE	VERSION	OPTIONS
Achievement Orientation Level 1	\checkmark	1.0	۲ 🌊
Achievement Orientation Level 2	\checkmark	1.0	۲.
Achievement Orientation Level 3	\checkmark	1.0	۵ 🖉 🌊
Achievement Orientation Level 4	\checkmark	1.0	۵ 🖉 🗐
Achievement Orientation Level 5	\checkmark	1.0	۵ 🖉 🍺
« Back Save			

Custom Employee Relationship for Goals Snapshot

Custom Employee Relationship for Goals Snapshot

Within the system, administrators can define custom employee relationships such as Dotted Line Manager or Secondary Manager. These custom relationships can be used in performance reviews, compensation, and custom approval workflows for Learning.

Prior to this enhancement, organizations could not assign and constrain permissions based on custom relationships.

With this enhancement, administrators can constrain users' permissions for Goals functionality using the custom employee relationships defined in their portal. These constraints can be applied to either individual permissions or as general constraints within a security role. In addition, the goal approval workflow is now enforced on all goals, and the option to view a user's goals is now available throughout Universal Profile.

The following permissions can now be constrained by custom employee relationships:

- Goals Create
- Snapshot Goals
- View Goals

If a user has permission to view goals, then a new *View All Goals* option is now available from the <u>Options</u> drop-down menu on the Universal Profile. This option is only available when viewing the Universal Profile of a user who is within constraints of their View Goals permission.

If a goal is created by anyone other than the approver, the goal is not automatically approved. The goal must be approved by the approver.

Use Case

An organization has a matrix manager structure with employees reporting to a manager and a "dotted line" or secondary manager. The dotted line or secondary managers need to complete goals actions for users that report to them in the matrix structure. The administrator grants the secondary managers permission to view and create goals and constrains these permissions to the appropriate employee relationship.

Considerations

For a custom relationship to view a user's goals, they either need access to Universal Profile - Snapshot or a direct link to view the user's Goals page.

This constraint type is only available for the indicated permissions. It is not available for all permissions that currently allow manager constraints (User's Self and Subordinates, User's Direct Reports).

Custom relationships are not displayed in the Team section of the Universal Profile - Bio - About page.

Implementation

Upon release, this functionality is automatically enabled for organizations using Goals and custom employee relationships. The availability of the Employee Relationships functionality is controlled by a backend setting. To enable this functionality, contact Global Product Support or your Client Success Manager.

Security

The following existing permissions apply to this functionality and can now be constrained by Employee Relationship. The permission descriptions will be updated when this functionality is released to Live portals.

Permis	sion Name	Permission Description	Cate	gory
Create reports if a manager). The permission c the user can create goals. This permissi		lls. This permission can be constrained b OU, User's OU, and User Self and Subo	r whom yy	Performance
Snapsh - Goals	Profile - Snapshot pa This permission can User's OU, User Self Manager, User's Sup Reports. Best Pract	the Goals widget and subpage within the oge for users within their permission con- be constrained by Employee Relationship and Subordinates, User, User's Self, Use eriors, User's Subordinates, and User's I ice: For most users, this permission sho Self and Subordinates.	straints. p, OU, er's Direct	Universal Profile
View Goals	goals of others (manager	n goals and (depending on role and sett ''s visible goals, direct subordinate's goa goals). This permission can be constrain	ils,	Performance

Employee Relationship, OU, User's OU, and User Self and Subordinates.

This is an end user permission.

Add Custom Employee Relationship Constraint

When creating or editing a security role, the following permissions can now be constrained by custom employee relationships:

- Goals Create
- Snapshot Goals
- View Goals

In addition, if an entire security role is constrained by a custom employee relationship, then this constraint is now applied to the above permissions.

Note: This functionality is only available if one or more custom relationships are defined within the portal.

To create a security role, go to **Admin > Tools > Core Functions > Security Role Administration**. Then, click the *Create New Role* link.

Permissi	ons					
Permiss	ion Name		Permission Descrip	tion	Category	
Goals - Create					n	ce
Security Administ General	ration - Constraint	when creatins works in cor	ng/editing a security r njunction with the Sec		Administratio	n
Security Administ Manage	ration -	within the port This permissio	al, and assign users to	constrain security roles o those security roles. oy OU, User's OU, User s is an administrator	Administratio	n
Snapsho - Goals	Profile This pe User's Manage Reports	- Snapshot pagermission can b OU, User Self a er, User's Supe s. Best Practio	e for users within the e constrained by Empl nd Subordinates, Use riors, User's Subordina	subpage within the Univ ir permission constraint oyee Relationship, OU, r, User's Self, User's ates, and User's Direct <i>is permission should be</i>	ts. Profile	ıl

	Goals	Grants ability to view own goals and (depending on role and settings) goals of others (manager's visible goals, direct subordinate's goals, company goals, division goals). This permission can be constrained by Employee Relationship, OU, User's OU, and User Self and Subordinates. This is an end user permission.	Performance	
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Add General Constraint

On the Constraints page, administrators can add general constraints to a role, which apply to all permissions within the role that can be constrained. To constrain the role by a custom employee relationship, click the *Add General Constraint* link in the General Constraints section. This opens the Add General Constraints pop-up.

Add General Constraints The selected constraints will only be applied to the related permissions. Not all permissions can be constrained.							
Add Constraint							
Restrict to Employee Relationship 🗸							
Cancel Submit							

Select "Restrict to Employee Relationship" from the drop-down. Then, click the pop-up icon to select the appropriate relationship. **Note:** *This option is only available if one or more custom relationships are defined within the portal.*

Add Permission Constraint

On the Constraints page, administrators can add constraints to specific permissions as long as the permission can be constrained. To constrain a Goals permission by a custom employee relationship, click the Add Constraint icon © to the right of the permission name in the Role Permissions section. This opens the Add Constraints pop-up.

Add Constraints								
he selected constraints will only be applied to the related permissions. Not all permissions can be constrained.								
Add Constraint								
Restrict to Employee Relationship 🗸 🖉								
Cancel Submit								

Select "Restrict to Employee Relationship" from the drop-down. Then, click the pop-up icon to select the appropriate relationship. **Note:** *This option is only available if one or more custom relationships are defined within the portal.*

Edit Role				?					
Gen	eral	F	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 Kole Co		Constanints	0						
	General C	Constraints:	Add General Constra	int					
Role Permission	ns								
PERMISSION	ADD CONSTRA	INT CON	STRAINTS						
View Goals	View Goals 🕹 👘 Restricted to Employee Relationship: HR Manager								
« Back Cancel Save									

Universal Profile - View All Goals

If a user has permission to view goals, then a new *View All Goals* option is now available from the <u>Options</u> drop-down menu on the Universal Profile. This option is only available when viewing the Universal Profile of a user who is within constraints of their View Goals permission.

To access the Bio homepage, go to **Home > Universal Profile**. Then, click the Bio tab. **Note:** *The location of this link is configurable by your system administrator.*

To access another user's Universal Profile - Bio page, click the user's photograph from any page within Universal Profile or from Global Search.

Permis	sions				
Permi	ssion Name	Permission Description Cate		egory	
Bio About - View	 constraints. If a user doe person's name or user p will not open. This perm 	e Bio page for users within their permission es not have this permission and they click a hoto within the Universal Profile, then the Bio ission can be constrained by Employee OU, User's Direct Reports, User Self and	page	Universal Profile	
View Goals	goals of others (manager' company goals, division g	n goals and (depending on role and settings) 's visible goals, direct subordinate's goals, joals). This permission can be constrained by U, User's OU, and User Self and Subordinates ssion.		erformance	

To view a user's goals, click the *View All Goals* option from the <u>Options</u> drop-down menu on the Universal Profile. This option is only available when viewing the Universal Profile of a user who is within constraints of the View Goals permission. This option is available on all Actions, Bio, Feedback, and Snapshot pages within the Universal Profile.

When the *View All Goals* option is selected, this opens the Goals page for the user. *See Goals Main Page for additional information.*

On the Snapshot: Goals page, the *View All Goals* option is now only available to users if they have the View Goals permission.

	Bio					Options 👻
Marissa Andre Manager Bio Feedback		Marissa An Customer Ser Manager			Assign Training Create Goals Launch Review View All Goals View Feedback	
Actions	About	Career Profile	Career Preferences	Onboarding		

Snapshot - Goals

Users with the Snapshot - Goals permission can view the Goals widget on the Snapshot page and the Snapshot: Goals page for users within their permission constraints.

To access the Snapshot page, go to **Home > Universal Profile**. Then, click the Snapshot tab. **Note:** *The location of this link is configurable by your system administrator.*

To access another user's Universal Profile - Bio page, click the user's photograph from any page within Universal Profile or from Global Search. From there, you can access the user's Snapshot page by clicking the Snapshot tab. Users can view the Snapshot page of other users who are within their permission to view the Snapshot page.

Permissions

Permission Name		Permission Description	Categ	jory
Snapsh - Goals	Profile - Snapshot pag This permission can b User's OU, User Self a Manager, User's Supe	the Goals widget and subpage within the Ur ge for users within their permission constrai e constrained by Employee Relationship, OL and Subordinates, User, User's Self, User's eriors, User's Subordinates, and User's Direc ce: For most users, this permission should b Self and Subordinates.	nts. J, :t	Universal Profile
View Goals	goals of others (manager' company goals, division g	goals and (depending on role and settings) s visible goals, direct subordinate's goals, oals). This permission can be constrained b U, User's OU, and User Self and Subordinat ssion.	y	Performance

Goals Approval Workflow

Prior to this enhancement, if a user created a goal for another user, then the goal was automatically approved, even if the user who created the goal was not the approver.

With this enhancement, if a goal is created by anyone other than the approver, the goal is not automatically approved. The goal must be approved by the approver.

Data Load Wizard - Competency Load Updates

With this release, administrators can now set the administrator visibility and active status for a competency.

With this enhancement, competencies loaded via the Competency Bank data load will have the Admin Visibility set to All Employees.

Admin Visibility

The <u>Admin Visibility</u> field enables the administrator to define which administrators are able to view the competency in the Competency Bank and when creating competency models and skills matrix roles. Visibility can be set by organizational unit (OU), Group, or specific users.

The Data Load Wizard does not support updating OU availability fields. Because of this, the Admin Visibility cannot be configured in a competency data load. The following occurs when competencies are loaded:

- Competency Created When a new competency is created via the Data Load Wizard, the Admin Visibility for this competency is automatically set to be visible to all employees. To change the administrator visibility for competencies loaded via the Data Load Wizard, administrators must manually set the Admin Visibility within the Competency Bank.
- Competency Updated When an existing competency is updated via the Data Load Wizard, the Admin Visibility settings are not updated. The existing settings are maintained.

Active Checkbox

An <u>Active</u> field enables administrators to define the Active status for the competency. When a competency is inactive, it cannot be added to new skills matrix roles and competency models. However, inactive competencies are still available in any competency model, competency assessment, performance review, skills matrix role, or any other place that it is in use by a user. Also, inactive competencies are available in reporting and when selecting competencies from an existing competency model. For example, a Competency performance review section can be configured to allow users to select competencies from a competency model. If inactive competencies exist in the competency model, then they can still be selected.

When loading competencies via the Data Load Wizard, the competency will be loaded to an Active status. The Data Load Wizard does not support loading competencies to an inactive status. To update the status of a competency created via the Data Load Wizard, administrators must manually deselect the Active checkbox for the competency within the Competency Bank.

Implementation

Upon release, this functionality is available to all organizations using the Competency Bank Data Load.

Security

The following existing permissions apply to this functionality:

Permission Name	9	Permission Description	Catego	ory
Data Load Wizard - Competency Bank	Load Wizard.	nistrator to load competency bank data This permission also enables administra ds and manage data load templates. Th permission.	ators to	Data Load Wizard
Data Load Wizard - Performance	Wizard. This pe	istrator to load performance data via th ermission also enables administrators to age data load templates. This is an adm	o track data	Data Load Wizard

New Competency Management Permissions

New Competency Management Permissions

Prior to this enhancement, only one permission controlled access to the Competency Bank and the Competency Models administration page.

With this enhancement, new Competency Assessment Bank Admin and Competency Assessment Model permissions control whether an administrator can view, edit, and manage competencies and competency models. Admin Visibility can be set for competencies and competency models, which restricts the administrators who can view the competencies and competency models.

Implementation

Upon release, this functionality is automatically enabled in Stage and Live portals for organizations using Competencies.

Upon release, there is no Admin Visibility set for competencies and competency models. When no Admin Visibility is set, then the visibility is not restricted.

Security

The following new permissions apply to this functionality:

Permission Name		Permission Description	Category
Competency Assessment Bank Admin - Edit	Bank have Visibi	is ability to edit competencies in the Competency Administrators can only edit a competency if they this permission and are also included in the Admin lity settings for the competency. This permission of be constrained. This is an administrator permission	Performance - Administration
Assessment Bank Admin - Manage		Grants ability to create, edit, view, and delete ompetencies in the Competency Bank. This ermission cannot be constrained. This is an dministrator permission.	Performance - Administration
Assessment Bank Bank Admin - View have Visib		ts ability to view competencies in the Competency . Administrators can only view a competency if they this permission and are also included in the Admin lity settings for the competency. This permission of be constrained. This is an administrator permissior	Performance - Administration
Competency Assessment Model Admin - Edit		,	Performance - Administration

Competency Assessment Model Admin - Manage	Grants ability to create, edit, delete, and view competency models. This permission cannot be constrained. This is an administrator permission.	Performance - Administration
Competency Assessment Model Admin - View	Grants ability to view competency models. This permission cannot be constrained. This is an administrator permission.	Performance - Administration

The existing Competency Assessment Model permission is updated so that it only grants access to define competency categories, competency model categories, and the default rating scale for competency models. The permission description will be updated when the functionality is released to Live portals.

Permission Name		Permission Description	Category
Assessment	competency mo for competency	o define competency categories, odel categories, and the default rating scale models. This permission cannot be is is an administrator permission.	Performance - Administration

Competency - Admin Visibility

When creating or editing a competency, administrators can define which administrators are able to view the competency in the Competency Bank.

To create a competency, go to **Admin > Tools > Performance Management > Competency Bank**. Then, click the *Create New Competency* link.

Permissions	Permissions									
Permission Nam	e	Permission Description	Category							
Assessment Bank Bank. Admin Admin - Edit have this pe Visibility set		o edit competencies in the Competency crators can only edit a competency if the ission and are also included in the Adm gs for the competency. This permission crained. This is an administrator permis	ey in	Performance - Administration						
Competency Assessment Bank Admin - Manage	competence permission	lity to create, edit, view, and delete ties in the Competency Bank. This cannot be constrained. This is an tor permission.		Performance - Administration						

The following option is now available when creating or editing a competency:

 <u>Admin Visibility</u> - This option enables the administrator to define which administrators are able to view the competency in the Competency Bank and when creating competency models and skills matrix roles. Administrators must also have permission to view or manage the competency. This applies to all versions of the competency. Editing this option does not create a new competency version. Visibility can be set by OU, Group, or specific users. Select the <u>Include Subordinates</u> option to include subordinate OUs or users. If no visibility is set, then the competency is visible to all administrators who have permission to view competencies.

Add Competency						
	🔄 - Add Development Action	🔕 - Translate	📝 - Edit	🗟 - Save	🗱 - Cancel	🗊 - Remove
Define Competency						
Name:				±	<i>🔊</i>	
Description:				$\hat{}$	<i>"</i>	
Version:	1.0					
ID:						
Admin Visibility:	Select Criteria	∨ n: Techwriter		E	Include sub	ordinates

Competency Bank - Permissions

Prior to this enhancement, administrators with the Competency Assessment Model permission could create, edit, and view all competencies in the Competency Bank.

With this enhancement, new Competency Assessment Bank Admin permissions control whether an administrator can view, edit, and manage competencies in the Competency Bank. In addition, administrators can only view, edit, and manage a competency if they are within the Admin Visibility for the competency.

To access the Competency Bank page, go to **Admin > Tools > Performance Management > Competency Bank**.

Permissions			
Permission Nam	e	Permission Description	Category
Assessment Bank Bank. Admin - Edit have t Visibili		s ability to edit competencies in the Competency Administrators can only edit a competency if they his permission and are also included in the Admin ity settings for the competency. This permission t be constrained. This is an administrator permission	Performance - Administration
Competency Assessment Bank Admin - Manage	co pe	rants ability to create, edit, view, and delete ompetencies in the Competency Bank. This ermission cannot be constrained. This is an Iministrator permission.	Performance - Administration
Competency Assessment Bank Admin - View	Bank. have t Visibili	s ability to view competencies in the Competency Administrators can only view a competency if they his permission and are also included in the Admin ity settings for the competency. This permission t be constrained. This is an administrator permission	Performance - Administration
Competency Assessment Mode Admin - Edit	l		Performance - Administration
Competency Assessment Mode Admin - Manage	I 0	Grants ability to create, edit, delete, and view competency models. This permission cannot be constrained. This is an administrator permission.	Performance - Administration
Competency Assessment Model Admin - View			Performance - Administration
Competency Assessment		access to define competency categories, tency model categories, and the default rating scale	Performance - Administration

Model	for competency models. This permission cannot be			
	constrained. This is an administrator permission.			

Create New Competency

The *Create New Competency* link is only available to administrators who have permission to manage competencies.

Define Competency Categories

The *Define Competency Categories* link is only available to administrators who have the Competency Assessment Model permission.

Competency Bank Table

Within the Competency Bank table, a competency is only displayed if the administrator is within the Admin Visibility set for the competency. In addition, the administrator must also have permission to view, edit, or manage competencies.

Within the Competency Bank table, the following options are only available to administrators who have the appropriate permissions:

- Active This option is only available if the administrator has permission to edit or manage competencies.
- View Description This option is only available if the administrator has permission to view, edit, or manage competencies.
- Edit This option is only available if the administrator has permission to edit or manage competencies.
- Delete This option is only available if the administrator has permission to manage competencies.

Competency Model - Admin Visibility

When creating or editing a competency model, administrators can define which administrators are able to view the competency model.

To create a competency model, go to **Admin > Tools > Performance Management > Competency Assessment Models**. Then, click the *Create New Competency Model* link.

Permissions				
Permission Nam	e	Permission Description	Category	
Assessment Bank Bank. Administrat Admin - Edit have this permissi Visibility settings		to edit competencies in the Competency trators can only edit a competency if they hission and are also included in the Admin gs for the competency. This permission strained. This is an administrator permission	Performance - Administration	
Competency Assessment Bank Admin - Manage	competence permission	lity to create, edit, view, and delete cies in the Competency Bank. This a cannot be constrained. This is an ator permission.	Performance - Administration	
Assessment Bank Bank. Administ Admin - View have this perm Visibility settin		to view competencies in the Competency trators can only view a competency if they hission and are also included in the Admin gs for the competency. This permission strained. This is an administrator permission		
Competency Assessment Model Admin - Edit	l permissi	bility to edit competency models. This on cannot be constrained. This is an trator permission.	Performance - Administration	
Assessment Model competer		pility to create, edit, delete, and view ncy models. This permission cannot be ed. This is an administrator permission.	Performance - Administration	

The following option is now available when creating or editing a competency model:

• <u>Admin Visibility</u> - This option enables the administrator to define which administrators are able to view and select the competency model throughout the system. Administrators must also have permission to view or manage the competency model. This applies to all versions of the competency model. Editing this option does not create a new competency model version. Visibility can be set by OU, Group, or specific users. Select the <u>Include Subordinates</u> option to include subordinate OUs or users. If no visibility is set, then the competency model is visible to all administrators who have permission to view competency models.

Add Competency Model						
Add Model						
Name:		<i>🔊</i>				
Description:		a				
Admin Visibility:	Select Criteria					

Competency Models - Permissions

Prior to this enhancement, administrators with the Competency Assessment Model permission could create, edit, and view all competency models.

With this enhancement, new Competency Assessment Model Admin permissions control whether an administrator can view, edit, and manage competency models. In addition, administrators can only view, edit, and manage a competency model if they are within the Admin Visibility for the competency model.

To access the Competency Models page, go to Admin > Tools > Performance Management > Competency Assessment Models.

Permissions			
Permission Nam	ne	Permission Description	Category
Assessment Model permi			Performance - Administration
Assessment Model cor		Grants ability to create, edit, delete, and view competency models. This permission cannot be constrained. This is an administrator permission.	Performance - Administration
Assessment Model permiss			Performance - Administration
Assessment competency mo Model for competency		access to define competency categories, tency model categories, and the default rating scale npetency models. This permission cannot be nined. This is an administrator permission.	Performance - Administration

Create New Competency Model

The *Create New Competency Model* link is only available to administrators who have permission to manage competency models.

Define Model Categories

The *Define Model Categories* link is only available to administrators who have the Competency Assessment Model permission.

Define Default Rating Scale

The *Define Default Rating Scale* link is only available to administrators who have the Competency Assessment Model permission.

Competency Models Table

Within the Competency Models table, a competency model is only displayed if the administrator is within the Admin Visibility set for the competency model. In addition, the administrator must also have permission to view, edit, or manage competency models.

Within the Competency Models table, the following options are only available to administrators who have the appropriate permissions:

- Preview This option is only available if the administrator has permission to view, edit, or manage competency models.
- Edit This option is only available if the administrator has permission to edit or manage competency models. **Note:** When editing a competency model, administrators can view all of the competencies that have been added to the competency model, regardless of the administrator's permissions and the competencies' Admin Visibility settings.
- Copy This option is only available if the administrator has permission to manage competency models.
- Delete This option is only available if the administrator has permission to manage competency models.

Select Competencies

With this enhancement, new Competency Assessment Bank Admin permissions control whether an administrator can view competencies. In addition, administrators can only view a competency if they are within the Admin Visibility for the competency.

When selecting a competency, administrators can only view and select a competency if they are within the Admin Visibility settings for the competency and if they have permission to view, edit, or manage competency.

Permission Name		Permission Description	Category
Assessment Bank Admin - Edit	Bank. Administ have this perm Visibility setting	o edit competencies in the Competency trators can only edit a competency if they ission and are also included in the Admin gs for the competency. This permission trained. This is an administrator permission.	Performance - Administration

Assessment Bankcompetencies in the Competency Bank. ThisAdministrationAdmin - Managepermission cannot be constrained. This is an administrator permission.Administration	istration	
---	-----------	--

Competency Assessment Bank Admin - View		Performance - Administration
---	--	---------------------------------

Competencies can be selected in the following areas throughout the system:

- Create Competency Model Competencies can be selected when creating a competency model.
- Create Skills Matrix Role Competencies can be selected on the Competencies step when creating a skills matrix role.

End users are not impacted by these permissions. End users can select any competency that is available to them. For example, is a user is selecting competencies for a Competency performance review section, the user is not required to have one of the Competency Assessment Bank Admin permissions.

Select Competency Model

Dormiccione

With this enhancement, new Competency Assessment Model Admin permissions control whether an administrator can view competency models. In addition, administrators can only view a competency model if they are within the Admin Visibility for the competency model.

When selecting a competency model, administrators can only view and select a competency model if they are within the Admin Visibility settings for the competency model and if they have permission to view, edit, or manage competency models.

Permissions		
Permission Name	Permission Description	Category
Competency Assessment Model Admin - Edit	Grants ability to edit competency models. This permission cannot be constrained. This is an administrator permission.	Performance - Administration
Competency Assessment Model Admin - Manage	Grants ability to create, edit, delete, and view competency models. This permission cannot be constrained. This is an administrator permission.	Performance - Administration
Competency Assessment Model Admin - View	Grants ability to view competency models. This permission cannot be constrained. This is an administrator permission.	Performance - Administration

Competency models can be selected in the following areas throughout the system:

- Create Competency Assessment Task A competency model can be selected on the Competency Model step when creating a competency assessment task.
- Create Observation Checklist A competency model can be selected on the General step when creating an observation checklist.
- Create Competency Performance Review Section A competency model can be selected in the Competency Settings section when creating a Competency performance review section.
- Career Center Preferences A competency model can be selected in the Competency Model section when configuring Career Center Preferences.
- Bio Resume and Career Center Preferences A competency model can be selected in the Competency Model section when configuring Bio Resume and Career Center Preferences.

Performance Review Email Digests

Email Digest - Performance Reviews

Prior to this enhancement, individual emails were sent to recipients based on defined email triggers.

With this enhancement, administrators can create email digests for performance review step assignments. An email digest is a scheduled email that is sent on a recurring basis. They are intended to group a user's notifications and reminders into a single email. Email digests are only sent to a user if there is active content for the user. In future releases, the Email Digest functionality will be expanded to include additional email digest sections for other modules.

Use Cases

An administrator wants to create an email digest, which consolidates email notifications to end users. This reduces the amount of emails an end user receives, reducing the likelihood that the user overlooks an email. The administrator creates a new email digest and adds a Performance Review Step Assigned section. This section notifies a recipient of all performance review steps that are assigned to them within the defined time frame.

Considerations

- Email digests are separate from existing email triggers. Existing email triggers are not migrated to digest emails.
- Default language exception handling is not included in this release. For example, a digest email is created by an administrator in the English language. A French administrator adds a section in the French language. In this case, the email will contain text in English and French. In a future release, validation will be added to prevent this behavior.

Implementation

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

Security

The following new permissions apply to this functionality:

Permission Name	e	Permission Description	Category
Email Digest Administration - Manage	digests. This p OU, User Self constraints de	to create, edit, view, and delete email ermission can be constrained by OU, User's and Subordinates, and User. The permission termine which email digests the can edit and delete. This is an administrator	Performance - Administration

Email Digest	Grants ability to view email digests. This	Performance -
Administration - View	permission cannot be constrained. This is an	Administration
	administrator permission.	

Email Digest Management

An email digest is a scheduled email that is sent on a recurring basis. They are intended to group a user's notifications and reminders into a single email. Email digests are only sent to a user if there is active content for the user.

The Email Digest Management page enables administrators to create, view, and manage email digests.

To manage email digests, go to Admin > Tools > Core Functions > Email Digest Management.

Permissions				
Permission Name		Permission Description		Category
Email Digest Administration - Manage	digests. This p OU, User Self constraints de	to create, edit, view, and delete email permission can be constrained by OU, Us and Subordinates, and User. The permis termine which email digests the can edit and delete. This is an administr	sion	Performance - Administration
Email Digest Administration - Vi	ew permissior	lity to view email digests. This n cannot be constrained. This is an ator permission.	_	erformance - Iministration

Create Email Digest

Click the **Create Email Digest** button to create an email digest. *See* **Email Digest** - **Create/Edit** *on* page 301 *for additional information.*

Email Digest Table

By default, the email digest table displays email digests in alphabetical order. The table can be sorted by one of the table columns by clicking the appropriate column header.

The following information is displayed for each existing email digest in the table:

- Digest Name This displays the name that was configured for the email digest.
 - For administrators with permission to manage email digests, clicking the digest name enables the administrator to edit the email digest.
 - For administrators with permission to view email digests, clicking the digest name enables the administrator to view the email digest.
- Frequency This displays how frequently the email digest may be sent to recipients. If there is no content to be sent to a user, then the email digest is not sent.

- Time This displays the specific time at which the email digest is sent.
- Day If the email digest is sent on a weekly basis, this displays the day of the week on which the email digest is sent. If the email digest is sent on a monthly basis, this displays the date on which the email digest is sent.
- Active Select this checkbox to make the email digest active. When an email digest is not
 active, the email digest is not sent to users. This option is not available if the administrator
 does not have permission to manage email digests.

Email Digest Actions

To view the available actions for an email digest, click the drop-down icon 🗾 in the Actions column. The following actions may be available:

- Edit Select this option to edit the email digest. This option is only available if the administrator has permission to manage email digests. *See* Email Digest Create/Edit on page 301 for additional information.
- Copy Select this option to copy the email digest. This option is only available if the administrator has permission to manage email digests. See Email Digest - Create/Edit on page 301 for additional information.
- Delete Select this option to delete the email digest. This option is only available if the administrator has permission to manage email digests. When this option is selected, a confirmation pop-up opens to confirm the action.
- View Select this option to view the email digest. This option is only available if the administrator does not have permission to manage email digests.

Tools Core Functions Email Digest Management					
Email Digest Management Create Email Digest					
 This is the Email Digest Management Section. Here you can create and manage email digest content and settings for periodic messages. Email Digests can be scheduled for specific times and intervals Email Digests are independent of current activity-driven emails Email Digests will only be sent to a recipient if there is active content for the recipient. For example, Email Digest for Performance Review Step Assigned will only be sent to a recipient if they have a new Performance Review Step Assigned notification. 					
Digest Name 🔹	Frequency \$	Time \$	Day ¢	Active 🗧	Actions
Daily Performance Email for US	Daily	12:00 AM (UTC-08:00) Pacific Time (US & Canada)	N/A	V	Edit
					Copy Delete

Email Digest - Create/Edit

An email digest is a scheduled email that is sent on a recurring basis. They are intended to group a user's notifications and reminders into a single email. Email digests are only sent to a user if there is active content for the user.

An email digest can contain standard and dynamic sections. Standard sections are sent to all recipients and are included any time an email digest is sent. Dynamic sections, such as the Performance Review Step Assigned section, are populated based on activity within the system. An email digest must contain at least one dynamic section, and the email digest will only be sent when a recipient has applicable content within a dynamic section. For example, a Performance Review Step Assigned email digest is only sent to a recipient when they have one or more performance review steps assigned to them.

To manage email digests, go to Admin > Tools > Core Functions > Email Digest Management.

- To create an email digest, click the **Create Email Digest** button.
- To copy an email digest, click the drop-down icon 🔳 to the right of the email digest and select *Copy*.
- To edit an email digest, click the drop-down icon 🔽 to the right of the email digest and select *Edit*.

FEITIISSIONS				
Permission Name		Permission Description		Category
Email Digest Administration - Manage	digests. This p OU, User Self constraints de	to create, edit, view, and delete email permission can be constrained by OU, Us and Subordinates, and User. The permis termine which email digests the can edit and delete. This is an administr	sion	Performance - Administration
Email Digest Administration - Vi	ew permission	ility to view email digests. This n cannot be constrained. This is an ator permission.	-	erformance - Iministration

General Details

Permissions

The following fields are available in the upper section of the page:

- Digest Email Title Enter a title for the email digest, up to 255 characters. This field is required. If multiple languages are enabled for your portal, click the Translate icon to translate the field into other available languages.
- Active Check this box to activate the email digest. When an email digest is not active, the email digest is not sent to users.

- From Address Enter the email address from which the email digest will be sent. This field is required. Email addresses must be entered in a valid email address format.
- Reply-To Address Enter the email address to which any replies to the email digest will be sent. Email addresses must be entered in a valid email address format.
- CC A copy or carbon copy (CC) of the email digest can be sent to a specific user or a role. To add a CC user or role, select the appropriate user or role, and then click the **Add** button.
 - To select a specific user, either enter the user's name in the field or click the Select icon to select a user from the system. See Select User Pop-up for additional information.
 - To select a role, select the appropriate role from the drop-down menu.
- Subject Enter a subject for the email digest. The subject is displayed to the recipient. Tags can be used in this field. This field is required. If multiple languages are enabled for your portal, click the Translate icon to translate the field into other available languages.
- Frequency From the drop-down, select how often the email digest will be sent to users. The email digest contains all appropriate notifications from the previous period (e.g., day, week, month), depending on the selected frequency. The following options are available:
 - Daily When this option is selected, the email digest is sent every day at the specified time. The time and time zone at which the email digest will be sent must be specified. If the specified time is modified, then the email digest contains all notifications since the last email digest was sent, up to a 48 hour period.
 - Weekly When this option is selected, the email digest is sent every week on a specific day and time. The day of the week, time, and time zone at which the email digest will be sent must be specified. If the specified time is modified, then the email digest contains all notifications since the last email digest was sent, up to a two week period.
 - Monthly When this option is selected, the email digest is sent every month on a specific date and time. The day of the month, time, and time zone at which the email digest will be sent must be specified. If the selected date does not exist in the month, then the email digest is sent on the nearest previous date. For example, if 30th is selected, then the email digest would be sent on February 28th. If the specified time is modified, then the email digest contains all notifications since the last email digest was sent, up to a two month period.

Digest Email Title		Act
Enter Title		(
From Address	Reply-To Address	
Enter Email Address	Enter Email Address	
СС		
Start Typing	or Select Relation V	dd
Subject		
Enter Subject		0
Frequency Time	Time Zone	
Daily v 12 : 00 AM v	(UTC -08:00) Pacific Time	(US & Ca ▼

Admin Visibility

This section determines which administrators can view and edit the email digest. Administrators must be within the selected criteria to view and edit the email digest. In addition, the administrator must have permission to manage Email Digest Administration.

To add a criterion, select the appropriate organizational unit (OU) type from the drop-down. Then, either enter the name of the OU in the field or click the Select icon \Box to select an OU from the system. Select the <u>Include Subordinates</u> checkbox to also include any subordinate OUs.

This is optional. Unless visibility is specified, all administrators with the proper permissions can view and edit the email digest.

Admir	n Visibility	
Determine	the administrators who can view and edit this email digest.	
Divisio	n 👻	
	Criteria	Include Subordinates
\times	All employees in Division: Central	

Availability

This section limits which users are able to receive the email digest. This enables organizations to customize or brand email digests differently for different groups of users.

Availability must be set for the email digest. To add a criterion, select the appropriate organizational unit (OU) type from the drop-down. Then, either enter the name of the OU in the field or click the Select icon \Box to select an OU from the system. Select the <u>Include Subordinates</u> checkbox to also include any subordinate OUs.

When an administrator creates an email digest, the constraints on the administrator's Email Digest Administration - Manage permission are automatically applied to the availability of the email digest. These are referred to as creator constraints. For example, if the administrator's Email Digest Administration - Manage permission is constrained to Location: United States, then the availability of any email digest the administrator creates is automatically limited to Location: United States.

When applicable, the creator constraints are displayed above the criteria table. Any availability that is selected will further constrain the availability of the email digest.

Note: Email digests are only sent to a user if there is active content for the user.

Availa	bility	
Determine	the users who can receive this email digest.	
Divisior		
	Criteria	Include Subordinates
\times	All employees in Division: Central	×

Sections

This section enables administrators to add and configure standard and dynamic sections within the email digest.

Add Section

An email digest can contain standard and dynamic sections. Standard sections are sent to all recipients and are included any time an email digest is sent. Dynamic sections, such as the Performance Review Step Assigned section, are populated based on activity within the system. An email digest must contain at least one dynamic section, and the email digest will only be sent when a recipient has applicable content within a dynamic section. For example, a Performance Review Step Assigned email digest is only sent to a recipient when they have one or more performance review steps assigned to them.

Click the **Add Section** button to add a new section to the email digest. *See* **Email Digest - Add Section** *on* page 307 *for additional information.*

Configure Section

The following properties can be configured for a section:

- Section Name Enter a name for the section, up to 255 characters. This name should indicate the purpose of the section, such as Email Digest Header or Review Step Assigned to Reviewer. This is required. If multiple languages are enabled for your portal, click the Translate icon to translate the field into other available languages.
- Send To Select to whom the email digest section should be sent. This field is required. Because Standard sections are always sent to all users within the email digest's availability,

this option is only available for non-Standard sections. To add a user or relation, select the appropriate user or relation, and then click the **Add** button.

- To select a specific user, either enter the user's name in the field or click the Select icon to select a user from the system. See Select User Pop-up for additional information.
- To select a relation, select the appropriate relation from the drop-down menu. The type of section determines which relations are available.
- Body To edit the body of the email section, click the Edit Body button. This opens the Edit Section pop-up. See Email Digest - Edit Section Body on page 309 for additional information.

Move Section

The sections can be moved up or down so that they appear in the proper order. For example, the Email Digest Header section should appear first, and the Email Digest Footer section should appear last.

- To move a section upward, click the up icon T.
- To move a section downward, click the down icon Ψ .

Remove Section

To remove a section from the email digest, click the Delete icon $^{\bigotimes}$. A pop-up opens to confirm the section deletion.

Sections	
Standard Section	
Standard sections will appear any time emails are sent. Typically used for header and	footer.
Section Name	_
Digest Header	0
Edit Body	
Performance Review Step Assigned	
Performance review of a specific user assigned.	↑ O
Section Name	
Performance Review Step Assigned	0
Send To Start Typing □ OR Select Relation ▼ Add Reviewer	
Edit Body	
Add Section	Preview Email
	Cancel Save

Preview Email

Click the *Preview Email* link to view how the email will appear to recipients. The preview is opened in a pop-up. All of the HTML in the sections is rendered properly except for <script> tags. Also, email tags are displayed as text.

The *Preview Email* link is not available if no sections have been added to the email digest.

Save or Cancel

Click **Save** to save the email digest. This button is not available if no sections have been added to the email digest.

Click **Cancel** to cancel the email digest creation or any unsaved changes to the email digest.

Email Digest - Add Section

An email digest can contain standard and dynamic sections. Standard sections are sent to all recipients and are included any time an email digest is sent. Dynamic sections, such as the Performance Review Step Assigned section, are populated based on activity within the system. An email digest must contain at least one dynamic section, and the email digest will only be sent when a recipient has applicable content within a dynamic section. For example, a Performance Review Step Assigned email digest is only sent to a recipient when they have one or more performance review steps assigned to them.

By default, a standard section is added to the email digest. As a best practice, a standard section should be included as the first and last sections of the email digest to provide introduction and closing text for the email digest.

To add a section to an email digest, click the **Add Section** button in the *Sections* section.

Permissions			
Permission Name	e	Permission Description	Category
Email Digest Administration - Manage	digests. This p OU, User Self constraints de	to create, edit, view, and delete email permission can be constrained by OU, User's and Subordinates, and User. The permission termine which email digests the can edit and delete. This is an administrator	Performance - Administration

Sections Table

The Select Section pop-up displays all sections that are available to the administrator. The following information is displayed for each available section:

- Name
- Type
- Description

The following email digest sections may be available:

- Standard Section This section type is a multipurpose section that is always included when added to an email digest. That is, if a standard section is added to an email digest, it is always included when an email digest is sent to a recipient.
- Performance Review Step Assigned This dynamic section is intended to alert recipients that they have been assigned one or more performance review steps. This dynamic section can be configured to display the details of each new performance review step assignment, including reopened steps. If a user has not been assigned a performance review step since the last digest was delivered, then this section is not included in the email digest for the user. *See* **Performance Review Step Assigned Section** *on* page 313 for additional information.

Add Section

To add a section to the email digest, click the section name. The pop-up is automatically closed, and the new section is added to the bottom of the *Sections* section.

Cancel

To cancel the section addition, click the **Cancel** button.

Name	Туре	Description
Standard Section	Standard Section	Standard sections will appear any time emails are sent. Typically used for header and footer.
Performance Review Step Assigned	Performance Management	Performance review of a specific user assigned

Email Digest - Edit Section Body

When an email digest section is added to an email digest, the body of the section can be configured so that the appropriate messaging and information is displayed for recipients.

To edit an email digest section body, add the appropriate section to the email digest and click the **Edit Body** button.

Permissions			
Permission Name	9	Permission Description	Category
Email Digest Administration - Manage	digests. This p OU, User Self constraints de	to create, edit, view, and delete email permission can be constrained by OU, User's and Subordinates, and User. The permission termine which email digests the can edit and delete. This is an administrator	Performance - Administration

When editing an email digest section body, the following options are available:

Language

If multiple languages are enabled for your portal, select a language from drop-down menu. The default value is the default language of the administrator who created the email digest.

The text that is entered in the section body should be entered in the selected language. When the email digest is sent to a user, the recipients receive the email digest in their preferred language. If content is not available in their preferred language, then the recipient receives the email digest in the language of the administrator who created the email digest.

Tags

Click the *Display a list of tags* link to view tags available to use in the section body. When the email is sent, the tags are replaced with actual information. The tags must be entered exactly as they are listed, and they are case sensitive. For example, to address the email to the email recipient, enter: "Dear {RECIPIENT.FIRST.NAME} {RECIPIENT.LAST.NAME}," and the fields would be replaced with the relevant information.

Which tags are available to include is dependent upon the email digest section type. Review the specific dynamic section topic to view the available tags for that dynamic section type.

Standard Section Tags

The following tags are available for standard sections:

- RECIPIENT.FIRST.NAME This displays the first name of the user who is receiving the email.
- RECIPIENT.LAST.NAME This displays the last name of the user who is receiving the email.

Section Body

Enter the message for recipient. The following options are available for configuring the message:

- Tags Tags may be used in this field. To view a list of available tags, click the *Display a list* of tags link.
- WYSIWYG Tool The WYSIWYG (What You See Is What You Get) tool provides configuration tools, such as images, fonts, colors, formatting, and tables. There is also a Copy from Word feature that enables administrators to import from Microsoft Word, preserving the formatting used in the Word document. HTML code can also be used. All of the HTML in the sections is rendered properly except for <script> tags.
 - The top toolbar of the WYSIWYG tool contains configuration options. The bottom toolbar is used to switch from design to HTML mode, as well as preview the email.
 - **Note:** Documents cannot be deleted from the Document Manager once they are added. This is because the document may be in use in emails that have already been sent to users. This prevents errors with document links after emails are sent.
 - See the WYSIWYG Tool Considerations below for important considerations when using the WYSIWYG tool.

Done or Cancel

To save the section body, click **Done**. Otherwise, click **Cancel** to discard any unsaved changes.

Performance Review Step Assigned	×
Language English (US) 🔻	
Display a list of tags that can be used within the body of the e-mail	
A \cdot \otimes \cdot Font Name \cdot Real \cdot Paragraph St \cdot Zoom \bullet <	
Dear REVIEWER.FIRST.NAME REVIEWER.LAST.NAME: REVIEW.TASK.TITLE: The REVIEW.STEP.TITLE step for REVIEWEE.FIRST.NAME REVIEWEE.LAST.NAME is now available for completion in Cornerstone. The REVIEW.STEP.TITLE step <u>must be submitted no later than</u> REVIEW.STEP.DUE.DATE . Please follow the steps below to complete the performance summary.	
 Log in to Cornerstone. A link to the performance summary will appear on your Welcome Page under "My Performance Tasks". Click the link to view brief instructions and begin completion of the performance summary. Follow the instructions on each screen to complete the performance summary. To submit the final performance summary, click the "Submit Review" button shown on the last page. Note: If you are not ready to submit, you can click the "Save & Return" button to continue the performance summary at a later time. 	
✓ ✓ ✓ Design ♦ HTML ♥ Preview Words: 130 Characters: 901	
Cancel	Done

WYSIWYG Tool Considerations

The following are important considerations when using the WYSIWYG tool:

- The Telerik editor demo website (http://demos.telerik.com/aspnetajax/editor/examples/default/defaultcs.aspx) is provided for reference purposes only. The editor available in Email Administration is a different version than the demo editor on the website, and there may be features that work differently or are missing. Hence, all features of the editor may not function in the same way as demonstrated in the demo editor.
- Editor Limitations:
 - Microsoft Outlook does not display media files embedded in the editor.
 - The paste feature may not paste some HTML content when done in the Design mode, for example "iframes." This can be done via HTML mode instead.
 - Some media file codes are taken in by the editor but may not display in the emails received by the user.
 - HTM files successfully uploaded via the Document Manager in the editor may not be displayed accurately in Outlook.

- Preview may not be identical to how a specific email client renders the email.
- "Paste" may not always paste the entire HTML content in design mode.
- "Select All" does not select all the content in design mode.
- Known Browser Limitations:
 - Firefox
 - The remove alignment button is not compatible with Firefox.
 - "Select All" does not select the horizontal lines when the editor is used in Firefox.
 - The Add button within Document Manager does not allow for multiple selection of documents in Internet Explorer and Firefox.
 - The "Remove Alignment" feature may not work as expected in Firefox.
 - Internet Explorer
 - In Internet Explorer 8, the HTM file that is uploaded may show as distorted in design mode.
 - In Internet Explorer, when a user uploads a HTM file using the Template Manager while setting up an email, the uploaded HTM file may have a slightly different layout and formatting.
 - The Add button within Document Manager does not allow for multiple selection of documents in Internet Explorer and Firefox.
- CSS Limitations: Some features such as tables, CSS classes, and styles may not be displayed as expected in certain email programs. As a best practice, please avoid the use of the CSS options.
 - The CSS class is not applied for the Document Manager if they are nested CSS classes.
 - The following reference link provides details about which email clients support which type of CSS: http://www.campaignmonitor.com/css/. Users can view the email using a browser to show the entire contents of the email properly.

Note: A detailed demo of all features in the editor is available at

http://demos.telerik.com/aspnet-ajax/editor/examples/default/defaultcs.aspx. Descriptions of each option in the toolbar are provided at http://demos.telerik.com/aspnet-ajax/editor/examples/default/defaultcs.aspx.

Performance Review Step Assigned Section

This dynamic section is intended to alert recipients that they have been assigned one or more performance review steps. This dynamic section can be configured to display the details of each new performance review step assignment, including reopened steps. If a user has not been assigned a performance review step since the last digest was delivered, then this section is not included in the email digest for the user.

Section Send To Options

When configuring the <u>Send To</u> option for a Performance Review Step Assigned section, the following relation options are available:

- Reviewer If this option is selected and the reviewer is also the reviewee, then this section is not included in the reviewer's email digest.
- Reviewee's Direct Manager
- Reviewee's Indirect Manager
- Reviewee If this option is selected, then this section is only included in the reviewee's email digest if the reviewee is also the reviewer.

Section Specific Tags

When configuring the section body for a Performance Review Step Assigned section, the following tags are available:

- REVIEW.LINK This displays a hyperlink that navigates the user to the Overview page of the performance review step.
- REVIEW.STEP.DUE.DATE This displays the due date of the performance review step.
- REVIEW.STEP.TITLE This displays the title of the performance review step.
- REVIEW.TASK.TITLE This displays the title of the performance review task.
- REVIEWEE.FIRST.NAME This displays the first name of the user who is being reviewed in the performance review step.
- REVIEWEE.LAST.NAME This displays the last name of the user who is being reviewed in the performance review step.
- REVIEWER.FIRST.NAME This displays the first name of the user who is required to complete the performance review step.
- REVIEWER.LAST.NAME This displays the last name of the user who is required to complete the performance review step.
- REVIEW.STEP.DISPLAY.TITLE This displays the title that appears for the step within Action Items.
- STEP.ASSIGNED.SUMMARY This displays a formatted summary of each assigned performance review step. Each summary contains the Review Step Display Title, Review Link, and Review Due Date. The Summary tag should only be included once within a section,

and Summary tags cannot be used inside a custom list. The Summary tags uses the following format:

 {REVIEW.STEP.DISPLAY.TITLE} | Due: {REVIEW.STEP.DUE.DATE}

Repeater Tags

Because non-standard sections are designed to display a digest of information in a single section, repeater tags must be placed before and after all of the content that should be repeated for each item in the digest. For a section that displays all of the items assigned to a user, then the repeater tags should be placed before and after the content and tags that describe each individual assigned item, such as title and due date.

The following repeater tags should be placed before and after the content that should be repeated:

- LIST.BEGIN This tag should be placed at the beginning of the content that should be repeated for each item.
- LIST.END This tag should be placed at the end of the content that should be repeated for each item.

Analytics - Added Fields in Custom Goal Reports

With this enhancement, a field is added to the Targets section for custom Goal reports.

Field Name	Field Description	Field Type
Target Actual Amount	This field displays the actual amount for a target associated with a goal.	Numeric

Security

The following existing permissions apply to this functionality:

Permission Name		Permission Description	Category	
Custom Goal Report - Create		create and edit custom Goals reports. This be constrained by OU, User's OU, and User Se s.		Reports - Analytics
Report - View o	or shared by other	ew results of custom Goal reports created by rs. This permission can be constrained by OU, er Self and Subordinates.		Reports - Analytics

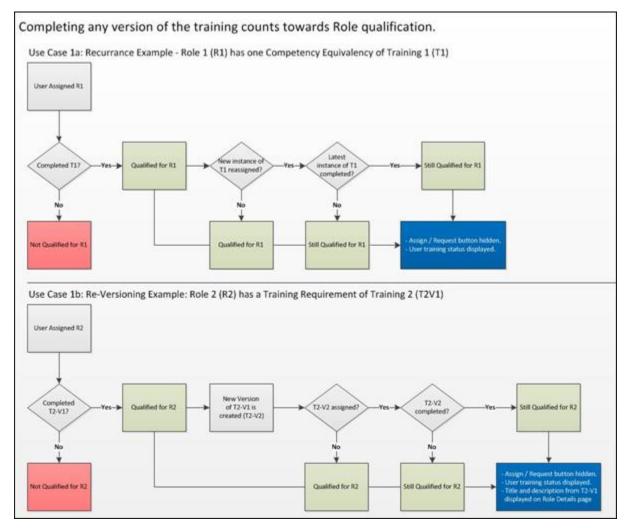
All Versions Count within Skills Matrix Standard Reports

Prior to this enhancement for the Skills Matrix Standard Report, role qualification through training completion did not recognize when learning objects (LO) were updated. The LO version was locked in when it was added as a training equivalency on a competency or as a direct training requirement. Users would only get credit towards role qualification if they had completed the specific version of the LO, when viewing the Skills Matrix Standard report. If a LO was updated and the latest version was completed by a new user, then the completed training was not recorded in the report.

With this enhancement, if a user has completed any version of a LO, the LO will show as Completed and count toward role completion in the Skills Matrix Report. If a user has completed any version of a training equivalency, the LO will show as Completed and count towards role completion in the Skills Matrix Report.

Note: A user's training completion will always count towards role completion.

Workflow



Use Case

A role is created for running the cash register at a restaurant. The cash register training is added as a training requirement for this role. James, Beth, and Amy all complete this training and are qualified to run the cash register. Two months later, the cash register training is updated by the training administrator. James, Beth, and Amy are actively using the cash register and do not need to take the updating training. Even though the training has been updated, James, Beth, and Amy will stay qualified when a Skills Matrix Report is run for the cash register role.

Today, Jon starts working at the restaurant and is assigned the Cash Register role and the latest version of the cash register training. Jon completes the training and will be qualified for the Cash Register role when a Skills Matrix Report is run for that role.

Security

The following existing permission applies to this functionality:

Permission Name		Permission Description	Category	
Skills Matrix Report	gap analysis of each co	Matrix Report, which displays an aggregate ompetency in an assessment for a group of can be constrained by OU, User's OU, and nates.	Reports - Performance	

Platform

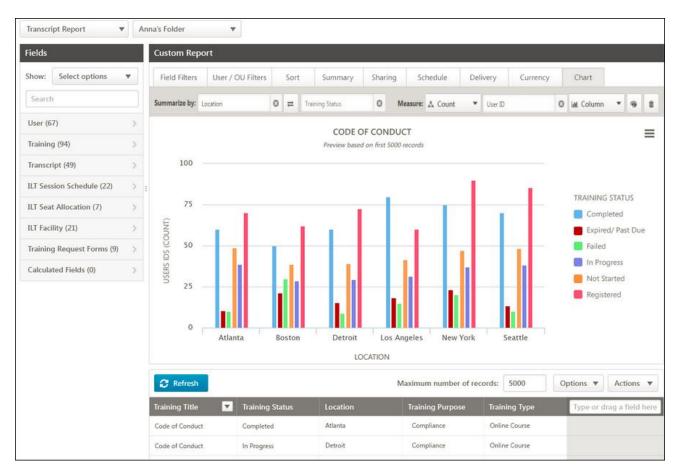
Custom Charting

Custom Charting Overview

With this enhancement, charts can now be created for all custom report types. A new Chart tab is added to the Custom Report Builder page to allow users to display data visually.

Use Case

An administrator would like to run a custom report that visually represents the training status of users by location for an online course. She creates a custom Transcript report and uses the Chart tab to create a chart. She adds the <u>Location</u> field to the Summarize by option for the chart, and then summarizes the field by <u>Training Status</u>. She adds the <u>User ID</u> field as the measure to count the number of user IDs in each status within each location. The chart type is automatically selected as a column chart. Then, she defines the colors for the chart by using the color palette. She clicks the **Refresh** button, and the chart refreshes to display the number of users who are in each status within each location.



Security

For a full list of custom report permissions, see the Analytics Permissions section on the Security Permissions topic in Online Help.

Chart Designer Overview

A new Chart tab is added to the Custom Report Builder page. The Chart tab is available for all custom report types. When selected, the Chart tab allows users to create charts in the Custom Report Builder by adding fields into the <u>Summarize by</u> and <u>Measure</u> options.

	_								
Fields		Custom Report							
Show Select options		Field Filters Us	er/OU Filters Sort	Summary Sharing	Schedule Delive	rry Chart			
Search		Summarize by: * Typ	e or drag a field here		· Measure:	Select 💌	Type or drag a field here	· Chart 👻	0 0
User (76)	>								
Training (99)	>								
Transcript (53)	>								
ILT Session Schedule (Part Level) (22) >								
ILT Seat Allocation (9)	>								
ILT Facility (21)	>								
Training Request Forms (9)	>								
Calculated Fields (0)	\bullet >								
		💠 Refresh 🛕				Ma	kimum number of records	5000 Options	 Actions
		User ID	User Last Name	User First Name	Training Title	Training Status	Training Hours	Location	* Type or drag a field I
		1000025	Pomeroy	MArdi	Bronze Product Certific	Approved	0.00		
		gguest	Guest	Gina	Information Security 4.0	Approved	0.00		
		alittle	Little	Amy	Information Security 4.0	Approved	0.00		

Chart Preview

The chart that displays on the Chart tab is a preview of the chart that will display in the report output. The preview displays data for up to 1,000 records. The chart displays and updates when the user clicks the **Refresh** button. The chart appearance will vary, depending on the number of records used to generate the chart. For instance, in the chart preview, a chart may appear with five columns and five colors.

Maximum Number of Records

Charts display the first 1,000 records in the chart tab (chart preview) and when generating the chart output from the preview drop-down options.

Minimum Fields Required

It is recommended that you first add fields to the report grid prior to adding fields to your chart. Add the minimum number of fields you want to include in the chart, then add these fields to the chart grid to generate the chart.

Chart Title

Currently, the title of the chart is the same title as the report. The title of the chart can be modified by updating the report title.

Plotted Data Points Limit

A limit will be set for the number of dimension data points that can be plotted per chart. By default, the limit is set to 50 data points across one- or two-dimension charts. If the chart exceeds the maximum number of plotted data points, then an error message displays when refreshing the chart.

Example 1:1

Example 2:²

Note: The data points limit can be modified through a backend setting. Contact your Client Success Manager or Global Product Support to modify this setting from the default value.

Refresh/Update Chart

The **Refresh** button is used to refresh the chart. To refresh the chart manually, click the **Refresh** button. When the chart is refreshed, the chart displays the first 1,000 records.

The chart automatically refreshes when the chart type or color palette selection is changed.

Note: As with current functionality, clicking Refresh also updates the report grid.

¹ An administrator would like to chart the number of users registered for training titles. She creates a column chart with Training Titles as the dimension and User ID as the measure. Based on the 50 data points limit, the number of training titles in the chart cannot exceed 50. ² An administrator would like to chart the status of the users in learning objects. She creates a column chart with Training Status as the first dimension and Training Titles as the second dimension. The measure is User ID. The number of training statuses multiplied by the number of training titles cannot exceed 50.

Chart Axis Labels

The labels for the X and Y axes on the chart are the field names defined as the dimensions and measure.

Note: Chart axis labels cannot be modified at this time.

Chart Data Labels

The count or percentage labels for the chart data are hidden by default. To display the labels, click the *Show Labels* option in the chart menu. This shows the labels as follows based on the chart type:

- Pie The labels display the name, count, and percentage for each pie slice.
- Column The labels display the count for each bar.
- Line The labels display the count at each data point in the line.
- Bar The labels display the count for each side bar.

To hide the labels, click the *Hide Labels* option in the options menu drop-down.

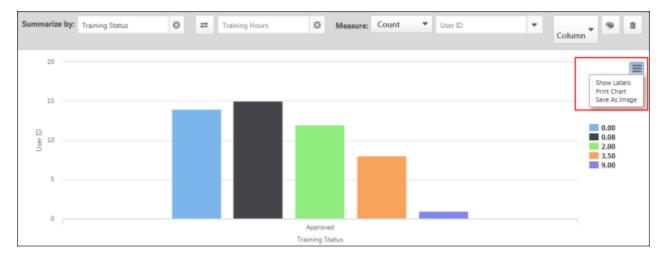


Chart Legend

The chart legend displays to the right of the chart. It provides the color key for up to 50 values for one of the dimensions. The dimension for which the chart displays is determined by the chart type. If the chart exceeds 50 values, then only the first 50 data points will be available. The filter criteria for the chart will need to be changed in order to reduce the values to 50 or fewer.

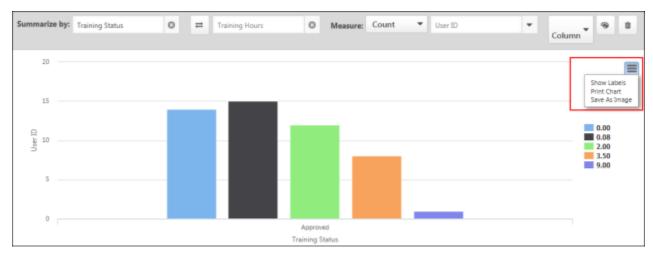
Fields can be deselected in the legend. Deselecting the field removes the field from the chart. You can deselect a field from the legend by clicking on the color next to the legend field label.

Note: By default, up to 50 values display in the legend.



Chart Output

Charts can be outputted on their own (without the report data) as a printable version and a .png image. Charts also display when viewing the report in Excel or the print output for the report. The menu in the upper-right corner of the chart allows users to print the chart preview or save the chart preview it as an image.



Note: The chart preview only includes the first 1,000 records.

To output the chart with the full data set, first design your chart, then save and close the report and the chart so that it can be queued up to run with the full data set.

Print Chart - Chart Menu

To print the chart, click *Print Chart*. This opens a printable view of the chart in a new window. The chart scales to fit the page. The chart title displays above the chart, and the key appears to the right of the chart. The chart can be printed using the browser's print options.

Save as Image - Chart Menu

To save the chart as a separate image that is accessible outside of the report, click *Save As Image*. The chart saves as a .png file.

Excel Output

The Excel charting features will be enabled for charts outputted in Excel. As a result, you will be able to manipulate the chart further using the Excel charting features. The colors selected in the color palette of the chart designer are not retained in the Excel output. Excel applies the default Excel colors to the charts outputted in Excel and cannot retain the palette colors from the chart designer. Chart colors can be modified using the Excel chart features.

Note: Reports containing more than 100,000 records will output in .csv format (instead of Excel). As a result, the chart will not be available in the Excel output for reports that exceed 100,000 records.

Chart Options

Chart Menu

From the chart preview on the Custom Report Builder page, you can access the chart menu to do the following:

- Show Chart Labels
- Print Chart
- Save Chart As Image

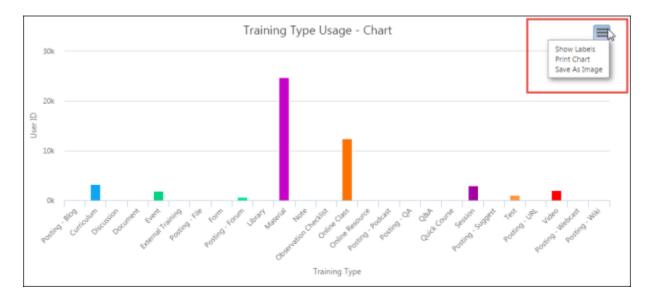


Chart Data

Hovering over the chart displays the information for each area of the chart.



Disable Legend Data Points

For charts that contain a legend, the option to disable legend data points will also be available in this view. Disabling a data point from the legend removes the field from the chart, and the chart reconfigures without the disabled data point.

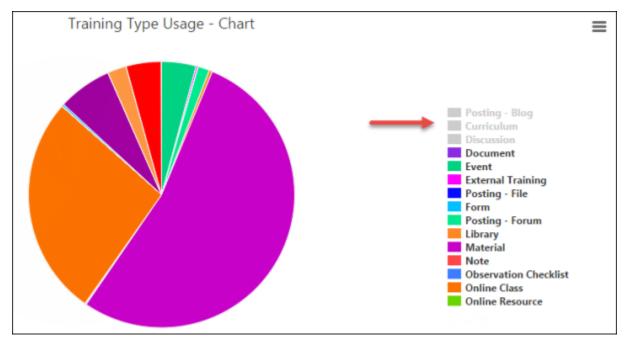


Chart Types

Multiple chart types are supported in the chart designer. The type of chart that can be created depends on the combination of fields that are added as dimensions and as the measure. The

Chart Type drop-down is grayed out and not selectable until at least one dimension or measure is added to the chart.

Measure: 🙏 Count 🔹	User ID	· Chart 🔹 🔻	۵ (
		Chart	
		🚯 Pie	
		Lill Column	
		<u>∣</u> ≣ Bar	
		🗠 Line	

Available Chart Types

The following chart types are supported:

- Bar This chart type displays as horizontal bars and compares multiple values with each other.
- Column This chart type displays as vertical lines and compares values across a range.
- Line This chart type displays as a line graph and shows trending over time.
- Pie This chart type displays as a pie chart and compares proportions of data and how they contribute to a whole.

Once fields are added for the chart, the chart type is selected automatically. If a different chart type is available based on the combination of fields, then a different chart type can be manually selected from the drop-down. Click **Refresh** to update the chart.

If a chart type is not selected, then when refreshing the report, a default chart displays.

Recommended Chart Types and Field Combinations

Each chart type has a recommended set of field types that can be added as summarization and measure fields. Although the chart designer will not prevent you from using any field type combinations for creating charts, the field combinations specified in the table below are the suggested field combinations for specific chart types. Pie charts can only be generated with a first level summary. If two summarization fields are added to a chart, a pie chart will not be available as a chart option in the chart type drop-down.

Field Type Selected as First Summary	Field Type Selected as Second Summary	Field Type Selected as Measure	Legend	Default Chart	Recommended Chart Types
Date	N/A	Numeric Field: SUM, Average, MIN, MAX String Field: Count, Count Distinct	No Legend	Column	Column, Line, Side Bar
Date	Numeric	Numeric Field: SUM, Average, MIN, MAX String Field: Count, Count Distinct	Second Summary Field	Column	Line
Date	Text or Yes/No	Numeric Field: SUM, Average, MIN, MAX String Field: Count, Count Distinct		Column	Column, Line, Side Bar
Numeric	N/A	Numeric Field: SUM, Average, MIN, MAX String Field: Count, Count Distinct Note: Summary and Measure Fields can be the same field.	JM, Average, IN, MAX ring Field: bunt, Count stinct ote: Summary of Measure elds can be the		Pie
Text or Yes/No	N/A	Numeric Field: SUM, Average,	First Summary Field	Column	Column, Pie, Side Bar

Field Type Selected as First Summary	Field Type Selected as Second Summary	Field Type Selected as Measure	Legend	Default Chart	Recommended Chart Types
		MIN, MAX String Field: Count, Count Distinct			
Text or Yes/No	Text or Yes/No	Numeric Field: SUM, Average, MIN, MAX String Field: Count, Count Distinct	Second Summary Field	Column	Column, Side Bar

Color Palette

The color palette allows users to select the color used for color-coding the dimension that appears in the legend. When a chart is first created, the chart will appear in the default palette. Users can update the colors by using the color palette. This option is grayed out and not selectable until at least one dimension or measure is added to the chart.

Palette color picker for data points	×
Neutral	
Approved	^
Cancelled Completed	
Confirmed	
Delete	
Disapproved	
Expired	
Final Granted	
Granted Requested	
Tentative	
Unknown	~
Close	Save

To modify the color palette:

- 1. Click the Palette icon ^(*). This opens the color palette pop-up. **Note:** *The color palette is only available once a valid chart is created.*
- 2. You can select a color palette from the drop-down. Each color palette includes 50 predefined colors. By default, the first color in the plot point is the first color in the color grid, and so on.
 - Bold This palette is selected by default. The colors in this palette have bold hues.
 - Neutral The colors in this palette have neutral hues.
 - Pastel The colors in this palette have pastel hues.
 - Custom This options is available if you customize a palette to colors you have chosen.
- 3. In the color palette pop-up, select the plot point in the left-hand column for which to change the color. The color can be defined for each plot point in the list. This opens a color selection pop-up.

Approved	
Pick palette color	More colors
Theme Colors	
Requested	
E Tentative	
Unknown	

- 4. Click the desired color for the plot point. Or, customize the color on the More Colors tab.
- 5. Click **Apply** to apply the color to the plot point. When a color is selected manually, the dropdown palette automatically changes to Custom if Custom was not already selected. Each plot point should be a different color. **Note:** *If a different color palette is selected in the color palette drop-down after the plot point colors are customized, all plot point colors change to the default colors for the selected palette and any customized colors are lost.*
- 6. Click **Save**. This saves the color selections for the chart.

When creating the custom palette, the color selection is saved for the field in the legend and can be used again for a different chart. For example:

- 1. Training Status is your legend and you decide to change the color palette to colors you have chosen.
- 2. Once you click **Save** the colors you have chosen for Training Status are saved for you account.
- 3. When you create a new chart that contains Training Status as the legend, you can now select Custom as an option in the color palette drop-down, and the colors you previously defined will now be set for your custom palette.
- 4. One custom palette is available per field in the legend. In the example above, if you change the colors you previously customized for Training Status and click **Save**, your change will be reflected for this field and any previous color customization for Training Status will be overwritten by the most recent change.

Measures

A measure is any string or numeric field that can be measured. The measure is the Y axis of the chart. The <u>Measure</u> option is grayed out and not selectable until at least one field is added to the report grid.

Transcript Report 🔻	An	a's Folder 🔻	
Fields		Custom Report	
Show: Select options	T	Field Filters User / OU Filters Sort Summary Sharing Schedule Delivery Currency Chart	
Search		Summarize by: Add a field here Measure: Add a field here	Û
User (67)	>	х х х	=
Training (94)	>	Add fields to the bar above and start building your chart!	_
Transcript (49)	>		
ILT Session Schedule (22)	> :		
ILT Seat Allocation (7)	>		
ILT Facility (21)	>		
Training Request Forms (9)	>		
Calculated Fields (0)	>		
		C Refresh Maximum number of records: 5000 Options ▼ Actions	•

Add Measure

Fields that are used in the <u>Summarize by</u> field can also be used in the <u>Measure</u> field. However, date fields cannot be used as a measure. Only one measure can be configured per chart.

To add a measure:

- 1. Type the field name into the text box for the <u>Measure</u> field. The list of matching fields appears as a drop-down. Select the desired field from the drop-down.
- 2. Or, click the options drop-down in the report grid for the desired field. Then, click the *Add Measure (chart)* option. This adds the field as the measure, if a measure is not already added. If a measure already displays in the text box, then the existing measure is replaced with the new measure.

Remove Measure

Once a field is added as a dimension or measure, it cannot be removed from the report unless it is removed from the chart. To remove the measure from the chart, click the Remove icon \times in the text box.

Aggregates

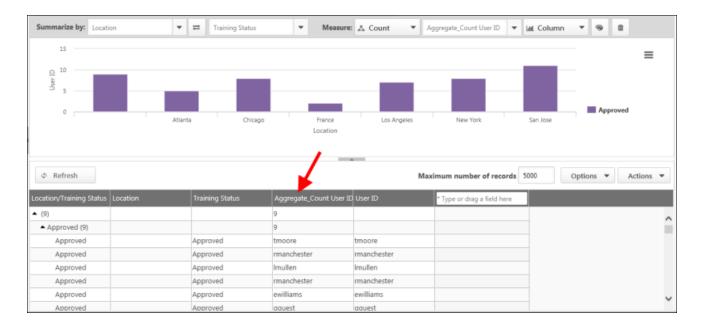
The drop-down to the right of the Measure field displays the aggregates. The aggregate is automatically defined by the system when selecting the field to measure, depending on the field type added to the measure option.

The following aggregates apply to each field type:

Field Type	Aggregates
Numeric	Numeric fields are measured by summation or averages. The following aggregates are used for numeric fields:
	 Summation - This aggregate is selected by default when adding numeric fields. This is the sum of the numeric values of the field.
	 Average - This is the sum of the numeric value of the field divided by the number of fields.
	• Min - This is the lowest value in the range for the measure.
	• Max - This is the highest value in the range for the measure.
String	String fields are measured by count or count unique. The following aggregates are used for string fields:
	• Count - This aggregate is selected by default when adding string fields. This is a count of all the values for the field selected. For example, if User ID is added as the measure, then the chart shows the number of users with user IDs on the Y axis in relation to the field or fields that are used to summarize the chart.
	• CountUnique - This is a count of all unique values returned for a field. For example, a user creates a report to show the training status for an online course. The report output returns 100 records. The training statuses for the course are Completed, In Progress, and Not Started. The training status Count for the report is 100. The training status CountUnique is 3, which represents the total number of training statuses.
	As another example, a user would like to chart the number of training hours per training type. The user adds the Training Type field as the dimension and adds the Training Hours field as the measure. The chart will be summarized by each training type, and then the training types are measured by the expected training hours for each training type.

Report Grid

Once the report is refreshed, the report grid adds a column that displays the aggregate data.



Remove Chart and Fields

The chart can be removed from the report, and individual fields and the measure can be removed from the chart.

Remove Chart

The entire chart can be removed by clicking the **Delete** button \hat{m} . This removes all data for the chart, as well as the dimensions and measure.

This option is grayed out and not selectable until at least one dimension or measure is added to the chart.

Remove Field from Chart

To remove a dimension or measure, click the Remove icon \times in the text box.

Remove Field from Report

Once a field is added as a dimension or measure, it should not removed from the report unless it is removed from the chart.

Report Delivery

Charts are not supported when using .csv and .txt report delivery outputs. Charts may be supported for these report delivery output types in a future release.

Run History

When viewing the Run History pop-up, a Chart option displays in the list of icon options to the right of the report. Click the option to view the chart. The data that displays in the chart is the data that was available at the time the report was run.

Note: The Run History pop-up is accessed by clicking the History link in the Actions drop-down for an individual report on the main Reports page.

Ru	Run History						
Tra	ining Status - Essentials	of Le	eade	rship)		
٥	10/27/2014 4:59:12PM 8 records in report	۲	₽	X		<u>.111</u>	
٥	10/27/2014 4:59:12PM 8 records in report	۲	₽	X		<u>.111</u>	
0	10/27/2014 4:59:12PM 8 records in report	۲	₽	X	- III	<u>111</u>	
					Clo	se	

Summarizing

The <u>Summarize by</u> field is used to define the dimensions for the chart, which display as the axis of the chart. The dimensions are the fields that summarize the chart. Up to two dimensions can be included in the chart. Any field type can be added to the <u>Summarize by</u> field. The fields should first be added to the report grid in prior to adding them to a chart.

The Summarize By function in the chart is linked to the report summary functionality available in the Summary tab. As a result, you can manage which dimensions are included in the chart via the Chart or the Summary Tab.

- The first level field added to the Summary tab will be the first dimension that will appear in the chart in the Summarize By function and vice versa.
- The second level field added to the Summary tab will be the second dimension that will appear in the chart in the Summarize By function and vice versa.
- The chart supports up to 2-level summaries. If your report has three or more summary levels, only the first two levels will affect the chart.
- When you change the order of the fields in the Summary tab for the first and second level summaries, the order of the dimensions in the Summarize By function will also change to reflect the new order.
- The swap button, which is located between the two dimensions in the Summarize By function of the chart, will swap the order of the two dimensions in the chart, as well as the order of the summary of those fields in the Summary Tab.

	Summari	ze by:	ocation		⊜ ≓	Training Sta	itus	Θ
					-			
Fields Show Select o	ptions 👻	Custom R	eport User/OU Filters So	rt Summary Sharin	g Schedule Deliv	very Chart		
Search		Summarize by:	* Type or drag a field here	• =	- Measure	:: Select 💌 *Ty	pe or drag a field here 💌 Char	t 🔻 🖲 🗈
User (76)		>						
Training (99) Transcript (53)		>						
		>						
ILT Seat Allocatio	on (9)	>						
ILT Facility (21)		>						
Training Request		> >						
		¢ Refresh	A		_	Maxir	num number of records 5000	Options 👻 Actions
		User ID	User Last Name	User First Name	Training Title	Training Status	Training Hours Location	* Type or drag a fiel
		1000025	Pomeroy	MArdi	Bronze Product Certific.		.00	
		gguest alittle	Guest Little	Gina Amy	Information Security 4.0 Information Security 4.0		.00	

Add Dimensions to Summary By

To add dimensions:

- 1. Type the field name into the text box in the <u>Summarize by</u> field. The list of matching fields appears as a drop-down. Select the desired field from the drop-down.
- 2. Or, click the drop-down in the <u>Summarize by</u> field and select a field from the list of available fields.
- 3. Or, click the options drop-down in the report grid for the desired field. Then, click the *Add Summary* (*chart*) option. This adds the field as the first dimension, if a dimension is not already added. If a dimension already displays in the first dimension text box, then the dimension is added as the second dimension.
- 4. Or, add fields to the Summary tab by clicking on the Summary tab and inputting the fields.

When at least one dimension is added to the <u>Summarize by</u> field, the report can be refreshed, and the chart preview displays. Adding a second dimension summarizes the chart first by the first dimension added, and then by the second dimension. Additional dimensions added to the <u>Summarize by</u> field replace the second dimension with the most recently added dimension.

Considerations

- Once a field is added as a dimension in the chart, it should not be removed from the report grid.
- Adding fields in the Summary tab will not automatically create a chart. You must next add fields for the measure and select the **Refresh** button to generate a chart.
- The View as Hierarchy summary option is not available in the chart. Creating a chart with a hierarchy is not currently supported. If you add a hierarchy field to the Summary tab, such as an OU (organizational unit), and then select the View as Hierarchy option, you will not be able to add that field as a dimension for the chart. To add a the field as a dimension in the chart, first deselect the View as Hierarchy option on the Summary tab.

Date Fields

Date fields can be added to the <u>Summarize by</u> field. When added, you are able to group the date by clicking on the available drop-down in the Summary tab. The user can select one of the following date options by which to group the date when summarizing the chart:

- Day
- Week
- Month
- Calendar Quarter
- Calendar Year

Field Filters	User/OU Filters	Sort	Summary	Sharing	Schedule	De	livery	Chart			
≎ Summarize by:	Transcript Due Date	•		•		•	μE (Includ	le percentage summar	Day Day	•
Then by:	* Type or drag a field	here				•				Week Month Calendar Quarter	3
										Calendar Year	

Change Order of Dimensions to Summarize By

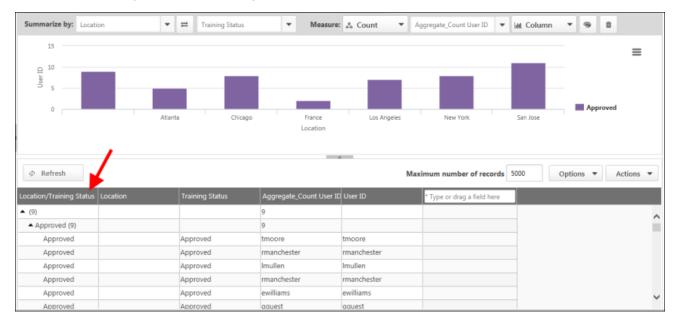
When there are two string field types added as dimensions, the order of the dimensions can be switched by clicking the Swap icon = that displays between the dimensions. Once the dimensions are switched, click the **Refresh** button to update the chart.

The Swap icon is disabled when only one dimension is added to the chart.

Report Grid

Once the report is refreshed, the report grid adds a column that displays the summarized data for the dimensions defined for the chart. This summary column also appears when you summarize the report by adding fields to the Summary tab in the report.

The Summarize By chart function and Summary tab report function are linked and will summarize the report the same way.



Common Charting Examples

This page provides examples of common charts and the fields and values to create the chart.

Transcript Status

Scenario: I'm interested in charting the transcript status of users.

Field	Value
Summary by	Transcript Status
Measure	User ID (or another unique identifier for user such as Username)
Aggregate	Count

Training Status by Location

Scenario: I'm interested in charting the training status of users across locations.

Field	Value
Summary by	Location then by Transcript Status
Measure	User ID (or another unique identifier for user such as Username)
Aggregate	Count

Custom Employee Relationship Security Roles

Custom Employee Relationship Security Roles

Within the system, administrators can define custom employee relationships such as Dotted Line Manager or Secondary Manager. These custom relationships can be used in performance reviews, compensation, and custom approval workflows for Learning.

Prior to this enhancement, organizations could not assign and constrain permissions based on custom relationships or dynamically assign security roles based on these relationships.

With this enhancement, administrators can constrain users' permissions using the custom employee relationships defined in their portal. These constraints can be applied to either individual permissions or as general constraints within a security role. In addition, administrators can enable dynamic security roles for any custom employee relationship, which are dynamically assigned to any user designated in the custom employee relationship.

The following permissions can now be constrained by custom employee relationships:

- Action Items View
- Bio About View
- Documents Delete
- Documents Preferences Manage
- Security Administration General Constraints
- Snapshot Documents View
- Snapshot Main View
- Snapshot Preferences Manage

Use Cases

Matrix/Dotted Line Managers

Frank is the Quality Manager at a factory within a particular division of a large manufacturing organization. On a day-to-day basis, Frank reports to the Plant Manager, James. However, Frank also has dotted line relationships with the Director of Quality for the division, Laura, and the Global Director of Quality, Nicole. All three of Frank's managers report into different organizational structures, and all three managers need to have access to specific talent data within Frank's Universal Profile.

On Frank's User Record, the following relationships are defined:

- Manager: James
- Dotted Line Manager: Laura
- Tertiary Manager: Nicole

With his current permissions and constraints, James already has access to view Frank's Universal Profile and his resume, goals, action items, and compensation data within Universal Profile. Laura needs access to Frank's Universal Profile and to be able to view Frank's progress on goals. To manage successors for Frank, Nicole needs access to his Universal Profile and resume, career preferences, and succession information in the Snapshot - Succession page.

Using the custom employee relationship constraint, an administrator for the organization is now able to add the appropriate Universal Profile permissions within the respective security roles for the Dotted Line Manager and Tertiary Manager.

The administrator wants to ensure that if Frank's dotted line manager changes, his existing dotted line manager's access to Frank's talent information is removed and his new dotted line manager is given the same access as the previous manager. The administrator enables a dynamic security role for the Dotted Line Manager employee relationship and adds the appropriate permissions and permission constraints to the security role. Then, whenever a user logs in to the portal and is in the Dotted Line Manager relationship, they will automatically be in the Dotted Line Manager security role.

HR Business Partner

Jennifer and Kathleen are HR Business Partners in the Human Resource division of a large, multi-national organization, and both work in the Copenhagen office. Jennifer is designated in the HR Business Partner relationship for all users working in a United States office and in the Manufacturing division. For all users working in the Finance division and any office in Canada, Kathleen is designated as the HR Business Partner.

Both need access to talent information for the employees they support, including each employee's bio, resume, career preferences, goals, historical performance reviews, current compensation, and pending action items within Universal Profile. Using the custom employee relationship constraint, their administrator is able to grant Jennifer and Kathleen access to the necessary areas of the Universal Profile while constraining their access to ensure they can only see this information for employees for whom they are designated as the HR Business Partner.

Considerations

Custom relationships are not displayed in the Team section of the Universal Profile - Bio - About page.

This enhancement does not impact how custom employee relationships are managed.

This constraint type is only available for the indicated permissions. It is not available for all permissions that currently allow manager constraints (User's Self and Subordinates, User's Direct Reports).

If a user is granted a permission that is constrained by a custom employee relationship but the user is not currently assigned that relationship for another user, then the permission does not impact the user until they are assigned the relationship for another user.

If the name of the custom employee relationship is modified, the corresponding dynamic security role is not automatically updated to reflect the updated name.

Implementation

Upon release, this functionality is automatically enabled for organizations using Universal Profile: Action Items, Universal Profile: Documents, Universal Profile: Snapshot, and custom employee relationships. The availability of the Employee Relationships functionality is controlled by a backend setting. To enable this functionality, contact Global Product Support or your Client Success Manager.

Upon release, dynamic security roles are not automatically created for each custom employee relationships currently defined. Administrators must enable individual security roles within the employee relationships preferences.

Security

The following existing permissions apply to this functionality and can now be constrained by Employee Relationship. The permission descriptions will be updated when this functionality is released to Live portals.

Permiss	ion N	lame	Permission Description	Categ	ory
Action Items - View	Items - Your Action Items widget. Users without this permission cannot access the				Universal Profile
Bio About - View	About - constraints. If a user does not have this permission and they click a				
Delete Documents page. The backend setting. The Relationship, OU, Use Direct Reports, Use		Documents page. Th backend setting. Th Relationship, OU, Us Direct Reports, User	ete a file that has been uploaded to the ne availability of this permission is co is permission can be constrained by f ser's OU, User Self and Subordinates, 's Self, User's Manager, User's Super Jser's Direct Reports.	ntrolled by a Employee , Self and	Universal Profile
Documents Enables admini Preferences - Preferences page Manage by a backend so Employee Relat		Preferences page by a backend se	trator to access and edit the Docume e. The availability of this permission i tting. This permission can be constra onship, OU, and User's OU. This is an ermission.	is controlled ined by	Universal Profile

Security	Grants access to apply general constraints to permissions	Core
Administration -	when creating/editing a security role. This permission	Administration
General Constraints	works in conjunction with the Security Administration -	
	Manager permission. This is an administrator permission.	

	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 Employee Relationship, 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.	
--	---------------------------------	--	--

Main - View permission cons Employee Relati User, User's Sel Subordinates, a	ew the Snapshot page for users within their aints. This permission can be constrained by nship, OU, User's OU, User Self and Subordinates, User's Manager, User's Superiors, User's User's Direct Reports. Best Practice: For most sion should be constrained by User Self and
---	--

Snapshot Preferences - Manage	Enables administrator to access and edit the Snapshot Preferences page. This permission can be constrained by Employee Relationship, OU, and User's OU. This is an administrator permission.	Universal Profile
-------------------------------------	---	----------------------

The following existing permissions apply to this functionality:

Permission Name	e	Permission Description	C	ategory
Security Administration - Manage	within the port This permissio	to create, modify and constrain security role tal, and assign users to those security roles. n can be constrained by OU, User's OU, Use and Subordinates. This is an administrator		Core Administration
Employee Relationships - Define	relationship ro	to create and manage custom user bles and peer groups that are utilized in tasks. This is an administrator permission.	-	rformance - ministration

Employee Relationships

With this enhancement, administrators are now able to enable a dynamic security role for custom employee relationships. The dynamic security roles can then be configured with the appropriate permissions and constraints in Security Administration.

To access the Employee Relationships page, go to **Admin > Tools > Core Functions > Employee Relationships**.

Permissions

Permission Name		Permission Description	Category
Employee Relationships - Define	relationship re	5	Performance - Administration

A new Security Role column is added to the Relationships section of the Employee Relationships page. A checkbox is only available in this column for custom employee relationships. When this option is selected, a dynamic security role is created for the custom employee relationship. The new security role is created as an active child role of the System Administrator role using the same name as the employee relationship. Upon creation, the security role does not contain any permissions. The security role can be fully configured via Security Administration.

- The Security Role checkbox is selected and cannot be unselected if the relationship already has a dynamic security role.
- The Security Role checkbox cannot be selected if the relationship is not active.

Whenever a user logs in to the portal and is within an active custom employee relationship that has an associated security role, the user is dynamically assigned the security role. The user is only assigned the security role while they are within an active custom employee relationship for another active user.

As with system defined security roles, a dynamic security role that is associated with a custom employee relationship cannot be deleted and users cannot be manually added to the role.

If a custom employee relationship is selected as a constraint for a permission within any security role, the custom employee relationship cannot be deactivated.

RELATIONSHIPS o

View and manage employee relationships below. By default, the standard employee relationships such as Self, Manager, etc. will appear. These relationships cannot be modified. Custom relationships may be added for the employee. These can include HR Generalist, Matrix Managers, etc. All custom relationships will be added to the user record where the appropriate users can be added for the employee. These custom relationships will be available for assigning Performance Reviews and Compensation Plans. Up to 10 custom employee relationships can be added.

NAME	ТҮРЕ	ACTIVE	SECURITY ROLE	TRANSLATE
Self	System	\checkmark		
Manager	System	\checkmark		
Anyone	System	\checkmark		
Subordinates	System	\checkmark		
Review Creator	System	\checkmark		
OU Approver	System	\checkmark		
Hiring Manager	System	\checkmark		
Indirect subordinates	System	\checkmark		
Applicant Reviewer	System	\checkmark		
Cost Center Owner	System	\checkmark		
Onboarding Employee	System	\checkmark		
Indirect Manager	System	\checkmark		
HR Manager	Custom	\checkmark		<i>Ş</i>
Compensation Specialist	Custom			Ş
Department Lead	Custom			<i>🔊</i>

Action Items

Users with the Action Items - View permission can view the Universal Profile: Action Items page for users within their permission constraints.

To access the Action Items page, go to **Home > Universal Profile**. Then, click the Actions tab. **Note:** *The location of this link is configurable by your system administrator.*

To access another user's Universal Profile - Bio page, click the user's photograph from any page within Universal Profile or from Global Search. From there, you can access the user's Snapshot page by clicking the Snapshot tab. Users can view the Snapshot page of other users who are within their permission to view the Snapshot page.

Permission Name		Permission Description	Categ	jory
Action Items - View	Your Action Items widge Action Items page. This	ction items on the Action Items page ar et. Users without this permission canno permission can be constrained by Emp s OU, User's Self and Subordinates, and r permission.	t access the loyee	Universal Profile

Bio - About

Users with the Bio About - View permission can view the Bio: About page for users within their permission constraints.

To access the Bio: About page, go to **Home > Universal Profile**. Click the Bio tab. Then, click the About sub-tab. **Note:** *The location of this link is configurable by your system administrator.*

To access another user's Universal Profile - Bio page, click the user's photograph from any page within Universal Profile or from Global Search. From there, you can access the user's Snapshot page by clicking the Snapshot tab. Users can view the Snapshot page of other users who are within their permission to view the Snapshot page.

Permission Name		Permission Description	Categ	Jory
Bio About - View	constraints. If a user doe person's name or user p will not open. This permi	Bio page for users within their permission es not have this permission and they click a hoto within the Universal Profile, then the Bio ission can be constrained by Employee OU, User's Direct Reports, User Self and	o page	Universal Profile

Snapshot

Users with the Snapshot Main - View permission can view the Snapshot page for users within their permission constraints.

Users with the Snapshot Documents - View permission can view the Documents widget on the Snapshot page and the Snapshot: Documents page for users within their permission constraints.

To access the Snapshot page, go to **Home > Universal Profile**. Then, click the Snapshot tab. **Note:** *The location of this link is configurable by your system administrator.*

To access another user's Universal Profile - Bio page, click the user's photograph from any page within Universal Profile or from Global Search. From there, you can access the user's Snapshot page by clicking the Snapshot tab. Users can view the Snapshot page of other users who are within their permission to view the Snapshot page.

Permission Name		Permission Description	Category
Documents - Delete	Documents page. The backend setting. The Relationship, OU, Use Direct Reports, Use	ete a file that has been uploaded to he availability of this permission is o is permission can be constrained by ser's OU, User Self and Subordinate r's Self, User's Manager, User's Sup Jser's Direct Reports.	controlled by a Profile Employee es, Self and

Snapshot Documents - View		Universal Profile	
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	Main - View	Enables user to view the Snapshot page for users within their permission constraints. This permission can be constrained by Employee Relationship, OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, and User's Direct Reports. Best Practice: For most users, this permission should be constrained by User Self and Subordinates.	Universal Profile	
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Data Load Wizard - Blank Overwrite

The Data Load Wizard User Load includes a <u>Blank values should overwrite existing data</u> option. When this option is selected, a blank value in the load file overwrites an existing value within the system. For example, a user record (John Smith) has an email address set in the system (jsmith@email.com), but the email value in the file is blank. If this option is selected, the blank value within the file overwrites the email value set in the system. If this option is not selected, the blank value within the file does not overwrite the email value in the system and John Smith's email address is not affected.

Prior to this enhancement, if the Blank Overwrite option was selected, some fields that were not mapped in the load file would be considered blank values and would overwrite data in the system. The following fields were impacted:

- Position OU Load
 - Plan Owner ID
- Location OU Load
 - Facility Type
 - Occupancy

With this enhancement, the Blank Overwrite feature is updated to prevent it from overwriting existing values in the database when the fields containing these values are not mapped to the data file.

Use Case

- 1. Sam Smith creates a Position OU Record for Sales Manager in the system using the Data Load Wizard. Along with all of the required fields, the following information is included:
 - Plan Owner ID: pjones
- 2. Sam Smith loads an updated file with the Sales Manager Record information using the Data Load Wizard. All of the required fields are included. However, the Plan Owner ID field is not mapped in the Data Load Wizard. The Blank Overwrite option is selected.
- 3. When the data is loaded, the Plan Owner ID information that was previously in the system is not overwritten, even though it was not mapped in the data load file.

Conditions

This impacts the Location and Position OU loads.

Implementation

Upon release, this functionality is available to all organizations using the Data Load Wizard, which can be enabled by request.

Data Load Wizard - Group Load

Data Load Wizard - Group Load

With this enhancement, administrators can now load group data into the system via the Data Load Wizard. Using the Data Load Wizard, administrators are able to create new groups, update existing groups, add users to groups, and remove users from groups.

Considerations

- Group criteria cannot be loaded.
- Custom fields can be loaded. However, custom field availability settings cannot be loaded.

Implementation

Upon release, this functionality is available to all organizations using the Data Load Wizard, which can be enabled with the purchase of the Data Load Wizard.

Security

The following new permission applies to this functionality:

Permission Name		Permission Description	Category	
Data Load Wizard - Group Data Load	This permission al	ator to load group data via the Data Load Wiz so enables administrators to track data loads templates. This permission cannot be constra trator permission.	and	Data Load Wizard

Load Group Data - Step 1 - Get Started

When you start the wizard, you can select which type of data you are loading. The maximum number of records that can be uploaded in a file is 50,000.

If you are using the Data Load Wizard to set up your portal, you should begin by loading the organizational units, and then users.

To start the Data Load Wizard, go to **Admin > Tools > Core Functions > Data Load Wizard**, and then click *Load Data*. The Data Load Wizard opens. Select the <u>Groups</u> option and click **Next**. When uploading group data, you must first select the type of data you are loading. *See* **Load Group Data - Step 2 - Upload** *on* page 359 *for additional information.*

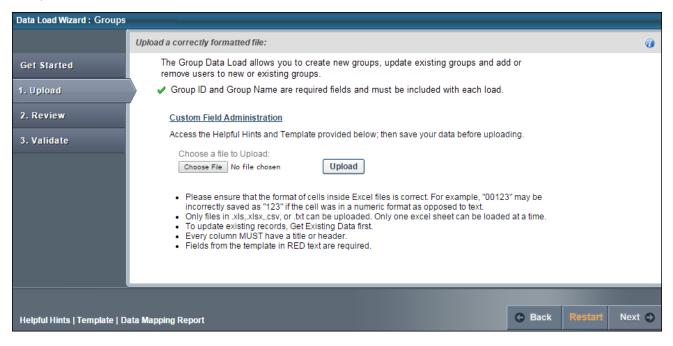
Permission Name	Permission Description	Category

Data Load	Enables administrator to load group data via the Data Load Wizard.	Data
Wizard -	This permission also enables administrators to track data loads and	Load
Group Data	manage data load templates. This permission cannot be constrained.	Wizard
Load	This is an administrator permission.	

Data Load Wizard	
	Follow the guide to select the type of data you wish to upload:
Get Started	The Data Load Wizard will allow you to validate and load files into different areas of the system.
1. Upload	As you progress through the wizard, templates and guides will be provided.
2. Review	Files saved as .xls, .xlsx, .csv, or .txt can be uploaded and processed one sheet at a time.
3. Validate	What would you like to load?
	Compensation 💿 🚑 Groups 🛛 🧧 Learning
	OU O 🔐 Performance O 🕎 Resume
	O 🚑 Users
·	
	Next 🥱

Load Group Data - Step 2 - Upload

If you are uploading new data to the system, first select a template by clicking the *Template* link in the lower-left corner. This ensures the proper data is included and that it is in the proper format. In the template, columns that are red are required. *See Load Data - Select Data Load Template for additional information.*



To upload a file of data, click the **Browse** button and locate the file.

- Only the following file types can be uploaded: .xls, .xlsx, .csv, .txt
- When uploading an Excel file, only one sheet can be loaded at a time.

Once the file is selected, click the **Upload** button. An Upload File pop-up appears with different options depending on the type of file that is uploaded.

Excel File (.xls, .xlsx):

Upload File			×
Please choose which wor	ksheet contains the data and then the template for upload:		
Select Worksheet	Worksheet1 Worksheet2	*	
Select Template:	Standard/Default	*	
	No template used	-	
🗹 My File has titles/head	ers. Continue Cancel		

Text, Comma, or Pipe Separated File (.txt, .csv):

Upload File		×
Please choose which delin	niter your file uses and then the template for upload:	
Select Delimeter:	ТАВ	
	COMMA PIPE	
Select Template:	Standard/Default No template used	
☑ My File has titles/head	ers. Continue Cancel	

<u>Select Worksheet</u> (Excel files only) - Only one worksheet can be uploaded at a time, so if the Excel file has multiple worksheets, you must select the worksheet that you are uploading.

<u>Select Delimiter</u> (Tab, Comma, or Pipe Separated files only) - Select what delimiter (e.g., tab, comma, pipe) is used to separate records within the file. This enables the system to properly extract the data from the file.

<u>Select Template</u> - If you used a template to create the file, select the appropriate template. If no template is used, select the "No template used" option. If you have used the Data Load Wizard in the past and saved a template for this file type, that template is available here.

<u>My File has titles/headers</u> - Data files should have titles or headers for each column of data. If the file you uploaded does not have titles or headers, deselect this option. Deselecting this option modifies the next step in the review process.

After selecting the appropriate options, click **Continue**. The file is uploaded and listed on the page.

Data Load Wizard : Groups		
	Upload a correctly formatted file:	0
Get Started 1. Upload 2. Review 3. Validate	 The Group Data Load allows you to create new groups, update existing groups and add or remove users to new or existing groups. ✓ Group ID and Group Name are required fields and must be included with each load. Custom Field Administration Access the Helpful Hints and Template provided below; then save your data before uploading. Choose a file to Upload: Browse Upload The file below has been successfully uploaded. If this is the correct file please click NEXT. Browse and upload a new file to replace this one or delete it. To load additional sheets, restart the Data Load Wizard after this file is imported. Template of GroupData2015-07-01.xls	
Helpful Hints Template D	ata Mapping Report 🕞 Back Restart Nex	xt 🕤

If this is the wrong file or the wrong worksheet within the file, you can delete it by clicking the Remove icon to the left of the file title and upload another file. Alternatively, you can browse and upload a new file. When the correct file is uploaded, click **Next** to proceed to the Review step. *See* **Load Group Data - Step 3 - Review** *on* page 362 *for additional information.*

Load Group Data - Step 3 - Review

The Review step of the load process allows you to match the uploaded data to the appropriate data elements within the system.

The wizard automatically reads the headers from the uploaded file and matches some of the data fields to the appropriate system fields. You may adjust the data fields as necessary and also move any unmatched fields to the appropriate system field. Once the fields are all matched, you have the option to save the settings as a template for future uploads.

Data Load Wizard : Groups						
	Drag & Drop	the unmatched fields to t	he file headers for all columns you wa	nt to uploa	ad:	0
Get Started						
1. Upload		File Headers	Matched Fields		Unmatched Fields	
2. Review	1	Group ID	Group ID	~	Group Owner	~
	2	Group Name	Group Name		User ID	
3. Validate	3	Parent Group ID	Parent Group ID			
	4	Group Description	Group Description			
	5	Active	Active			
	6	Group Owner				
	7	User ID		~		<u> </u>
		Preview	Save Template		*At minimum all Required fi should be matched.	elds
					should be materied.	
Helpful Hints					G Back Restart No	ext 🔿

After uploading the file and proceeding to the Review page, the wizard reads the file and displays the column headers from the file. Some data fields may be automatically matched to a file header. If this is the case, the system field is listed in the Matched Fields column immediately to the right of the matching file header. All unmatched system fields are listed on the right in the Unmatched Fields column. Also, fields that the system has mismatched can be moved to the correct file header.

To match the system fields to the file headers, click them from the <u>Unmatched Fields</u> list and drag them to the appropriate row in the <u>Matched Fields</u> column. The items in the Matched Fields column should be directly to the right of the appropriate item in the File Headers column. Once a system field is matched to a file header, it is removed from the <u>Unmatched Fields</u> list.

If the uploaded file does not have titles or headers and the administrator deselected the "My file has titles/headers" option in the Upload step, then each column of data is given a generic header name (e.g., Column 1, Column 2). This enables you to match the data, even though it does not have headers.

All required fields must be paired with one of the file headers in order to proceed. The required system fields are displayed in red, while optional system fields are displayed in black.

Once all items in the File Headers column are matched to the appropriate system field, click the **Preview** button to verify that the data is properly matched. This displays a preview of up to 20 rows of the data in a pop-up window. The system data field titles are displayed in green, and the uploaded file headers are displayed in blue. If some data is not properly matched, you can then reorganize the fields prior to proceeding. The preview is also helpful to view a sample of the data within a column if you are unsure with what field the file header should be matched.

Preview							
	ta fields are highliq 2's headers are hig						
Group ID	Group Name	Parent Group ID	Group Description	Active			User Action
Group ID	Group Name	Parent Group ID	Group Description	Active	Group Owner	User ID	User Action
Group25	Managers						

If all fields are properly matched, you may save the pairings as a template. This may be useful if your organization performs multiple data loads of the same file format. In that case, saving the pairings as a template saves you the effort of matching the fields each time. To save the pairings as a template, click the **Save Template** button. A pop-up appears where you can enter a name for the template. The character limit for template names is 150. Changing the name of a previously saved template creates a new template in the system. **Note:** *All fields that are required by the system must be matched in order to save the parings as a template.*

	X
Save Template	
Template Name:	
	Submit Cancel

After all fields are properly matched, click the **Next** button. If all required fields are paired with a file header, some additional options appear prior to moving to the next step. **Note:** *All fields that are required by the system must be matched in order to proceed to the next step.*

The Processing Options pop-up appears with additional options. *See* **Load Group Data - Step 4 - Processing Options** *on* page 364 *for additional information.*

After selecting the appropriate options, click **Continue** to proceed to the Validate step. *See* **Load Group Data - Step 5 - Validate** *on* page 365 *for additional information.*

Load Group Data - Step 4 - Processing Options

General Criteria

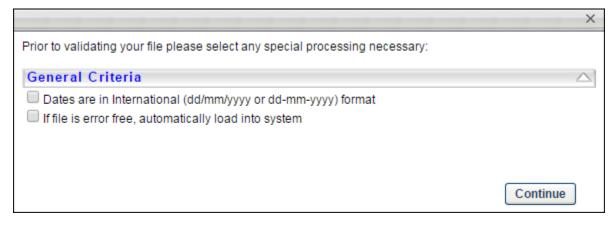
The following General Criteria options are available when loading data:

Dates are in International (dd/mm/yyyy or dd-mm-yyyy) format

Select this option if the dates within the file are in International format. This allows the system to properly read and interpret the date values when loading them into the system. Many date formats are supported in both American and International versions. Consult the Helpful Hints documents for a full list.

If file is error free, automatically load into system

Select this option to automatically load the data into the system if the data within the uploaded file is error free. The data within the file is still validated during the validation step. But, if there are no formatting or system compatibility errors, you will not have the option to perform a final review before the data is loaded.



After selecting the appropriate options, click **Continue** to proceed to the Validate step. *See* **Load Group Data - Step 5 - Validate** *on* page 365 *for additional information.*

Load Group Data - Step 5 - Validate

The Validate step of the load process is where the system validates the data contained in the uploaded file.

Validation Progress

When you reach the Validate page, the system automatically begins validating the format of the data.

If there are no errors, the wizard automatically begins validating the data's compatibility with existing system data.

Depending on the number of records being loaded, any format and system validation errors can be viewed and the load can be initiated in different locations:

- For data files with 250 or less records, format and system validation errors can be viewed and the load can be initiated on the Validation page of the Data Load Wizard. The detailed error log can be viewed on the Data Load Queue page.
- For data files with over 250 records, format and system validation errors can be viewed and the load can be initiated on the Track Data Loads page of the Data Load Wizard. The system automatically opens this page once the validation begins.

Files with 250 or Less Records

If there are errors in the file, you have the option to view the errors by clicking the **View Errors** button to the right of the progress bar. This opens a pop-up which displays a list of the errors that exist in the file as well as a description for the error. Error descriptions are found in far right column, and each error contains its own description. This list can be exported to Excel or printed using the icons in the upper-left corner of the table.

After the data format is checked, a summary of the results is displayed, including:

- Number of records that will continue to system validation
- Number of records that have errors and cannot be loaded

Data Load Wizard		
		0
Get Started	Checking File Format Progress :	
1. Upload	Checking the Format Progress :	
1912/001647	Formatting validation complete.	
2. Review	Checking System Compatibility :	
3. Validate	View Errors System validation complete.	
	Checking that Organizational Unit IDs exist in the system	
	0 record(s) will be updated	
	0 record(s) will be added 3 record(s) had errors and cannot be updated	
	Please review the Errors AND How to Fix Errors	
	Manage this and all previous uploads at the Data Load Queue.	
		Restart
Helpful Hints Data Load Que	e Load same file type again	the property of
Errors		
Error Description is on the	right.	
Download the errors and t	ne full data provided with errors highlighted using the 🛣	
# Records: 3 System data fields are h	iabliabted CREEN	
System data neids are n		
🔉 🍃		
User Wage Labor Payn	ent Date Currency Error Description	

User ID	Wage Type	Labor Hours	Payment	Date	Currency Type	Error Description
12345	Salary	1040	20000	08/01/2013		Currency Type (Effective Date) needs to be formatted in a standard date/time format. Wage Type (Wage Type) must be one of these values {ANNUAL;HOURLY}.

To view how to fix the data errors, on the Validate page, click the *How to fix errors* link. This opens a document that details how each type of error can be resolved. After resolving the issues in the file, you may click the *Load same file type again* link or the **Restart** button to reattempt the load.

- If more than 50% of the records contain errors, you cannot proceed with the data upload. You must resolve the issues prior to proceeding.
- If less than 50% of the records contain errors, you may continue to load the data, but the data records that contain errors cannot be uploaded and they are skipped.

Once the errors are resolved or there are a minimal number of errors, you may continue the validation process by clicking the **Continue Validation** button. This begins the process of verifying the data's compatibility with the system. The system then validates the following items:

- OU and User IDs referenced on other records are valid or active
- The administrator has permission to load each record based on constraints

After the system compatibility is checked, a summary of the results is displayed:

- Number of records that will be updated
- Number of records that will be added
- Number of records that have errors and cannot be updated

Data Load Wizard		
Data Load Wizard Get Started 1. Upload 2. Review 3. Validate	Checking File Format Progress : Fomatting validation complete. Checking System Compatibility : System validation complete. View Errors Load Data	0
Helpful Hints Data Load Queur	231 records will be updated O records will be added 31 records had errors and cannot be updated Please review the Errors AND How to Fix errors Load Data the above changes excluding the errors Manage this and all previous uploads at the Data Load Queue. Load same file type again	Restart

To finalize the data load, click the **Load Data** button. This adds the data load to the Data Load Queue for processing.

After the data is loaded, the status is updated in the Data Load Queue and the uploaded data is available. *See Data Load Queue for additional information.*

Load Group Data - Template and Validations

The Group template contains all of the fields that can be loaded via the Data Load Wizard. Each Group ID must be unique.

The Group template contains the following data fields:

System Field	Туре	Limit	Comments/Rules
Group ID	String	100	This field is required. This is the unique identifier for the group. This cannot be updated once it is created.
Group Name	String	1000	This field is required. This is the group name, which can be updated after creation. If the data load contains multiple rows of data, then this value must be the same as the first row.
Parent Group ID	String	100	This field is optional. This specifies the ID of the parent group, which enables the ability to create a group hierarchy. This must be a valid group ID within the system. For a given group, this cannot be the same as the Group ID. If the data load contains multiple rows of data for the same group, then this value must be the same as the first row.
Group Description	String	3950	This field is optional. This is the group description. If the data load contains multiple rows of data, then this value must be the same as the first row.
Active	Boolean	50	This field is optional. This sets the status of the group to Active or Inactive. Values must be either True, False, T, F, Yes, No, Y, N, Active, or Inactive. If this field is blank, then it defaults to True. If the data load contains multiple rows of data, then this value must be the same as the first row.
Group Owner	String	128	This field is optional. This specifies the User ID of the group owner. This must be a valid User ID within the system. If the data load contains multiple rows of data, then this value must be the same as the first row.
User ID	String	128	This field is optional, but it is required if a User Action is provided for the row. This specifies the ID of the user being added or removed from the group. This must be a valid User ID within the system. Only one User ID can be entered per row. The same User ID cannot be entered multiple times for the same group.
User Action	String	2	This field is optional, but it is required if a User ID is provided for the row. This specifies whether the user in the User ID column is being added to or removed from the group. Values must be either 1 or 2.
			• If "1" is entered, the user in the User ID column is added to the group. A user cannot be added to the group if they are already in the group.
			• If "2" is entered, the user in the User ID column is removed

System Field	Туре	Limit	Comments/Rules
			from the group. A user cannot be removed from the group if they are not already in the group.
Custom Fields			Group custom field values can be loaded after the custom field is defined within the system. Once a group custom field is defined in the system, it appears within the template and the mapping page. The following custom field types are supported: • Checkbox • Date Field • Drop-down • Numeric Field • Radio Button • Scrolling Text Box • Short Text Box The following custom field types are not supported: • Branched Drop-down • Hierarchy • Multiple Checkbox
			Multiple Checkbox

The following custom field types are available:

Custom Field Type	Custom Field Validation
Checkbox	Values must be either True, False, T, F, Yes, No, Y, N, Active, or Inactive.
Date Field	Date format must comply with standard format rules. International dates are supported when the <u>Dates are in International format</u> option is selected in the Processing Options pop-up. <i>See the Domestic Date Formats and International Date Formats sections below for additional information.</i>
Dropdown	The available drop-down options must be configured in the system prior to the data load. Drop-down values can be active or inactive within the system. The ability to load values that are inactive may be determined in the Processing Options.
Numeric Field	Positive and negative values are supported. Decimals are supported. The character limit for this field is 50.
Radio	Values must be either True, False, T, F, Yes, No, Y, N, Active, or Inactive.

Custom Field Type	Custom Field Validation
Button	
Scrolling Text Box	The character limit for this field is 3950.
Short Text Box	The character limit for this field is 3950.

Domestic Date Formats

The following domestic date formats are supported:

- M/D/YY
- M/D/YYYY
- M-D-YY
- M-D-YYYY
- MM/DD/YY
- MM/DD/YYYY
- MM-DD-YY
- MM-DD-YYYY

International Date Formats

The following international date formats are supported:

- D/M/YY
- D/M/YYYY
- DD/MM/YY
- DD/MM/YYYY
- DD-MM-YY
- DD-MM-YYYY
- D-M-YY
- D-M-YYYY
- YYYY/D/M
- YYYY/DD/MM
- YYYY/M/D
- YYYY/MM/DD
- YYYY-D-M
- YYYY-DD-MM

Data Load Wizard - User Load Primary Key

Data Load Wizard - User Load Primary Key

With this enhancement, the User Data Load can now support the GUID as the primary key for a user record. This enables organizations to convert an external candidate within the Recruiting module to an internal user in the system. Organizations can also now use the Username as the primary key for a user record. When the Username is used as the primary key, the organization is able to modify the User ID via the data load.

Implementation

The ability to use the Username as the primary key for a User Data Load is controlled by a backend setting, which is disabled by default.

The ability to use the GUID as the primary key for a User Data Load is controlled by a new permission.

Security

The following new permission applies to this functionality:

Permission Na	me	Permission Description	Catego	ory
Data Load Wizard - Users Enable GUID	template. This e	D in the Data Load Wizard User Load and ma nables organizations to include the GUID as t user data loads. This permission cannot be	he	Data Load Wizard

Add GUID to User Data Load

With this enhancement, the GUID can now be included in the User Data Load. The availability of this functionality is controlled by a new permission.

Perm	issions	
	10010110	

Permission Na	me	Permission Description	Catego	ory
Data Load Wizard - Users Enable GUID	template. This e	D in the Data Load Wizard User Load and manables organizations to include the GUID as t user data loads. This permission cannot be		Data Load Wizard

When an administrator has the Data Load Wizard - Users Enable GUID permission, the GUID appears in the User Data Load template and can be mapped in the Data Load Wizard. When the GUID is included in the User data load, the GUID is used as the primary key and validates the user record. The GUID must be an existing value within the system. If the GUID is an existing value within the system, the following is true for the corresponding user record:

- The User ID can be updated. The User ID remains a required field and must be a unique value in the system.
- The Username can be updated. Username values must be unique. The Username value may be required, depending on a backend setting.
- All External Candidates or Applicants with a GUID are updated to Internal Users in the system.
- If a GUID is not provided, then either the User ID or Username is used as the primary key, depending on the backend setting.

Username as Primary Key

With this enhancement, the Username field can now be used as the primary key in the User Data Load. The availability of this functionality is controlled by a backend setting.

When the Username is used as the primary key for the user record, the following is true:

- The Username cannot be updated once it is set, and all Username values must be unique.
- The User ID can be updated, but all User ID values are required and must be unique.

Introducing Link

Link is the newest product in Cornerstone OnDemand's unified suite of talent management applications. Link adds functionality to general Cornerstone system functionality so that organizations can use Cornerstone to manage their employee records. Organizations can continue to feed data from 3rd party systems, but Link's added functionality enables organizations to additionally manage their people data within the Cornerstone system. In addition, employee data can be maintained within the Cornerstone system and updated, when necessary in 3rd party business applications.

Link enables organizations to manage their talent data and their employee data in the same system.

Link features the following:

- Enhanced auditing of user data
- Effective dating of user data
- Forms management
- Employee self-service
- Support for encrypted custom fields
- Reporting

See Link Overview for additional information.

Implementation

The Link functionality is available by request at an additional cost.

Enabling Link requires data migration. Because of this, Link can only be activated by the CRT team.

Jump to Predictive Search

Jump to Predictive Search

Prior to this enhancement, clicking a predictive search result would navigate the user to the Global Search page and perform a search using the selected result as a search query.

With this enhancement, clicking a predictive search result in the Global Search widget or page directly navigates the user to the appropriate page for the selected search result.

Implementation

This feature is enabled by default for all organizations.

Security

The following existing permissions apply to this functionality:

Permissio	on Nam	e	Permission Description	Categoi	Y
Global Sea Certificatio	-	permission can	to search for certifications via G not be constrained. This is an e of this permission is controlled	end user permission.	Learning
Global Search - People	constra within	ained to a speci Global Search, ermission. The a	h for people via Global Search. fic OU, then that constraint is a including search filters and sea availability of this permission is	utomatically applied rch results. This is an e	
Global Search - Training	const withir end u	rained to a spec Global Search,	ch for training via Global Search cific OU, then that constraint is , including search filters and sea The availability of this permiss	automatically applied arch results. This is an	Learning

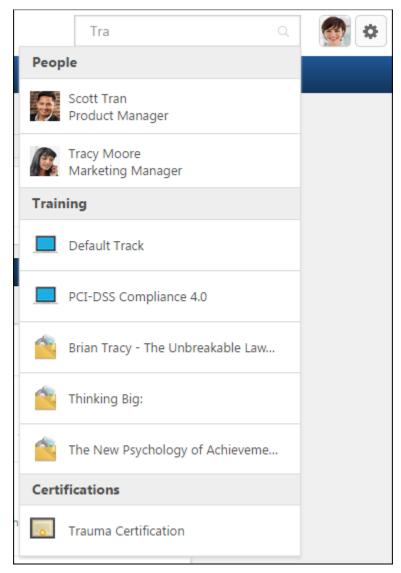
Global Search	Grants ability to search for volunteer activities via Global Search. This	Learning
- Volunteer	permission cannot be constrained. This is an end user permission. The	
	availability of this permission is controlled by a backend setting.	

Global Search Functionality

With this enhancement, when a predictive search result is selected, the user is navigated directly to the selected item.

Global Search Widget

Upon typing a search term, the Global Search widget displays potential results in a drop-down menu.



Depending on the type of predictive result selected and viewing permissions enabled, the user is navigated to the following pages:

• Selecting a person - Default Universal Profile page of the selected user.

- Selecting a training item Training Details page for the selected training.
- Selecting a certification Training Details page for the selected certification.
- Selecting a volunteer activity Activity Details page for the selected activity.

If a user does not select a predictive result and initiates a global search, they are directed to the Global Search page using the query entered.

Global Search Page

Upon typing a search term, the Global Search page displays potential results in a drop-down menu.

	Global Search		
	Global Search		
Show All			
- Training	Tra People	Everything 💌	Search
People	Scott Tran Product Manager		
Certifications	Tracy Moore Marketing Manager		
Connect	Training		
Volunteer	Default Track		
	PCI-DSS Compliance 4.0		
	Brian Tracy - The Unbreakable Laws of Self-Confidence - H	low to Tap the Infinite	
	🐴 Thinking Big:		
	The New Psychology of Achievement (by Brian Tracy)		
	Certifications		
	Trauma Certification		

Depending on the type of predictive result selected and viewing permissions enabled, the user is navigated to the following pages:

- Selecting a person Default Universal Profile page of the selected user.
- Selecting a training item Training Details page for the selected training.
- Selecting a certification Training Details page for the selected certification.
- Selecting a volunteer activity Activity Details page for the selected activity.

If a user does not select a predictive result and initiates a global search, they are directed to the Global Search page using the query entered.

Predictive Search Results Tooltip

Hovering the cursor over a predictive search result in either the Global Search widget or page displays a tooltip.

		Tran	Q	🎯 🕻	¥
	Реор	le			
	9	Scott Tran Product Manager			
	Train	ing			
		PCI-DSS Compliance 4.0			
		Organizational Learning: Creatin			
Organization	al Learni	ng: Creating, Retaining and Transfer	rring Knov	vledge	
		Purple Cow: Transform Your Bus	sine		
 Sta Das Cus 	100	Invisible Engines: How Software	Pla		

Hovering over a volunteer activity, training, or certification title displays a tooltip with the full name of the result.

Hovering over a person displays a tooltip with the person's full name and position in the following format: "Full Name - Position." If there is no position, the tooltip only displays the full name.

Link: Scheduled Changes in Auditing Log

Link: Scheduled Changes in Auditing Log

With this enhancement, administrators now have the option to view future effective changes within the Modification History section. Administrators can also modify past or future effective dated records via the Effective Dated Records section. Lastly, when a future effective dated change is cancelled, the Modification History section now displays all cancelled modifications.

Considerations

Currently, if data is being fed in to the system, it must be via the Data Load Wizard so that all modifications to employee data are both audited and effective dated. If user data is fed in to the system via a feed and not the Data Load Wizard, this will result in issues with the user data.

Scheduled Changes in Auditing Log is not currently available within reports. Currently, reporting only includes when a modification is implemented. That is, future effective changes are not available within reports.

Implementation

When Link is enabled for a portal, then this functionality is also enabled.

Upon release, this functionality is automatically enabled in Stage and Live portals for organizations using Effective Dating.

If Effective Dating is enabled, then Scheduled Changes in Auditing Log is enabled.

Security

The following existing permission applies to this functionality:

Permission N	ame	Permission Description	Category
Users - Effective Dating: Manage	user record. This p conjunction with tl	ator to make effective dated changes to the permission only works when used in he Users - Edit permission. This permission ned. This is an administrator permission.	Core Administration

User Record - Scheduled Changes in Auditing Log

With this enhancement, administrators now have the option to view future effective changes within the Modification History section. Administrators can also modify past or future effective dated records via the Effective Dated Records section. Lastly, when a future effective dated change is cancelled, the Modification History section now displays all cancelled modifications.

To edit a user record, go to **Admin > Tools > Core Functions > Users**. Search for the appropriate user. Then, click the user's name in the Search Results table.

Permissions			
Permission Name		Permission Description	Category
Users - Effective Dating: Manage	user record. This p conjunction with the	ator to make effective dated changes to the permission only works when used in ne Users - Edit permission. This permission ned. This is an administrator permission.	Core Administration

User Record Auditing Enabled, Effective Dating Disabled

If User Record Auditing is enabled and Effective Dating is disabled, then the following changes are implemented on the User Record page.

Modification History

The Field Modified column is renamed and is now titled Field Changed. In addition, the Changed From column now appears before the Changed To column.

ïeld Modified	Field Type: All Field Ty	pes 🔻 🔍 Search			
Change Date	Field Changed	Field type	Changed From	Changed To	Changed By
I/26/2015 7:12:14 PM	Retirement Account Type	User custom field	401K		Admin, Cornerstone (c
1/26/2015 7:12:14 PM	My Notes	User custom field	Great Employee		Admin, Cornerstone (c
1/26/2015 7:12:14 PM	Email	User standard field	mgoldberg@csod.com	jdwyer@csod.com	Admin, Cornerstone (c
0/17/2014 11:59:53	Employee Type	Organizational Unit	N/A	Part Time	Admin, Cornerstone (c.
10/16/2014 1:23:47 PM	P&L responsibility	User custom field		Small	Manager, HR (HRMan.
0/16/2014 1:23:45 PM	Email	User standard field	Imullen@csod.com	mgoldberg@csod.com	Manager, HR (HRMan.
0/16/2014 1:23:45 PM	Language	User standard field	English (US)	English (UK)	Manager, HR (HRMan.
10/16/2014 1:23:45 PM	Division	Organizational Unit	Central	EMEA	Manager, HR (HRMan.
10/6/2014 5:01:00 PM	Password	User standard field	Not tracked	Not tracked	Simms, Curtis (csimms)

User Record Auditing and Effective Dating Enabled

If User Record Auditing and Effective Dating are both enabled, then the following changes are implemented on the User Record page.

Modification History

The Field Modified column is renamed and is now titled Field Changed. The Changed From column now appears before the Changed To column.

Also, a new <u>Include scheduled changes</u> option is now available. When this option is not selected, the *Modification History* section does not display any records in which the effective date is after the current date and time. When this option is selected, the *Modification History* section displays all records that meet the search criteria. The section is automatically refreshed each time this option is modified.

When the User Record page is saved, all current, past, and future modifications are captured in the *Modification History* section.

ield Modified	Field Type: All Field Type	es 🔻 🔍 Search 🔽	Include scheduled changes		
Change Date	Field Changed	Field type	Changed From	Changed To	Changed By
I/26/2015 7:12:14 PM	Retirement Account Type	User custom field	401K		Admin, Cornerstone (c
1/26/2015 7:12:14 PM	My Notes	User custom field	Great Employee		Admin, Cornerstone (c
1/26/2015 7:12:14 PM	Email	User standard field	mgoldberg@csod.com	jdwyer@csod.com	Admin, Cornerstone (c
10/17/2014 11:59:53	Employee Type	Organizational Unit	N/A	Part Time	Admin, Cornerstone (c
10/16/2014 1:23:47 PM	P&L responsibility	User custom field		Small	Manager, HR (HRMan
10/16/2014 1:23:45 PM	Email	User standard field	Imullen@csod.com	mgoldberg@csod.com	Manager, HR (HRMan
10/16/2014 1:23:45 PM	Language	User standard field	English (US)	English (UK)	Manager, HR (HRMan
10/16/2014 1:23:45 PM	Division	Organizational Unit	Central	EMEA	Manager, HR (HRMan
10/6/2014 5:01:00 PM	Password	User standard field	Not tracked	Not tracked	Simms, Curtis (csimms)

Effective Dated Records

An Edit icon is now available in the Options column for all effective dated records except for Cancelled records. This includes the first effective record. When the Edit icon is clicked, the User Record page is refreshed to allow the administrator to edit the effective dated record. Any modifications to the effective dated record are captured in the *Modification History* section.

If the Cancel icon in the Options column is clicked, the scheduled modifications are cancelled, and all cancelled modifications are captured in the *Modification History* section.

			(5 Results
Date Effective	Status	Changed By	Options
81/12015 8:00 AM	Pending	Cornerstone Admin (cesadmin)	X
11/6/2014 8:06:16 AM	Complete	Cornerstone Admin (cesadmin)	2
10/28/2014 12:00:00 AM	Complete	Lori Mullen (Imullen)	2
10/26/2014 12:00:00 AM	Complete	Cornerstone Admin (cesadmin)	2
11/23/2010 9:19:53 AM	Complete	Lori Mullen (Imullen)	2
1/6/2014 8:06:13 AM	Complete	Cornerstone Admin (cesadmin)	2

Scheduled Changes in Auditing Log Use Cases

With this enhancement, administrators can now edit an effective dated record.

Use Case 1: Backdated Change

On 2015/03/01, Kyle Sherman modifies Colin's Position and Location, and the changes are effective as of 2014/10/01.

The following table shows the historical data on the user record and the effective date of the data <u>prior to the change</u>:

First Name	Division	Location	Effective Date
Colin	Sales	France	2014/09/01
Colin	Sales	United States	2014/11/01
Colin	Product	United States	2014/12/01

The following table shows the historical data on the user record and the effective date of the data <u>after the change</u>:

First Name	Division	Location	Effective Date
Colin	Sales	France	2014/09/01
Colin	Service	London	2014/10/01
Colin	Service	London	2014/11/01
Colin	Product	London	2014/12/01

The following table displays the entries that are added to the user's Modification History section:

Effective Date	Change Date	Field Modified	Field Type	Changed From	Changed To	Changed By
2014/10/01	2015/03/01	Division	User standard field	Sales	Service	Sherman, Kyle
2014/10/01	2015/03/01	Location	User standard field	France	London	Sherman, Kyle

The following table displays the entries that are available in the user's Effective Dated Records section:

Date Effective	Status	Changed By	Options
2014/09/01	Complete	Rob Mullen	Edit
2014/10/01	Complete	Kyle Sherman	Edit
2014/11/01	Complete	Rob Mullen	Edit

Date Effective	Status	Changed By	Options
2014/12/01	Complete	Rob Mullen	Edit

Use Case 2: Future Effective Change

On 2015/03/01, Frank Jones modifies Colin's Location, and the changes are effective as of 2015/08/01.

The following table shows the historical data on the user record and the effective date of the data <u>prior to the change</u>:

First Name	Division	Location	Effective Date
Colin	Sales	France	2014/09/01
Colin	Sales	United States	2014/11/01
Colin	Product	United States	2014/12/01

The following table shows the historical data on the user record and the effective date of the data <u>after the change</u>:

First Name	Division	Location	Effective Date
Colin	Sales	France	2014/09/01
Colin	Sales	United States	2014/11/01
Colin	Product	United States	2014/12/01
Colin	Product	Australia	2015/08/01

The following table displays the entries that are added to the user's Modification History section:

Effective	Change	Field	Field Type	Changed	Changed	Changed
Date	Date	Modified		From	To	By
2015/08/01	2015/03/01	Location	User standard field	United States	Australia	Jones, Frank

The following table displays the entries that are available in the user's Effective Dated Records section:

Date Effective	Status	Changed By	Options
2014/09/01	Complete	Rob Mullen	Edit
2014/11/01	Complete	Rob Mullen	Edit
2014/12/01	Complete	Rob Mullen	Edit
2015/08/01	Scheduled	Frank Jones	Edit, Cancel

Use Case 3: Effective Record is Modified

On 2015/03/01, Jim Tillman modifies Colin's effective dated record from 2014/11/01.

The following table shows the historical data on the user record and the effective date of the data <u>prior to the change</u>:

First Name	Division	Location	Effective Date
Colin	Sales	France	2014/09/01
Colin	Sales	United States	2014/11/01
Colin	Product	United States	2014/12/01

The following table shows the historical data on the user record and the effective date of the data <u>after the change</u>:

First Name	Division	Location	Effective Date
Colin	Sales	France	2014/09/01
Colin	Marketing	Canada	2014/11/01
Colin	Product	Canada	2014/12/01

The following table displays the entries that are added to the user's Modification History section:

Effective Date	Change Date	Field Modified	Field Type	Changed From	Changed To	Changed By
2014/11/01	2015/03/01	Division	User standard field	Sales	Marketing	Tillman, Jim
2014/11/01	2015/03/01	Location	User standard field	United States	Canada	Tillman, Jim

The following table displays the entries that are available in the user's Effective Dated Records section:

Date Effective	Status	Changed By	Options
2014/09/01	Complete	Rob Mullen	Edit
2014/11/01	Complete	Rob Mullen, Jim Tillman	Edit
2014/12/01	Complete	Rob Mullen	Edit

Use Case 4: Scheduled Effective Change is Cancelled

On 2015/03/01, Frank Jones modifies Colin's Location, and the changes are effective as of 2015/08/01.

On 2015/03/06, Rose Tutor cancels Colin's future effective change that was scheduled for 2015/08/01.

The following table shows the historical data on the user record and the effective date of the data <u>prior to the change</u>:

First Name	Division	Location	Effective Date
Colin	Sales	France	2014/09/01
Colin	Sales	United States	2014/11/01
Colin	Product	United States	2014/12/01
Colin	Product	Australia	2015/08/01

The following table shows the historical data on the user record and the effective date of the data <u>after the change</u>:

First Name	Division	Location	Effective Date
Colin	Sales	France	2014/09/01
Colin	Sales	United States	2014/11/01
Colin	Product	United States	2014/12/01

The following table displays the entries that are added to the user's Modification History section. Frank Jones' modification remains in the section, and Rose Tutor's cancellation of the change is added, which effectively reverses Frank Jones' modification.

Effective Date	Change Date	Field Modified	Field Type	Changed From	Changed To	Changed By
2015/08/01	2015/03/01	Location	User standard field	United States	Australia	Jones, Frank
2015/08/01	2015/03/06	Location	User standard field	Australia	United States	Tutor, Rose

The following table displays the entries that are available in the user's Effective Dated Records section. Frank Jones' future effective dated record is removed.

Date Effective	Status	Changed By	Options
2014/09/01	Complete	Rob Mullen	Edit
2014/11/01	Complete	Rob Mullen	Edit
2014/12/01	Complete	Rob Mullen	Edit

Use Case 5: User's First Effective Record is Modified

On 2015/03/01, Kyle Sherman modifies Colin's first effective dated record, and the changes are effective as of the original creation date.

The following table shows the historical data on the user record and the effective date of the data <u>prior to the change</u>:

First Name	Division	Location	Effective Date
Colin	Sales	France	2014/09/01

The following table shows the historical data on the user record and the effective date of the data <u>after the change</u>:

First Name	Division	Location	Effective Date
Matt	Sales	France	2014/09/01

The following table displays the entries that are added to the user's Modification History section:

Effective	Change	Field	Field Type	Changed	Changed	Changed
Date	Date	Modified		From	To	By
2014/09/01	2015/03/01	First Name	User standard field	Colin	Matt	Sherman, Kyle

The following table displays the entries that are available in the user's Effective Dated Records section:

Date Effective	Status	Changed By	Options
2014/09/01	Complete	Rob Mullen, Kyle Sherman	Edit

Link: Reason for Change

Link: Reason for Change

With this enhancement, administrators can select a reason for change when modifying employee data. These are intended to provide an explanation as to why a change was made. Administrators can define the reasons that can be selected. On the User Record, the reason for change is displayed in the *Modification History* section and the *Effective Dated Record* section.

Considerations

Currently, if data is being fed in to the system, it must be via the Data Load Wizard (DLW) so that all modifications to employee data are both audited and effective dated. If user data is fed in to the system via a feed and not the Data Load Wizard, this will result in issues with the user data.

Currently, the DLW does not support loading "reasons for change" from a 3rd party tool. This functionality is expected as part of a future release.

Currently, the Reporting platform does not support reporting on "reasons for change." This functionality is expected as part of a future release.

Implementation

When Link is enabled for a portal, then this functionality is also enabled.

Upon release, this functionality is automatically enabled in Stage and Live portals for organizations using Effective Dating.

Security

The following new permissions apply to this functionality:

Permission Name	9	Permission Description	Category
User Preferences - Core Information: View	page. This pe modify the pr	to view the User Preferences administrator ermission does not allow administrators to references. This permission cannot be This is an administrator permission.	Core Administration
- Reasons for t Change: Manage I I	the User Prefer when modifying have the User I permission to a	o define and configure Reasons for Change or ences administrator page, which may be used g the user record. The administrator must also Preferences - Core Information: View occess the User Preferences page. This not be constrained. This is an administrator	Administration

The following existing permissions apply to this functionality:

Permission N	ame	Permission Description	Category
Users - Edit Core Information	record, including OUs, and custom conjunction with t Edit Custom Field	add users and edit core information on a user first name, last name, username, assigned relationships. This permission works in the Users - View and Users - View Core and s permissions. This permission cannot be is an administrator permission.	Core Administration
Users - Effective Dating: Manage	user record. This p conjunction with t	ator to make effective dated changes to the permission only works when used in he Users - Edit permission. This permission ined. This is an administrator permission.	Core Administration
Users - View Modification Details	User Record and custom report. T conjunction with	view the Modification Details section on the view User Audits fields when creating a User his permission only works when used in the Users - View and Users - Edit s is an administrator permission.	Core Administration
View in the constr	portal, via the Adn	or and view summary information about user hin/Users screen. This permission can be s OU, User Self and Subordinates, and Users permission.	Administration

User Preferences

The User Preferences page enables administrators to manage preferences for the User Record. Administrators can configure which Reason for Change values are available when providing a reason for modifying the User Record.

This functionality is only available if Effective Dating is enabled for the portal.

To access the User Preferences page, go to **Admin > Tools > Core Functions > Core Preferences > User Preferences**.

Permissions			
Permission Name		Permission Description	Category
User Preferences - Core Information: View	page. This pe modify the pr	to view the User Preferences administrator ermission does not allow administrators to references. This permission cannot be This is an administrator permission.	Core Administration
- Reasons for Change: Manage	the User Preferences administrator page, which may be used Administration		

Reason for Change

This section is only available to administrators who have permission to manage reasons for change.

This section enables administrators to configure the reasons that can be selected when modifications are made to employee data. These are intended to provide an explanation as to why a change was made.

The section is expanded by default and can be expanded or collapsed using the up and down arrow icons to the right of the section heading.

Reason - Create

To create a new reason for change, click the **Create** button. This opens the Add Reason for Change pop-up. *See* **Reason for Change - Create/Edit** *on* page 397 *for additional information.*

Reasons for Change Table

The following information is displayed for each existing reason for change:

- Reason Reasons are sorted alphabetically.
- Reason Type
- ID
- Active When a reason for change is active, it can be selected as a reason for change when modifying user data on the User Record page. When a reason for change is inactive, the reason cannot be selected. However, the reason remains associated with any existing modifications.

The following options may be available from the Options drop-down menu:

- Edit Select this option to edit the reason. System defined reasons cannot be edited. *See* **Reason for Change Create/Edit** *on* page 397 *for additional information.*
- Translate If multiple languages are enabled for your portal, select this option to translate the <u>Reason</u> field into other available languages.
- Delete Select this option to delete the reason. This option is not available if the reason is a system-defined reason or if it has been used in the system. A confirmation pop-up opens to confirm the deletion.
- Info Select this option to view a description of the system-defined reason. This option is only available for system-defined reasons.

Reasons for Change - Default Reasons

System-defined reasons for change cannot be edited or deleted, and they cannot be selected when making modifications to user record data. Default reasons for change can be edited or deleted.

The following system-defined reasons for change are available:

- Self-service This reason for change is automatically selected when a user modifies their user record data in a self-service area, such as My Account.
- Record Creation This reason for change is automatically selected when a user record is created.

The following default reasons for change are available:

- User status/type change
- Promotion
- Demotion
- Transfer
- Data Correction

- Personal Data Change
- Reorganization

Require Reason for Change when modifying data on the User Record

When this option is selected, administrators must select a reason for change when making modifications on the User Record page. This option can only be selected when there is at least one active reason for change.

Done

Click **Done** to save any changes to the <u>Require reason for change</u> option and return to the Core Preferences page.

nage Preferences for the User Record				
REASON FOR CHANGE				~
onfigure Reasons that are selected when modifi ut cannot be selected for any new modifications	cations are made to employee data. Inactive Reaso	ons will continue to display for prio	or modifications,	Create
Reason	Reason type	ID	Active	Options
Data Correction	Data correction		Yes	-
Demotion	Demotion		Yes	-
Personal Data Change	Personal data change		Yes	•
Promotion	Promotion		Yes	-
Record Creation	Record Creation (system defined)		Yes	-
Relocation to International Country	Employee Relocation	Relocation	Yes	•
Reorganization	Reorganization		Yes	-
Self-service	Self-service (system defined)		Yes	
Transfer	Transfer		Yes	
User status/type change	User status/type change		Yes	-

Reason for Change - Create/Edit

If Effective Dating is enabled, when editing the User Record, administrators may provide a Reason for Change which is intended to explain why the employee data is being modified. Reasons for change must be predefined via User Preferences.

Reasons for change can be created and edited from the Reason for Change section of the User Preferences page. *See* **User Preferences** *on* page 394 *for additional information.*

To create a new reason for change, click the **Create** button. This opens the Add Reason for Change pop-up. *See* **Reason for Change - Create/Edit** *above for additional information.*

To edit a reason for change, select *Edit* from the <u>Options</u> drop-down menu. System defined reasons cannot be edited.

Enter the following information for the reason for change:

- <u>Reason</u> Enter the reason name, up to 40 characters. This should clearly describe a reason why an administrator may change a field on the User Record. This is required.
- <u>ID</u> Enter a unique ID for the reason, up to 10 characters. This is optional, but it must be unique if it is provided. The ID cannot contain any spaces. When editing a reason for change, this value cannot be edited if it has been used in the system.
- <u>Reason Type</u> Select one of the system-defined reason types from the drop-down menu. This enables organizations to categorize their reasons for change. This is required. When editing a reason for change, this value cannot be edited if it has been used in the system.
- <u>Active</u> When this option is selected, the reason for change is active and can be selected when modifying the User Record. If a reason is deactivated, the reason continues to display for existing modifications. However, inactive reasons cannot be selected for new modifications.

Note: If multiple languages are enabled for a portal, the <u>Reason</u> field can be translated. However, this is done by selecting the Translate option from the Options drop-down on the User Preferences page.

Save or Cancel

Click **Save** to save the reason for change and return to the User Preferences page. Or, click **Cancel** to discard any unsaved changes.

Add Reason for Change	×
Add a reason for change to be tracked for the user modifications. Once saved, the reason can be translated. The reason can be edited and deleted until it is first used. Reason *	2
ID	
Reason type * Select Active	
Cancel	ve

User Record - Reason for Change

With this enhancement, the Reason for Change functionality is added to User Record Auditing and Effective Dating. Administrators can select a reason for change when editing a user record. In addition, the reason for change is displayed in the *Modification History* section and the *Effective Dated Record* section.

The Effective Dated Records section is only available to organizations using Effective Dating.

To edit a user record, go to **Admin > Tools > Core Functions > Users**. Search for the appropriate user. Then, click the user's name in the Search Results table.

Permissions			
Permission Name		Permission Description	Category
Users - Effective Dating: Manage	user record. This p conjunction with th	ator to make effective dated changes to the permission only works when used in he Users - Edit permission. This permission ned. This is an administrator permission.	Core Administration
Users - View Modification Details	User Record and custom report. T conjunction with	view the Modification Details section on the view User Audits fields when creating a User his permission only works when used in the Users - View and Users - Edit s is an administrator permission.	Core Administration

Reason for Change

This option is only available when editing a user record. Also, this option is only available to organizations using Effective Dating.

From the drop-down menu, select the reason why the user record is being modified. Administrators can configure the available options and whether this field is required in User Preferences.

When a user record is modified, the Reason for Change value is stored in the *Modification History* section and the *Effective Dated Record* section.

When modifying an effective dated record, this field is populated with the previous value that was set for the effective dated record. If this value is modified, the following occurs:

- In the *Modification History* section, all existing modifications continue to be associated with the originally selected reason for change. All new modifications are associated with the newly selected reason for change.
- In the *Effective Dated Record* section, the modified effective dated record displays the newly selected reason for change.

Modification History

With this enhancement, a new Reason column is added to the *Modification History* section. In addition, a new <u>Reason</u> filter is added.

The Reason column displays the reason for change that was selected when the modification was made.

- If the modification was made through a self-service location such as My Account, then the self-service location is displayed in this column.
- If no reason was selected for the modification, then "None" is displayed.
- If the reason for change for an effective dated record is modified, then any new modifications are associated with the newly selected reason for change, and any unaffected modifications remain associated with the previous reason for change.

The Reason filter enables administrators filter the Modification History table by a particular reason for change. When a reason for change is selected and the **Search** button is clicked, the table only displays modifications that are associated with the selected reason for change.

Effective Dated Records

With this enhancement, a new Reason column is added to the *Effective Dated Records* section.

The Reason column displays the reason for change that was selected for the effective dated record.

- When a record is created, the reason for change is "Record Creation."
- If the modification was made through a self-service location such as My Account, then the self-service location is displayed in this column.
- If no reason was selected for the modification, then "None" is displayed.
- If multiple reasons for change have been set for an effective dated record, then all reason are displayed, comma delimited.

Edit User				as of: Right No
Edit User				
Upload Photo	Prefix: First Name: Colin Username: ccampbell Original Hire Date: Time Zone: Please select a time zone. Display Language: English (US) User Status: Active: Absent: Allow Reconci	User ID: ccampbell Last Hire Date: Signature: Arial	Last Name: Campbell	Suffix: Compensation Currency: \$ USD
Contact Information				∇
E-Commerce Information				▼
Tax Exemption				∇
Organization Structure				▼
User Custom Fields				•
Reason for change Select Save Cancel	Ŧ			

Lockout Preferences

Lockout Preferences

Prior to this enhancement, organizations could not configure the number of incorrect login attempts a user was allowed to make before they were locked out of their account. Additionally, organizations could not configure the length of time that an account was locked.

With this enhancement, administrators can configure the number of incorrect login attempts a user is allowed to make before they are locked out of their account. Administrators can configure the amount of time a user is locked out of their account before they can attempt to log in again. Administrators also have the ability to unlock a user's account when it has been locked.

Use Cases

- An administrator can increase the number of incorrect login attempts allowed in order to accommodate a user who might have forgotten their login credentials.
- In the event a user does become locked out, the user can directly contact support or administration to have the account unlocked.

Considerations

Organizations should be cautious when making lockout preferences less restrictive. If portal lockout preferences are configured to be less restrictive, this increases the threat of malicious users accessing the portal. Cornerstone is not responsible for the risk to client portals when lockout preferences are less restrictive.

Implementation

This functionality is enabled in Stage and Live portals by default for all organizations.

Security

The following new permissions apply to this functionality:

Permission Name			Permission Description	Category	
Lockout Preferences - the Corp		the Corpo cannot b	bility to configure the Lockout Preferences on orate Preferences page. This permission e constrained. This is an administrator on.	Core Administration	
Unlock This permission car			lock user accounts that are currently locked. be constrained by OU, User's OU, User's Jser. This is an administrator permission.	Core Administration	

The following existing permissions apply to this functionality:

Permission Name			Permission Description	Category	
Corpora Preferer Manage	nces -		v to manage Corporate Preferences, which eral portal-wide settings. This is an r permission.	Core Administration	
	in the porta constrained	I, via the Adm	or and view summary information about users hin/Users screen. This permission can be s OU, User Self and Subordinates, and Users. hermission.	Core Administration	

Corporate Preferences - Lockout Preferences

With this enhancement, a Lockout Preferences panel is added to the Corporate Preferences page.

Through the Lockout Preferences panel, an administrator can:

- Adjust the amount of login attempts that are allowed before an account is locked.
- Configure the duration of an account lockout.
- Configure the time frame in which login attempts are counted towards a lockout.
- Edit the message displayed if an account is locked.
- By default, the lockout settings are not changed with this release.

To manage Corporate Preferences, go to **Admin > Core Functions > Core Preferences > Corporate Preferences**.

Permissions Permission Name		Permission Description	Category
	the Corp	bility to configure the Lockout Preferences on orate Preferences page. This permission e constrained. This is an administrator on.	Core Administration

Lockout Preferences

An account becomes locked if a user unsuccessfully attempts to log in to their account a certain number of times within a certain amount of time. When an account is locked, the user cannot access their account for a certain duration of time.

Organizations should be cautious when making lockout preferences less restrictive. If portal lockout preferences are configured to be less restrictive, this increases the threat of malicious users accessing the portal. Cornerstone is not responsible for the risk to client portals when lockout preferences are less restrictive.

This section enables administrators to configure lockout characteristics for user accounts. The following options are available:

- <u>Login Attempt Restrictions</u> Set the login attempt restrictions for the portal. A user's account will become locked if they exceed the selected restrictions.
 - Number of Attempts Allowed From the first drop-down, select the number of unsuccessful login attempts a user is able to submit within the selected time frame. The default value is 5.
 - Time Frame From the second drop-down, select the time frame during which a user is able to attempt to selected number of login attempts. The default value is 5.

- <u>Lockout Duration</u> From the drop-down, select the amount of time for which a user is locked out of their account if they exceed the selected restrictions.
- <u>Lockout Message</u> Enter the message that is displayed on a user's login page when their account is locked. The character limit is 200. This is required. If multiple languages are enabled for your portal, click the Translate icon to translate the field into other available languages.

Use Case:

The Number of Attempts Allowed is 5, the Time Frame is 5 minutes, and the Lockout Duration is 60 minutes. A user unsuccessfully attempts to log in to their account 4 times within 2 minutes.

- If the user waits for 5 minutes, then the time frame and the number of attempts are reset. The user is able to attempt 4 more incorrect logins without a lockout.
- If the user waits for 2 minutes and incorrectly enters their login information, then they are locked out of their account.
- If the user successfully logs in on their fifth attempt, then the time frame and the number of attempts are reset.

Corporate Preferences
Header Logo
Select Logo: Edge_Logo.png
Remove
Upload New Header Logo
Upload Browse
Support Information
Support Email: helpdesk@techwriter.com
Support Phone: 555-555-5555
Preferences
Compensation Currency: SUSD V
Absent Status: On the My Account page, the absent checkbox will display the name: Out of Office 🔊 (Character Limit is 100)
Portal Name Configuration
By Updating the portal name in this section, "Empowering People: Tec" will be updated.
Portal Name: Tec
Lockout Preferences
An account will lock when consecutive login attempts within the specified time-frame are exceeded. The account will remain locked for the lockout duration, unless the account is manually unlocked by an administrator.
An account will lock after $5 \vee$ consecutive incorrect login attempts within $5 \vee$ minutes.
Lockout duration, enforced after incorrect login attempts are exceeded: 1 hour
Lockout Message: This account has been temporarily disabled due to too many
Save Cancel

Admin - Users - Unlock Account

Prior to this enhancement, a locked user account would be locked until the lockout duration was expired.

With this enhancement, administrators are able to manually unlock accounts.

To unlock a locked account, go to **Admin > Core Functions > Users**. Then, click the Unlock Account icon in the Options column for the appropriate user.

Permissions

Permission Name		Permission Description	Category	
Users - Unlock Accounts	This permission car	lock user accounts that are currently locked. In be constrained by OU, User's OU, User's User. This is an administrator permission.	Core Administration	
View in the const	e portal, via the Adm	or and view summary information about users hin/Users screen. This permission can be s OU, User Self and Subordinates, and Users. hermission.	Core Administration	

An Unlock Account icon now appears in the Options section for a locked account.

Click the Unlock Account icon to unlock the locked account. A confirmation pop-up opens to confirm the action.

Search Users							
с		1	Manager	Q	Select OU Criteria		New Group
First Name		Į.	Approver	Ø			
User ID			Active	•			
User Name							
				Q Search			
Add User							
SEARCH RESULT	rs						X 6
-							
USER	USER NAME	USER ID	CTATUS	5 IDENTIFIER	MANAGER	APPROVER	(46 Results) OPTIONS
USEN	USERNAME	USERID	STATUS	DENTIFIER	MANAGER	APPROVER	OPTIONS
Caldez, Isabella	icaldez	icaldez	Active	HR5 (Division)	Sergio Perez	Sergio Perez	🔒 🔎 🌾 🕏 👧 📰 🕹 🕲 🗮
Calhoun, John	jcalhoun	jcalhoun	Active	State Department (Division)	Gwen Fields	Gwen Fields	🍇 🔒 🔎 🕼 🖏 🔭 🖓 📰 👶 🕲 🗒
Camden, Rob	RCamden	RCamden	Active	Internal Development (Division)	Stephen McDonnell		🔒 🔎 🎺 🖏 👷 📰 👶 🕲 📜
Cameron, John	jcameron	jcameron	Active	Sales2 (Division)	Sam Stewart	Sam Stewart	🛧 🔒 🖉 ジ 🖏 🔭 📰 🕹 🕲 🗮
Camp, Anna	acamp	acamp	Active	Operations2 (Division)	Richard Martin	Richard Mar Un	lock Account
Camp, Peter	pcamp	pcamp	Active	Federal Department (Division)	Amy Little	Amy Little	🔒 🔎 🤣 🕏 🕵 🐨 😓 🕲 🗮

Portal Login Page Functionality

With this enhancement, the Portal Login page now functions in accordance with settings configured in Lockout Preferences. *See* **Lockout Preferences** *on* page 402 *for additional information.*

Within Lockout Preferences, administrators determine the number of unsuccessful login attempts a user can make within a certain timeframe before they are locked out of their account. Administrators also determine the duration of time an account is locked before the user is able to login. Administrators can configure the message that is displayed on the Login page when a user is locked out of their account.

-	Cornerstone			and the second s
π	his account has been temporarily disabled due to too many invalid login attempts. Please try again in 1 hour. Welcome to Cornerstone!	O)		
	Password			and the
	English (US)		Y.	
	Forgot Password?			

Universal Profile - View Enlarged Photo

Universal Profile - View Enlarged Photo

This enhancement allows the user to view enlarged profile photos on all Universal Profile Bio pages.

Implementation

This feature is enabled by default for all clients with the Universal Profile functionality.

Security

The following existing permissions apply to this functionality:

Permission	n Na	me	Permission Des	scription	Categ	jory	
About - cor View pe wil Re	About - constraints. If a user does not have this permission and they click a person's name or user photo within the Universal Profile, then the Bio page will not open. This permission can be constrained by Employee Relationship, OU, User's OU, User's Direct Reports, User Self and Subordinates, and User.						
Bio About Preferences Manage	Preferences - Preferences page. The availability of this permission is controlled P						
Preferences -within the permViewconstrained by I		within the permis constrained by E	o view the Bio - Career Preferences page for users ission constraints. This permission can be Employee Relationship, OU, User's OU, User Self es, User's Direct Reports, User's Self, and User.			Unive Profile	
Resume - I View	Bio Enables user to view the Bio - Resume page for users within their I Resume - permission constraints. If a user does not have permission to view the I					Unive Profile	
Bio Enables user to view the Bio - Volunteer page for users within their				Unive Profile			
User Upload Photo		nables users to u			cord, via the My		Core

1			1
	Users -	Enables administrator to upload a photo for a user via the	Core
	Edit Users	admin/users screen. This permission only works when used in	Administration
	Photo	conjunction with the Users - View and Users - Edit permissions.	

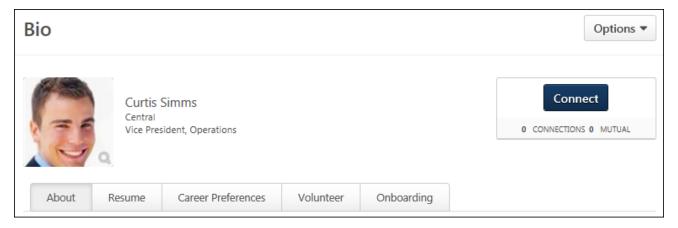
Universal Profile - Bio

This enhancement allows the user to view an enlarged profile picture on all Universal Profile Bio page and its subsections. Prior to this enhancement, this functionality was only available when using the mobile app or mobile web platform.

To access the Bio homepage, go to **Home > Universal Profile**. Then, click the Bio tab. **Note:** *The location of this link is configurable by your system administrator.*

To access another user's Universal Profile - Bio page, click the user's photograph from any page within Universal Profile or from Global Search.

A user's profile picture is displayed on all sub tabs of the Universal Profile Bio page. A magnifying glass icon is displayed in the lower-right corner of the profile picture as long as the user is not using the default system photo.



Hovering the cursor over the profile picture displays a "Click to Enlarge" tool tip. Click the picture to display the enlarged photo in the center of the screen. **Note:** *This functionality is only available if the user is not using the default system photo.*

Per Accessibility/508 Compliance, the user is also able to select the profile photo using a screen reader, or by pressing the [TAB] key. When the profile photo is selected, the user can access the enlarged version by pressing the [ENTER] key.



The enlarged profile photo displays within a pop-up window. The employee's full name is displayed in upper-left corner of the pop-up. The pop-up displays a 400px x 400px version of the profile picture.

To close the pop-up, either click the X icon in the upper-right corner of the pop-up, or press the [ESC] key.

User Record Contact Fields on My Account

User Record Contact Fields on My Account

With this enhancement, administrators are able to enable users to modify their own contact information within My Account. Administrators configure which contact fields display on the page and which contact fields can be edited.

Use Cases

An organization wants employees to update their personal mobile phone numbers. The organization can empower their users to update this personal contact information within My Account.

A consumer moves and must change their address information. The user can now update their address information within My Account.

Considerations

Email can already be changed on the My Account page, via the <u>Options</u> drop-down menu. Because there is a workflow associated with changing a user's email, if email changes are needed, this must be managed from the <u>Options</u> drop-down within My Account.

Implementation

This functionality is enabled by default for all organizations. Contact information can be configured to display in My Account via My Account Preferences.

Security

The following existing permissions apply to this functionality:

Permission N	ame	Permission Description	Category				
My Account Preferences - Manage	allows selection of by OU. Define wh are editable, and ability to customi	the My Account Preferences page, which of which custom fields display in My Account bether custom fields appear as read only or whether entry is required. Also provides ze the names of the tabs that appear in My an administrator permission.	Core Administratio	on			
My Account Allow users to view and modify their preferences on the My Account screen. Co - Manage The user must have this permission to access My Account. This permission cannot be constrained. This is an end user permission.							

My Account Preferences - Settings Fields

Prior to this enhancement, users could not configure their own contact information within My Account.

With this enhancement, administrators can allow users to modify their contact information on the My Account page.

To modify My Account Preferences, go to **Admin > Core Functions > Preferences > My Account Preferences**.

Permissions								
Permission Na	ame	Permission Description	Category					
My Account Preferences - Manage	allows selection of by OU. Define wh are editable, and ability to customi	the My Account Preferences page, which of which custom fields display in My Account nether custom fields appear as read only or whether entry is required. Also provides ize the names of the tabs that appear in My an administrator permission.	Core Administration					

Define the preferences for My Account. Rename the tabs that appear in My Account. Select and define the order of user custom fields to include on the users' My Account Preferences Settings page by using drag and drop. User custom fields can be included in the main section or in a separate section. The additional section will not appear if no fields are included or available to the user.

My Account Preferences						
Tabs Settings Fields						
Add Field						
Name	Туре	Options	Required	Delete		
Address	Address Data	Read / Write 🗸		Ū		
Phone	Short Text Box	Read / Write 🗸		Ì		
Mobile Phone	Short Text Box	Read / Write 🗸		Ì		
Fax	Short Text Box	Read / Write 🗸		Ì		
Handles dangerous materials	Radio Button	Read / Write 🗸		Ì		
	Additional Information	<i>🔊</i>				
Transfer Date	Date Field	Read / Write 🗸		Ū		
Overwrite custom settings for all child Divisions. To apply new options, you must reset all of the subordinate Divisions' preferences. If this						
not checked, the preferences will only app			ale prototo prot	o. one oo. in t		
Save Cancel						

Contact information fields can now be added to the Settings Fields tab of the My Account Preferences page. This enables administrators to allow users to modify their own contact information from My Account. When a user modifies their own contact information, this also updates their User Record.

As previously implemented, administrators can configure whether the contact information fields are editable or read-only. Administrators can make the fields required. Also, administrators can configure the order in which the fields appear.

My Account - Preferences - Settings

Prior this enhancement, contact information fields could not be displayed or modified on the My Account page.

With this enhancement, contact information fields, if enabled and configured, are displayed and can be modified on the My Account page. When a user modifies their own contact information in My Account, this also updates their contact information on their User Record.

To access My Account, click the Settings icon in the upper-right corner of the screen and select the *My Account* link.

Permissions

Permission	Name	Permission Description	Category	
My Account - Manage	The user must have	and modify their preferences on th this permission to access My Acco ed. This is an end user permission.	unt. This permission	Core

	My Account Preferences	
	Preferences	Options
Yereferences Image: Orders Image: Orders <td< th=""><th>Country*</th><th>Options V</th></td<>	Country*	Options V
	Select Country Phone Mobile Phone Additional Information Last Vacation Date clear Select a date	Save

User Transcript Audit Report - New Action Time Stamp and HTML Output

With this enhancement, a new action time stamp and HTML output capabilities are added to the User Transcript Audit Report.

This functionality is controlled by a backend setting that is disabled by default. To enable this functionality, contact Global Product Support.

Action Time Stamp

The Action Date column is updated to now include the time at which the action took place. The column displays the date and time as MM/DD/YYYY HH:MM:SS <AM/PM>.

	A	В	C	0	E	F	G	н	1	J	K	L	M
1	User Transcript Audit Report												
3					1								
4	Report Criteria												
5	Date From:	3/17/2015											
6	Date To:	7/15/2015											
7													
	User Last Name					Training Version	Training Description		Registration Number			Action Performed By (Na	
9	1_ad1	DF	DF1_ad1		!! Pam Material 1			Registered	2		L=1_ad1	1_ad1, DF	Other
	1_ad1	DF	DF1_ad1		!! Pam Material 1			Requested	7		Lad1	1_ad1,DF	Other
	1_ad1	DF	DF1_ad1			1.0	<html> <h2> third ev</h2></html>		2	4/2/2015 2:34:10 PM	Smith	Smith, Sam	Other
	1_ad1	DF	DF1_ad1				<html> <h2> third ev</h2></html>		1	4/2/2015 2:34:10 PM	Smith	Smith, Sam	Other
13	1_ad1	DF	DF1_ad1				<html> <h2> third ev</h2></html>		1	4/2/2015 2:34:09 PM	Somith	Smith, Sam	Other
	1_ad1	DF		Curriculum	!!!!! _Ambrish Cur		!!!!! _Ambrish Curriculum		1	4/21/2015 5:39:50 PM	Evoung	Young, Erin	Other
	1_ad1	DF		Curriculum	!!!!! _Ambrish Cur		!!!!! _Ambrish Curriculum		7	4/21/2015 5:39:50 PM	Evoung	Young, Erin	Other
	1_ad1	DF		Curriculum	!!!!! _ Ambrish Cur		!!!!! _Ambrish Curriculum	Assigned	7		Evoung	Young, Erin	Other
17	1_ad1	DF	DF1_ad1	Quick Course	!! 1aardvark Quick		This should be quick	Registered	ñ	4/6/2015 10:19:43 AM		Admin, Cornerstone	Other
18	1_ad1	DF	DF1_ad1	Quick Course	11aardvark Quick		This should be quick	Approved	ñ	4/6/2015 10:19:43 AM		Admin, Cornerstone	Other
19	1_ad1	DF	DF1_ad1	Quick Course	11aardvark Quick			Assigned	5	4/6/2015 10:19:43 AM		Admin, Cornerstone	Other
20	1_ad1	DF	DF1_ad1	Curriculum	108 CURR-003 v	7.0	"DB CURR-003 with Rec	Assigned	5	6/15/2015 1:57:46 PM		bhatia, drishti	Version L
21	1_ad1	DF	DF1_ad1	Curriculum	11DB CURR-003	7.0	!DB CURR-003 with Rec		ñ	6/15/2015 1:57:46 PM	EF1_ad1	1_ad1.DF	Other
22	1_ad1	DF	DF1_ad1	Curriculum	HDB CURR-003	2.0	IDB CURR-003 with Rec	Registered	5	5/27/2015 12:24:28 PM	Smith	Smith, Sam	Other
	1_ad1	DF	DF1 ad1	Curriculum	IIDB CURR-003		IIDB CURR-003 with Rec		5	5/27/2015 12:24:28 PM	Smith	Smith, Sam	Other
24	1_ad1	DF	DF1_ad1	Curriculum	HDB CURB-003 v	2.0	IDB CURR-003 with Rec	Assigned	5	5/27/2015 12:24:28 PM	Somith	Smith, Sam	Other
	Ladl	DF		Online Class	!!offline player tes	10	This is a course for testing		5	5/9/2015 11:00:57 PM	sounda	Soundararajan, Sathish	Other
	Lad1	DF		Online Class	!!offline player tes		This is a course for testing		5	5/9/2015 11:00:56 PM	sounda	Soundararajan, Sathish	Other
	1_ad1	DF		Online Class	03/04 Scorn 1.2 (Registered	5		EF1_ad1	1_ad1.DF	Other
	Ladi	DF	DF1 ad1	Online Class	03/04 Scorn 1.2 (10		Requested	5		EF1 ad1	1_ad1.DF	Other
	1_ad1	DF		Curriculum	03/12 CUR 2	3.0		Registered	5	5/20/2015 1:25:48 PM	sounda	Soundararajan, Sathish	Other
	Ladi	DF		Curriculum		3.0		Approved	5		sounda	Soundararaian, Sathish	Other
	Ladl	DF		Curriculum		3.0		Assigned	5	5/20/20151:25:41PM	sounda	Soundararaian, Sathish	Other
	Ladi	DF		Curriculum	03/19 CURR VER		03/19 CURR VER - CURF		5	5/20/2015 12:36:17 PM		Soundararajan, Sathish	Other
	1_ad1	DF		Curriculum	03/19 CURR VER		03/19 CURB VEB - CURE		5	5/20/2015 12:36:17 PM		Soundararajan, Sathish	Other
	Ladi	DF	DF1 ad1			10		Denied	5		EF1 ad1	1 ad1.DF	Replace
	Ladi	DF	DF1_ad1			10		Approved	5		inendoza	Mendoza, Julienne	Other
	Ladi	DF	DF1_ad1			10		Assigned	5		inendoza	Mendoza, Julienne	Other
	Lad1	DF		Session		10		Denied	5	4/4/2015 8:30:35 AM	aest	Test, Audit	Replace
	Ladi	DF		Session				Withdrawn	5		EF1_ad1	1_ad1.DF	Limiting
	1_ad1	DF	DF1_ad1					Requested Waitlist			LF1_ad1	Ladi.DF	Other
	1 ad1	DF	DF1_ad1			10			5	3/23/2015 7: 15:53 PM			
	4 14	DP	UP Ladi	Dession	U323 Event JPI	1.0 5.0	TIIO Event UI	Assigned		arzarzo is 7:15:53 PM	rendoza	Mendoza, Julienne	Other -
1 1	Report												▶ [

HTML Output

Once the User Transcript Audit Report is processed, the report can now be outputted to HTML by selecting a new Print icon in the Output column of the Processed Reports table. Clicking the icon opens a printable version of the report.

Date Criteria: Last 120 Days From: 3/17/2015 To: 7/15/2015 ADVANCED FILTERS Training Type: Image: Traininining Type: </th <th></th>							
Training Type: All Traini							
Training Type: All							
Recurring Training: Include all records of this training on a transcript. If unchecked only the most recent registration will be included. User Status: Include Inactive Users Include Removed Training: Include training that was removed from user transcript PROCESS REPORT Report Title: (If no report title is entered, the title of the report will default to User Transcript Audit Report)							
User Status: Include Inactive Users Include Removed Training: Include training that was removed from user transcript PROCESS REPORT Report Title: (If no report title is entered, the title of the report will default to User Transcript Audit Report)							
Include Removed Training: Include training that was removed from user transcript PROCESS REPORT Report Title: (If no report title is entered, the title of the report will default to User Transcript Audit Report)							
ROCESS REPORT Report Title: (If no report title is entered, the title of the report will default to User Transcript Audit Report)							
Report Title: (If no report title is entered, the title of the report will default to User Transcript Audit Report)							
(If no report title is entered, the title of the report will default to User Transcript Audit Report)							
I Bronnes Banert							
III FIOLOSS REPORT							
rocessed Reports							
eport Name Create Date Last Run Output Opti							
ser Transcript Audit Report 07/15/2015 07/15/2015 🗞 🗶 🧶 🐲	ons						

Security

The following existing permission applies to this functionality:

Permission I	Name	Permission Description	Catego	ory
User Transcript Audit Report	transcript approval training in the trans permission constra	ser Transcript Audit report, which displays us history from the Training Details page for ar script. The report results are limited by the ints. The selected constraints function are then combined to determine the availabi	ıy	Reports - Training

Analytics - Added Fields in Core

With this enhancement, a field is added to the User section for all custom reports that include a User section.

Field Name	Field Description	Field Type
Date Effective	This field displays the value in the <u>Date Effective</u> field added to the user record for clients who are using the Link effective dating functionality.	Date

Security

For a list of custom report permissions, see the Analytics Permissions section on the Security Permissions topic in Online Help.

Recruiting

First Advantage Integration

First Advantage Integration Overview

Integration with First Advantage (FADV) provides a new integration provider for screenings, including background checks and drug screening.

Upon implementation, this feature is available by work order. For more information, contact Global Product Support. Customers must also have an agreement in place with FADV in order to use this integration.

Security

There are no new permissions associated with the First Advantage integration. Portals must create a custom status to assign the background check and must use the Sensitive Status option in order to prevent access to the status.

With this enhancement, the following existing permission is renamed *Applicants: Manage HireRight Background Checks* to indicate that the permission only applies to HireRight. The permission grants access to manage HireRight background checks from the Applicant Profile page. The name change will be visible in Online Help upon implementation of this enhancement with the July '15 release.

Permission Name	Permission Description	Category
	Grants access to manage HireRight background or rom the Applicant Profile page. This permission e constrained.	

The following existing permissions apply to this functionality:

Permission	Name	Permission Description	Ca	ategory
Applicants: A Statuses	ccess Sensitive	Grants ability to access the applica configured as sensitive.	ant statuses that a	are Recruiting
Applicant Sta Manage		rants ability to access and manage oplicant Status Bank.	Recruit Admini	ing stration
Requisition:		to access and manage all requisitio	-	Recruiting

		J	
Manage	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.		

Requisition:		Recruiting	
	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.

Requisition:		Recruiting	
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.		

Create Custom Applicant Status

Administrators must create a new custom applicant status to be used for the First Advantage (FADV) background check integration. One custom status will be used for both background checks and drug screenings.

Permissions			
Permission Name	Permission Description	Category	ory
Applicants: Access Sensitiv Statuses	e Grants ability to access the applicant configured as sensitive.	statuses that are Re	cruiting
Applicant Status Bank - Manage	Grants ability to access and manage Applicant Status Bank.	Recruiting Administration	

Create Custom Status

To create a custom applicant status:

- 1. Navigate to the Manage Applicant Statuses page.
- 2. Click Create Custom Status. This opens the Create Custom Status pop-up.

Create Custom	Status	X
Language:	English (US)	
Display Name:	FADV Background Check	
Description:	Applicant requires or is in the process of a background (check.
Type:	Custom Integration 👻	
Integration:	Please Select	
	FADV Background Check	
	Active	
	ſ	Save Cancel
	L	

- 3. Complete the following fields in the pop-up:
 - <u>Language</u> If multiple languages are enabled, from the drop-down list select the language in which you are entering the status name and description. To localize the status name and description into other available languages, select the appropriate

language from the drop-down list and enter the localized name and description in the appropriate fields.

- <u>Display Name</u> Enter the status name, which appears throughout the system. The character limit for this field is 50. When the Display Name of an active status is modified after the status is in use or has been used in a job requisition:
 - The new display name appears on the Default Status List page.
 - The new display name appears in the Status list on the job requisition template.
 - Any new job requisitions created after the display name is changed apply the new display name.
 - Job requisitions created before the status display name is changed continue to honor the name that existed at the time the requisition was created.
- <u>Description</u> Enter the status description. This should describe the purpose of the status and what is implied when an applicant is in that status. The character limit for this field is 500.
- <u>Type</u> Select Custom Integration from the drop-down. **Note:** *This field only displays* when creating a custom status at the top level OU. When creating a custom status for a child OU, the Type field displays the type selected for the parent OU but is not editable.
- Integration Select FADV Background check from the drop-down.
- <u>Allow Comments</u> If this option is selected, when an applicant profile has this status, comments can be applied and are tagged with this status. If the <u>Allow Comments</u> option is deselected for an active status, the change is applied to any templates implementing the status; new job requisitions created from the template apply the new behavior, but existing job requisitions are unaffected.
- <u>Active</u> This field is checked by default. Ensure the field is checked before saving the status so that the status is active for the portal.
- 4. Click **Save** to save the custom applicant status.

Configure Status as Sensitive

The administrator must configure the FADV custom applicant status as sensitive to restrict access to the status. The status can be designated as sensitive in the following areas of the system:

- Default Status List If the status is part of the default status list, then check the box in the Sensitive column of the default status list.
- Requisition Template The status can be designated as sensitive on the General step when configuring job requisition templates. To designate the status as sensitive, check the box in the Sensitive column of the status list in the Status List section.

Note: As with existing functionality for sensitive statuses, only users with permission to view sensitive statuses can view the status in the applicant status workflow.

Change Applicant Status to First Advantage

In order for applicants to be assigned the First Advantage (FADV) background check, the applicant's status must be changed to the custom FADV status. The status can be changed by clicking the *Change Status* action on the Manage Applicants page for the desired applicants.

Changing an applicant's status is existing functionality that is unchanged with this enhancement. For detailed information about changing an applicant's status, see the Manage Applicants - Change Status topic in Online Help.

Permissions Permission	Name	Permission Description Ca	ategory
Requisition: Manage	ownership (constra only access to the	ccess and manage all requisitions regardless of aints permitting). This permission also grants re Applicant Review tab when creating or editing a ermission can be constrained by OU, User's OU,	a job

Change Status To	Disposition			
Applicant	Current Status	New Status	Disposition	
Jason Smith	In Review	In Review 💌	Please Select 💌	0
Leigh Ann Weeks	Background Check	In Review 👻	Please Select 💌	0

Applicant Profile - Assign First Advantage Screening

The First Advantage (FADV) screening is assigned to applicants from the FADV status panel on the Applicant Profile > Statuses tab. Applicants must be in the custom FADV status in order to assign the screening.

Permissions				
Permission	Name	Permission Description Cat	egory	
Applicants: A Statuses	ccess Sensitive	Grants ability to access the applicant statuses that a configured as sensitive.	e Recruiting	
Requisition: Manage	ownership (co only access to	to access and manage all requisitions regardless of instraints permitting). This permission also grants reac the Applicant Review tab when creating or editing a j is permission can be constrained by OU, User's OU, a	ob	
Requisition: Owner	which they are to video interv portals with Re requisition own page. This pern Note : This is a in Security Rol the permission can permission can permission nec owner, the con overrule those owners that do	to access requisitions and applicants for requisitions an owner. This permission also grants read-only acce ews that are completed by applicants via HireVue. For ferral Suite enabled, this permission also enables pers to edit the referral source on the Applicant Profile mission cannot be constrained. <i>dynamically assigned permission that is not available</i> <i>e Administration. If the user is removed as an owner,</i> <i>is revoked for the associated requisition. This</i> <i>not be manually assigned. Also, if a user has both the</i> <i>essary to manage requisitions and be a requisition</i> <i>straints of the</i> Requisition: Manage <i>permission</i> <i>of the</i> Requisition: Owner <i>permission. For requisition</i> <i>not also have permission to manage requisitions, on</i> <i>re editable when editing a requisition.</i>	ess r e on	

Requisition: Reviewer	Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained.	Recruiting
	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.

Applicant Profile		Options 👻
David Price	davidprice@csod.com Position: Marketing Manager 123 Main Street Organization: ABC Corp Los Angeles, CA 90049 Type: External United States External	
Snapshot	Summary Statuses Application Comments Documents History	
Accountant (req36) Status: New Submission Applied: 4/1/2014	NEW SUBMISSION	♥
	IN REVIEW	∇
Sales Manager (req39) Status: New Submission Applied: 9/5/2013	VIDEO SCREENING	V
Sales Associate (reg126)	PHONE SCREENING	\bigtriangledown
Status: New Submission Applied: 9/5/2013	INTERVIEW	V
Sales Associate (req25)	FADV BACKGROUND CHECK	A
Status: In Review Applied: 9/5/2013	Current Status: Not Assigned to Applicant	
Sales Associate (req1) Status: New Submission Applied: 9/5/2013	Current Status: Not Assigned to Applicant <u>Assign to Applicant</u>	
Manager of Accounting (req162) Status: Background Check Applied: 7/11/2013		
« Back		

To assign the FADV screening:

1. Click *Assign to Applicant* in the FADV status panel. This opens the Select Screening Program Option pop-up.

Select Screening Program Option		
Select Account: Test Data Select Package: Test Data		
	Cancel	Submit

2. Select the FADV account from the <u>Select Account</u> drop-down. The options in the drop-down are the account values sent by FADV.

- 3. Select the package from the <u>Select Package</u> drop-down. The options in the drop-down are the package values sent by FADV.
- 4. Click **Submit** to assign the screening. The selected account and package information is sent to FADV, and FADV sends an email to the applicant once the screening is assigned.

Applicant Profile - FADV Status Panel

The FADV status panel on the Applicant Profile > Statuses tab allows recruiters to assign screenings to applicants and view updates from FADV regarding the applicant's progress on completing the screening.

Permissions				
Permission	Name	Permission Description	Catego	ory
Applicants: A Statuses		Grants ability to access the applicant st configured as sensitive.	tatuses that are	Recruiting
Requisition: Manage	ownership (con only access to t	o access and manage all requisitions re straints permitting). This permission al he Applicant Review tab when creating permission can be constrained by OU,	lso grants read- g or editing a job	Recruiting
Requisition: Owner	which they are a to video intervie portals with Ref requisition owne	o access requisitions and applicants for an owner. This permission also grants r ws that are completed by applicants vi erral Suite enabled, this permission als ers to edit the referral source on the Ap ission cannot be constrained.	read-only access ia HireVue. For so enables	Recruiting
	<i>in Security Role</i> <i>the permission i</i> <i>permission cann</i> <i>permission nece</i> <i>owner, the cons</i>	dynamically assigned permission that is Administration. If the user is removed s revoked for the associated requisitior ot be manually assigned. Also, if a use ssary to manage requisitions and be a traints of the Requisition: Manage per of the Requisition: Owner permission.	l as an owner, n. This er has both the requisition ermission	

Requisition:		Recruiting
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	

owners that do not also have permission to manage requisitions, only

certain fields are editable when editing a requisition.

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.

Screening Not Yet Assigned

When a screening is not yet assigned to the applicant, the FADV status panel displays the following information:

- Current Status This field displays a status of Not Assigned to Applicant to indicate that the screening is not yet assigned to the applicant.
- Assign to Applicant The Assign to Applicant link displays below the status to enable recruiters to assign an FADV screening to the applicant. The link only displays if the screening has not yet been assigned to the applicant.

```
FADV BACKGROUND CHECK
```

Current Status: Not Assigned to Applicant

Assign to Applicant

Screening Assigned

Once the screening is assigned, FADV sends updates to the system as the screening progresses through the various stages and statuses. The FADV status panel displays each status update. The following information displays in the status panel, depending on the stage of the screening process:

- Assigned This field displays the date on which the screening was assigned.
- Reference ID This field displays the Cornerstone Reference ID.
- Status This field displays the status of the screening order (i.e., ordering a background check from FADV for an applicant) as Acknowledge, In Progress, or Completed.
- Check Application Progress Click *Check Application Progress* to check the progress of the applicant's application. This link will open a browser window to allow the user to check the progress on the FADV side. This link only displays if the order is in an Acknowledged status, which means that the applicant has not yet completed the application.

FADV BACKGROUND CHECK

Assigned - 2/26/2015

Reference ID: 1000439Y5, Status: Acknowledged, Check Application Progress

- Background Package This section displays once the applicant has submitted the screening. The "Background Package" section title in the status panel only displays if the applicant has been assigned a background package. If a background package was not assigned, a different package name will display. The following package information displays in the section:
 - Provider Reference ID This field displays the reference ID returned from FADV for the order.
 - Status This field displays the order status as In Progress, Completed, or Cancelled.
 - Result This field displays the result and score (if applicable) of the screening. The value of the result is dependent upon the type of screening, either background check or drug screening. The following are the possible result values:
 - Background Checks The following are the possible result or score values:
 - Pass
 - Fail
 - Eligible
 - Ineligible
 - Decisional
 - Drug Screenings The following are the possible result or score values:
 - Pass
 - Fail
 - Positive
 - Negative
 - Check Order Progress This option displays for screenings that have an In Progress status. Clicking the *Check Order Progress* link opens the order progress details on the FADV site. Availability for viewing the order progress is controlled by FADV.
 - View Report This option displays for screenings that are in a Completed status. Clicking the *View Report* link opens the FADV site to display details regarding the Screening Report.

K 051515	4
s: Completed	
WPS-6657098	
Completed	
Pass - Eligible	
	Completed

Multiple Screenings

If an applicant has multiple screenings, then the status panel displays the information for each screening in the same status panel but as separate sections within the panel.

Assigned - 6/27/2015	
Reference ID: 63078	Status: Completed
Background Package:	
Provider Reference ID	WPS-6657098
Status	Completed
Result	Pass - Eligible
View Report	
Drug Screening:	
Provider Reference ID	CPS-764395
Status	Completed
Result	Positive

Applicant Profile - History Tab

When a First Advantage (FADV) screening is assigned to an applicant or completed by FADV, the History tab on the Applicant Profile page logs the event.

Event	Details	User	Date and Time 🗸
Integration Result Completed	FADV Background Check - Background Package Completed	bro bro [vlad.shut+6291528@gmail.com]	6/29/2015 1:00:59 PM
Integration Assigned	FADV Background Check Assigned	Vladimir Shut (vshut)	6/29/2015 12:39:35 PM
Email Sent	Title: Application Confirmation (Notification)	bro bro [vlad.shut+6291528@gmail.com]	6/29/2015 12:27:00 PM
Email Sent	Title: Application Confirmation (Confirmation)	bro bro [vlad.shut+6291528@gmail.com]	6/29/2015 12:27:00 PM
Email Sent	Title: Application Confirmation (Notification)	bro bro [vlad.shut+6291528@gmail.com]	6/29/2015 12:27:00 PM
Applicant Status Changed	From: New Submission To: VladFADV0610	Vladimir Shut [vshut]	6/29/2015 12:22:43 PM

Integration Assigned

The Integration Assigned event is logged when an FADV screening is assigned to an applicant. The following information displays for the event:

- Event Title This column displays the name of the event as Integration Assigned.
- Details This column displays "< Integration Name> Assigned."
- User This column displays the name of the user who executed the event along with their user name if available, as "<Jeremy Johnson [jjohnson]>."
- Date and Time This column displays the date and time associated with the event.

Integration Result Completed

The Integration Result Completed event is logged when FADV sends the system a Completed status for the screening. The following information displays for the event:

- Event Title This column displays the name of the event as Integration Result Completed.
- Details This column displays "<Integration Name [Background Check Package Title] [Drug Screening Package Title] Result> Completed." **Note:** *If the background check or drug screening does not have a title from FADV, then the title displays as the name of the custom FADV applicant status.*
- User This column displays the name of the user who executed the event along with their user name if available, as "<Jeremy Johnson [jjohnson]>."
- Date and Time This column displays the date and time associated with the event.

Manage Applicants - View First Advantage Results Column

Recruiters can view the status and results of a First Advantage (FADV) screening assignment on the Manage Applicants page. A column displays in the applicants table to provide updates based on data received from FADV. The column must be configured to display on the Edit Page Layout page.

Note: For users who do not have access to view the data in the column because the custom FADV status is configured as sensitive and the user does not have permission to view sensitive statuses, the column is blank.

Permissions			
Permission I	Name	Permission Description Categ	ory
Applicants: Ao Statuses	ccess Sensitive	Grants ability to access the applicant statuses that are configured as sensitive.	Recruiting
Requisition: Manage	ownership (con only access to	to access and manage all requisitions regardless of nstraints permitting). This permission also grants read- the Applicant Review tab when creating or editing a job is permission can be constrained by OU, User's OU, and	Recruiting
Requisition: Owner	which they are to video intervi portals with Re requisition own page. This pern Note : This is a in Security Role the permission can permission can permission nec owner, the con overrule those owners that do	to access requisitions and applicants for requisitions for an owner. This permission also grants read-only access iews that are completed by applicants via HireVue. For iferral Suite enabled, this permission also enables hers to edit the referral source on the Applicant Profile mission cannot be constrained. <i>dynamically assigned permission that is not available</i> <i>e Administration. If the user is removed as an owner,</i> <i>is revoked for the associated requisition. This</i> <i>not be manually assigned. Also, if a user has both the</i> <i>ressary to manage requisitions and be a requisition</i> <i>straints of the</i> Requisition: Manage <i>permission</i> <i>of the</i> Requisition: Owner <i>permission. For requisition</i> <i>not also have permission to manage requisitions, only</i> <i>re editable when editing a requisition.</i>	Recruiting
Requisition: Reviewer	for which they	ver to access requisitions and applicants for requisitions are a reviewer. This permission cannot be constrained. 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.

Interview (Phone) 🗢	FADV Background Check
N/A	Status: In Progress
N/A	Background Package: Pass - Eligible Drug Screening: RuleViolation
N/A	Drug Screening: Cancelled Background Package: Fail - Ineligible
N/A	Status: In Progress
N/A	Background Package: Pass - Eligible
N/A	Background Package: Fail
N/A	Status: In Progress
N/A	Status: In Progress

The column name displays as <Name of Integration>. The following are the possible values in the column:

• <Blank> - If the user does not have permission to view the custom status, then no value displays.

- Not Assigned This displays if a screening has not yet been assigned to the applicant.
- Assigned This displays if the screening has been assigned but the applicant has not yet started the application and a status has not been sent from FADV. **Note:** *The term "application" refers to the screening application that the applicant must complete for FADV.*
- Status: In Progress In Progress displays if FADV has not yet returned a final result for the screening.
- Result The result displays as <Screening Package Title>: <Result Value><Score Value, if applicable>. A result displays for each screening package that has been completed or cancelled and FADV has returned a final result value for the screening. The score displays only if a score has been provided by FADV as part of the type of screening.

Analytics

Custom Recruiting reports can be created to report on First Advantage (FADV) data. The updates to custom Recruiting reports are part of a separate enhancement for the July '15 release. For more information about this reporting enhancement, see the Added Recruiting Requisition and Vendor Fields in Custom Reports topic in Online Help or the Recruiting release notes.

Candidate My Profile Redesign and Auto Upgrade

Candidate My Profile Redesign and Auto Upgrade Overview

With this enhancement, the My Profile page in career sites is updated to improve the user experience by introducing common page elements, updating graphic to match current user interface (UI) styles, and enabling applicants to view applications and resumes per job application. In addition, applicants can now view their application and resume from the Application Status section on the My Profile page.

Security

There are no permissions associated with this functionality.

My Profile - Profile Information

With this enhancement, changes are made to the profile information section to improve the user experience. The profile information section displays in the upper portion of the My Profile page and includes the user's photo and contact information.

Welcome, Jennifer!	Search Jobs Options 🔻
Jennifer Whitmer & 800-123-4567 @ email@csod.com	My Profile Edit Profile Change Photo Change Password Disconnect from Facebool Logout

Search Jobs

- The Search for Jobs button is renamed Search Jobs.
- The **Search Jobs** button is moved from the lower-left of the page to the upper-right corner of the page.

Options

An Options drop-down is added to the upper-right corner of the page. The following options have been moved into the drop-down to better organize the profile information section:

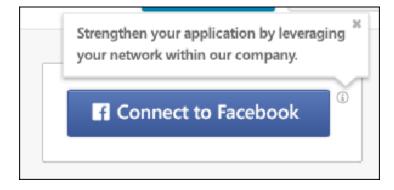
- My Profile This option previously displayed as a link at the top of the page. Click *My Profile* to view the My Profile page. This link is helpful for applicants when they would like to access their My Profile page from the My Resume page.
- Edit Profile This option previously displayed below the user's contact information. Click *Edit Profile* to edit your contact information, language setting, and consideration for open positions. *See* **My Profile Edit Profile Information** *on* page 448 *for additional information.* **Note:** *As with existing functionality, applicants can only edit their profile if enabled by the administrator in Requisition and Applicant Preferences.*
- Change Photo This option was previously named Upload Photo and displayed below the applicant's photo. Click *Change Photo* to upload a different photo or modify your existing photo. **Note:** *As with existing functionality, applicants can only change their photo if enabled by the administrator in Requisition and Applicant Preferences.*
- Change Password This option previously displayed as a link at the top of the page. Click *Change Password* to change your password for the career site. This opens the Change Password pop-up. The UI for the pop-up is updated with this enhancement to match current styles. The pop-up also now includes guidance for creating a password. **Note:** *As with existing functionality, applicants can only change their password if the administrator has enabled the* <u>Allow user to change password</u> *option in Password Preferences.*

Change Password		×
The new password must match	the following criteria:	
 Passwords cannot be the same Passwords must be 6 - 20 char Passwords cannot have leading 	or more consecutive characters the same e as the previous 3 passwords racters g or trailing spaces	
* Passwords cannot be the same	e as the Username, User ID or e-mail address.	
Current password		
New password		
Confirm password		
	Cancel	Save

• Logout - This option previously displayed as a link at the top of the page. Click *Logout* to log out of the career site.

Connect to Facebook

The **Connect with Facebook** button is renamed **Connect to Facebook**. In addition, an information icon is added to the upper-right corner of the button to explain the benefit of connecting with Facebook. Applicants can hover over the information icon to view the tooltip.



My Profile - Edit Profile Information

The Edit Profile information page is updated to improve the user experience and match current styles for the user interface (UI).

Wala	Incellect			-
welcome	, Jennifer!			Search Jobs Options
(Z	Jennifer W € 800-123-456 ⊖ email@csod.	1		onnect to Facebook
Edit Prof	le			
Prefix	Suffac			
First Name *				
Middle Narr	•.:			
1				
Last Name *				
Phone Numb	ei *			
Email Addre	.*			
Address Line	1			
Address Line	2			
Oty	State/ Province	Zip/ Postal Code		
1 Sectors				
Country *	v Selo			
C Opt out	of Candidate Search. If	selected, your data will not be sea	schable for other positions.	
	te My Profile			
Canori	Save			
	1000			
My Tasks				
Show All				
		Date Assigned 12/13/14	umod tempor incelidunt ut ladore et co	Launch -
-	ompetency Asses	sment Questions		

Contact Information Fields

The UI for the contact information fields is updated to match current styles. There are no functionality changes to these fields.

Language

The UI for this option is updated to match current styles. There are no functionality changes to this field.

Opt Out of Candidate Search

As part of a separate enhancement for the July '15 release, the <u>Consider me for all open</u> <u>positions</u> option is renamed <u>Opt out of Candidate Search</u>. When applicants check the box, they are not available in Candidate Search.

For applicants submitted by a recruiting agency, checking this option overrides the setting that is available when configuring recruiting agencies that allows applicants submitted by agency users to be available in Candidate Search after a certain timeframe.

For additional information about this feature, see the Opt Out of Candidate Search topic in Online Help. The topic is included in the Candidate Search Enhancements folder in the What's New for July 2015 section.

Note: This feature is not available for internal applicants applying through Career Center. This option is also not available for recruiting agencies applying through an agency portal.

Deactivate My Profile

The UI for this option is updated to match current styles. There are no functionality changes to this field. **Note:** *As with current functionality, this field only displays if enabled by the administrator in Compliance Enablement Preferences. In addition, the option does not display for applicants who are in a Hired status and is not available for internal applicants.*

My Profile - My Tasks

With this enhancement, the user interface (UI) of the My Tasks section is updated to improve the user experience. As part of this enhancement, the My Tasks section will no longer be visible until an applicant is assigned at least one task.

My Tasks		
All 🔻		
Pending sition Sales Ma	Internet Use nager ReqID: req1433 Date Assigned 12/12/14 or sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore ma	Launch 👻
Position Sales Ma	Assessment Questions inager Req ID: req1433 Date Assigned 12/12/14 or sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore	Launch
	Form inager ReqID: req1433 Date Assigned 12/12/14 or sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore ma	Launch
	hent nager ReqID: req1433 Date Assigned 12/12/14 th to begin the assessment	Launch
Lorem ipsum dok aliqua. Ut enim ac	ing Manager Req ID: req9665 Date Assigned 12/12/14 or sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna d minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis o reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaeca More	Launch
	fiew Inager ReqID: req1433 Date Assigned 12/12/14 sunch button for more information	Launch
	Iterview Inager ReqID: req1433 Date Assigned 12/12/14 Date Completed 12/14/14 Details for more information	View Details
	terview Inager ReqID: req1433 Date Assigned 12/12/14 Date Completed 12/14/14 Details for more information	View Details
	ed Interview Inger Reg10: reg1433 Date Assigned 12/12/14 Date Completed 12/14/14 Details for more information	View Details
Position Sales Ma	tter Request inager ReqID: req1433 Date Assigned 12/12/14 Date Completed 12/14/14 Details for more information	View Details
Show Less		

Filter Tasks Drop-Down

A drop-down is added to the top of the My Tasks section to better organize the viewing of pending and completed tasks. The following options are available in the drop-down:

• All - Click this option to view both pending and completed tasks.

- Pending Click this option to show only pending tasks.
- Completed Click this option to show only completed tasks.

Show More/Less

Up to four tasks display in the My Tasks section by default. To view more tasks, click the *Show More* link, which displays at the bottom of the list of tasks. To view fewer tasks, click the *Show Less* link.

Task Details

The UI for the task details is updated to match current styles. The following information displays for the tasks details:

- Task Icon The designated icon for the task displays to the left of the task details. The icon allows applicants to quickly recognize the type of task.
- Task Title The title of the task displays at the top of the task box.
- Position This field displays the linked title of the position to which the applicant applied. Click the link to view the Job Details page for the position. **Note:** *If the applicant is logged into a career site to which the job is not posted, then the applicant is automatically redirected to the career site where the job details are displayed.*
- Req ID This field displays the requisition ID for the position to which the applicant applied.
- Date Assigned This field displays the date on which the task was assigned to the applicant.
- Date Completed This field displays the date on which the applicant completed the task.
- Task Description The description for the task display at the bottom of the task box. If the description is longer than the space allows, click *More* to expand the description, then click Less to collapse the expanded lines of the description.
- Launch This option now displays as a button. When there are additional options available, the options display together in a button drop-down.
- View Details This option now displays as a button. When there are additional options available, the options display together in a button drop-down.

My Profile - Application Status

With this enhancement, the user interface (UI) of the Application Status section is updated to improve the user experience. In addition, applicants now have the ability to view both their resume and the application they submitted. As part of this enhancement, the Application Status section will no longer be visible until an applicant is assigned at least one task.

Applica	ation Status	
All 🔻		
80%	Accounting Manager 😁 Req ID: req1191 Last Modified: 10/28/2014 Review S	tatus: Not Submitted
40%	QA Support Req ID: req1156 Last Modified: 10/28/2014 Review S	Status: Not Submitted
	V Social Worker 🚰 Req ID: req1777 Last Modified: 10/28/2014 Review :	Status: Not Submitted
100%	Accounting Manager Req ID: req9865 Last Modified: 10/28/2014 Review:	Status: Submitted Applied: via Mobile with LinkedIn Resume
10%	Product Manager 🐕 Req ID: req7253 Last Modified: 10/28/2014 Review !	Status: Not Submitted
Show Mo	ore	

Filter Applications Drop-Down

A drop-down is added to the top of the Application Status section to better organize the viewing of in progress and completed applications. The following options are available in the drop-down:

- All Click this option to view the application status for jobs you have applied for and jobs for which the application is in progress but has not yet been submitted.
- In Progress Click this option to show only applications that are in progress but have not yet been submitted.
- Applied Click this option to show only applications for jobs you have applied for, meaning that the application has been submitted.

Show More/Less

Up to five applications display in the Application Status section by default. To view more tasks, click the *Show More* link, which displays at the bottom of the list of applications. To view fewer applications, click the *Show Less* link.

Application Status Details

The UI for the application status details is updated to match current styles. The following information displays for the application status details:

- Progress Bar/Percentage The progress bar and percentage display to the left of the application status details. The bar colors are defined as follows:
 - Red Application is less than 40% completed.
 - Yellow Application is less than 40-80% completed.
 - Green Application is 80-100% completed.
- Job Title This field displays the linked title of the position to which the applicant applied or is applying. Click the link to view the Job Details page for the position. **Note:** *If the applicant is logged into a career site to which the job is not posted, then the applicant is automatically redirected to the career site where the job details are displayed.*
- Agency Submission A new Agency Submission icon displays to the right of the job title for applications submitted by a recruiting agency. The icon displays in the corporate color defined by the administrator in Display Preferences.
- Req ID This field displays the requisition ID for the position to which the applicant applied or is applying.
- Last Modified This field displays the date on which the application was last modified. Applications are sorted by Last Modified date with the most recently modified application listed first.
- Review Status Previously, an Application Status and a Review Status column displayed. With this enhancement, the Review Status field combines the Application Status column to display the status of the application with the organization. The following statuses are available:
 - Closed This status displays if the applicant status is Closed.
 - Hired This status displays if the applicant status is Hired.
 - Initiated by Recruiter This status displays if the applicant has been submitted by a recruiting agency but has not yet started or completed their application for submission. Previously, this status appeared in the Application Status field.
 - In Review This status displays if the applicant status is In Review.
 - Not Submitted This status displays if the application is not yet completed by the applicant and was not submitted by a method other than the applicant, such as manually moved by a recruiter or submitted from an agency portal.
 - Requisition Closed This status displays if the job requisition is closed.
 - Submitted This is a new status for the Review Status field. This status displays if the applicant status is New Submission.
- Applied This is a new field that indicates whether the applicant submitted their application via a mobile device, a LinkedIn resume, or both.

Options

With this enhancement, the options that are available to the applicant display in a drop-down when there are multiple options available. In addition, the name of some options is changed with this enhancement.

- Apply With this enhancement, the **Apply Now** option is renamed **Apply**. This option allows applicants to apply to the requisition if they have not already started their application.
- Continue With this enhancement, the **Continue Application** option is renamed **Continue**. This option allows applicants to continue filling out their application.
- Delete This option allows applicants to delete an application that they have started but have not yet submitted.
- Re-Apply This option allows applicants to reapply to a job requisition, if enabled by the administrator in General Preferences.
- Unavailable This displays for job requisitions that were closed before the applicant submitted an application.
- View Application This is a new option. Click **View Application** to open a pop-up that displays the application. This option is available even if the requisition is closed. *See* **Application Status View Application** *on* page 456 *for additional information.*
- View Resume This is a new option. Click **View Resume** to open the resume submitted with the application. The resume opens in the format in which it was submitted. This option is available even if the requisition is closed. This option does not display for applicants who applied via LinkedIn or submitted a structured resume.
- Withdraw This option allows the applicant to withdraw their application once it has been submitted.

Note: If an applicant has started an application, and the job requisition is no longer available on the current career site but is available on another career site, the application options are not affected. The applicant can still complete the application as long as the job is available on the other career site. The application source in the system will be the career site from which the application was originally started.

Application Status - View Application

With this enhancement, applicants can now view their application from the My Profile page on the career site. A **View Application** option is added to the Application status section, which allows applicants to open a pop-up that shows their application.

acmelli					
Application for: Product Manager					
Requisition ID: req1145					
Submitted by: Richard D. Headley					
Date Submitted: 6/5/2015					
Section 2 - Pre-Screening & Forn					
ID QUESTION	CORRECT				
39930 PMO's Pre-Screening Questions (en-US)	NIA				
✓ **Yes (en-US)**					
No (en-US)					
39882 mktest 2 question (correct ans yes) (en-US)	N/A				
No (en-US)					
Short text form test					
(en-US)					
1. Where re you from ? (en-US)					
me internet *					
2 whit is your nme ? (en-US)					
namely					
3. City of born ? (en-US)					
born city					
1998-1999 Tax Update on Retirement/IRA Income					
Training Details					
	sinininini 0 Reviews				
Training Type: Online Class Provider: Test Provider					
Version: 1.28					
Training Hours: 0 Hours 0 Min					
Description: This course reviews the IRS Restructuring and Reform Act of 1998 as it relates to the federal income tax rules concerning qualified retirement plans (ORPs) and Individual Retirement Accounts (IRAs). It provides technical corrections and clarifications in these areas.					
Due Date: None					
From Training Plan?: No					
Ambrish Custom Field:					
sia test: CF pam textbox:					
Event Date Field:					
Davian Test #346831					

Application Attachments

If attachments are included with the application, they display at the end of the application.

Pre-Screening Questions

If pre-screening questions were included in the application workflow, and the applicant's application includes responses to the questions, any correct answers to the questions do not display when viewing the application pop-up.

My Profile - Interviewer Names

With this enhancement, applicants who are scheduled for an in-person, phone, self-scheduled, or live video interview can now view the names of the interviewers with whom they are interviewing. The interviewer names display in the Interviewing With section of the Interview Details pop-up.

Interview De	tails	×
O Tuesday 3/11/14	8:30AM - 9:00AM (PST)	
Location Santa Monica Office		
Type In-Person Interview		
Interviewing With Mike Stanley Stan Michaels Michael Stanford		
	me at least one hour early for this in th three people during this time.	terview. You
		Close

My Profile - Saved Jobs

With this enhancement, the user interface (UI) of the Saved Jobs section is updated to improve the user experience. As part of this enhancement, the Saved Jobs section will no longer be visible until an applicant has saved at least one job.

All 🔻				
All	signer	_	Social Worker	
Open Closed	I (No Longer Available)	Delete	Req ID: req1888 Last Modified: 10/28/2014	Apply +
	ng Manager 865 Last Modified: 10/28/2014	Apply 👻	QA Support Reg ID: reg1156	Continue 👻
Product I Req ID: req7	Manager 253	Apply 👻	Marketing Evangelist Req ID: req1616	Apply 👻
ales Asso leg ID: reg20		Apply 👻	Graphic Designer Req ID: req2133	Apply 👻
Project M	-	Apply 🚽	Marketing Manager Reg ID: reg1900	Apply 👻

Filter Tasks Drop-Down

A drop-down is added to the top of the Saved Jobs section to filter by open and closed saved jobs. The following options are available in the drop-down:

- All Click this option to view both open and closed saved jobs.
- Open Click this option to show only open saved jobs.
- Closed Click this option to show only closed saved jobs.

Show More/Less

Up to six saved jobs display in the Saved Jobs section by default. To view more saved jobs, click the *Show More* link, which displays at the bottom of the list of jobs. To view fewer jobs, click the *Show Less* link.

Saved Jobs Details

The UI for the saved jobs details is updated to match current styles. The following information displays for saved jobs:

• Job Title - This field displays the linked title of the saved job. Click the link to view the Job Details page for the position. **Note:** *If the applicant is logged into a career site to which the job is not posted, then the applicant is automatically redirected to the career site where the job details are displayed.*

- Req ID This field displays the requisition ID for the saved job.
- Last Modified This field displays the date on which the application was last modified for applications that are in progress.
- No Longer Available This displays if the job is no longer available to apply to.
- You Applied On "You applied on [date]" displays if the applicant has applied to the job.

Options

With this enhancement, the options that are available to the applicant display in a drop-down when there are multiple options available.

- Apply This option allows applicants to apply to the saved job if they have not already started their application.
- Continue This option allows applicants to continue filling out their application for the saved job.
- Delete This option allows applicants to delete the saved job. If the applicant has started their application and deletes the saved job, then they are also deleting the application for the job.
- Re-Apply This option displays if the applicant has been moved into a Closed status for the job. The applicant can click **Re-Apply** to reapply to the job. **Note:** *Applicants can only reapply to a job if enabled by the administrator in General Preferences.*

My Profile - Job Alerts

With this enhancement, the user interface (UI) of the Job Alerts section is updated to improve the user experience. As part of this enhancement, the Job Alerts section will no longer be visible until an applicant has created at least one job alert.

Job Alerts			
San Diego Jobs Frequency: Weekly Expiration: 12/12/14	Edit 👻	San Francisco Jobs Frequency: Weekly Expiration: 12/12/14	Edit 👻
Show More			

Show More/Less

Up to six job alerts display by default. To view more job alerts, click the *Show More* link, which displays at the bottom of the list. To view fewer job alerts, click the *Show Less* link.

Job Alerts Details

The UI for the job alert details is updated to match current styles. Job alerts display in alphabetical order in two columns from left to right. The following information displays for job alerts:

- Job Alert Title This field displays the title of the job alert. Click the link to view the Job Details page for the position. **Note:** *If the applicant is logged into a career site to which the job is not posted, then the applicant is automatically redirected to the career site where the job details are displayed.*
- Frequency This field displays the frequency of the alert, either Daily or Weekly.
- Expiration This field displays the date on which the job alert expires.

Options

With this enhancement, the options that are available to the applicant display in a drop-down when there are multiple options available.

- Edit This option allows applicants to edit the job alert. The UI for the Edit Job Alert pop-up is updated with this enhancement to match current styles.
- Delete This option allows applicants to delete the job alert.

Candidate Search Redesign

Candidate Search Redesign Overview

The Candidate Search Query functionality is enhanced to improve the user experience when searching for talent or looking up specific candidates across internal and external users. The search is improved by enhancing the capabilities of the keyword search feature to allow Boolean operators to be used in the search. In addition, the information that is used to find matching candidates is expanded by including attached resumes. The user interface (UI) for the Candidate Search and search results pages is also updated to match current styles.

The Candidate Search page displays in two tabs: Quick Search and Advanced Search. The Quick Search tab allows recruiters to search for candidates using keywords and Boolean operators that will search the parsed resume/CV fields, typed-in resume/CV, and the most recently attached resume. The Advanced Search tab allows recruiters to search the same data sources as in Quick Search, but instead of using a single keyword text field, users can create complex Boolean search queries in a new step-by-step interface.

Navigation Sublink

The Candidate Search Query sublink must be added by the administrator to the Recruit navigation tab. The sublink must be added via Navigation Tabs and Links preferences in order for the Candidate Search Query page to be available to users.

Use Cases

Boolean Operators

- 1. **Scenario** A recruiter is looking for a candidate to fill a Supply Chain Manager position. The recruiter is interested in candidates with supply chain, operations, and procurement experience who also possess analytical skills and VBA certification. Candidates must be located within 50 miles of Boston, Massachusetts.
- Query The recruiter enters the following into the keyword search field on the Candidate Search page: +("Supply chain manager" "Procurement Manager" operations analy*) +vba.
 Query Interpretation: Position required to be included in search results, Supply chain manager or procurement manager or operations or analytical or analysis or analyses or analytics or etc. with VBA required as a term that must appear in the resume.
- 3. Country United States
- 4. Location Boston, Massachusetts
- 5. **Postal Code** 02112
- 6. Radius 50 miles

Wildcard Search

1. **Scenario** - A recruiter wants to find a particular applicant in order to invite them to apply to a position. The recruiter can only remember the first four characters of the applicant's first

name, Jon. The recruiter wants to make sure that the search returns all candidates whose name starts with Jon by adding a wildcard operator at the end of the query.

- 2. **Query** The recruiter enters the following into the keyword search field on the Candidate Search page: "Jon*"
- 3. **Search Results** The search returns all internal employees/candidates and external candidates whose first name starts with Jon (i.e., Jon, Jonathan).

Security

The following new permission applies to this functionality:

Permission Name	Permission Description	Categ	ory
Saved Searches	to view and manage the Availability column ones Page. This permission can be constrained J.		

The following existing permissions apply to this functionality:

Permission Name		Permission Description	Catego	ory
Applicants: Add/Move to Requisition		Grants ability to add or move applicants to requisitions the applicant did not apply for. This permission can be constraby OU, User's OU, and Grade.		Recruiting
Navigation Ta Links - Manag			Core Admin	istration
Recruiting: Grants ability to access Candidate Search page for recruiting, Search which enables searching for internal candidates and external Candidates 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.		Recru Admir	iting histration	
Requisition: Manage	owner only a	s ability to access and manage all requisitions regardless of ship (constraints permitting). This permission also grants r ccess to the Applicant Review tab when creating or editing ition. This permission can be constrained by OU, User's OU	read- a job	Recruiting

Quick Search Tab

The Quick Search tab on the Candidate Search page allows recruiters to search for candidates using keywords and Boolean operators that will search the parsed resume/CV, typed-in resume/CV, and the most recently attached resume. Recruiters can also enter candidate contact information and filter the search by applicant status and applicant type.

To access the Quick Search tab on the new Candidate Search page, go to **Recruit > Candidate Search Query**.

Permissions **Permission Name Permission Description** Category Recruiting: Grants ability to access Candidate Search page for recruiting, Recruiting Search which enables searching for internal candidates and external Administration Candidates 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.

Candidate S	Search					
						Reset Search
Quick Search	Advanced Search					
Resume/CV Fields a	nd Resume Attachment K	eywords			All Sources 🔻	0
First Name		Country	•			
Last Name		City, State/Province				
Email		25 mi / 40.23 km	•			
Filters						
Select Applicar	nt Flag 🔹	2 User Types	•			
				Save Search	Saved Searches	Q Search

Keyword Search

The keyword search bar allows recruiters to search for candidates using keywords and Boolean operators that will search the parsed resume/CV, typed-in resume/CV, and the most recently attached resume. The searches are not case sensitive. An error message displays upon clicking **Search** if the search terms are invalid.

Boolean Operators

The following Boolean operators can be included in the search bar as part of the keyword search:

Operator	Description	Query	Search Results
+	AND, used to require term to be included in search	+Manager +Associate +"Sales Associate" +"Product Manager"	Results include all candidates whose resume/CV contains the terms Manager and Associate. Results include all candidates whose resume/CV contains the exact terms Sales Associate and Product Manager.
-	NOT, used to exclude term from search	Manager Associate -VP Note: Quotation marks must be used when user wants to include + and - as part of a search term or a query (e.g., "c+".) Note: The - operator must be used in conjunction with another operator. For example, -java is an invalid search term. Since - operators generally do not filter out as many results as other Boolean operators, the - operator(s) in a query will be applied to the documents remaining only after other operators are applied to the entire document population. This is to improve system performance and prevent the system from returning a very large number of results before applying other operators to them.	Results include all candidates whose resume/CV contains the terms Manager or Associate or both but does not contain the term VP.
*	Begins with, used to search for terms that begin with the letters	analy* analy* procur*	Results include all candidates whose resume/CV contains terms that begin with

Operator	Description	Query	Search Results
	that appear before the *		analy, such as analytical and analysis.
	At least two letters must appear before the *		Results include all candidates whose resume/CV contains terms that begin with analy (i.e., analytical, analysis) and/or procur (i.e., procure, procurement).
Parentheses	Used to group or nest search terms	+(Director Manager Associate) +(Sales Operations)	Results include all candidates whose resume/CV contains the terms Director, Manager, or Associate AND candidates whose resume/CV contains the terms Sales or Operations.
Quotation Marks	Used to conduct an exact match search	"Customer Service Representative"	Results include all candidates whose resume/CV contains the exact term Customer followed by the term Service followed by the term Representative.
Special Characters	The following special characters are accepted: ! (searchable with/without quotes) ((searchable with quotes)) (searchable with quotes)	A recruiter would like to find candidates who have included a salary of \$120,000 on their resume/CV. The recruiter enters "\$120,000" in the quick search field.	Results include all candidates whose resume/CV contains the term \$120,000.
	[(searchable with quotes)] (searchable		

Operator	Description	Query	Search Results
	with quotes)		
	? (searchable with/without quotes)		
	: (searchable with quotes)		
	\ (searchable with quotes)		
	@ (searchable with/without quotes)		
	. (searchable with/without quotes)		
	- (searchable with quotes)		
	_ (searchable with quotes)		
	+ (searchable with quotes)		
	# (searchable with/without quotes)		
	\$ (searchable with/without quotes)		
	% (searchable with/without quotes)		
	& (searchable with/without quotes)		
	' (searchable with quotes)		

Operator	Description	Query	Search Results
	* (searchable with quotes)		
	/ (searchable with quotes)		
	= (searchable with quotes)		
	 (searchable with/without quotes) 		
	{ (searchable with quotes)		
	} (searchable with quotes)		
	~ (searchable with quotes)		
Whitespace	OR, used to make term optional in search results	Manager Associate Note: If only one search term is entered and that term does not have a "+" or "-" preceding it, such as "Manager", the system treats the search term as a required term (as if "+" preceded the single term). This also applies where there is only one search term with whitespace accompanied by another search term with a "-", such as "-Manager Associate". In this case, the term with whitespace preceding it is treated as a required term; all documents containing the word "Associate" will then have the negation operator "-" applied to them to arrive at the list of all documents containing "Associate" that do not also contain "Manager". [Quotations do not apply.]	Results include all candidates whose resume/CV contains Manager or Associate or both.

Sources

The source drop-down displays to the right of the keyword search bar. This option allows recruiters to select the source information that is used in the search. The following options are available in the <u>Source</u> drop-down:

- <u>All Sources</u> This option is selected by default. When this option is selected, both the parsed resume/CV fields and most recently attached resume are searched.
- <u>Resume/CV Fields</u> When this option is selected, only the information saved in the resume fields of the external applicant's profile and in the internal applicant's Universal Profile > Bio page will be searched. For parsed resume data (if parsing is enabled), only the parsed data that is saved by the applicant into one of the mapped resume fields is searchable.
- <u>Resume Attachment</u> When this option is selected, only the most recently attached resume is searched. This search does not include parsed resume data.

Quick Search Info Pop-Up

The Quick Search Info pop-up provides descriptions and examples of the Boolean operators that are accepted in the keyword search field. To open the pop-up, click the Quick Search Info icon

to the right of the sources drop-down.

```
Resume/CV Fields and Resume Attachment Keywords
```

User Fields

The user fields allow recruiters to search for candidates by first/last name and email, as well as add location criteria to the search query. The values entered in the user fields are preserved when toggling between the Quick Search and Advanced Search tabs.

The following criteria are available:

- <u>First Name</u> This field allows recruiters to search by full or partial first name. This field accepts the * wildcard Boolean operator.
- <u>Last Name</u> This field allows recruiters to search by full or partial last name. This field accepts the * wildcard Boolean operator.
- <u>E-mail</u> This field allows recruiters to search by an exact email address. This field accepts the special characters of @, ., -, _, +, 0-9, A-Z, a-z, !, #, \$, %, &, ', *, /, =, ?, ^, {, }, ~.
- <u>Country</u> This field allows recruiters to search for candidates by country. Select a country from the drop-down to search by country. Completing the <u>Location</u> field is required when a country is selected. Depending on the country selected, a <u>Postal Code</u> field displays to the right of the <u>Location</u> 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. **Note:** *If geolocation has been disabled for your portal, this field does not display.*

- <u>City State/Province</u> 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. **Note:** If geolocation has been disabled for your portal, this field does not display.
- <u>Postcode</u> This field only displays if one of the following countries is selected in the <u>Country</u> field: (**Note:** *If geolocation has been disabled for your portal, the this field does not display.*)
 - 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
- <u>Radius</u> Recruiters can search for candidates within a certain radius of the location. The <u>Within</u> 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

Note: Searching by phone number is not available on the new Candidate Search page.

Applicant Flags

This option allows recruiters to search for candidates by applicant flags. All flags are unchecked by default. Click the <u>Applicant Flags</u> drop-down to view the flags and select one or more flags.

The Potential Duplicate Applicant flag is only available if the <u>Flag Potential Duplicates</u> option is enabled in Requisition and Applicant Preferences. Selecting this flag enables recruiters to search for applicants who are flagged by the system as potential duplicates. When the flag is selected, potential duplicates display in the search results.

The Merged Duplicate Applicants flag is available. When this flag is selected, applicants who have been automatically flagged by the system with the Merged Duplicate Applicants flag can be searched using the applicant flag filter.

The additional flags that display are the flags that are visible to the recruiter based on the flag's visibility settings and organizational unit availability. In addition, the candidate search option must be enabled for a flag in order for the flag to be available in the Search Candidates feature.

Note: *Visibility and candidate search settings for flags are defined by the administrator in Applicant Flags Preferences. See Applicant Flags Preferences for additional information.*

Candidate Type

This is a required field. This option allows recruiters to define the candidate type for the search criteria. The following options are available in the <u>User Type</u> drop-down:

- <u>Select All</u> This option is checked by default. When checked, both internal and external candidates are included in the search.
- <u>Internal</u> Checking this option includes current employees who have not applied to the requisition and existing applicants.
- External Checking this option includes external candidates in the search.

Reset Search

Click the *Reset Search* link at the top of the page to clear all search criteria fields. The page is refreshed to display the default values for all fields.

Save Search

You can save the search by clicking the **Save Search** button. This opens the Save Search popup. Enter a unique title in the <u>Title</u> field, up to 100 characters. This is a required field. Click **Save** to save the search, or click **Cancel** to close the pop-up without saving.

Save Search	×
Search Title	
	Cancel Save

Note: If you save changes to the criteria, and then make additional changes that you would like to save, the title given to the previous saved search populates the <u>Title</u> field in the Save Search pop-up. When accessing the saved search, you can edit the criteria.

Saved Searches

The Saved Searches option enables you to search for candidates using searches you saved or searches shared with you. To search using a saved search, click the **Saved searches** button. This opens the Saved Searches page.

Save As

The *Save As* link only displays when editing an existing saved search. Once all changes are made to the saved search, click the *Save As* link to save the search as a new saved search. Enter a title in the Save Search pop-up, and then click **Save** to save the search.

Search

Once at least one search term is entered, click **Search** to view the search results page. If the option to require a reason for the search is enabled in Compliance Enablement Preferences, then the Reason for Search pop-up displays, and a reason for the search must be selected before the search results display.

Reason for Search

Clicking the **Search** button may require you to enter a reason for the search prior to conducting the search. If configured in Compliance Enablement Preferences, when **Search** is clicked, a Reason for Search pop-up opens. Select a requisition from the <u>Specific Requisition</u> drop-down to indicate the requisition for which you are conducting the search. Or, select <u>Other</u> and enter a

reason in the text field. There is no character limit when entering a reason in the <u>Other</u> field. Click **Save** in the pop-up to execute the search.

Reason for Search	\times
 Please define the reason for this search. Specific Requisition 	
Select Requisition	
Other	
	Cancel Save

Note: The <u>Specific Requisition</u> drop-down displays all requisitions that are available to the user. For this reason, the user must have permission to manage or review requisitions or must be a requisition owner.

Note: If users are not required to enter a reason for the search, then clicking **Search** on the Search Candidates page executes the search.

Quick Search - Search Results Criteria Panel

The search criteria panel on the left side of the search results page for the Quick Search tab displays all criteria that were selected when conducting the search.

Recruiters can edit the search criteria if enabled by the administrator in Compliance Enablement Preferences. If recruiters are not allowed to modify the search criteria, then the criteria in the panel are grayed out and not selectable. **Note:** *The* Job Details *and* View Criteria *links are still selectable. However, the criteria in the View Criteria pop-up cannot be modified.*

Permissions				
Permission Name		Permission Description	Category	
Recruiting: Search Candidates	which enables sea candidates who ha permission also en appear in the Actio	ccess Candidate Search page for recruiting, rching for internal candidates and external ave applied for open positions. This hables the Invite to Apply action item to ons drop-down on the Search Candidates - ge. This permission can be constrained by	Recruiting Administration	

Search	Select All Actions 🕶	
Accounting	John Tanner	
First Name	🔄 🔝 🎍 External 🕓 714 200 8483 🖂 indianajonah@yahoo.com	
Last Name	Position: Houses Coordinator Location: Anaheim CA Organization: Scripture Union United States	
Email	Rachel Green	
Country •	🖳 🦾 External 🕓 714 200 8483 🖂 meghanagera@yahoo.com	
City, State/Province	Position: Houses Coordinator Location: Anaheim CA Organization: Scripture Union United States	
25 mi / 40.23 km 🔹	Ruth Green	
User Type >	Position: Customer Service Repr Location: Mountain View CA Organization: ABC Utility Company United States, 94043	
Applicant Flags	Carsten Langreiter	
Source >	🖳 🏊 External 📞 1231231234 🖂 carsten.langreiter@csod.com	
aved Searches	Position: Not Defined Location: French Polynesia Organization: Not Defined	
e Search	Anndrais Griogarach	
Search	🖷 🎑 👗 External 📞 1231231234 🖂 anndrais.griogarach@csod.com	
	Position: Not Defined Location: Oxford Organization: Not Defined United Kingdom. OX4	

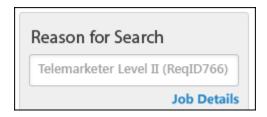
New Search

Click the *New Search* option at the top of the page to conduct a new search. This opens the Quick Search tab on the search page, with all fields returned to their default state.

Reason for Search

The Reason for Search section only appears if enabled in Compliance Enablement Preferences. This section displays the following information:

- Reason for Search This is the reason that was selected for conducting the search. The reason is not editable for the search once the search has been conducted.
- Job Details Click the *Job Details* link to view the job details, which includes the requisition's internal and external job description, minimum qualifications, and ideal qualifications.



Search

This section displays the additional user criteria used to filter the search results. The following fields display:

- Source This option displays the source information that was selected for the search, either Resume/CV Fields or Resume Attachments or both.
- Keywords This field displays the keywords used in the <u>Resume/CV keywords</u> field.
- First Name This field displays the full or partial first name entered for the search.
- Last Name This field displays the full or partial last name entered for the search.
- Email This field displays the email address entered for the search.
- Country This field displays the country selected for the search.
- City/State/Province This field displays the city and state/province entered for the search.
- Postcode -This field displays the postal code entered for the search. **Note:** *This field only displays if a postal code applies to the country selected in the* <u>Country</u> *field.*
- Radius This field displays the radius defined for the search location.

User Type

This option displays the candidate type selected for the search, either Internal or External or both.

Applicant Flags

This option displays the applicant flags that were selected for the search.

Saved Searches

The Saved Searches option enables you to search for candidates using searches you have saved or searches made public by other users.

To search using a saved search, click the *Saved searches* link. This opens the Saved Searches pop-up, which displays the following information:

Field	Description
Keyword Search	Filter the list of saved searches by entering keywords into the search bar, up to 50 characters. Click Search to update the list.
Saved Search Title	Click the title of the saved search to view the search results on the search results page. The results display all candidates found using the search criteria for the saved search.
Date Saved	The date the search was added as a saved search displays below the saved search title.
Search Criteria	The search criteria that were configured on the Candidate Search page displays in the center column. The following criteria types may have been configured for the search:
	Resume/CV keywords
	First Name
	Last Name
	• Email
	Country
	City, state/province
	Zip Code
	• Radius
	• Applicant Flags - (Note: If a flag has been removed from a user, then the user does not appear in the search results using this search filter. If the flag's visibility rule has changed and no longer allows the user to view the flag or the flag cannot be used to search in Candidate Search, then candidates will not appear in the results for the flag.)
	User Type
	Source

Field	Description
Options Drop- Down	The drop-down to the right of the search criteria displays the <i>Edit</i> option. Click the link to open the Candidate Search page with the criteria options filled. You can change the settings for the saved search, and then click <i>Save Search</i> to save the updated settings. To reset the search criteria after making changes, click <i>Reset Search</i> .
Cancel	Click Cancel to cancel the changes to the search.

Save As

The *Save As* link only displays when editing an existing saved search. Once all changes are made to the saved search, click the *Save As* link to save the search as a new saved search. Enter a title in the Save Search pop-up, and then click **Save** to save the search.

Save Search

Save the changes to the criteria by clicking the **Save Search** button. This opens the Save Search pop-up. Enter a unique title in the <u>Title</u> field, up to 100 characters. This is a required field. Click **Save** to save the criteria or **Cancel** to close the pop-up without saving. **Note:** *If you save changes to the criteria, and then make additional changes that you would like to save, the title given to the previous saved search populates the <u>Title</u> field in the Save Search pop-up. You can edit or rename the title.*

Save Search	×
Search Title	
	Cancel Save

Search

If changes are made to the fields, then the **Search** button executes a new search based on the updated criteria. If the option to require a reason for the search is enabled in Compliance Enablement Preferences, then the Reason for Search pop-up displays, and a reason for the search must be selected before the search results display.

Note: The **Search** button only displays on the Search Candidates results page if the <u>Require</u> <u>OFCCP</u> Compliance Enablement functionality option is not checked in Compliance Enablement Preferences. In addition, users must be allowed to filter the search results, which also must be enabled in Compliance Enablement Preferences. See Compliance Enablement Preferences for additional information.

Reason for Search

Clicking the **Search** button may require you to enter a reason for the search prior to conducting the search. If configured in Compliance Enablement Preferences, when **Search** is clicked, a Reason for Search pop-up opens. Select a requisition from the <u>Specific Requisition</u> drop-down to indicate the requisition for which you are conducting the search. Or, select <u>Other</u> and enter a reason in the text field. There is no character limit when entering a reason in the <u>Other</u> field. Click **Save** in the pop-up to execute the search.

Reason for Search	×
Please define the reason for this search.	
 Specific Requisition 	
Select Requisition	
Other	
	Cancel Save

Note: The <u>Specific Requisition</u> drop-down displays all requisitions that are available to the user. For this reason, the user must have permission to manage or review requisitions or must be a requisition owner.

Note: If users are not required to enter a reason for the search, then clicking **Search** on the Search Candidates page executes the search.

Advanced Search Tab

From the Advanced Search tab, users can search all of the same sources as in Quick Search by entering keywords to match criteria in applicant resumes. With the advanced search, both the parsed resume/CV fields and the attached resume are searched.

To access the Quick Search tab on the new Candidate Search page, go to **Recruit > Candidate Search Query**, then click the Advanced Search tab.

Permissions				
Permission Name		Permission Description	Category	
Recruiting: Search Candidates	which enables sea candidates who ha permission also er appear in the Actio	ccess Candidate Search page for recruiting, rching for internal candidates and external ave applied for open positions. This nables the Invite to Apply action item to ons drop-down on the Search Candidates - ge. This permission can be constrained by	Recruiting Administration	

Candidate S	earch				
					Reset Search
Quick Search	Advanced Search				
Add resume search	criteria 🕒				
First Name		Country	•		
Last Name		City, State/Province			
Email		25 mi / 40.23 km	•		
Filters					
Select Applican	t Flag 🔻	2 User Types	•		
				Save Search	Saved Searches QSearch

Add Resume Search Criteria

The *Add resume search criteria* option allows recruiters to enter keywords for searching the most recent resume attachment for candidates.

(Candidate Search				
	Quick Search	Advanced Search			
	Add resume search criteria				

To add resume criteria:

1. Click the Add resume search criteria option. This opens the resume criteria fields.

Quick Search	Advanced Search		
Resume			0
Exact 🔻		Required •	
Add resume search	criteria 🕒		

- 2. Select one of the following equality operators:
 - Starts With When this option is selected, the search includes results that match the partial search term entered (equivalent to using an asterisk * in Quick Search). This option cannot be selected if multiple search terms are entered in the search field or if Boolean operators are present.
 - Exact When this option is selected, the search only includes results that exactly match the search term entered. If multiple search terms are entered, then the search matches the terms as a phrase (equivalent to using quotation marks "" in Quick Search).
- 3. Enter full or partial search terms in the search field. At least one search term must be entered. Each search term must be at least two characters.
- 4. Select one of the Boolean operators from the drop-down to the right of the text field:
 - Required This option assigns a Must operator to the keywords entered. Matching results must include the keywords entered in the search field.

• Optional - This option assigns a Should operator to the keywords entered. Matching results may or may not include the keywords entered in the search field. If one search term is entered in the search field, then selecting Optional treats the search term as required.

This also applies where there is only one search term with whitespace accompanied by another search term with a "-" such as "-Manager Associate". In this case, the term with whitespace preceding it is treated as a required term; all documents containing the word "Associate" will then have the Negation Operator "-" applied to them to arrive at the list of all documents containing "Associate" that do not also contain "Manager". (**Note:** *Quotations do not apply.*)

• Exclude - This option assigns an Exclude operator to the keywords entered. Matching results must not include the keywords entered in the search field.

Due to the fact that Exclude operators generally do not filter out as many results as other operators, the Exclude operator(s) in a query will be applied to the documents remaining only after other operators are applied to the entire document population. This is to improve system performance and prevent the system from returning a very large number of results before applying other operators to them.

Additional resume search criteria can be added by clicking the *Add resume search criteria* option.

Group Search Criteria

When more than one search criteria box is added, a Group option 🛄 displays in the upperright corner of the search box. This allows the recruiter to conduct a nested search by linking the search criteria together into a group of at least two terms that are perceived by the system as child search terms in parentheses. Grouped search terms are executed prior to other operations.

Candidate Search		
Quick Search Advanced Search	Reset	t Search
Resume Exact Product Manager Required	•	
Resume Exact UCLA Optional		
Resume Exact USC Optional		
Resume Exact ▼ Software Required ▼		

To group the search criteria:

- 1. Add two or more search criteria boxes. This enables the Group icon to appear in all search boxes below the top box.
- 2. Click the Group icon 🔚 in the upper-right corner of the search box. This groups the search box with the box directly above it.
- 3. Define the equality operator in the drop-down. **Note:** *Selecting a Boolean operator is not necessary, since the system considers the terms in all child search boxes to be required.*
- 4. Define the priority operator in the drop-down. **Note:** *Depending on the priority operators (required, optional, exclude) that are defined for the nested search terms, the search results may include all, some, or none of the nested terms.*

Search groups must have at least two search boxes. If only one search box is grouped under another box when the **Search** button is clicked, an error message displays to indicate that at least one more search box must be added to the group.

Ungroup Search Box

To ungroup a search box, click the Ungroup icon 💷.

Delete Search Criteria

To delete a search criteria box, click the Delete icon $^{\textcircled{}}$ in the upper-right corner of the box.

If the search box is part of a group that has additional search boxes below it, then the search boxes are moved up to the next position. If the ungrouped search box above a group is deleted, then the first grouped search box below the deleted box is moved up to the ungrouped level.

User Fields

The user fields allow recruiters to search for candidates by first/last name and email, as well as add location criteria to the search query. The values entered in the user fields are preserved when toggling between the Quick Search and Advanced Search tabs.

The following criteria are available:

- <u>First Name</u> This field allows recruiters to search by full or partial first name. This field accepts the * wildcard Boolean operator.
- <u>Last Name</u> This field allows recruiters to search by full or partial last name. This field accepts the * wildcard Boolean operator.
- <u>E-mail</u> This field allows recruiters to search by an exact email address. This field accepts the special characters of @, ., -, _, +, 0-9, A-Z, a-z, !, #, \$, %, &, ', *, /, =, ?, ^, {, }, ~.
- <u>Country</u> This field allows recruiters to search for candidates by country. Select a country from the drop-down to search by country. Completing the <u>Location</u> field is required when a country is selected. Depending on the country selected, a <u>Postal Code</u> field displays to the right of the <u>Location</u> 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. **Note:** *If geolocation has been disabled for your portal, this field does not display.*

- <u>City State/Province</u> 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. **Note:** If geolocation has been disabled for your portal, this field does not display.
- <u>Postcode</u> This field only displays if one of the following countries is selected in the <u>Country</u> field: (**Note:** *If geolocation has been disabled for your portal, the this field does not display.*)
 - 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
- <u>Radius</u> Recruiters can search for candidates within a certain radius of the location. The <u>Within</u> 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

Note: Searching by phone number is not available on the new Candidate Search page.

Applicant Flags

This option allows recruiters to search for candidates by applicant flags. All flags are unchecked by default. Click the <u>Applicant Flags</u> drop-down to view the flags and select one or more flags.

The Potential Duplicate Applicant flag is only available if the <u>Flag Potential Duplicates</u> option is enabled in Requisition and Applicant Preferences. Selecting this flag enables recruiters to search for applicants who are flagged by the system as potential duplicates. When the flag is selected, potential duplicates display in the search results. The Merged Duplicate Applicants flag is available. When this flag is selected, applicants who have been automatically flagged by the system with the Merged Duplicate Applicants flag can be searched using the applicant flag filter.

The additional flags that display are the flags that are visible to the recruiter based on the flag's visibility settings and organizational unit availability. In addition, the candidate search option must be enabled for a flag in order for the flag to be available in the Search Candidates feature.

Note: *Visibility and candidate search settings for flags are defined by the administrator in Applicant Flags Preferences. See Applicant Flags Preferences for additional information.*

Candidate Type

This is a required field. This option allows recruiters to define the candidate type for the search criteria. The following options are available in the <u>User Type</u> drop-down:

- <u>Select All</u> This option is checked by default. When checked, both internal and external candidates are included in the search.
- <u>Internal</u> Checking this option includes current employees who have not applied to the requisition and existing applicants.
- External Checking this option includes external candidates in the search.

Reset Search

Click the *Reset Search* link at the top of the page to clear all search criteria fields. The page is refreshed to display the default values for all fields.

Save Search

You can save the search by clicking the **Save Search** button. This opens the Save Search popup. Enter a unique title in the <u>Title</u> field, up to 100 characters. This is a required field. Click **Save** to save the search, or click **Cancel** to close the pop-up without saving.

Save Search	×
Search Title	
	Cancel Save

Note: If you save changes to the criteria, and then make additional changes that you would like to save, the title given to the previous saved search populates the <u>Title</u> field in the Save Search pop-up. When accessing the saved search, you can edit the criteria.

Saved Searches

The Saved Searches option enables you to search for candidates using searches you have saved or searches made public by other users.

To search using a saved search, click the **Saved searches** button on the Candidate Search page. This opens the Saved Searches pop-up, which displays the following information:

Field	Description	
Keyword Search	Filter the list of saved searches by entering keywords into the search bar, up to 50 characters. Click Search to update the list.	
Saved Search Title	Click the title of the saved search to view the search results on the search results page. The results display all candidates found using the search criteria for the saved search.	
Date Saved	The date the search was added as a saved search displays below the saved search title.	
Search Criteria	The search criteria that were configured on the Candidate Search page displays in the center column. The following criteria types may have been configured for the search: • Resume/CV keywords	
	First Name	
	Last Name	
	Email	
	Country	
	City, state/province	
	 Zip Code 	
	Radius	
	• Applicant Flags - (Note: If a flag has been removed from a user, then the user does not appear in the search results using this search filter. If the flag's visibility rule has changed and no longer allows the user to view the flag or the flag cannot be used to search in Candidate Search, then candidates will not appear in the results for the flag.)	
	User Type	
	Source	
Options Drop- Down	The drop-down to the right of the search criteria displays the <i>Edit</i> option. Click the link to open the Candidate Search page with the criteria options filled. You can change the settings for the saved search, and then click <i>Save Search</i> to save the updated settings. To reset the search criteria after making changes, click <i>Reset</i>	

Field	Description
	Search.
Cancel	Click Cancel to cancel the changes to the search.

Save As

The *Save As* link only displays when editing an existing saved search. Once all changes are made to the saved search, click the *Save As* link to save the search as a new saved search. Enter a title in the Save Search pop-up, and then click **Save** to save the search.

Search

Once the search criteria are defined, click **Search** to view the search results page. If the option to require a reason for the search is enabled in Compliance Enablement Preferences, then the Reason for Search pop-up displays, and a reason for the search must be selected before the search results display.

Reason for Search

Clicking the **Search** button may require you to enter a reason for the search prior to conducting the search. If configured in Compliance Enablement Preferences, when **Search** is clicked, a Reason for Search pop-up opens. Select a requisition from the <u>Specific Requisition</u> drop-down to indicate the requisition for which you are conducting the search. Or, select <u>Other</u> and enter a reason in the text field. There is no character limit when entering a reason in the <u>Other</u> field. Click **Save** in the pop-up to execute the search.

Reason for Search	×
Please define the reason for this search.	
 Specific Requisition 	
Select Requisition	
Other	
	Cancel Save

Note: The <u>Specific Requisition</u> drop-down displays all requisitions that are available to the user. For this reason, the user must have permission to manage or review requisitions or must be a requisition owner.

Note: If users are not required to enter a reason for the search, then clicking **Search** on the Search Candidates page executes the search.

Advanced Search - Search Results Criteria Panel

The search criteria panel on the left side of the search results page for the Advanced Search tab displays all criteria that were selected when conducting the search. The criteria cannot be modified from the search results page.

Permissions					
Permission N	lame	Permission Description	Category		
Recruiting: Search Candidates	which enables sea candidates who ha permission also en appear in the Actio	ccess Candidate Search page for recruiting, rching for internal candidates and external ave applied for open positions. This hables the Invite to Apply action item to ons drop-down on the Search Candidates - ge. This permission can be constrained by	Recruiting Administration		

dvanced Search				
Edit Search 🗇 New Search	Acti	ons 🔻		Sort by Distance V
Current Search		John Appleseed 🏁 🏁		
REQUIRED: Resume Attachment EXACT: Accountant		Internal \$\$\left\$ 800-123-4567 Position: Telemarketer	email@csod.com Location: San Diego, CA	
REQUIRED: Organization EXACT: McKinsey		Manager: Mike Stanley User ID: 232-334	United States, 97889 23 miles	
OPTIONAL: School EXACT: UW Madison		John Fallon 🗯		
OPTIONAL: School EXACT: UW Milwaukee	X	Position: Telemarketer	⊡email@csod.com	10 B 🆀
REQUIRED: Licenses EXACT: CPA		Managor: Mike Stanle User ID: 232-334	Location: San Diego, CA United States, 97889 23 miles	
EXCLUDE: Licenses EXACT: CFA		John Latini 🏴		
Contact Details		Internal \$\$ 800-123-4567 Position: Telemarketer	email@csod.com Location: San Diego, CA	
FIRST NAME		Manager: Mike Stanle User ID: 232-334	United States, 97889 23 miles	
LAST NAME Michaels	0	John Tran 💻		
Location 🗸	1	Linternal 5 800-123-4567	email@csod.com Location: San Diego, CA	
COUNTRY United States of America		Position: Telemarketer Manager: Mike Stanle User ID: 232-334	United States, 97889 23 miles	
LOCATION Santa Monica, CA		🗴 John Nicol 📂 🎮		
POSTAL CODE	0	L Internal 5 800-123-4567	🖂 email@csod.com	
90404 RADIUS 25mi/ 40 km		Position: Telemarketer Manager: Mike Stanle User ID: 232-334	Location: San Diego, CA United States, 97889 23 miles	
		Nisy John		
Applicant Status		L Internal \$\$ 800-123-4567	⊡ email@csod.com	10 El 🌢
Applicant Flags		Position: Telemarketer Manager: Mike Stanle User ID: 232-334	Location: San Diego, CA United States, 97889 23 miles	
Application Flags				

Edit Search

Click *Edit Search* to return to the Advanced tab of the Candidate Search page and make changes to the search criteria. The criteria cannot be modified from the search results page.

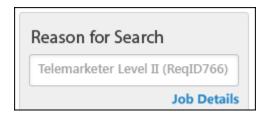
New Search

Click *New Search* to conduct a new search. This opens the Advanced Search tab on the Candidate Search page, with all fields returned to their default state.

Reason for Search

The Reason for Search section only appears if enabled in Compliance Enablement Preferences. This section displays the following information:

- Reason for Search This is the reason that was selected for conducting the search. The reason is not editable for the search once the search has been conducted.
- Job Details Click the *Job Details* link to view the job details, which includes the requisition's internal and external job description, minimum qualifications, and ideal qualifications.



Current Search

This section displays the resume criteria defined for the search. The equality and Boolean operators display, as well as the keywords entered for the search.

For grouped criteria, the child criteria are indented below the parent criteria.

Required ORGANIZATION is McKinsey			
Optional SCHOOL is UW Madison			
Required SCHOOL is UW Milwaukee			

Contact Details

This section displays the criteria defined in the <u>First Name</u>, <u>Last Name</u>, and <u>Email</u> fields on the Advanced Search tab. Only the fields that have values display in this section. This section does not display if none of the fields are defined for the search.

Location

This section displays the criteria defined in the <u>Country</u>, <u>City</u>, <u>State/Province</u>, <u>Postcode</u>, and <u>Radius</u> fields on the Advanced Search tab. Only the fields that have values display in this section. This section does not display if none of the fields are defined for the search or if geolocation is disabled.

User Type

This option displays the candidate type selected for the search, either Internal or External or both.

Applicant Flags

This option displays the applicant flags that were selected for the search.

Saved Searches

The Saved Searches option enables you to search for candidates using searches you saved or searches shared with you. To search using a saved search, click the **Saved searches** button. This opens the Saved Searches page.

Save As

The *Save As* link only displays when editing an existing saved search. Once all changes are made to the saved search, click the *Save As* link to save the search as a new saved search. Enter a title in the Save Search pop-up, and then click **Save** to save the search.

Save Search

Save the changes to the criteria by clicking the **Save Search** button. This opens the Save Search pop-up. Enter a unique title in the <u>Title</u> field, up to 100 characters. This is a required field. Click **Save** to save the criteria or **Cancel** to close the pop-up without saving. **Note:** *If you save changes to the criteria, and then make additional changes that you would like to save, the title given to the previous saved search populates the <u>Title</u> field in the Save Search pop-up. You can edit or rename the title.*

Save Search		×
Search Title		
	Cancel	Save

Search Results Details

The search results for both the Quick Search and Advanced Search tabs display all candidates who match the criteria defined for the search. The results display general details for each candidate and provide direct access to the candidate's Applicant Profile page.

Permissions					
Permission Name		Permission Description	Category		
Recruiting: Search Candidates	which enables sea candidates who ha permission also en appear in the Actio	ccess Candidate Search page for recruiting, rching for internal candidates and external ave applied for open positions. This hables the Invite to Apply action item to ons drop-down on the Search Candidates - ge. This permission can be constrained by	Recruiting Administration		

dvanced Search				
Edit Search 🕀 New Search	Actio	ons 🔻		Sort by Distance 🔻
Current Search		John Appleseed 🇯		
REQUIRED: Resume Attachment EXACT: Accountant		▲ Internal 5 800-123-4567 Position: Telemarketer	E email@csod.com	
REQUIRED: Organization EXACT: McKinsey		Manager: Mike Stanley User ID: 232-334	United States, 97889 23 miles	
OPTIONAL: School EXACT: UW Madison		John Fallon 📕		
OPTIONAL: School EXACT: UW Milwaukee		La Internal Sector Sector	⊡email@csod.com	10 B 🏜
REQUIRED: Licenses EXACT: CPA		Manager: Mike Stanle User ID: 232-334	Location: San Diego, CA United States, 97889 23 miles	
EXCLUDE: Licenses EXACT: CFA		John Latini 🏴		
Contact Details		Internal \$\$\sum 800-123-4567 Position: Telemarketer	E email@csod.com	
FIRST NAME John		Manager: Mike Stanle User ID: 232-334	United States, 97889 23 miles	
LAST NAME Michaels	0	John Tran 🛏		
Location 🗸		Internal 5800-123-4567	email@csod.com Location: San Diego, CA	
COUNTRY United States of America		Position: Telemarketer Manager: Mike Stanle User ID: 232-334	United States, 97889 23 miles	
LOCATION Santa Monica, CA		John Nicol 📂 🎮		
POSTAL CODE		La Internal 5 800-123-4567 Position: Telemarketer	E email@csod.com	4
90404 RADIUS 25mi/ 40 km		Manager: Mike Stanle User ID: 232-334	United States, 97889 23 miles	
Applicant Status		Nisy John	T will be advert	B B A
Applicant Flags		Fosition: Telemarketer	E email@csod.com	m #1 .
Application Flags		Manager: Mike Stanle User ID: 232-334	United States, 97889 23 miles	

Select All

The <u>Select All</u> box to the left of the <u>Actions</u> drop-down checks all candidates on the current page, enabling you to batch perform the Add to Requisition, Add To Talent Pool, and Send Email actions. Unchecking the box unchecks all users on the current page.

Actions

The <u>Actions</u> drop-down enables you to perform a series of actions on all candidates at once or on individual candidates. The drop-down only displays actions for which you have permission to perform and that are relevant to the functionality in your portal.

For detailed information about the existing Invite to Apply, Compare Candidates, Add to Requisition, Add to Talent Pool, and Send Email actions, see the Search Candidates - Actions topic in Online Help.

Export to Excel Action

This is a new action as part of the new Candidate Search. This action allows recruiters to export the data for the selected candidates to Excel. The Excel file includes the search criteria and the candidate data.

Candidate Search Results														
Search Criteria														
Resume/CV Keywords: *	Sales													
First Name:														
Last Name:														
Email:														
Country:														
City, State/Province:														
Postal Code:														
Radius:														
Source: A	All Sources													
Search User: 5	am Smith													
Search Date: 5														
Displaying 2														
Dishotal 1	0000122													
User ID A	pplicant Profile	eUser Type	First Name	Last Name	Phone	Email	Position	Manager	Organization	Applicant Flags	Country	Location	Postal Code	Distance (mi/km
jwilliams	View	Internal	Jordan	Williams	555-555-5555	williams@csod.com	Sales Associate	Sam			United States of Americ	Anytown C#	12345	
	View	External	Brian	Terdz	555-555-5555	bterdz@csod.com	Not Defined		Test org					

Quick Search Excel Output

The Excel output for searches conducted from the Quick Search tab includes a Search Criteria section and the table that lists the search results.

Search Criteria

The Search Criteria section displays the following information:

- Resume/CV Keywords This field displays the search terms defined in the quick search field.
- First Name
- Last Name
- Email
- Country
- City, State/Province
- Postal Code
- Radius
- Source
- Search User This field displays the name of the user who conducted the search.

- Search Date This field displays the date of the search.
- Displaying This field displays the number of candidates selected to export out of the number of candidates available to select.

Search Results

The information that displays in the table is the information that displays for candidates on the search results page.

- User ID
- Applicant Profile Click the View link to open the applicant's profile page.
- User Type This field displays the option selected in the User Type drop-down, either Internal or External or both.
- Phone
- Email The candidate's email displays as a link. Click the link to email the applicant from your email provider.
- Position
- Manager
- Organization
- Applicant Flags
- Country
- Location
- Postal Code This column only displays if an applicable country is selected in the Country field when configuring the search criteria.
- Distance

Advanced Search Excel Output

The Excel output for searches conducted from the Advanced Search tab displays the equality and Boolean operators, as well as the resume keywords defined for the search. The search results display below the criteria.

Best Practices for Exporting to Excel

When exporting candidate search data to Excel, it is a best practice to consider candidate data privacy and level of security when sharing Excel files with other users within the organization. For portals that have the archive applicant data functionality enabled in Compliance Enablement Preferences, the following best practices should be considered when using the Export to Excel action:

- Grant candidate search permissions to a limited number of users.
- Destroy exported candidate search results after a certain period of time.

Add to Talent Pool Action

The Add to Talent Pool pop-up is updated to match current styles. The following changes are made:

- The position of the options in the pop-up is switched.
- The Add button is renamed Save.

Add to talent pool	×
Add all selected users to a talent pool. Select existing Talent Pool Select Talent Pool	
Create New Talent Pool	
Cancel	/e

Candidate Results

The candidate search results are displayed in the order in which they were retrieved from the search server and currently cannot be sorted. The ability to sort results by various methods will be enabled in the next release. Each candidate card shows general information about the candidate and helps the recruiter to determine the candidates on which to take action.

	pleseed ⊨ ⊨	⊠ email@csod.com	in 17 🔺
	Telemarketer Mike Stanley 232-334	Location: San Diego, CA United States, 97889 23 miles	

Note: When constraints are applied to the recruiter or administrator's permission to search candidates, the search results are limited to candidates who fit within the permission constraints. For example, if the search criteria are for Sales Manager Position OU and Houston Location OU, then only candidates associated with the indirect OUs of Sales Manager and Houston display in the search results. For external candidates, the following constraints are associated with external candidates: Restrict to Position, Restrict to User's Position, Restrict to Division, Restrict to User's Location.

Feature	Description
Checkbox	Each row displays a checkbox next to the candidate's name with which you can

Feature	Description
	use to perform single actions. The box is unchecked by default.
Photo, Name & Contact	 The following displays for the candidate: Photo, if available; ghost image displays if no photo is available. Candidate's name displays as a link. Clicking the link opens the Applicant Snapshot page of the applicant's profile for the most recent requisition to which the candidate applied. The snapshot opens for all candidates, including those who have not yet applied to a job requisition. Type - Indicates if a candidate is internal (existing employee) or external (applied for a position through the application process). Phone Number Email
Applicant Flags	Applicant flags that are associated with an applicant display to the right of the candidate's name. This information only displays for users with permission to manage flags. The flags that display are the flags that are visible to the recruiter based on the flag's visibility settings and OU availability. Hover over the flag to view the name of the flag. Up to five flags display by default. Click <i>Show More</i> to open the Applicant Profile page, from which the recruiter can view the additional applicant flags. Click the flag to view the flag details. This opens the Application Flag pop-up, which displays the flag name and description. The user who added the flag also displays, as well as the date on which the flag was added. For portals with multiple languages enabled, the name and description display in the viewing user's language, if available.
Social Profiles	You can access the candidate's Facebook or LinkedIn social profiles by clicking the social profile icons on the right side of the candidate's row. The profiles must be linked via the My Account page or the candidate's My Profile page on the career site.
Resume	Click the resume icon solving to view the candidate's most recently uploaded resume. The resume opens in the file type in which the applicant submitted the document. For resumes that are typed or pasted into the <u>Write or Paste a Resume/CV</u> field during the application process, clicking the Resume icon opens a pop-up that displays the resume data. For pasted resumes, the resume data appears in the original format in which the candidate pasted it. For resumes submitted by internal users using their Career Center resume, clicking the Resume icon opens the resume as a PDF.

Feature	Description
Candidate Network	Click the Candidate Network f icon to view the candidate's Candidate Network page, with the candidate displaying as the center of the network. <i>See Candidate Network for additional information.</i>
Position	For internal candidates, displays their current position. For external candidates, displays their current position and the organization associated with their current position, as defined on the candidate's resume. If the position or organization are longer than 100 characters, hover over the name to display the full name.
Manager	This field displays the candidate's manager, if available. If the manager's name is longer than 100 characters, hover over the name to display the full name.
User ID	This field displays the user ID for the candidate.
Location	For internal candidates, displays the name of the Location OU to which they are assigned. For external candidates, displays the city and state defined in the Contact
	Information section of the user record.
Distance	The candidate's distance from the location displays below the location information. This field only appears if the search defined a location.

Next/Previous

Click <u>Next</u> to view the next page of search results. Click **Previous** to view the previous page of search results. Up to 20 search results display per page, with a maximum of 500 results total. If a larger-than-desired number of results appear, the search query may need to be refined with additional or more specific criteria.

Saved Searches

The Saved Searches feature enables you to search for candidates using searches you saved or searches shared by other users. Searches that are saved on the Quick Search and Advanced Search tabs are accessed from the same Saved Searches page. The searches display in order or most to least recently saved.

To search using a saved search, click the **Saved Searches** button on the Candidate Search page or the search results page. This opens the Saved Searches page.

Permissions

Permission Name		Permission Description C	Catego	jory	
Saved Searches		to view and manage the Availability column on les Page. This permission can be constrained b J.		Recruiting	

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
-------------------------------------	---	------------------------------

What would you like to searc	:h for?			Q Search
ïtle	Search Criteria	Created By	Availability	Options
Velder 5/17/2015	View Advanced Search Criteria	Rich Headley	View Availability Settings	
CFO 5/17/2015	View Advanced Search Criteria	Rich Headley	View Availability Settings	
CPA 5/17/2015	View Advanced Search Criteria	Rich Headley	View Availability Settings	
Product Manager 5/17/2015	Product Manager Source: All Sources User Type: Internal, External	Rich Headley	View Availability Settings	
Accountant 5/17/2015	Accountant Source: All Sources User Type: Internal, External	Rich Headley	View Availability Settings	
Manager 5/17/2015	View Advanced Search Criteria	Rich Headley	View Availability Settings	•

Keyword Search

Filter the list of saved searches by entering full or partial keywords into the search bar, up to 50 characters. Click **Search** to update the list.

Title/Date

This column displays the title of the search and the date the search was saved. Click the title of the saved search to view the search results of the saved search on the search results page. The results display all candidates found using the search criteria defined on either the Quick Search or Advanced Search tabs.

Search Criteria

For searches saved from the Quick Search tab, this column displays the search criteria that were configured on the Candidate Search page.

For searches saved from the Advanced Search tab, this column displays a *View Advanced Search Criteria* link. Click the link to open a pop-up that displays the full criteria defined on the Advanced Search tab. The pop-up displays the resume criteria defined for the search, as well as the equality and Boolean operators and the keywords entered for the search.

For grouped criteria, the child criteria are indented below the parent criteria.

Saved Search Title 02	×
Search Terms	- I
Required EXACT: Accountant	
Required EXACT: McKinsey	
Optional EXACT: UW Madison	
Required STARTS WITH: UW Milwaukee	
Required EXACT: CPA	
Exclude EXACT: CFA	
Contact Details	
FIRST NAME John	
LAST NAME Michaels	
Filters	
APPLICANT STATUS In Review, Backround Check, Video Interview	
	ОК

Note: For saved searches that included applicant flags, if a flag has been removed from a user, then the user does not appear in the search results that include the flag criteria. If the flag's visibility rule has changed and no longer allows the user to view the flag or the flag cannot be used to search in Candidate Search, then candidates will not appear in the search results for the flag.

Created By

This column displays the name of the user who saved the search.

Availability

This option allows you to share the search. The users with whom the search is shared must have permission to share saved searches and access the Candidate Search page in order to have access to the Saved Searches page.

To share your saved search:

1. Click *View Availability Settings* in the Availability column. This opens the Saved Search Availability pop-up.

Saved Search Availability	×
Saved Search 01 Determine the users who will be able to view the search criteria Selecting All Users will share the saved search only with users	
Employee Type 🔻	
All employees in Division: ACME Recruiters	✓ Include subordinates
All employees in Position: Accountant	✓ Include subordinates
🛍 All employees in Location: North America	✓ Include subordinates
🛍 All employees in Employee Type: Full Time	✓ Include subordinates
	Cancel Save

- 1. Select the users or organizational units (OU) from the <u>Select OU Criteria</u> drop-down with whom to share the search.
- 2. Check the <u>Include subordinates</u> option to include subordinate OUs. When unchecked, the saved search is not shared with subordinate OUs.
- 3. Click **Save**. This adds the saved search to the Saved Searches page for the selected users. The selected users cannot share the search with other users.

Note: Saved searches that include applicant flags or applicant custom fields in the search criteria cannot be shared.

Options

The drop-down to the right of the search criteria displays the *Delete* option. Click the link to delete the saved search. Saved searches that were shared with other users will no longer be available to those users after they are deleted.

Back

Click the **Back** button to return to the page from which you accessed the Saved Searches page.

Opt Out of Candidate Search

A new <u>Opt out of Candidate Search</u> option is added to the My Profile page on career sites and the Submit Application step of the application workflow. This option allows applicants to prevent their applicant data from recruiters from being able to search their applicant data in Candidate Search to see if they are a good match for other positions.

Welcome, Tasha!	Search Jobs	Options 🔻
Tasha Moore	Connect to Facebook	0
Edit Profile		
Prefix Suffix		
First Name *		
Middle Name		
Last Name *		
Moore		
Phone Number *		
Email *		
tmoore@csod.com		
Address Line 1 123 Main St.		
Address Line 2		
City		
Los Angeles		
State/ Province		
Zip/ Postal Code		
90028		
Country *		
Language * English (US) ▼		
Opt out of Candidate Search. If selected, your data will	not be searchable for other positions.	
Cancel Save		

Note: This feature is not available for internal applicants applying through Career Center. This option is also not available for recruiting agencies applying through an agency portal.

Opt Out on My Profile Page

To opt out of being searchable in Candidate Search:

- 1. Go to your My Profile page on the career site.
- 2. Select Edit Profile in the Options drop-down. This opens the Edit Profile page.
- 3. Check the box for the Opt out of Candidate Search field. The box is unchecked by default.
- 4. Click **Save** to save the change to your profile. This adds a message in the profile section of the My Profile page to indicate that the applicant is not searchable for other positions.

Note: The profile section on the My Profile page displays a message indicating that your data is or is not searchable for other positions.

Welcom	e, Tasha!	Search Jobs Options T
8	Tasha Moore € ⊠ tmoore@csod.com My data is not searchable for other positions.	Connect to Facebook

When the opt out option is checked, the setting applies to all existing and future applications submitted by the applicant.

Opt Out on Application

To opt out on the application:

- 1. Navigate to the Submit Application step.
- 2. Check the box for the Opt out of Candidate Search field. The box is unchecked by default.

Welcome Tasha Moore				
Accountant				
1 Resum	e 2			
Submit Application				
Default Action				
Opt out of Candidate Search. If selected, your application will not be searchable for other positions.				
Submit Application				

3. Click Submit Application.

Once the application is submitted, the Applicant Profile page indicates that the applicant's data is not searchable for other positions.

Applicant Profile

An applicant's decision to opt in or out of being searchable for other positions displays in a new <u>Candidate Search</u> field in the applicant details section of the Applicant Profile page. This field indicates whether or not the applicant is searchable in Candidate Search.

Applicant Profile		0 out of 1 selected
		Satch Process Options -
	➢ A Structure-QA@cornerstoneondemand.com Position: Learning Admin 월 800-555-1222 Division: Mayor's Staff ☆ United States Type: Internal Candidate Search: Data is not searchable for other positions	
Ann Structure		
Snapshot	Summary Statuses Application Comments Documents History	
Screenout 3/31 (req12794) Status: New Submission	Applicant Summary	

Onboarding

Encrypted User Custom Fields on Forms

Encrypted User Custom Fields on Forms Overview

Sensitive information, such as Social Security and driver's license numbers, is often collected from new hires during the onboarding process. While forms can be used to collect such information, the fields that were used to collect and store sensitive information were not secure.

This enhancement allows encrypted short text box fields to be used as User Custom Fields on forms. When included on a form, the fields automatically encrypt the data that is entered in the field once the form is saved or submitted.

Data Security Note: To ensure the encrypted data is secure, Cornerstone will not have the ability to view the encrypted data unless the data is exported through a data feed and a decryption key is provided by the organization.

Implementation

Upon implementation of this enhancement, this feature is available via work order for portals with the new Form Management functionality enabled. A public encryption certificate must be included when submitting the work order.

Decryption

Data can only be decrypted after the data has been exported via an outbound data feed, and then your private key is used to decrypt the exported data.

Use Case

Scenario

ACME Inc. is a consulting company with many international employees that travel around the globe to meet with clients. As part of their onboarding process, they ask for the new hire passport information so they can ensure they have it on file in the event of travel emergencies.

Enablement

ACME Inc. has contacted CSOD to create a Work Order to enable Encrypted Short Text Box for the User Record Custom Fields. ACME provides CSOD with the Public Encryption Certificate for CSOD to begin the enablement process. Once enablement has been completed, ACME Inc. is ready to start using Encrypted Short Text Box fields on the user record as well as in forms.

Administrator

1. Isadora is an admin at ACME Inc. She wants to ensure ACME can collect Passport Numbers from new hires. She first configures a new custom field for the User Record. She selects the Encrypted User Short Text Box type and names it Passport Number. She proceeds to create

other custom fields needed to collect passport information and selects whether they can be regular fields or encrypted depending on the sensitivity of the information.

- 2. After all the fields that are required are created for the user record, Isadora can start creating the form that needs to be assigned to new hires. She goes to Manage Forms to create a Traveler Information form. She is able to see all the User Record fields she had previously created under the User Custom Fields section of Available Fields. She puts all the necessary User Custom Fields on her form, including Encrypted Fields like Passport Number.
- 3. Isadora can then configure the onboarding task in Form Task Administration so that she can include the Traveler Information form as a form task in the onboarding workflow that will be assigned to new hires when onboarding is launched.

New Hire

- 1. Roger is a newly hired consultant for whom onboarding has just been launched. Roger sees on his Actions tab in Universal Profile that he has a task to complete a Traveler Information form.
- 2. Roger launches the form task and starts to fill out his information. As he fills out the form, he can see the data he has entered for the encrypted user custom fields, such as the Passport Number, in clear text.
- 3. After Roger has completed the form, he submits it. The data that he has entered in the encrypted user custom fields is then encrypted using ACME's public encryption key.
- 4. When Roger opens his Snapshot Document folder where his completed Traveler Information form is saved, he can view the responses he has entered for the form he submitted. However, for Roger and any other user who may have access to Roger's Document folder, the responses entered in the Passport Number field and other encrypted user custom fields display as ***** in place of the data that was entered.

Administrator

- 1. Isadora needs to ensure that the encrypted data in the user record, which was collected via forms, makes it over to the company's HRIS system. She works with CSOD to have the data outputted via an outbound data feed (ODF). The ODF includes the encrypted fields.
- 2. ACME uses its private decryption key to decrypt the data feed before the data is inputted into the correct fields.

Security

The following existing permissions apply to this functionality:

Permission	Name	Permission Description	Category	
Items -		r Form actions via the Universal Profile - Action Provident Provident Profile - Actions widget. This permission d.		

Action	Grants ability to view action items on the Action Items page and in the	Universal
Items -	Your Action Items widget. Users without this permission cannot access the	Profile
View	Action Items page. This permission can be constrained by Employee	
	Relationship, OU, User's OU, User's Self and Subordinates, and User's	
	Self. This is an end user permission.	

Forms - Manage	Grants access to the Manage Forms functionality. This permission can be constrained by OU and User's OU. This is an administrator permission.	Forms Management Administration
	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.	

	3		Core Administration	
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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 Employee Relationship, 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
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Snapshot Main - View	Enables user to view the Snapshot page for users within their permission constraints. This permission can be constrained by Employee Relationship, OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, and User's Direct Reports. Best Practice: For most users, this permission should be constrained by User Self and Subordinates.	Universal Profile
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Manage Forms - Create Form

With this enhancement, encrypted short text box fields can be used as user custom fields on forms and appear in the User Custom Fields section in the Available Fields panel when creating forms. When included on a form, the fields automatically encrypt the data that is entered in the field once the form is saved or submitted.

As with existing functionality for using custom fields on forms, the fields that are available in the User Custom Fields section are the fields for which the administrator meets the availability criteria configured for the custom field.

For more information about encrypted short text box fields, see the Custom Field Admin -Encrypted Short Text Box topic in the Custom Field Administration section of Online Help.

To create a form, go to **Admin > Tools > Core Functions > Form Management > Manage Forms**. Then, from the Manage Forms page, select the **Create Form** button.

Permissions				
Permission Name		Permission Description	Category	
Forms - Manage	permission can be con administrator permiss Note: <i>This permission</i> <i>functionality that is p</i>	n enables access to the Form Management art of the Onboarding module. This grant access to the Old Forms	Forms Management Administration	

Available Fields	~	Title Title		0
User Standard Fields User Custom Fields	> ~	Build	Access	Storage
✓ 11111111111	+	API Name		• Generate
🛗 AK - Date Field	+	Description		•
O AK - Radio Butt	+	Active		
matter Auto)	+	Active		
B-05355 Check	+			
🏙 B-05355 Date	+	An Encrypted Field		\$ ^ 4 0
▼ B-05355 Dropd	+	Required		
				Cancel Save Save and Continue

Add Field

To add the field to the form, drag and drop the field into the form. Or, click the add icon to the right of the field name. When users complete and submit the form, the information they enter into the field will be encrypted. Users can enter a maximum of 50 alphanumeric characters when filling in the field.

Settings

The following configuration options are available for encrypted short text box field types. The options display to the right of the field.

Option	Description
Settings	
	Click the Settings icon 🌣 to open the following option:
	• <u>Required</u> - This option is selected by default. When selected, end users are required to complete the field. When unchecked, the field is not required to be completed.
	Note: If the field is defined as required on the form but is defined as read-only in <i>Custom Field Administration, then the field is read-only for users when completing the form.</i>

Option	Description
Move Up/Down	Use the Up \uparrow and Down \checkmark arrows to move the fields to the desired location on the form. Fields can be moved above and below page breaks.
Remove	Click the Remove icon $^{\mbox{\scriptsize 20}}$ to delete the field. Once removed, the field reappears in the User Custom Fields list.

Edit Form

As with existing functionality for forms, when editing the form before the form is published, the encrypted field settings can be modified. The field can also be removed. Once the form is published, the field cannot be modified.

Remove Field

As with existing functionality for using custom fields on forms, if the field is removed from the form and is subsequently inactivated in Custom Field Administration, then the field cannot be added back to the form until the field is activated in Custom Field Administration.

Copy Form

When copying forms that include encrypted short text box custom fields, the field is copied if both of the following conditions are true:

- The administrator meets the availability criteria defined for the custom field.
- The custom field is active in Custom Field Administration.

Launch Form

When users launch a form that includes encrypted short text box custom fields, the information users enter into the field will be encrypted once the form is saved and/or submitted. Users can enter up to 50 numeric characters. The field may be required or read-only, depending on how the field is configured by the administrator when creating the form or when configuring the field in Custom Field Administration.

To launch a form, go to **Universal Profile > Actions**.

Permission Name		Permission Description Ca	itegory
Action Items - Forms		w Form actions via the Universal Profile - Actions ne/Custom page Actions widget. This permission ed.	Universal Profile
Items - Ye View A R	our Action Items wide ction Items page. Thi	action items on the Action Items page and in the get. Users without this permission cannot access is permission can be constrained by Employee 's OU, User's Self and Subordinates, and User's er permission.	Universal the Profile

Field Visibility

Encrypted short text box custom fields only display on forms if the following conditions are true:

- The user is within the availability criteria defined for the custom field in Custom Field Administration.
- The custom field is active in Custom Field Administration.

Read-Only Fields

If the encrypted short text box custom field is configured by the administrator to be read-only and data exists in the database to populate the field, then "*****" displays in the field when users launch the form. This indicates that the data is encrypted. Users cannot modify the field.

If data does not exist to populate the field, then the field is blank and users cannot modify the field.

Required Read-Only Fields

If the encrypted short text box custom field is configured by the administrator as required, but the user does not have accessibility to the field because the field is read-only, the user can still submit the form without completing the field.

Multi-Page Forms

When completing forms with multiple pages, the data entered in encrypted fields will appear as encrypted and displays as **** when moving between pages of the form by clicking **Next** or **Review**.

Submit Form

When the form is submitted by clicking the **Submit** button, the data entered in the encrypted short text box fields is encrypted. The user who completed the form and any other user who can access the form will not be able to view the user's response. In place of the response, the field displays *****.

View Form

When users view the form on the Snapshot - Documents folder, the data entered in the encrypted short text box fields is encrypted and displays as *****. For the user who completed the form and any other user who can access the form, the original data entered in the field is not visible and is encrypted. Even if the form is returned to the user for approval, the data that was originally entered into the field is encrypted.

The field is only visible on the form if the following conditions are true:

- The user is within the availability criteria defined for the custom field in Custom Field Administration.
- The custom field is active in Custom Field Administration.

Permissions

Permission Name		Permission Description	Categ	ory
Snapshot Documents - View	 Universal Profile - is controlled by a constrained by Em and Subordinates, 	iew the Documents widget and subpa Snapshot page. The availability of th backend setting. This permission can ployee Relationship, OU, User's OU, U User, User's Self, User's Manager, Us Subordinates, and User's Direct Report on.	is permission be User's Self ser's	Universal Profile
Snapshot Main - View	permission constrain Employee Relationsh User, User's Self, Use Subordinates, and Use	the Snapshot page for users within t ts. This permission can be constraine ip, OU, User's OU, User Self and Sube er's Manager, User's Superiors, User's ser's Direct Reports. Best Practice: <i>I</i> <i>n should be constrained by User Self</i>	d by ordinates, s For most	Universal Profile

Form Approvals

Form Approvals Overview

With this enhancement, an approval workflow process is added to the Form Management functionality. The approval process allows for submitted forms to go through a predefined approval workflow before they are considered completed.

Upon implementation, this functionality is controlled by backend settings that are disabled by default. To enable the settings, contact Global Product Support.

Use Cases

Computer Request Form

- 1. John is a new hire who is currently going through onboarding. One of the tasks in his onboarding workflow is for his manager, Kate, to fill out and complete a Computer Request Form for John. The Computer Request Form has been configured so that once it is submitted, it needs to be approved by an IT Manager.
- 2. Kate fills out and completes the Computer Request Form for John and submits it for approval. The submitted form will be saved in John's Snapshot Documents folder.
- 3. Bob, an IT Manager, is assigned a Form Approval Request after Kate submits the Computer Request Form. He reviews the Form Approval Request, and then clicks Approve to approve the form.
- 4. Bob can view the approved Computer Request Form for John in his Requests tab on his Actions page. The approved form can be seen in John's Snapshot Documents folder.

Travel Request Form

- 1. John has finished onboarding and is going on his first business trip as an account manager. Before he can travel, it is company policy that he submit a Travel Request Form. The Travel Request Form has been configured so that once it is submitted, it needs to be approved by either his manager or director.
- 2. John searches for the Travel Request Form in Global Search and launches the form. He completes the form and submits it for approval.
- 3. Kate, John's manager, and Jane, John's director, are both assigned a Form Approval Request to approve John's Travel Request Form.
- 4. Jane happens to view the form approval request before Kate does. She notices that John has entered an incorrect date. She enters a comment in the Comment box, then and clicks Deny and Return so that John can correct the date.
- 5. Jane can access the form she denied for John from her Requests tab.
- 6. Since either Kate or Jane could approve John's form, once Jane denies the form, the form is denied and returned to John. **Note:** *Kate can still submit an approval decision, but her decision is not counted in the approval workflow since Jane made an approval decision first.*

- 7. John is assigned a form task for his Travel Request Form. He launches it and sees that Jane has denied the form and has included a comment to explain why she denied it. He quickly updates the date on his form and resubmits it for approval.
- 8. Both Kate and Jane are once again assigned a Form Approval Request for John's resubmitted Travel Request Form. This time, Kate gets to John's form first, and she approves the form.
- 9. Since either Kate or Jane could approve John's form, once Kate approved the form, the form is approved. Jane can no longer enter an approval decision for the form.
- 10. Kate can access John's approved form from her Requests tab.
- 11. John can see his approved form in his Snapshot Documents folder.

Security

The following new permission applies to this functionality:

Permission Name		Permission Description		Category	
Request ItemsAllows user to access the Requests tab on the Universal Profile >- ViewActions tab. This permission cannot be constrained.				Universal Profile	
Form Approvals - Manage			-	gement histration	
	Management funct	sion enables access to the new Form ionality that is part of the Onboarding ission does not grant access to the Old t functionality.			

Request Items	Allows user to access form requests on Universal Profile Request	Universal
- Forms	items. This permission cannot be constrained.	Profile

The following existing permissions apply to this functionality:

Permissi	ion Name	Permission Description	Categ	Jory
Action Items - Forms		w Form actions via the Universal Prof e/Custom page Actions widget. This ed.		Universal Profile
Action Items - View	Your Action Items widg	ction items on the Action Items page et. Users without this permission car s permission can be constrained by E	nnot access the	Universal Profile

Relationship, OU, User's OU, User's Self and Subordinates, and User's	
Self. This is an end user permission.	

Global Em Administra Manage		Core Administration	
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|--|

-	Grants ability to manage user onboarding in the Onboarding Dashboard and the Onboarding tab on the Universal Profile. This permission can be constrained by OU and User's OU.	Employee Onboarding
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Onboarding - View	Grants ability to view the Onboarding Dashboard and the Onboarding tab on the Universal Profile. This permission can be constrained by OU and User's OU.	Employee Onboarding
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i			
	Forms -	Allows user to create and manage custom form templates	Forms Management
	Manage	and create and assign form tasks. This is an administrator	Administration
		permission.	

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 Employee Relationship, 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
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Snapshot Main - View	Enables user to view the Snapshot page for users within their permission constraints. This permission can be constrained by Employee Relationship, OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, and User's Direct Reports. Best Practice: For most users, this permission should be constrained by User Self and Subordinates.	Universal Profile
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Form Approvals Workflows

From the Form Approvals Workflows page, you can view, edit, and copy form approval workflows. You can also check the active status of a workflow. When an approval workflow is added to a form, the form must go through the defined approval process once the form is completed and submitted by the user.

To access the Form Approvals Workflows page, go to **Admin > Tools > Core Functions > Form Management**.

Permissions			
Permission N	lame	Permission Description	Category
Form Approvals - Manage	permission cannot permission. Note: <i>This permiss</i> <i>Management funct</i>	anage Form Approvals functionality. This be constrained. This is an administrator sion enables access to the new Form ionality that is part of the Onboarding ission does not grant access to the Old t functionality.	Forms Management Administration

Form Approval Workflows			Create Workflow		
Title	Sear	ch Include inactive			
Title 🗢		Description	Active	Options	
aaaxxx		хххааа	Yes	-	
аааххх-Сору		xxxaaa-ccc	Yes	-	
Back					

Create Workflow

To create a new approval workflow, click the **Create Workflow** button. This opens the Create Form Approval Workflow page.

Search Workflows

Workflows can be searched by title. To search for a workflow, enter a search term in the <u>Title</u> field and click **Search**. This filters the list of workflows to match the search terms.

Include Inactive

To include inactive workflows in the table, check the <u>Include inactive</u> option. The page refreshes to update the list to include inactive workflows.

Title/Description/Active

The title, description, and active status³ of existing workflows displays in the table. The information in the table columns is defined when configuring the workflow. The Title column is sortable.

Edit Workflow

To edit the workflow, click the *Edit* link in the <u>Options</u> drop-down. This opens the workflow for editing. Workflows can only be edited if they have not yet been used in a form. Once they have been used in a form, the *Edit* option does not display.

Copy Workflow

To copy the workflow, click the *Copy* link in the <u>Options</u> drop-down. This opens the workflow with all fields copied except the <u>Title</u> field.

³ Active approval workflows can be used in forms

Create Approval Workflow

From the Create Form Approval Workflow page, you can build a form approval workflow. This workflow can be used for any form created in Manage Forms. The approval workflow begins after the form has been submitted by the user and is used to ensure that the user's responses or the requests in the form are considered acceptable to submit.

To access the Create Form Approval Workflow page, go to **Admin > Tools > Core Functions > Form Management**.

Permissions			
Permission Name		Permission Description	Category
Form Approvals - Manage	permission cannot permission. Note: <i>This permiss</i> <i>Management funct</i>	nanage Form Approvals functionality. This be constrained. This is an administrator sion enables access to the new Form ionality that is part of the Onboarding ission does not grant access to the Old t functionality.	Forms Management Administration

Create Form Approval Workflow	
General	
Title Description	0 0
Active	
Add Approval Step	
	Cancel Save

Title

Enter a title in the <u>Title</u> field, up to 100 characters. This is a required field. If multiple languages are enabled for your portal, click the Translate icon to translate the field into other available languages.

Description

Enter a description in the <u>Description</u> field, up to 500 characters. This is not a required field. If multiple languages are enabled for your portal, click the Translate icon to translate the field into other available languages.

Active

Check or uncheck the <u>Active</u> box. When checked, the workflow can be selected as the approval workflow on a form. When unchecked, the workflow is considered inactive and cannot be used on a form.

Editing Note: Inactivating a workflow does not impact forms to which the workflow has already been added. However, the workflow will no longer be available to add to forms until the workflow is activated.

Add Approval Step

The approval steps make up the workflow of the approval process. Approval workflows must have at least one step and can have up to five steps. Up to two approvers can be added to each step. If two or more approvers are in the same step, then you can configure the step so that one or more approvers must approve the step in order for the workflow to move to the next step.

To add an approval step:

1. Click the **Add Approval Step** button. This opens the options for adding an approval step and adding approvers to the step.

Approval Workflow	
Approver Select	Add Approver
Select	, and Approver

- 2. Click the <u>Select</u> drop-down to choose the approver. You can select from individual users or employee relationships. At least one approver must be selected. All steps must have at least one approver.
 - a. Users Click the *Users* option. Then, click the *Select a user* icon \Box . This opens the Select a user pop-up from which you can search for and select the approver.
 - b. Employee Relationships Click the *Employee Relationships* option. Then, click the *Select an employee relation* icon . This opens the Select Employee Relationship pop-up from which you can select the relationship from the list. The relationships that display are the standard and custom employee relationships. The user who is defined for the employee

relationship is the user who will be the approver. **Note:** For onboarding users who were external applicants, the employee relationships is the relationship once the user reaches their start date.

- 3. Click the **Add Approver** button to add additional approvers to the step. When a step has more than one approver, decide if only one approver or all approvers must approve the form before the approval workflow can move to the next step.
 - a. Select *AND* to require that all approvers in the step must approve the form before the approval workflow can move to the next step.
 - b. Select *OR* to indicate that any of the approvers in the step can approve the form before the approval workflow can move to the next step.

To add approval steps, click the **Add Approval Step** button and repeat the steps above.

Move Step Up/Down

Click the Move Up arrow to move the step up in the workflow.

Click the Move Down arrow to the move the step down in the workflow.

Remove Approver

For steps with multiple approvers, you can remove an approver by clicking the **Remove Approver** button.

Remove Step

Click the Remove icon $^{\mbox{\scriptsize O}}$ to delete the step from the workflow.

Cancel/Save

Click **Cancel** to cancel creating/editing the workflow.

Click **Save** to save the workflow.

Create Form Approval Workflow		
General		
Title		
	•	
Description	0	
	•	
Active		
Approval Workflow		
Approver	↑ ↓ 0	
圖 Manager	Add Approver	
Approver	↑ ↓ 0	
D Approver		
OR 🔻		
Approver		
🗐 Indirect Manager	Remove Approver	
Add Approval Step		
	Cancel Sav	е

Edit Workflow

When editing an approval workflow that has *not* been used on a form, all fields are editable.

When editing an approval workflow that has been used on a form, only the <u>Active</u> field is editable.

Add Approval Workflow to Form

With this enhancement, an approval workflow can be added to new and existing forms. An Approval tab is added to the Create Form page in Manage Forms to allow administrators to select a predefined approval workflow or create a workflow on the form.

To create a form, go to **Admin > Tools > Core Functions > Form Management > Manage Forms**. Then, from the Manage Forms page, select the **Create Form** button.

Permissio	Permissions					
Permission Name		Permission Description	Category			
Forms - Manage	permission can be con- administrator permissi Note: <i>This permission</i> <i>functionality that is pa</i>	enables access to the Form Management rt of the Onboarding module. This rant access to the Old Forms	Forms Management Administration			

Add Predefined Approval Workflow

To add a predefined approval workflow to a form:

- 1. Go to the Approval tab on the form.
- 2. Check the <u>Approval Required</u> box to require the form submitted by the user be approved before it is considered complete. The box is unselected by default. **Note:** *The approval process is for forms that a user fills out and submits. The process is not for the actual form when it is created by the administrator.*
- 3. Select the <u>Use Existing Workflow</u> option.
- 4. Click the **Add Approval Workflow** button. This opens the Select Approval Workflow popup.
- 5. Search for and select an approval workflow from the list.
- 6. Click Save or Save and Continue.

For more information about creating forms, see the Create Form Overview page in Online Help.

Form with Approval Workflow			0	
Build	Access	Approval		Storage
Approval Required If selected, this form will go through Use Existing Workflow Cree Add Approval Workflow	2	below.		
Back		C	ancel Sav	Save and Continue

Create New Approval Workflow

To create a new approval workflow:

- 1. Go to the Approval tab on the form.
- 2. Check the <u>Approval Required</u> box to require that the form submitted by the user be approved before it is considered complete. The box is unselected by default. **Note:** *The approval process is for forms that a user fills out and submits. The process is not for the actual form when it is created by the administrator.*
- 3. Select the <u>Create New Workflow</u> option. This opens the options for adding an approval step.

Title			
Update Contact Information		0	
Build	Access	Approval	Storage
✓ Approval Required			
If selected, this form will go through	the designated approval workflow	below.	
🔘 Use Existing Workflow 💿 Crea	te New Workflow		
Title			
Title		0	
Approval Workflow			
Add Approval Step			
Back		Cancel	Save Save and Continue
Dack		Cancel	Save and Continue

- 4. Enter a title for the approval workflow in the <u>Title</u> field, up to 100 characters. This is a required field.
- 5. Click the **Add Approval Step** button. This opens the options for adding approvers.

Approval Workflow	
Approver	↑ ↓ 0
Select 💌	Add Approver
Add Approval Step	

- 6. Click the <u>Select</u> drop-down to choose the approver. You can select from individual users or employee relationships. At least one approver must be selected. All steps must have at least one approver.
 - a. Users Click the *Users* option. Then, click the *Select a user* icon \Box . This opens the Select a user pop-up from which you can search for and select the approver.
 - b. Employee Relationships Click the *Employee Relationships* option. Then, click the *Select an employee relation* icon . This opens the Select Employee Relationship pop-up from which you can select the relationship from the list. The relationships that display are the

standard and custom employee relationships. The user who is defined for the employee relationship is the user who will be the approver. **Note:** For onboarding users who were external applicants, the employee relationships is the relationship once the user reaches their start date.

- 7. Click the **Add Approver** button to add additional approvers to the step. When a step has more than one approver, decide if only one approver or all approvers must approve the form before the approval workflow can move to the next step.
 - a. Select *AND* to require that all approvers in the step must approve the form before the approval workflow can move to the next step.
 - b. Select *OR* to indicate that any of the approvers in the step can approve the form before the approval workflow can move to the next step.

To add approval steps, click the **Add Approval Step** button and repeat the steps above. Then, click **Save** to save the form as a draft, or click **Save and Continue** to move to the next step of creating the form.

For more information about creating forms, see the Create Form Overview page in Online Help.

Move Step Up/Down

Click the Move Up arrow to move the step up in the workflow.

Click the Move Down arrow to the move the step down in the workflow.

Remove Approver

For steps with multiple approvers, you can remove an approver by clicking the **Remove Approver** button.

Remove Step

Click the Remove icon $^{\odot}$ to delete the step from the workflow.

Copy Form

When copying a form from the Manage Forms page, any approval workflow configurations are copied.

Email Management

With this enhancement, the following emails are added to the Form Management action type in Email Administration:

- Form Approval Required
- Form Approval Completed

Permissions			
Permission Name	e	Permission Description	Category
Global Email Administration - Manage	active modules deleting email actions and wo by OU, User's	to manage email trigger templates across all s in the portal. Enables creating, editing and message templates for various system orkflows. This permission can be constrained OU, User Self and Subordinates, and User. inistrator permission.	Core Administration
Global Email Administration -		nly access to email templates/triggers and the global level for the portal. This permission	Core Administration

Global Email	Grants view only access to email templates/triggers and	Core
Administration -	email logs at the global level for the portal. This permission	Administration
View	can be constrained by OU, User's OU, User Self and	
	Subordinates, and User. This is an administrator	
	permission.	

Form Approval Required

Action	Description/Trigger
Form Approval Required	This email is triggered when a form request is assigned to an approver. The email can be sent to Request Recipient or a specific user. This email can be configured as a Notification or Reminder type email. This email is active by default and can be found in the Form Management action type section of Email Administration. Use Case: This trigger notifies approvers that they have a pending form approval request to complete.

Email Tags

The following email tags are available for the Form Approval Required email:

Tag Name	Description
ACTION.DATE	Date that the action took place that triggers the email.
APPROVER.DIVISION	Division of the approver.

Tag Name	Description
APPROVER.FIRST.NAME	First name of the approver.
APPROVER.LAST.NAME	Last name of the approver.
APPROVER.PHONE	Phone of the approver.
APPROVER.POSITION	Position of the approver.
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.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.

Form Approval Completed

Action	Description/Trigger
Forms Approval Completed	 This email is triggered when a form request is assigned to an approver. The email can be sent to Form Responder, Request Recipient, or a specific user. This email can be configured as a Notification or Reminder type email. This email is active by default and can be found in the Form Management action type section of Email Administration. Note: The form responder is the user who submitted the form. Note: The form approval request is considered completed when the form is either approved or denied. If the form is denied and returned, the form is not considered completed. Use Case: This trigger notifies the form responder (user who submitted the
	form) and approvers that the form approval request is completed.

Email Tags

The following email tags are available for the Form Approval Completed email:

Tag Name	Description
ACTION.DATE	Date that the action took place that triggers the email.
APPROVER.DIVISION	Division of the approver.
APPROVER.FIRST.NAME	First name of the approver.
APPROVER.LAST.NAME	Last name of the approver.
APPROVER.PHONE	Phone of the approver.
APPROVER.POSITION	Position of the approver.
APPROVAL.STATUS	Status of the approval (approved, denied, returned, etc.).
APPROVER.COMMENT	Comments made by approver.
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.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.

Universal Profile - Requests Tab

A new Requests tab is added to the Actions page in Universal Profile. From the Requests tab, approvers can access their pending approval requests, view completed requests, and view approval progress. The tab only displays for users with permission to view request items and request forms.

To view approval requests, go to **Universal Profile > Actions**. Then, click the Requests tab.

Permissions			
Permission Na	me	Permission Description	Category
Request Items	Allows user to a	ccess form requests on Universal Profile Reque	est Universal
- Forms	items. This perm	ission cannot be constrained.	Profile

Request ItemsAllows user to access the Requests tab on the Universal Profile >
Actions tab. This permission cannot be constrained.Universal
Profile

	Actions	ons 🔻
Reyhan Jhaver Innovation Director	Actions (6) Requests (2)	
9 Bio	Form Management By Date Submitted Show All Search	Q,
Feedback	Start Date 🛍 End Date 🛍 Search	
[월표] Transcript		
Actions	Form Management	
Snapshot	Vacation Request Form Date Submitted: 12/04/11 Status: Pending Submitter: Tonie Wan	~
	US Sales Development Team Date Submitted: 12/02/11 Status: Approved Submitter: Tonis Super Long Name Wan Extra Field: 11/28/11	~
	Vacation Request Form Date Submitted: 11/29/11 Status: Pending Submitter: Isadora Azevedo de Araujo Dantas	~
	Address Change form Date Submitted: 11/28/11 Status: Denied Submitter: Tonie Super Long Name Wan Extra Field: 11/28/11 View	~
	Approval Prog	ress

Sort & Filter Options

The following sorting and filter options are available:

- <u>Request Type</u> This option allows you to filter the list of requests by the request type. The following options are available:
 - Show All This option is selected by default. When selected, all forms appear on the page.
 - Form Approval Select this option to only display forms created in Manage Forms.
- <u>Date</u> This option allows you to sort the requests by the date submitted, the request status, or the request type.
- <u>Status</u> This option allows you to sort the requests by pending, approved, denied, or returned status. The Pending status is selected by default. You can also select the *Show All* option to show requests with any of the request statuses.
 - Approved This status indicates that the submitted form has been approved. The request is now considered completed.
 - Denied This status indicates that the submitted form has been denied. The approver may have included comments to explain why the form was denied.
 - Denied and Returned This status indicates that the submitted form has been denied and returned to the user.
 - Pending Approval This status indicates that the submitted form is pending action from the approver to approver, deny, or deny and return the form.
- <u>Keyword Search</u> This option allows you to filter the requests by the title of the form or the user who submitted the form. Enter the search terms in the field. **Note:** *There is no character limit to this field. However, the more search terms you enter, the more specific the search results. To expand the search results, you can enter fewer search terms.*
- <u>Start/End Date</u> This option allows you to filter the requests by a date range from when the form was submitted. Enter a date in the field or select a date from the calendar. The requests that display are the requests that were submitted by the user within the defined date range. The results display in order of the requests' status, from pending to approved, denied, returned. Within each group, the results display in order of least to most recently submitted.

Once the sort and filter options are defined, click **Search** to display the request results.

Request Details

The following information displays for approval requests:

- Title This field displays the linked title of the form. Click the link to view the form.
- Date Submitted This field displays the date on which the form was submitted.
- Status This field displays the approval status as Approved, Denied, Denied and Returned, or Pending Approval.

- Submitter This field displays the name of the user who submitted the request.
- Approve Click the **Approve** button it to approve the request. This commits your approval decision for that step in the approval workflow and any other steps for which you are an approver. If this is the last step in the workflow and you are the only approver in the step, then the request is considered completed, and the form's status is updated to Approved. If there are other approval steps in the workflow or if other approvers are in your step of the workflow who are required to submit an approval decision, then the request is not considered until all steps in the workflow are finished.
- Deny To deny a request, click the **Deny** button . Denying a request ends the approval workflow process.
- Options The following options display in the drop-down:
 - View To view a form for which you are an approver, click the drop-down in the far right of the form row. Then, click *View*. This opens the form so that you can see the content of the form and the user's responses, as well as approve, deny, or deny and return the form. You can also view the progress of the approval workflow. If you have already made an approval decision for the request, then your decision displays at the top of the form along with the date on which you submitted your decision. Click **Done** to close the form. *For more information on submitting an approval decision from the form, see the Approvers Approve/Deny Request on Form topic in Online Help.*
 - Approval Progress The approval workflow is defined by the administrator when creating the form. Your step of the approval process may be the only step or one of many steps. In addition, there may be more than one approver in your step. Steps can also be configured so that if there are multiple approvers in a step and one of the approvers approves or denies the form before you, then you can no longer make an approval decision. To view the progress of the form's approval workflow, click the drop-down in the far right of the form row. Then, click *Approval Progress*. This opens the Approval Progress pop-up. *For more information about the Approval Progress pop-up, see the Approvers View Approval Progress topic in Online Help.*
 - Approve This option only displays for requests that are in a Pending status. Click *Approve* from the drop-down to approve the request. This commits your approval decision for that step in the approval workflow and any other steps for which you are an approver. If this is the last step in the workflow and you are the only approver in the step, then the request is considered completed, and the form's status is updated to Approved. If there are other approval steps in the workflow or if other approvers are in your step of the workflow who are required to submit an approval decision, then the request is not considered completed until all steps of the workflow are finished. *For more information about approving requests, see the Approvers Approve/Deny Request topic in Online Help.*
 - Deny This option only displays for requests that are in a Pending status. Click *Deny* from the drop-down to deny the request. Denying a request ends the approval workflow process. *For more information about denying requests, see the Approvers Approve/Deny Request topic in Online Help.*

FAQs

What happens to the request if onboarding is cancelled for the onboarding user?

The approval request is automatically removed from the Requests tab for all approvers.

What if I'm an approver in more than one step?

If the same approver is in multiple steps, then their approval decision applies to each step they are in. Once they have submitted their approval decision, they are skipped in any remaining steps in the workflow.

What approval workflow is used for forms completed by proxy?

For forms that are completed by proxy, the approver is based on the user for whom the form is being completed.

Approvers - Approve/Deny Request on Form

Form approval requests can be approved or denied by opening the form and using the approval options on the form. Approvers can only provide comments when making an approval decision directly on the form. When viewing the form, approvers can see the form questions and the user's responses, as well as access the approval progress.

Note: Approvers can also approve/deny requests from the Requests tab in Universal Profile.

To view approval requests, go to **Universal Profile > Actions**. Then, click the Requests tab.

Permission	าร			
Permission Name		me	Permission Description	Category
Action Items - Forms	pag	•	 Form actions via the Universal Profile - Action Custom page Actions widget. This permission d. 	
Request It - Forms	ems		ccess form requests on Universal Profile Reque ission cannot be constrained.	st Universal Profile

Request Items	Allows user to access the Requests tab on the Universal Profile >	Universal
- View	Actions tab. This permission cannot be constrained.	Profile

Sample Computer Setup Request Form for Pui Mu	n		Options 🔻
		View Approval P	rogress
First Name			
Pui			
Last Name			
Mun			
S/11/2015			
Approval Comment (optional)			
	Cancel Deny	Deny and Return	Approve

View Form

When viewing the form to make an approval decision, the form is read-only. The form displays all questions and the user's responses to the questions.

Approve/Deny Form

The approval options display at the bottom of the form. For forms with multiple pages, the approval options and comments box display on the last page of the form. The following options are available:

- Deny Click **Deny** to deny the form. The request status is updated to Denied, and the form request is considered completed. No subsequent approvers in the workflow can make an approval decision. Any approval decisions and comments made prior to the denial are saved.
- Deny and Return Click **Deny and Return** to deny the form and return it to the submitter. The request status is updated to Returned, and the form request is considered completed. Any approval decisions and comments made prior to the denial are saved. The user is notified that the form has been denied and returned. The user can modify the form and resubmit. Once the user resubmits the form, the approval workflow starts again from the beginning. **Note:** For forms that were completed by proxy, the form is returned to the user who originally completed the form. The form can be corrected and resubmitted by the original user.
- Approve Click **Approve** to approve the form. This commits your approval decision for that step in the approval workflow and any other steps for which you are an approver. If this is the last step in the workflow and you are the only approver in the step, then the request is considered completed, and the form's status is updated to Approved. If there are other approval steps in the workflow or if other approvers are in your step of the workflow, then the request is not considered completed until all steps in the workflow are finished.

For information about the approval process, see the Approvers - View Approval Progress topic in Online Help.

Approval Comment

Enter comments about your approval decision in the Approval Comment box, up to 500 characters. Providing comments is optional.

Best Practice: When using the **Deny and Return** option, it is a best practice to provide comments that explain why the form is being returned to the user.

View Approval Progress

To view the approval progress of the approval workflow, click the *View Approval Progress* link from the Options drop-down. This opens the Approval Progress pop-up.

Approvers - View Approval Progress

The Approval Progress pop-up displays all steps of the approval workflow. The approval decision and any comments by approvers display for each step.

To access the Approval Progress pop-up:

- Click the *Approval Progress* link in the options drop-down on the Actions > Requests tab in Universal Profile.
- Click the *Approval Progress* link in the <u>Options</u> drop-down on the form.

Ар	oroval Progre	SS						×
9	Reyhan Jhaver Approved 2/14/2015 This is a short commen	e nt						
¢	Debra Smith Approved 2/15/2015	?	AND	Oscar Alley Approved 2/14/2015				
 ✓ 	Charlie Carroll		AND	Jessica Walker-Gre Returned 2/15/2015 This, on the other hand, my fellow coworkers, is what I call an extremely super ultra long comment. Not sure why one would need so many words, but we need to be prepared.	OR	Steve Vargas		
\bigcirc	Executive 1							
	Indirect Manager							
							Close	

Approver Details

The following information displays in the approval box for approvers:

- Approver Name The approver's name displays at the top of the box. For approval steps that have not yet been reached in the workflow, the approver's name displays as the employee relationship to the user. **Note:** *If the form is completed and submitted by someone other than the user, such as the user's manager, then the employee relationship is the approver's relationship to the user not the person who filled out the form.*
- Approval Status The approval status displays below the approver's name. The following are the possible statuses:
 - Approved This status indicates that the approver approved the form.
 - Denied This status indicates that the approver denied the form.
 - Returned This status indicates that the approver denied the form and returned it to the submitter.
- Approval Status Icon A checkmark displays in the box if the status is Pending or Approved. An X displays in the box if the approver denies the form or denies and returns the form.
- Approval Decision Date The date on which the approver submitted their approval decision displays to the right of the approval status.
- Comments If the approver entered comments when making their approval decision, then the comments display in the box.

If the box is grayed out, the approval step has not yet been assigned or has been retracted.

Approval Steps

Each row in the pop-up represents a step in the approval workflow. Steps can include one or more approvers. The following approval rules apply:

Step with One Approver

- 1. If a step only has one approver, and the approver approves the request, then the step is considered completed. The workflow moves to the next step. If there are no additional steps, then the workflow is complete and the form is considered Approved and completed.
- 2. If a step only has one approver, and the approver denies the request, then the workflow is stopped. The request status is updated to Denied, and the form request is considered completed. No subsequent approvers in the workflow can make an approval decision. Any approval decisions and comments made prior to the denial are saved. Changes cannot be made to the form by the user if the form is denied. **Note:** *In order to allow users to make changes to denied forms, the approver must select the Deny and Return option instead of the Deny option.*
- 3. If a step only has one approver, and the approver clicks the **Deny and Return** button on the form, then the workflow is stopped. Any approval decisions and comments made prior to the denial are saved. The request status is updated to Returned, and the form request is considered completed. The user is notified that the form has been denied and returned. The user can modify the form and resubmit. Once the user resubmits the form, the approval workflow starts again from the beginning.

Step with Two Approvers

- 1. If a step has two approvers, and both approvers approve the request, then the workflow moves to the next step. If there are no additional steps, then the workflow is complete and the form is considered Approved and completed.
- 2. If a step has two approvers, and one of the approvers in the step denies the request, then the workflow is stopped. The request status is updated to Denied, and the form request is considered completed. The other approver in the step and in the workflow can no longer make an approval decision. No subsequent approvers in the workflow can make an approval decisions and comments made prior to the denial are saved.
- 3. If a step only has one approver, and the approver clicks the **Deny and Return** button on the form, then the workflow is stopped. Any approval decisions and comments made prior to the denial are saved. The user is notified that the form has been denied and returned. The user can modify the form and resubmit. Once the user resubmits the form, the approval workflow starts again from the beginning.

AND/OR Rules

- 1. For approval steps with two approvers with AND between the approver's names, both approvers must make an approval decision before the workflow can move to the next step in the approval process.
- 2. For approval steps with two approvers with OR between the approver's names, only one of the approvers needs to submit an approval decision before the workflow can move to the next step in the approval process.

My Inbox Widget

Permissions			
Permission Na	me	Permission Description	Category
Request Items - Forms		ccess form requests on Universal Profile Requ hission cannot be constrained.	est Universal Profile

The My Inbox widget on the Welcome Page displays an approver's pending form approval requests. The approver can click the View Form Approval Requests link to open the Requests tab in Universal Profile. The number of pending approvals displays below the link.

Users - Submit Form

When submitting a form that has an approval workflow, the **Submit** and **Sign** buttons are updated to indicate that the form will be submitted for approval.

To launch a form, go to **Universal Profile > Actions**. Then, click the **Launch** to open the form.

Permission	IS		
Permissio	on Name	Permission Description	Category
Action Items - Forms		 Form actions via the Universal Profile - Action/ P/Custom page Actions widget. This permission d. 	
Items - View	Your Action Items widge Action Items page. This	ction items on the Action Items page and in t et. Users without this permission cannot acce permission can be constrained by Employee oU, User's Self and Subordinates, and User permission.	ess the Profile

Submit for Approval

When submitting a form that has an approval workflow, a **Submit for Approval** button appears instead of a **Submit** button. Once the user has filled out the form, they click **Submit for Approval** to submit the form. This triggers the approval process for the form, and the first approval request is assigned to the first approver in the approval workflow.

Sample Computer Se	tup Request Form
First Name *	7
Last Name *	
Last Hire Date	
	Cancel Submit For Approval

Sign and Submit for Approval

For forms that require a signature and that have an approval workflow, a **Sign and Submit for Approval** button appears instead of a **Sign** button. Once the user has filled out the form, they click **Sign and Submit for Approval** to sign the form and then submit it. Once the form is submitted, the approval process for the form is triggered, and the first approval request is assigned to the first approver in the approval workflow.

Users - Resubmit a Denied and Returned Form

Permission	IS		
Permissio	on Name	Permission Description	Category
Action Items - Forms	-	 Form actions via the Universal P Custom page Actions widget. Th d. 	
Items - View	Your Action Items widge Action Items page. This	ction items on the Action Items part et. Users without this permission permission can be constrained by s OU, User's Self and Subordinate r permission.	cannot access the Profile

When an approver denies and returns a form, users can launch the returned form from their Universal Profile > Actions tab.

Sample Computer Setup Request Form	
Tonie Wan denied and returned to you with the following comments: This is filled out incorrectly. Please update.	
First Name * Pui Last Name * Mun Last Hire Date 5/11/2015	
	Cancel Resubmit For Approval

View Approver's Comments

If the approver included comments when returning the form, the comments display at the top of the form.

Make Changes to Forms

Users can make changes to the form in order to correct the errors identified by the approver.

E-Signature

If the form requires an e-signature prior to resubmitting the form, then a **Sign and Resubmit for Approval** button displays at the bottom of the form. The user can click the button to sign the form in the signature field and then resubmit the form for approval.

Resubmit Form

Once the changes are made to the form, click **Resubmit for Approval** to submit the form for approval. The form is returned to start the approval process again.

Form Due Date

For forms that are assigned through an onboarding task, the due date for resubmitting the form is the same due date that was originally configured for the form.

Forms that are launched by the user via Global Search do not have a due date for completion, even when denied and returned by an approver.

Proxy Completion

For forms that were completed by proxy, the form is returned to the user who originally completed the form. The form can be corrected and resubmitted by the original user.

View Approval Status

Users can view the approval status of their form from their Universal Profile > Actions tab. The approval status displays in the <u>Status</u> field in the form details.

Users can also view the approval status of their form from their Universal Profile > Onboarding tab. The approval status displays in the Status column of the tasks table.

Users - View Form Approval Status

Permissions			
Permission Name		Permission Description	Category
Snapshot Documents - View	Universal Profile - is controlled by a l constrained by Em and Subordinates,	ew the Documents widget and subpage with Snapshot page. The availability of this permi backend setting. This permission can be ployee Relationship, OU, User's OU, User's S User, User's Self, User's Manager, User's Subordinates, and User's Direct Reports. This on.	ission Profile Self

Universal Profile > Snapshot Documents

When a user submits a form that requires approval, the user can view the form's approval status by opening the submitted form from their Universal Profile > Snapshot Documents page. The top of the form will display one of the following approval statuses:

- Approved This status indicates that the submitted form has been approved. The form is now considered completed.
- Denied This status indicates that the submitted form has been denied. The approver may have included comments to explain why the form was denied. When a form is denied, the user cannot make changes to the form and resubmit it for approval.
- Denied and Returned This status indicates that the submitted form has been denied and returned to the user. The user can access the returned form from the Universal Profile > Actions tab, where they can make changes to the form and resubmit it for approval.
- Pending Approval This status indicates that the submitted form is pending action from the approver to approve, deny, or deny and return the form.

Sample Computer Setup Request Form
Pending Approval.
First Name Tonie Last Name Wan
Last Hire Date 5/19/2015
Done

Universal Profile > Onboarding

When a user submits a form that requires approval, the user can view the form's approval status from their Universal Profile > Onboarding tab. The approval status displays in the Result column of the tasks table. The following are the possible approval statuses:

- Approved This status indicates that the submitted form has been approved. The form is now considered completed.
- Denied This status indicates that the submitted form has been denied. The approver may have included comments to explain why the form was denied. When a form is denied, the user cannot make changes to the form and resubmit it for approval.
- Denied and Returned This status indicates that the submitted form has been denied and returned to the user. The user can access the returned form from the Universal Profile > Actions tab, where they can make changes to the form and resubmit it for approval.
- Pending Approval This status indicates that the submitted form is pending action from the approver to approve, deny, or deny and return the form.

Ari Baraban	Bio							Options •
Bio Actions	Ari Baraban Car Clubs 1-9 Position						© CONNECTIONS © MUTUAL	
File	About	Resume/CV	Career	Onboarding				
출표 Transcript	Integration	+ Form Task (In	ter) (Start Da	te: 10/18/2014)				
	New Divisio	on:						
	Car Clubs New Locatio Daring Locat New Manag Srivastava, D	on: tion ger:			66%			
	Car Clubs New Locatio Daring Locat New Manag Srivastava, D	on: tion ger: Dhara			66% atus	Assignee	Result	
	Car Clubs New Locatic Daring Locat New Manag Srivastava, D Status: Com	on: tion ger: Dhara		St		Assignee Ali Baraban	Result	
	Car Clubs New Locatic Daring Locat New Manag Srivastava, D Status: Com Task Title Form I-9 Form I-9	on: tion ger: phara npleted - 66%		St	atus	A Charles Press and a charles of the	Result	
	Car Clubs New Locatic Daring Locat New Manag Srivastava, D Status: Com Task Title Form 1-9	on: tion ger: phara npleted - 66%		56 CC	atus ompleted	Ali Baraban		1.
	Car Clubs New Locatic Daring Locat New Manag Srivastava, D Status: Com Task Title Form I-9 Form I-9 Benefits Ele Employee A	on: tion ger: phara npleted - 66%		St CC In CC	atus ompleted ompleted Progress ompleted	Ali Baraban Dhara Shrivastava	Authorized	
	Car Clubs New Locatic Daring Locat New Manag Srivastava, D Status: Com Task Title Form I-9 Form I-9 Benefits Ele	on: tion ger: Dhara npleted - 66%		St CC In CC	attrs ompleted ompleted Progress	Ali Baraban Dhara Shrivastava Ali Baraban	Authorized	
	Car Clubs New Locatic Daring Locat New Manag Srivastava, D Status: Com Task Title Form I-9 Form I-9 Benefits Ele Employee A W-4 Form Business Ca	on: tion ger: Dhara npleted - 66%		Sto Co In Co In Co In	atus ompleted ompleted Progress ompleted	Ali Baraban Dhara Shrivastava Ali Baraban Ali Baraban	Authorized	

Users - View Completed Form

Permissions					
Permission N	lame	Permission Description	Category		
Snapshot Documents - View	Universal Profile - is controlled by a constrained by Em and Subordinates,	iew the Documents widget and subpage within Snapshot page. The availability of this permis backend setting. This permission can be ployee Relationship, OU, User's OU, User's Se User, User's Self, User's Manager, User's Subordinates, and User's Direct Reports. This i on.	sion Profile If		

A form that requires approval is not considered completed until the form is approved or denied. Users can view completed forms by opening the form from their Universal Profile > Snapshot Documents page. The approval status displays in a banner at the top of the form, as either Approved or Denied.

Sample Computer Setup Request Form	
Form approved.	
First Name	
Pui	
Last Name	
Mun	
Last Hire Date	
5/1/2015	
Dom	e

Future Manager in Onboarding Emails

Prior to this enhancement, when User's Manager was selected as the email recipient, the email was only sent to the user's current manager. This presented an issue in the onboarding process, because the user's current manager for internal new hires was not the manager that the new hire would have once they reached their onboarding start date. External new hires do not have a current manager while they are in their temporary organizational units, so the email is not sent to any recipient.

This enhancement rectifies the issue by adding an option to designate the User's Future Manager as a recipient for Onboarding emails. The user's future manager is the manager they will have when they reach the start date for their new position.

Affected Emails

For the following emails, a User's Future Manager recipient option is added to the <u>Send To</u> and <u>Cc</u> fields:

- Employee Onboarding Started
- Employee Onboarding Cancelled
- Onboarding Form Assigned
- Onboarding Form Completed

Action :	Employee Onboarding Started
Email Title :	Active
From Address :	techwriterQAR@csod.com
Reply-To Address :	
Type :	Notification V
Language :	English (US)
Please select users to	receive this email.
Send To :	G User OR Add (A separate email will be sent to each recipient listed)
Cc :	I Add I (These users will be copied on the emails sent out to each recipient)
	Restrict the availability of this email to the User's Future Manager
Availability :	Select Criteria
Tags are replaced wit	h the corresponding values when emails are sent.
	Display a list of tags that can be used within the subject and body of the e-mail 🖉
Subject :	
Message :	HTML O Plain Text
	A 🔹 🏷 👻 Font Name 🔹 Real 🝷 Paragraph St 👻 Zoom 🔹 🎰 🔛 🌷 🕩 🙆
	ウ・ペ・ 📰 務 🕺 🛍 🕄 🐏 🎌 🂖 📓 📲 🏰 👖 🖬 🗄 🕒 Ω・ 🗊・
	B I ∐ abs] ≡ ≡ ≡ ≝ x* ×₂ ½ ½ ‡ ≢ ☷ ☷ 😣 😣 晶 ダ -

Security

The following existing permissions apply to this functionality:

Permission Name		Permission Description	Category	
Global Email Administration - Manage	active modules deleting email actions and wo by OU, User's	to manage email trigger templates across all s in the portal. Enables creating, editing and message templates for various system orkflows. This permission can be constrained OU, User Self and Subordinates, and User. inistrator permission.	Core Administration	
Global Email Administration - View	email logs at t can be constra	nly access to email templates/triggers and the global level for the portal. This permission ained by OU, User's OU, User Self and and User. This is an administrator	Core Administration	

Added Recruiting Requisition and Vendor Fields in Custom Reports

With this enhancement, new fields are added to the Requisition and External Vendor sections for custom Recruiting reports. In addition, existing fields are enhanced in the External Vendor section.

Permissions			
Permission Name		Permission Description	Category
Custom Recruiting Report - Create		y to create and edit Custom Recruiting repo ion can be constrained by Division, Position	
Custom Recruiting Report - View	created by self	o view results of Custom Recruiting reports or shared by others. This permission can be Division, Position, and Location.	

External Vendor Fields

The following new fields are added and existing fields are enhanced in the External Vendor section:

Field Name	Field Description	Field Type
Assigned Date	This is a new field. This field displays the date the assignment was made to the applicant for the external vendor action. The assigned date will store the date assigned to the external vendor as integrated with Integration Using Platform (IUP).	Date
Completed Date	This is a new field. This field displays the date the assignment was completed for the external vendor action. The completed date will store the date completed by the external vendor as integrated with Integration Using Platform (IUP).	Date
External Vendor Name	This is an existing field. This field is modified to display the name of the external vendor that is used for integration with Integration Using Platform (IUP). Previously, this field displayed the external vendor name that was used for RISE integrations.	Text
External Vendor Package Result	This is a new field. This field displays the result of the package as returned from the external vendor. This field is only populated if the external vendor returns individual products for a single order and includes results for each product.	Text
External Vendor Package Title	This is a new field. This field displays the title of the individual package as returned from the external vendor. This field is only populated if the external vendor returns individual products for a	Text

Field Name	Field Description	
	single order with a title.	
External Vendor Product	This is an existing field. This field is modified to display the product name of the external vendor that is used for integration with Integration Using Platform (IUP). Previously, this field displayed the external vendor product name that was used for RISE integrations.	Text
External Vendor Product Result	This is a new field. This field displays the result returned from the external vendor for a given product as integrated with Integration Using Platform (IUP).	Text
External Vendor Product Score	This is an existing field. This field is modified to display the score returned from the external vendor that is used for integration with Integration Using Platform (IUP). Previously, this field displayed the score from the external vendor that was used for RISE integrations.	Numeric
External Vendor Status	This is an existing field. This field is modified to display the status returned from the external vendor that is used for integration with Integration Using Platform (IUP). Previously, this field displayed the external vendor status that was used for RISE integrations.	Text

Requisition Fields

The following fields are added to the Requisition section:

Field Name	Field Description	Field Type
Requisition Date Closed	Date the requisition was closed.	Date
Requisition Date Posted	Job posting date per career site for each job.	Date
Requisition Template Title	Title or name of the requisition template.	Text

Security

The following existing permissions apply to this functionality:

Permission Name		Permission Description	Category
Custom Recruiting Report - Create		y to create and edit Custom Recruiting report ion can be constrained by Division, Position,	
Custom Recruiting Report - View	created by self	o view results of Custom Recruiting reports or shared by others. This permission can be Division, Position, and Location.	Reports - Analytics

Succession

Custom Employee Relationships for Succession Snapshot

Custom Employee Relationships for Succession Snapshot

Within the system, administrators can define custom employee relationships such as Dotted Line Manager or Secondary Manager. These custom relationships can be used in performance reviews, compensation, and custom approval workflows for Learning.

Prior to this enhancement, organizations could not assign and constrain permissions based on custom relationships.

With this enhancement, administrators can constrain users' permissions for Succession functionality using the custom employee relationships defined in their portal. These constraints can be applied to either individual permissions or as general constraints within a security role.

The following permissions can now be constrained by custom employee relationships:

- Bio Career Preferences View
- Bio Resume View
- Snapshot Succession Manage
- Snapshot Succession View

Use Case

A project manager is managing the project execution and the team that is assigned to the project. Based on the execution of this project, management will be making talent review decisions and reviewing team members' readiness to progress in their career paths. The project manager wants to review the succession information for their team members. The project manager also wants to assign successors for an exceptional team member who is ready to move to another position. The project manager views the Succession Snapshot page for their team members where they can view succession information and add successors.

Considerations

Custom relationships are not displayed in the Team section of the Universal Profile - Bio - About page.

This constraint type is only available for the indicated permissions. It is not available for all permissions that currently allow manager constraints (User's Self and Subordinates, User's Direct Reports).

Implementation

Upon release, this functionality is automatically enabled for organizations using Succession, Universal Profile: Snapshot, and custom employee relationships. The availability of the Employee Relationships functionality is controlled by a backend setting. To enable this functionality, contact Global Product Support or your Client Success Manager.

Security

The following new permission applies to this functionality:

Permission N	ame	Permission Description	Categ	jory
Snapshot Succession - View	Universal Profile - constraints. On thi ratings. Users can regardless of perm User's Subordinate Relationship. Best	ew the Succession widget and subpage with Snapshot page for users within their permis is page, users can view successors and succ not view their own Succession widget and su hissions. This permission can be constrained es, User's Direct Reports, and Employee E Practice: For most users, this permission so User Self and Subordinates.	sion essor ıbpage, by	Universal Profile

The following existing permission is renamed and is now titled Snapshot Succession - Manage. This permission can now be constrained by Employee Relationship. The permission title and description will be updated when this functionality is released to Live portals.

Permission N	ame	Permission Description	Categ	jory
Snapshot Succession - Manage	Universal Profile - constraints. On th and successor rati widget and subpa- be constrained by User's Direct Repo	ew the Succession widget and subpage withi Snapshot page for users within their permiss is page, users can view and manage success ings. Users cannot view their own Succession ge, regardless of permissions. This permissio Employee Relationship, User's Subordinates orts. Best Practice: For most users, this I be constrained by User Self and Subordinates	sion ors n n can , and	Universal Profile

The following existing permissions apply to this functionality and can now be constrained by Employee Relationship. The permission descriptions will be updated when this functionality is released to Live portals.

Permission N	ame	Permission Description	Categ	ory
Bio Career Preferences - View	within the permi constrained by E	view the Bio - Career Preferences page for u ssion constraints. This permission can be mployee Relationship, OU, User's OU, User S s, User's Direct Reports, User's Self, and Use	elf	Universal Profile
Resume - per View Bio per	mission constraints - Resume page, th mission can be con	he Bio - Resume page for users within their s. If a user does not have permission to view en the Resume tab is not available. This strained by Employee Relationship, OU, User nates, User's Direct Reports, User's Self, and	's OU,	Universal Profile

Snapshot - Succession

Users with the Snapshot Succession - View permission can view the Succession widget on the Snapshot page and the Snapshot: Succession page for users within their permission constraints.

Users with the Snapshot Succession - Manage permission can view the Succession widget on the Snapshot page and view and edit the Snapshot: Succession page for users within their permission constraints.

To access the Snapshot page, go to **Home > Universal Profile**. Then, click the Snapshot tab. **Note:** *The location of this link is configurable by your system administrator.*

To access another user's Universal Profile - Bio page, click the user's photograph from any page within Universal Profile or from Global Search. From there, you can access the user's Snapshot page by clicking the Snapshot tab. Users can view the Snapshot page of other users who are within their permission to view the Snapshot page.

Permissions				
Permission N	lame	Permission Description	Categ	ory
Snapshot Succession - Manage	Universal Profile - constraints. On th and successor rati widget and subpa- be constrained by User's Direct Repo	ew the Succession widget and subpage within Snapshot page for users within their permiss is page, users can view and manage success ings. Users cannot view their own Succession ge, regardless of permissions. This permissio Employee Relationship, User's Subordinates, orts. Best Practice: For most users, this be constrained by User Self and Subordinates	sion ors n can and	Universal Profile
Snapshot Succession - View	Universal Profile - constraints. On thi ratings. Users can regardless of perm User's Subordinate Relationship. Best	ew the Succession widget and subpage within Snapshot page for users within their permiss s page, users can view successors and succes not view their own Succession widget and sub issions. This permission can be constrained be es, User's Direct Reports, and Employee Practice: For most users, this permission sh User Self and Subordinates.	ion ssor opage, oy	Universal Profile

Bio - Resume

Users with the Bio Resume - View permission can view the Bio: Resume page for users within their permission constraints.

To access the Bio: Resume page, go to **Home > Universal Profile**. Click the Bio tab. Then, click the Resume subtab. **Note:** *The location of this link is configurable by your system administrator.*

To access another user's Universal Profile - Bio page, click the user's photograph from any page within Universal Profile or from Global Search. From there, you can access the user's Snapshot page by clicking the Snapshot tab. Users can view the Snapshot page of other users who are within their permission to view the Snapshot page.

Permissions

Permissio	on Name	Permission Description	Categ	Jory
Bio Resume - View	permission constraints Bio - Resume page, th permission can be con	he Bio - Resume page for users within their 5. If a user does not have permission to view en the Resume tab is not available. This strained by Employee Relationship, OU, User hates, User's Direct Reports, User's Self, and	's OU,	Universal Profile

Bio - Career

Users with the Bio Career Preferences - View permission can view the Bio: Career page for users within their permission constraints.

To access the Bio: Career page, go to **Home > Universal Profile**. Click the Bio tab. Then, click the Career subtab. **Note:** *The location of this link is configurable by your system administrator.*

To access another user's Universal Profile - Bio page, click the user's photograph from any page within Universal Profile or from Global Search. From there, you can access the user's Snapshot page by clicking the Snapshot tab. Users can view the Snapshot page of other users who are within their permission to view the Snapshot page.

Permissions

Permission Na	me	Permission Description	Categ	Jory
Preferences - View	within the permis constrained by E	view the Bio - Career Preferences page for us ssion constraints. This permission can be mployee Relationship, OU, User's OU, User S s, User's Direct Reports, User's Self, and Use	elf	Universal Profile

Display Successor Roles in Succession Snapshot

Display Successor Roles in Succession Snapshot

Prior to this enhancement, it was not possible to view the positions and users for which user was named as a successor from the Succession Snapshot page within Universal Profile.

With this enhancement, administrators can now quickly view for how many positions and users a user is planned as a successor from the Succession Snapshot page within Universal Profile. This enables them to make effective decisions based on the information.

Administrators can configure whether or not the information appears on the Succession Snapshot page.

Use Cases

- 1. Chris is a manager of the Accounting team. During multiple annual succession planning reviews, Chris has identified three critical positions within department and defined the team's top performers as successors for these positions.
- 2. During regular succession planning meetings, Chris also designated successors for users who are a higher risk of loss.
- 3. After one of the high risk of loss employees resigned and two of the critical positions were vacated, Chris realized that he named the same top performing employees as successors for the critical positions and high risk of loss employees.
- 4. Chris views the Succession Snapshot for each of the top performing employees and views the number of positions and users for which the top performers are designated as successors. With this information, Chris can make better succession planning decisions.

Implementation

Upon release, this functionality is automatically enabled in Stage and Live portals for organizations using Succession and Universal Profile - Snapshot.

Security

The following new permission applies to this functionality:

Permission N	Name	Permission Description	Categ	ory
Snapshot Succession - View	Universal Profile - constraints. On thi ratings. Users can regardless of perm User's Subordinate Relationship. Best	ew the Succession widget and subpage within Snapshot page for users within their permiss s page, users can view successors and succe not view their own Succession widget and sul issions. This permission can be constrained to es, User's Direct Reports, and Employee Practice: For most users, this permission si User Self and Subordinates.	ion ssor opage, oy	Universal Profile

The following existing permission is renamed and is now titled Snapshot Succession - Manage. The permission functionality is not changed. The permission title will be updated when this functionality is released to Live portals.

Permission N	ame	Permission Description	Categ	jory
Snapshot Succession - Manage	Universal Profile - constraints. On th and successor rati widget and subpar- be constrained by User's Direct Repo	ew the Succession widget and subpage with Snapshot page for users within their permis is page, users can view and manage success ngs. Users cannot view their own Succession ge, regardless of permissions. This permission Employee Relationship, User's Subordinates orts. Best Practice: For most users, this be constrained by User Self and Subordinates	sion sors on can s, and	Universal Profile

The following existing permissions apply to this functionality:

Permission N	ame	Permission Description	Category
Succession - Successor User Search	succession task. U cannot search for are applied to this searched and add can be constraine	earch for potential successors in a Jsers who do not have this permission potential successors. The constraints that s permission limit the users who can be ed as potential successors. This permission d by OU, User's OU, Subordinates, Direct d User Self and Subordinates. This is an on.	Talent/Succession
Succession Management		nistrators to view and edit the Snapshot Tal	

Succession Enables administrators to vie	ew and edit the Snapshot Talent/Succession -
Management Succession Preferences page	e. This permission can be Administration
Preferences constrained by OU and User	s OU. This is an
administrator permission.	

Snapshot Succession Preferences

With this enhancement, user succession settings are added to the Snapshot Succession Preferences page to enable administrators to configure incumbent-based succession planning and position-based succession planning.

To access Snapshot Succession Preferences, go to Admin > Tools > Core Functions > Universal Profile > Snapshot Succession.

Perm	issi	ons

Permission Name		Permission Description	Category
Management 9 Preferences 0	Succession Pre	nistrators to view and edit the Snapshot eferences page. This permission can be y OU and User's OU. This is an permission.	

Successor and User Succession Sections

The Successors section is renamed and is now titled Successor and User Succession Sections.

The following new options are now available in the *Successor and User Succession Sections* section:

- <u>Succession Information by Incumbent</u> When this option is selected, a Succession Information - Incumbent section is available on the Succession Snapshot page, and this section displays all of the incumbents for which the user has been named a potential successor.
- <u>Succession Information by Position</u> When this option is selected, a Succession Information

 Position section is available on the Succession Snapshot page, and this section displays all
 of the positions for which the user has been named a potential successor. In addition, the
 current incumbents for the positions are also displayed.

SUCCESSOR AND USER SUCC	ESSION SECTIONS
Succession Information by Incu	mbent - List of the incumbents the user has been named as a successor for.
Succession Information by Posi	tion - List all the positions the user has been named as a successor for.
User Successors - List potential	successors for the selected user
Position Successors - List poter	tial successors for the selected user's position
Maximum Successors:	0 allowed
Recommend Successors:	Recommend successors based on job profiles. Enable this option if job profiles are implemented in the system.
Talent Search for Successors:	Search for successors using the Talent Search interface. Users must also have the Candidate Search permission.
External Successors:	External Successors can be added as successors.
Rate External Successors:	External Successors can be rated as successors on metrics included in Successor Information.
User Search for Successors:	Search for successors using User Search.

Successor and User Succession Information

The Successor Information section is renamed and is now titled Successor and User Succession Information.

With this enhancement, the fields that are added to this section are also displayed for each incumbent and position for which the user has been named a potential successor in the Succession Information - Incumbent and Succession Information - Position sections. Only fields that are set as Read-Only will be displayed in the Succession Information - Incumbent and Succession Information - Position sections. Also, the Succession Information - Incumbent and Succession Information - Position sections are only included on the Succession Snapshot page if they are enabled in the *Successor and User Succession Sections* section.

Values that are displayed in the Succession Information - Incumbent and Succession Information - Position sections are pulled from the most recently saved SMP tasks. If there is no value configured for the field in any saved SMP task, then N/A is displayed for the field.

	USER SUCCESSION INFORMATION to order the fields. Fields displayed ur Read-Only.		ent and Succession Information -	Position
Field	Display Name	Туре	Response	Remove
Division	Division	User	Read - Only	Ì
Position	Position	Subser	Read - Only	Ì

Succession Snapshot

With this enhancement, administrators have the ability to enable a Succession Information -Incumbent and Succession Information - Position section via Snapshot Succession Preferences. When these sections are enabled, they appear at the bottom of the Succession Snapshot page. In addition, each section on the Succession Snapshot page can now be expanded or collapsed using up and down arrow icons.

To access the Succession Snapshot page, go to **Home > Universal Profile**. Then, click the Snapshot tab. Then, click the Succession widget.

Permissions					
Permission Name		Permission Description	Category		
Snapshot Succession - Manage	Universal Profile - constraints. On th and successor rati widget and subpa- be constrained by User's Direct Repo	ew the Succession widget and subpage within Snapshot page for users within their permiss is page, users can view and manage success ings. Users cannot view their own Succession ge, regardless of permissions. This permissio Employee Relationship, User's Subordinates, orts. Best Practice: For most users, this I be constrained by User Self and Subordinates	sion Profile ors n can , and		

Expand/Collapse Sections

With this enhancement, each section on the Succession Snapshot page can now be expanded or collapsed using up and down arrow icons to the right of the section heading.

Succession Information - Incumbent

This section displays all incumbents for which the user has been identified as a potential successor.

To the right of the section heading, the number of incumbents for which the user has been identified as a potential successor is displayed. The section can be expanded or collapsed using up and down arrow icons to the right of the section heading.

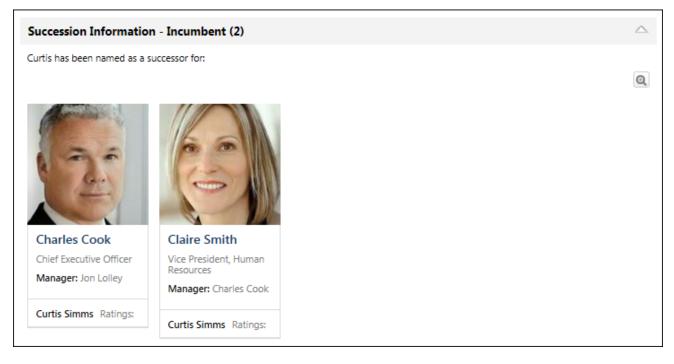
The following information is displayed for each incumbent:

- User's Photograph
- User's Name
- User's Position
- User's Manager
- Color Strip This color indicates the user's rating as a potential successor for the corresponding incumbent. No color is displayed if the user has not been rated or if no fields

are available. The colors are configured by the administrator in Snapshot Succession Preferences.

All incumbents can be expanded to view additional information by clicking the expand

magnifying glass icon () in the upper-right corner of the section. This displays any additional fields that were configured to display by the administrator in Snapshot Succession Preferences.



Succession Information - Position

This section displays all positions for which the user has been identified as a potential successor.

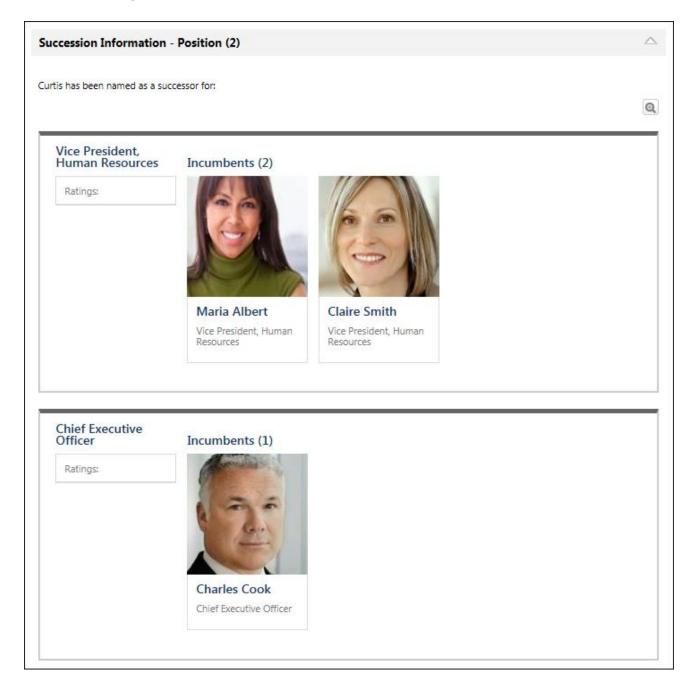
To the right of the section heading, the number of positions for which the user has been identified as a potential successor is displayed. The section can be expanded or collapsed using up and down arrow icons to the right of the section heading.

Each position is segmented so that each position is clearly distinguishable. The color strip for the position indicates the user's rating as a potential successor for the corresponding position. No color is displayed if the user has not been rated or if no fields are available. The colors are configured by the administrator in Snapshot Succession Preferences.

All positions can be expanded to view additional information by clicking the expand magnifying glass icon (a) in the upper-right corner of the section. This displays any additional fields that were configured to display by the administrator in Snapshot Succession Preferences.

Within each position segment, all current incumbents for the position are displayed. If the position is vacant, then "Vacant Position" is displayed. The following information is displayed for each incumbent:

- User's Photograph
- User's Name
- User's Position
- User's Manager



Charles Cook Shapshot Succession					
Charles Cook Chief Executive	Succession		My Team ▼		
Bio	Ratings		\bigtriangleup		
Feedback			ø		
Transcript					
Actions					
Snapshot	PERFORMANCE High	IMPACT OF LOSS High			
	\cap				
	PROBABILITY OF LOSS High	POTENTIAL High			
	riigii	riigri			
	Potential Successors - User		\bigtriangleup		
			Add Successors 🔻		
	Claire Smith Vice President, Human Resources Manager: Charles Cook				
	Potential Successors - Position		\bigtriangleup		
			Add Successors 🔻		
	Scott Street Vice President, Sales Manager: Charles Cook				
	Succession Information - Incumbent (0)		\bigtriangledown		
	Succession Information - Position (0)		\bigtriangledown		
	Modification History		\bigtriangledown		

Search Attributes in Universal Profile Resume

Search Attributes in Universal Profile Resume

With this enhancement, users are able to search for a resume attribute when selecting a resume attribute on their Bio: Resume page. In addition, the Select Attribute pop-up now displays the parent attributes if the attribute has a parent value.

Use Cases

An administrator defines a list of schools as attribute values within the Resume section. The administrator wants employees to be able to select from the extensive list of attributes instead of manually entering a school value. Since the list of options configured by the administrator is extensive, users need to be able to search for a school.

Implementation

Upon release, this functionality is automatically enabled in Stage and Live portals for organizations using Succession and Bio: Resume.

Security

The following existing permissions apply to this functionality:

Permission Name		Permission Description Cate		
Bio About - View	constraints. If a user doe person's name or user p will not open. This permi	Bio page for users within their permission es not have this permission and they click a hoto within the Universal Profile, then the Bio ssion can be constrained by Employee OU, User's Direct Reports, User Self and	Unive Profile page	
Bio Resume View	 permission constraints Bio - Resume page, th permission can be con 	ne Bio - Resume page for users within their . If a user does not have permission to view en the Resume tab is not available. This strained by Employee Relationship, OU, User nates, User's Direct Reports, User's Self, and	's OU,	

Bio: Resume - Add Attribute

When adding a predefined resume attribute to the Bio: Resume page, users are now able to search for a resume attribute. In addition, the Select Attribute pop-up now displays the parent attributes if the attribute has a parent value.

To access the Bio - Resume page, go to **Home > Universal Profile**. Click the Bio tab. Then, click the Resume subtab. **Note:** *The location of this link is configurable by your system administrator.*

Permissions

Permission Name		Permission Description C		ory
About - View	constraints. If a user doe person's name or user p will not open. This permi	Bio page for users within their permission es not have this permission and they click a hoto within the Universal Profile, then the Bio ission can be constrained by Employee OU, User's Direct Reports, User Self and		Universal Profile
Bio Resume - View	permission constraints Bio - Resume page, th permission can be cons	he Bio - Resume page for users within their . If a user does not have permission to view en the Resume tab is not available. This strained by Employee Relationship, OU, User nates, User's Direct Reports, User's Self, and	the 's OU,	Universal Profile

When editing a resume section on the Bio: Resume page, users can click the Select icon \Box to select a predefined attribute for the resume field. This opens the Select Attribute pop-up.

Skills	
	Skill *
	Current Skill *
	0
	Proficiency *
	Last Used
	Select date
	Details
	BISU := := HE HE HE
	Cancel Save

The pop-up displays all active predefined attributes in alphabetical order. Users can click an attribute to select the attribute.

The top of the pop-up now contains a <u>Search</u> field that enables users to search for a specific attribute. When the magnifying glass icon \bigcirc is clicked, the pop-up only displays active attributes that match the search query.

An attribute is considered a parent attribute if it has one or more attributes below it in the attribute hierarchy. If an attribute is a parent attribute, a plus icon appears to the left of the attribute name. When the plus icon is clicked, the pop-up is refreshed to only display the parent attribute's child attributes.

The attribute display now contains a Parent column, which displays the parent attribute if the attribute on the left is a child attribute.

Select Award		×
What would you like to search for?		Q
Award	Parent	
± Employee of the Month		
Employee of the Year		
Other		
President's Club		
Runner Up to Employee of the Year		
	·	
		Cancel

Succession Snapshot History Enhancements

Succession Snapshot History Enhancements

Users with the Snapshot Succession - Manage permission are able to add and remove successors and modify successor ratings on the Succession Snapshot page.

With this enhancement, updates to the Succession Snapshot page are tracked in a Modification History section at the bottom of the page.

Use Cases

- A manager is assigned the task of modifying SMP ratings for a subordinate. The manager views the Succession Snapshot page for the user and changes the Impact of Loss SMP rating from Low to High. The manager views the Modification History section and can see the details of the SMP rating change.
- A manager is assigned a succession planning task for critical positions. The manager completes the task and adds new successors. The updates from the succession planning task are pushed to the Succession Snapshot page. The manager can view the Modification History section of the Succession Snapshot page and see the successors that were added via the succession planning task.

Implementation

Upon release, this functionality is automatically enabled in Stage and Live portals for organizations using Succession and Universal Profile - Snapshot.

Security

The following existing permission is renamed and is now titled Snapshot Succession - Manage. The permission functionality is not changed. The permission title will be updated when this functionality is released to Live portals.

Permission Name		Permission Description Categ		gory	
Snapshot Succession - Manage	Universal Profile - constraints. On th and successor rati widget and subpa- be constrained by User's Direct Repo	ew the Succession widget and subpage withi Snapshot page for users within their permis is page, users can view and manage success ings. Users cannot view their own Succession ge, regardless of permissions. This permission Employee Relationship, User's Subordinates orts. Best Practice: For most users, this I be constrained by User Self and Subordinates	sion ors n n can , and	Universal Profile	

Succession Snapshot - Modification History

A new Modification History section is now available at the bottom of the Succession Snapshot page. This section displays a log of any updates to the Succession Snapshot page.

To access the Succession Snapshot page, go to **Home > Universal Profile**. Click the Snapshot tab. Then, click the Succession widget.

Permissions						
Permission Name		Permission Description Categ		gory		
Snapshot Succession - Manage	Universal Profile - constraints. On th and successor rati widget and subpay be constrained by User's Direct Repo	ew the Succession widget and subpage within Snapshot page for users within their permise is page, users can view and manage success ngs. Users cannot view their own Succession ge, regardless of permissions. This permissio Employee Relationship, User's Subordinates, orts. Best Practice: For most users, this be constrained by User Self and Subordinates	sion ors n can , and	Universal Profile		

Modification History

This section displays a log of any updates to the Succession Snapshot page. This section is only available to users with permission to manage succession on the Succession Snapshot page.

The section is collapsed by default and can be expanded or collapsed using the up and down arrow icons to the right of the section heading.

The following updates to the Succession Snapshot page are captured in the Modification History table:

- SMP rating is modified via a SMP task or the Succession Snapshot page. A SMP rating
 modification is only captured if the SMP field is displayed on the Succession Snapshot page.
 Note: Modifications to User Rating fields in the Snapshot User and Snapshot Position
 fields are not tracked in the Modification History section.
- User or position successor is added via a SMP task or the Succession Snapshot page.
- User or position successor is removed via a SMP task or the Succession Snapshot page.
- User is identified as a potential successor for an incumbent or position via a SMP task or the Succession Snapshot page.
- User is removed as a potential successor for an incumbent or position via a SMP task or the Succession Snapshot page.
- **Note:** Modifications that are made via the Succession Snapshot page are not displayed in the Modification History section until the page is saved.

The following information is displayed for each entry in the Modification History table:

- Action Displays the specific action that was performed, such as adding a successor or modifying a rating.
- Changed From Displays the original value of the SMP rating. This value is only populated when a SMP rating is modified.
- Changed To Displays the updated value of the SMP rating. This value is only populated when a SMP rating is modified.
- User When a successor is added or removed, this displays the name of the successor. When a SMP rating is modified, this displays the name of the user whose SMP rating was modified.
- Changed By Displays the name of the user who performed the modification.
- Smp Task Displays the name of the SMP task in which the action was performed. This value is only populated with the action was performed within a SMP task.
- Date Displays the date on which the action was performed. Modifications are displayed in chronological order with the most recent modification displayed first.

Modification History						
Action	Changed From	Changed To	User	Changed By	Smp Task	Date
Successor (Position) Added			Curtis Simms	Jon Lolley		6/30/2015
Successor (User) Added			Curtis Simms	Jon Lolley		6/30/2015
Successor (User) Added			Claire Smith	Jon Lolley		6/30/2015

View-Only Permission for Succession Snapshot

View-Only Permission for Succession Snapshot

Prior to this enhancement, only one permission controlled access to the Succession Snapshot information, and users with this permission also had the ability to modify succession data for users within their permission constraints.

With this enhancement, a new permission is now available, which only grants users the ability to view Succession Snapshot information. Because of the new permission, the Snapshot - Succession permission is renamed and is now titled Snapshot Succession - Manage. This permission continues to allow the ability to view and manage Succession Snapshot information.

Implementation

Upon release, the new Snapshot Succession - View permission is automatically enabled in Stage portals for organizations using Succession and Universal Profile - Snapshot.

The new Snapshot Succession - View permission is disabled in Live portals and is available upon request for organizations using Succession and Universal Profile - Snapshot.

Security

The following new permission applies to this functionality:

Permission Name		Permission Description Categ		jory	
Snapshot Succession - View	Universal Profile - constraints. On thi ratings. Users can regardless of perm User's Subordinate Relationship. Best	ew the Succession widget and subpage within Snapshot page for users within their permiss is page, users can view successors and succe not view their own Succession widget and su hissions. This permission can be constrained l es, User's Direct Reports, and Employee E Practice: For most users, this permission so User Self and Subordinates.	ion ssor bpage, by	Universal Profile	

The following existing permission is renamed and is now titled Snapshot Succession - Manage. The permission functionality is not changed. The permission title will be updated when this functionality is released to Live portals.

Permission Name		Permission Description	Categor	ory	
Snapshot Succession - Manage	Universal Profile - constraints. On th and successor rati widget and subpa- be constrained by	ew the Succession widget and subpage within Snapshot page for users within their permiss is page, users can view and manage success ings. Users cannot view their own Succession ge, regardless of permissions. This permissio Employee Relationship, User's Subordinates orts. Best Practice: For most users, this	sion P ors n n can	Iniversal rofile	

permission should be constrained by User Self and Subordinates.

Succession Snapshot

With this enhancement, a new permission is now available, which only grants users the ability to view Succession Snapshot information.

To access the Succession Snapshot page, go to **Home > Universal Profile**. Click the Snapshot tab. Then, click the Succession widget.

Permissions	Permissions						
Permission I	Name	Permission Description	Categ	ory			
Snapshot Succession - View	Universal Profile - constraints. On thi ratings. Users can regardless of perm User's Subordinate Relationship. Best	ew the Succession widget and subpage within Snapshot page for users within their permiss s page, users can view successors and succe not view their own Succession widget and sul issions. This permission can be constrained t es, User's Direct Reports, and Employee Practice: For most users, this permission sh User Self and Subordinates.	ion ssor bpage, by	Universal Profile			
Snapshot Succession - Manage	Universal Profile - constraints. On th and successor rat widget and subpa be constrained by User's Direct Repo	ew the Succession widget and subpage within Snapshot page for users within their permiss is page, users can view and manage success ings. Users cannot view their own Succession ge, regardless of permissions. This permissio Employee Relationship, User's Subordinates, orts. Best Practice: For most users, this I be constrained by User Self and Subordinates	sion ors n can , and	Universal Profile			

Users with the Snapshot Succession - Manage permission can perform the following actions:

- View SMP Ratings
- Edit SMP Ratings
- View Successors
- Add Successors
- Remove Successors
- View Modification History section of the Succession Snapshot

Users with the Snapshot Succession - View permission can perform the following actions:

- View SMP Ratings
- View Successors